

Rec'd MT DOR  
FEB 27 2018

**AMERICAN**  
**Chemet**  
**CORPORATION**

P.O. Box 1160  
145 Highway RT 282  
East Helena, MT 59635 USA

406-227-5302 EX-236  
Fax 406-227-8522  
[jpoole@chemet.com](mailto:jpoole@chemet.com)

Date: 2/26/2018

*Jeff Poole*  
*Research Specialist*  
*American Chemet Corporation*

ATT: Mr. Mark Schoenfeld  
Auditor, Miscellaneous Tax Unit  
Montana Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: (406) 444-6900 Fax: (406) 444-7997  
Email: mschoenfeld@mt.gov

RE: Large Customer Universal System Benefits Program (USBP) Annual Summary  
Report for American Chemet Corporation

Dear Mr. Schoenfeld:

A large customer is required to submit an annual summary report, pursuant to 69-8-402, MCA, of its universal system benefits program activities and expenditures for the previous calendar year to the Montana Department of Revenue and to the large customer's electric utility.

This 2017 year summary report is from:

**American Chemet Corporation**  
**145 Highway RT 282**  
**PO Box 1160**  
**East Helena, MT 59635**

A copy of our USBC Progress Report for 2017 from NorthWestern Energy is attached for your reference. In 2017, American Chemet Corporation received credits for \$10,281.16 against our qualifying credit that was installed in 2012. American Chemet Corporation had a carryover request for \$28,742.65 USBC related expenditures in 2016. At the end of 2017, the Request Balance is \$19,210.96.

American Chemet Corp. submitted no new claims in 2017 for USBC related expenditures and a copy of our Form B(s) submitted to NorthWestern Energy for payment is attached. Please consider this letter fulfillment of our obligation, pursuant to 69-8-402, MCA, to submit an annual summary report of large customer USBP activities and expenditures for the year 2017.

*Best Regards,*



*Jeff Poole*  
*American Chemet Corporation*

[www.chemet.com](http://www.chemet.com)



19 FEB 2018

USBC Annual Report – Year 2017

RE: USBC Annual Report

Ash Grove, operating at Clancy, MT reports there was a significant 2016 USBC Payment Pending Balance. Listed below is a summary of our Credits including Payments Issued and Pending Balance remaining.

Payment Pending Balance of - \$3,155.34

Our USBC Credit YTD of - \$28,784.80

For a Total USBC Credit of - \$31,940.14

YTD Payments Received - \$28,784.80

With a USCB Credit Balance - \$3,155.34

Our Self-Directed USBC Program for the year 2017 encompassed upgrading our plant lighting with 256 energy efficient LED type fixtures. These conversions equate a 234.15 kWh savings annually. These included twelve different types of fixtures to meet our replacement needs.

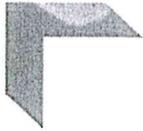
This equaled a total Cost of \$39,621.90

Included with this report is FORM B.

Our efforts are having a positive outcome as well. One being, the improved lighting and the quality of lighting. This has helped to make our facility safer. Members of our community have commented positively on the outcome of our lighting upgrade.

Sincerely,

Clifton L Strang  
Electrical Supervisor  
Ash Grove Cement  
100 MT HWY 518  
Clancy, MT 59634  
(406) 444-7109



February 12, 2018

Dick Johnson  
Ash Grove Cement - Western Region  
100 Montana Highway 518  
Clancy MT 59624-9701

RE: "Self-Directed USBC Progress Report for 2017" for Department of Revenue Annual Report

Dear Dick:

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2017, and I am contacting you regarding your 2017 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end "Self-Directed USBC Progress Report for 2017" showing a summary of your USB activity during 2017 including payment requests you submitted (Form B's), payments issued and any reservations (Form A's) you may have submitted to carry over all or a portion of your 2017 USB credits into 2018. If your final progress report shows a "Payment Pending", it reflects your December 2017 USB credits that were carried over into 2018, and these credits will be distributed when we issue our first quarter USB checks in mid-April. Please review the numbers provided, and notify me immediately of any differences you identify.

Your "Self-Directed USBC Progress Report for 2017" will be helpful as you prepare your required year-end USB report that you must file with the Montana Department of Revenue (DOR) by March 1, 2018. The annual USB reporting requirements are highlighted in yellow in the attached copy of the Montana Code Annotated (MCA) and Montana Administrative Rule 4.29.103. Here are some tips to assist you in preparing your annual report for DOR.

- ✓ A large customer claiming USB credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the Montana DOR and to the large customer's utility (NorthWestern Energy) by March 1st of the following year.
- ✓ In 2015, legislative changes to the MCA now impose penalties of not less than \$1,000 or more than \$5,000 if a large customer does not file an annual report on its USB credits with DOR by March 1.
- ✓ A report must be filed with the DOR even if a large customer is being reimbursed USB credits for a project submitted in previous years and the report should indicate if the USB credits were received for projects submitted in previous years.
- ✓ The annual report of a large customer must identify each qualifying project or expenditure for which it claimed a credit and the amount of the credit. So, if any new Form B's were submitted to the utility during 2017 to request credits, a copy of these forms should be submitted with your annual report to DOR. Large customers need to keep their own documentation on the project submitted as to the costs and energy savings claimed, etc. NorthWestern Energy does not qualify large customers' self-directed USB claims.
- ✓ The large customer's report must indicate the amount of USB funds earned and self-directed in 2017.
- ✓ We encourage large customers to make a copy of the "Self-Directed USBC Progress Report" and send it along with your other documentation to DOR.
- ✓ Also, as required by the MCA, please provide NorthWestern Energy with a copy of what you send to DOR, and send it to: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 or email: rick.edwards@northwestern.com.

You may want to send your report via certified mail to DOR by March 1, 2018 to the address below.

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

If you have any questions, please contact me at 406-497-3756.

Sincerely,

Dale Mahugh  
Specialist, Key Accounts



# Self-Directed USBC Progress Report for 2017

Prepared by Rick Edwards on 2/6/2018

## ASH GROVE CEMENT - Western Region

### Account Summary

|                                 |             |                          |              |
|---------------------------------|-------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$229,288.07 |
| Reservations Made YTD:          | \$0.00      |                          |              |
| 2016 Carryover Payment Request: | \$13,666.87 | Total Payment Requests:  | \$73,577.76  |
| Payment Requests Made YTD:      | \$59,911.89 | Current Request Balance: | \$44,792.96  |
| 2016 Carryover USBC Credit:     | \$3,056.77  | Total USBC Credit:       | \$31,940.14  |
| USBC Credit YTD:                | \$28,883.37 | Payments Issued YTD:     | \$28,784.80  |
| Average Monthly Credit Earned:  | \$2,406.95  | USBC Credit Balance:     | \$3,155.34   |
|                                 |             | Payment Pending:         | \$3,155.34   |

### Payment Requests Made

| Submitted By   | Date       | Amount      |
|----------------|------------|-------------|
| Clifton Strang | 11/27/2017 | \$39,621.90 |
| Clifton Strang | 11/27/2017 | \$13,742.99 |
| Clifton Strang | 11/27/2017 | \$6,547.00  |

### Payments Issued

| Date       | Amount      |
|------------|-------------|
| 04/10/2017 | \$5,042.07  |
| 07/07/2017 | \$8,404.06  |
| 10/09/2017 | \$219.74    |
| 12/06/2017 | \$15,118.93 |

### Account Detail

| Account | Premise | Meter      | Jan                 | Feb         | Mar        | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|------------|---------------------|-------------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100043  | 1050    | DA15843429 | 1,601,115           | 306,817     | 297,955    | 2,796,995   | 3,256,958   | 3,283,885   | 3,193,722   | 3,451,985   | 3,693,453   | 3,536,456   | 3,227,347   | 3,505,935   | 32,092,623   |
|         |         |            | KWH >               | 5,788       | 518        | 1,503       | 5,685       | 5,719       | 5,788       | 5,780       | 5,780       | 5,901       | 5,944       | 5,832       | 5,000        |
|         |         |            | KW >                | \$2,257.99  | \$3,830.42 | \$20,848.03 | \$22,779.80 | \$22,960.13 | \$22,634.83 | \$23,494.22 | \$24,224.63 | \$24,031.66 | \$22,858.04 | \$23,795.97 | \$229,288.07 |
|         |         |            | Elec Revenue >      | \$15,572.35 | \$297,955  | \$2,796,995 | \$3,256,958 | \$3,283,885 | \$3,193,722 | \$3,451,985 | \$3,693,453 | \$3,536,456 | \$3,227,347 | \$3,505,935 | \$28,883.37  |
|         |         |            | Total KWH           | 1,601,115   | 306,817    | 297,955     | 2,796,995   | 3,256,958   | 3,283,885   | 3,193,722   | 3,451,985   | 3,693,453   | 3,536,456   | 3,227,347   | 32,092,623   |
|         |         |            | Combined Average KW | 5,788       | 518        | 1,503       | 5,685       | 5,719       | 5,788       | 5,780       | 5,780       | 5,901       | 5,944       | 5,832       | 5,000        |
|         |         |            | USBC Charge         | \$1,441.00  | \$276.14   | \$268.16    | \$2,517.30  | \$2,931.26  | \$2,955.50  | \$2,874.35  | \$3,106.79  | \$3,270.11  | \$3,182.81  | \$2,904.61  | \$28,883.37  |
|         |         |            | Total Elec Revenue  | \$15,572.35 | \$2,257.99 | \$3,830.42  | \$20,848.03 | \$22,779.80 | \$22,960.13 | \$23,494.22 | \$24,224.63 | \$24,031.66 | \$22,858.04 | \$23,795.97 | \$229,288.07 |

| Count Installed | WEEK INSTALLED | TYPE           | K HEAT | AREA    | Catalog #              | WATTAGE |
|-----------------|----------------|----------------|--------|---------|------------------------|---------|
| 1               | 0317           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 3               | 0517           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 8               | 617            | Keystone       | 4000   | Inside  | KT-LED18T8-48GC-840-D  | 18      |
| 1               | 0717           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 8               | 1117           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 2               | 1117           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 3               | 1117           | Caretaker      | 5000   | Outside | CTKRV1A                | 52      |
| 1               | 1117           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 2               | 1217           | Caretaker      | 5000   | Inside  | CTKRV1A                | 52      |
| 1               | 1217           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 1               | 1217           | LS 38 (PAR)    | 5000   | Inside  | LS38120WENWNFL120S1    | 19      |
| 2               | 1217           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 3               | 1517           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 5               | 1617           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 1               | 1617           | Caretaker      | 5000   | Inside  | CTKRV1A                | 52      |
| 3               | 1717           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 80              | 1717           | Keystone       | 4000   | Inside  | KT-LED18T8-48GC-840-D  | 18      |
| 4               | 1817           | LITETRONICS    | 5000   | Inside  | HB185B150DL            | 185     |
| 1               | 1817           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 3               | 1817           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 4               | 1817           | Keystone       | 4000   | Inside  | KT-LED18T8-48GC-840-D  | 18      |
| 3               | 2017           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 3               | 2017           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 2               | 2117           | Caretaker      | 5000   | Inside  | CTKRV1A                | 52      |
| 3               | 2117           | LS 38 (PAR)    | 5000   | Inside  | LS38120WENWNFL120S1    | 19      |
| 3               | 2117           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 8               | 2417           | Crouse-Hines   | 5000   | Inside  | FM13LCY/UNV347-76      | 112     |
| 15              | 2617           | LSI            | 5000   | Inside  | SDL-8-LED-SS-CW-UE     | 64      |
| 15              | 2617           | Keystone       | 4000   | Inside  | KT-LED18T8-48GC-840-D  | 18      |
| 1               | 2817           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 1               | 2817           | LS 38 (PAR)    | 5000   | Inside  | LS38120WENWNFL120S1    | 19      |
| 6               | 2717           | RAB            | 5000   | Inside  | FFLED52                | 52      |
| 8               | 2717           | Caretaker      | 5000   | Inside  | CTKRV1A                | 52      |
| 3               | 2817           | RAB            | 5000   | Inside  | FFLED52                | 52      |
| 2               | 2817           | Caretaker      | 5000   | Inside  | CTKRV1A                | 52      |
| 4               | 2917           | Keystone       | 4000   | Inside  | KT-LED18T8-48GC-840-D  | 18      |
| 1               | 3117           | Caretaker      | 5000   | Inside  | CTKRV1A                | 52      |
| 1               | 3517           | RAB            | 5000   | Outside | FFLED52                | 52      |
| 1               | 3517           | RAB            | 5000   | Outside | FXLED                  | 300     |
| 1               | 3517           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 2               | 3517           | ESL Vision Tr. | 5100   | Outside | ESLMFL300W150TM        | 45      |
| 4               | 3517           | ESL Vision Kn. | 5100   | Outside | ESLMFL300W150KM        | 45      |
| 5               | 3517           | ESL Vision Kn. | 5100   | Inside  | ESLMFL300W150KM        | 45      |
| 1               | 3717           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 1               | 3717           | Lumicon        | 5700   | Inside  | LC-SM-25-DM-1-CW       | 22      |
| 7               | 3917           | Keystone       | 5000   | Inside  | KT-LED54HID-EX39-850-D | 54      |
| 5               | 3917           | LS 38 (PAR)    | 5000   | Inside  | LS38120WENWNFL120S1    | 19      |
| 1               | 3917           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 6               | 4017           | CREE A21       | 5000   | Inside  | A21-100W-50K-B1        | 18      |
| 6               | 4317           | LITETRONICS    | 5000   | Inside  | HB185B150DL            | 185     |
|                 |                |                |        |         |                        |         |

November 27, 2017

Mark Schoenfeld, Auditor, Montana Department of Revenue  
Montana Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

RE: Universal System Benefits (USB) Large Customer Credit Request

Dear Mr. Mark Schoenfeld:

I am writing regarding our Large Customer Universal System Benefits (USB) submitted to North Western Energy for calendar year 2017.

Enclosed are FORM B Credit Requests for the following purchases:

- LED Lighting \$39,621.90
- Fuel Booster Fan VFD \$13,742.99
- Carryover funds to be used for LED lighting \$ 6,547.00

Total Requested: \$59,911.89

Sincerely,



Clifton L Strang  
Electrical Supervisor  
Ash Grove Cement

Cc: Rick Edwards, Customer Services Department, North Western Energy  
Joni Johnson, Quality Utility Operator, Ash Grove Cement  
Dick Johnson, Plant Manager, Ash Grove Cement  
Chris Hines, Maintenance Manager, Ash Grove Cement

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                             |
|----------------------|-----------------------------|
| DATE:                | 11-29-2017                  |
| NAME OF BUSINESS:    | Ash Grove Cement            |
| CITY/TOWN LOCATION:  | Clancy, MT                  |
| CONTACT PERSON:      | Clifton Strang              |
| MAILING ADDRESS:     | 100 State Hwy 518           |
| CITY, STATE AND ZIP: | Clancy, MT 59634            |
| PHONE NUMBER:        | (406) 444-7109              |
| FAX NUMBER:          | (406) 442-9269              |
| E-MAIL ADDRESS       | Clifton.Strang@ashgrove.com |

|                             |            |
|-----------------------------|------------|
| AMOUNT OF CREDIT REQUESTED: | \$6,547.00 |
|-----------------------------|------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):           |
| Lighting Replacements of HID Fixtures and lamps with LED in maintenance shop. |

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |         |
|------------------------|---------|
| ESTIMATED kWh SAVINGS: | 5.2 kWh |
| ESTIMATED KW SAVINGS:  |         |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: Clifton Strang

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                             |
|----------------------|-----------------------------|
| DATE:                | 11-27-2017                  |
| NAME OF BUSINESS:    | Ash Grove Cement            |
| CITY/TOWN LOCATION:  | Clancy, MT                  |
| CONTACT PERSON:      | Clifton Strang              |
| MAILING ADDRESS:     | 100 State Hwy 518           |
| CITY, STATE AND ZIP: | Clancy, MT 59634            |
| PHONE NUMBER:        | (406) 444-7109              |
| FAX NUMBER:          | (406) 442-9269              |
| E-MAIL ADDRESS       | Clifton.Strang@ashgrove.com |

|                             |             |
|-----------------------------|-------------|
| AMOUNT OF CREDIT REQUESTED: | \$13,742.99 |
|-----------------------------|-------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|  |
|--|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):<br>Fuel (coal) Booster Fan VFD System Upgrade of Electrical Feed |
|--|

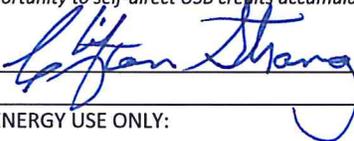
Estimated Savings in kWh and/or KW for project needs to be provided

|                        |                    |
|------------------------|--------------------|
| ESTIMATED kWh SAVINGS: | 130,931 kWh Annual |
| ESTIMATED KW SAVINGS:  |                    |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:

Signature: \_\_\_\_\_



|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
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 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                             |
|----------------------|-----------------------------|
| DATE:                | 11-27-2017                  |
| NAME OF BUSINESS:    | Ash Grove Cement            |
| CITY/TOWN LOCATION:  | Clancy, MT                  |
| CONTACT PERSON:      | Clifton Strang              |
| MAILING ADDRESS:     | 100 State Hwy 518           |
| CITY, STATE AND ZIP: | Clancy MT 59634             |
| PHONE NUMBER:        | (406) 444-7109              |
| FAX NUMBER:          | (406) 442-9269              |
| E-MAIL ADDRESS       | Clifton.Strang@ashgrove.com |

|                             |             |
|-----------------------------|-------------|
| AMOUNT OF CREDIT REQUESTED: | \$39,621.90 |
|-----------------------------|-------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):<br>Lighting, Replacements of Ballast Fixtures and incandescent Lamp 5<br>with LED Fixtures and Lamp 5 |
|---|

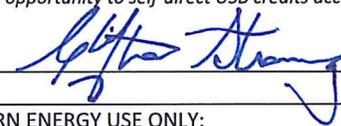
Estimated Savings in kWh and/or KW for project needs to be provided

|                        |                    |
|------------------------|--------------------|
| ESTIMATED kWh SAVINGS: | 234.15 kWhs Annual |
| ESTIMATED KW SAVINGS:  |                    |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:

Signature: \_\_\_\_\_



|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

## Hensley, Nicole

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**From:** Schoenfeld, Mark  
**Sent:** Monday, January 29, 2018 4:08 PM  
**To:** Hensley, Nicole  
**Subject:** FW: Self-Directed USBC Progress Report for 2017 – Aspen Air  
**Attachments:** Aspen Air 2017 CustomerUSBCSummary.pdf; USB Form B 2017.pdf

**From:** Brad Cowan [mailto:bcowan@aspencorp.com]  
**Sent:** Monday, January 29, 2018 3:49 PM  
**To:** Schoenfeld, Mark <mschoenfeld@mt.gov>  
**Cc:** rick.edwards@northwestern.com; Brendan Fowler <BFowler@aspencorp.com>; Onkar Dhaliwal <odhaliwal@aspencorp.com>; Sheryl.Mayo@TalenEnergy.com  
**Subject:** Self-Directed USBC Progress Report for 2017 – Aspen Air

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 USBC Report that we receive from NorthWestern Energy showing our USB activities during 2017. Also, please find a copy of the Form B submitted to NorthWestern Energy attached.

In 2017, we received \$35,000 in USB credit payments. These payments were composed of \$31,374.32 in 2016 USB credits that were carried over into 2017 and \$3,625.68 in 2017 USB credits.

The \$35,000 in USB payments was self-directed for an energy efficient project submitted to NorthWestern Energy in 2017.

We also had a reservation to carry over all remaining 2017 USB credits at year-end of \$37,058.29 into 2018 for a potential project in 2018.

Sincerely,

*Brad Cowan*  
Plant Manager



[www.aspenaircorp.com](http://www.aspenaircorp.com)

t: 406-259-9014 Ext: 8221 | f: 406-259-9024  
d: 406-318-8221 | c: 406-860-1410

1524 Lockwood Road | Billings, Montana 59101

\*The contents of this e-mail message and any attachments are confidential and are intended solely for addressee. The information may also be legally privileged. This transmission is sent in trust, for the sole purpose of delivery to the intended recipient\*

\*\*Be Green, only print if necessary\*\*



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## ASPEN AIR

### Account Summary

|                                 |             |                          |              |
|---------------------------------|-------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$60,000.00 | YTD Elec Revenue:        | \$164,013.71 |
| Reservations Made YTD:          | \$37,100.00 |                          |              |
| 2016 Carryover Payment Request: | \$0.00      | Total Payment Requests:  | \$35,000.00  |
| Payment Requests Made YTD:      | \$35,000.00 | Current Request Balance: | \$0.00       |
| 2016 Carryover USBC Credit:     | \$31,374.32 | Total USBC Credit:       | \$72,058.29  |
| USBC Credit YTD:                | \$40,683.97 | Payments Issued YTD:     | \$35,000.00  |
| Average Monthly Credit Earned:  | \$3,390.33  | USBC Credit Balance:     | \$37,058.29  |
|                                 |             | Payment Pending:         | \$0.00       |

### Payment Requests Made

| Submitted By  | Date       | Amount      |
|---------------|------------|-------------|
| Bradley Cowan | 11/20/2017 | \$35,000.00 |

### Payments Issued

| Date       | Amount      |
|------------|-------------|
| 12/06/2017 | \$35,000.00 |

### Account Detail

| Account | Premise | Meter               | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 1542392 | 94951   | DA06183442          | 11,120      | 8,640       | 9,120       | 7,960       | 9,000       | 10,400      | 10,080      | 8,440       | 7,800       | 6,640       | 8,760       | 9,440       | 107,400      |
|         |         | KWH >               | 16          | 17          | 15          | 15          | 24          | 20          | 21          | 18          | 17          | 15          | 18          | 18          |              |
|         |         | KW >                |             |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         | Elec Revenue >      | \$228.81    | \$206.72    | \$200.65    | \$189.39    | \$261.26    | \$242.62    | \$249.89    | \$215.07    | \$200.83    | \$176.22    | \$215.46    | \$219.36    | \$2,606.28   |
| 1645209 | 415891  | DA06183399          | 3,344,204   | 3,155,882   | 3,480,968   | 3,634,360   | 4,447,625   | 4,873,505   | 3,880,852   | 3,031,765   | 3,703,941   | 3,687,116   | 3,895,355   | 3,961,449   | 45,097,022   |
|         |         | KWH >               | 7,578       | 8,019       | 7,929       | 7,686       | 7,731       | 7,434       | 7,380       | 7,263       | 7,479       | 7,758       | 7,776       | 8,442       | 7,706        |
|         |         | KW >                |             |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         | Elec Revenue >      | \$12,055.63 | \$13,359.62 | \$13,545.19 | \$13,394.28 | \$14,179.73 | \$14,209.84 | \$13,252.25 | \$12,348.94 | \$13,210.76 | \$13,527.37 | \$13,736.19 | \$14,587.63 | \$161,407.43 |
|         |         | Total KWH           | 3,355,324   | 3,164,522   | 3,490,088   | 3,642,320   | 4,456,625   | 4,883,905   | 3,890,932   | 3,040,205   | 3,711,741   | 3,693,756   | 3,904,115   | 3,970,889   | 45,204,422   |
|         |         | Combined Average KW | 7,594       | 8,036       | 7,944       | 7,701       | 7,755       | 7,454       | 7,401       | 7,281       | 7,496       | 7,773       | 7,794       | 8,460       | 7,724        |
|         |         | USBC Charge         | \$3,019.79  | \$2,848.07  | \$3,141.08  | \$3,278.08  | \$4,010.96  | \$4,395.51  | \$3,501.84  | \$2,736.19  | \$3,340.57  | \$3,324.38  | \$3,513.70  | \$3,573.80  | \$40,683.97  |
|         |         | Total Elec Revenue  | \$12,284.44 | \$13,566.34 | \$13,745.84 | \$13,583.67 | \$14,440.99 | \$14,452.46 | \$13,502.14 | \$12,564.01 | \$13,411.59 | \$13,703.59 | \$13,951.65 | \$14,806.99 | \$164,013.71 |

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                            |
|----------------------|----------------------------|
| DATE:                | November 20, 2017          |
| NAME OF BUSINESS:    | Aspen Air Corporation      |
| CITY/TOWN LOCATION:  | Lockwood, Montana          |
| CONTACT PERSON:      | Bradley R. Cowan           |
| MAILING ADDRESS:     | 1524 Lockwood Road         |
| CITY, STATE AND ZIP: | Billings, MT 59101         |
| PHONE NUMBER:        | (406) 259 – 9014 ext. 8221 |
| FAX NUMBER:          | (406) 259 – 9024           |
| E-MAIL ADDRESS       | bcowan@aspenaircorp.com    |

|                             |             |
|-----------------------------|-------------|
| AMOUNT OF CREDIT REQUESTED: | \$35,000.00 |
|-----------------------------|-------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (If more space is needed, please attach):<br>Rebuild/repair 1310 HP main air compressor electric motor in air separation plant. |
|---|

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |          |
|------------------------|----------|
| ESTIMATED kWh SAVINGS: |          |
| ESTIMATED KW SAVINGS:  | 8,300 kW |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: 

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



Barretts Minerals Inc.  
8625 Highway 91 S.  
Dillon, MT 59725  
Tel: 406 683-3300  
Fax: 406 683-3351



February 16, 2018

**Rec'd MT DOR**  
**FEB 23 2018**

Montana Department of Revenue  
Mark Schoenfeld  
PO Box 5805  
Helena, MT 59604-5805

Dear Mark,

This letter is to report the Universal System Benefits funds that were directed for Barretts Minerals and how they were used.

A new USB Large customer credit Form B was submitted for \$791,000 in 2007. This is an energy savings project at the plant that eliminated 400 hp of equipment by replacing 4 old hammer mill systems with a new more energy efficient ACM mill. This reduced our energy consumption and improved our milling capacity. Our prior USB credits had reduced this amount to \$530,429

For 2017 Barretts Minerals Inc received \$29,612 with a pending payment of \$2,293 in USBC credit. (See attached NorthWestern Energy USBC progress report for 2017).

If you have any questions or would like more details on the project please let me know.

Sincerely,

A handwritten signature in blue ink that reads "Tom Waldorf".

Tom Waldorf  
Engineering Manager, Barretts Minerals Inc.  
8625 Hwy 91 South  
Dillon, MT 59725  
406-683-3343

Attachments:  
USBC credit report 2017



# Self-Directed USBC Progress Report for 2017

Prepared by Rick Edwards on 2/6/2018

## BARRETTS MINERALS

### Account Summary

|                                 |              |                          |              |
|---------------------------------|--------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00       | YTD Elec Revenue:        | \$226,156.66 |
| Reservations Made YTD:          | \$0.00       |                          |              |
| 2016 Carryover Payment Request: | \$560,041.47 | Total Payment Requests:  | \$560,041.47 |
| Payment Requests Made YTD:      | \$0.00       | Current Request Balance: | \$530,429.41 |

|                               |             |                      |             |
|-------------------------------|-------------|----------------------|-------------|
| 2016 Carryover USBC Credit:   | \$2,365.71  | Total USBC Credit:   | \$31,905.06 |
| USBC Credit YTD:              | \$29,539.35 | Payments Issued YTD: | \$29,612.06 |
| Average Monthly Credit Eamed: | \$2,461.61  | USBC Credit Balance: | \$2,293.00  |
|                               |             | Payment Pending:     | \$2,293.00  |

| Payment Requests Made |      | Payments Issued |            |
|-----------------------|------|-----------------|------------|
| Submitted By          | Date | Date            | Amount     |
|                       |      | 04/10/2017      | \$9,716.13 |
|                       |      | 07/07/2017      | \$7,834.72 |
|                       |      | 10/09/2017      | \$7,028.33 |
|                       |      | 12/06/2017      | \$5,032.88 |

### Account Detail

| Account | Premise | Meter               | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100620  | 1624    | DA19312279          | 2,803,659   | 2,834,186   | 2,529,294   | 3,021,916   | 2,810,396   | 2,872,930   | 2,545,254   | 2,506,410   | 2,757,591   | 2,844,146   | 2,747,943   | 2,547,783   | 32,821,508   |
|         |         | KWH >               | 4,811       | 4,877       | 4,592       | 4,661       | 4,657       | 4,592       | 4,406       | 4,519       | 4,583       | 4,843       | 4,730       | 4,704       | 4,670        |
|         |         | KW >                |             |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         | Elec Revenue >      | \$19,058.65 | \$19,679.97 | \$17,922.50 | \$20,092.60 | \$19,223.70 | \$19,372.51 | \$17,710.76 | \$17,628.66 | \$18,907.47 | \$19,517.15 | \$18,945.40 | \$18,097.29 | \$226,156.66 |
|         |         | Total KWH           | 2,803,659   | 2,834,186   | 2,529,294   | 3,021,916   | 2,810,396   | 2,872,930   | 2,545,254   | 2,506,410   | 2,757,591   | 2,844,146   | 2,747,943   | 2,547,783   | 32,821,508   |
|         |         | Combined Average KW | 4,811       | 4,877       | 4,592       | 4,661       | 4,657       | 4,592       | 4,406       | 4,519       | 4,583       | 4,843       | 4,730       | 4,704       | 4,670        |
|         |         | USBC Charge         | \$2,523.29  | \$2,550.77  | \$2,276.36  | \$2,719.72  | \$2,629.36  | \$2,585.64  | \$2,290.73  | \$2,255.77  | \$2,481.83  | \$2,559.73  | \$2,473.15  | \$2,293.00  | \$29,539.35  |
|         |         | Total Elec Revenue  | \$19,058.65 | \$19,679.97 | \$17,922.50 | \$20,092.60 | \$19,223.70 | \$19,372.51 | \$17,710.76 | \$17,628.66 | \$18,907.47 | \$19,517.15 | \$18,945.40 | \$18,097.29 | \$226,156.66 |



BARRICK GOLD CORPORATION    Tel: (406) 287-3257  
Golden Sunlight Mines        Fax: (406) 287-2035  
453 Montana Hwy 2 East  
Whitehall, Montana  
U.S.A.  
59759

February 26, 2018

Mark Schoenfeld  
Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-0756

RE: Barrick Golden Sunlight Mines 2017 Universal System's Benefits Report

Barrick Golden Sunlight Mines submitted two request forms for USB refunds totaling \$30,314.57 for projects contributing a total estimated annual power savings of 92,529 kW-hours. The following narrative recaps the USB activity for Barrick Golden Sunlight Mines for the year 2017.

Improved Energy Efficiency Lighting

Twelve 159578 150-watt LED retrofit lamps were purchased to replace twelve 400-watt high pressure sodium lamps in the maintenance shop high bay. Each retrofit required approximately one electrician manhour labor. Total cost for this project was \$3,663.07 including \$3,184.44 material costs and \$478.63 labor costs. Annual estimated power savings resulting from the lamp replacements total 14,732 kWh.

Pump Fluid Drive Coolers

Seven steel tubing Nelson Pump Drive oil coolers and two crusher lube oil coolers were replaced with higher efficiency stainless steel tubing coolers. Because the new coolers are stainless steel, reclaim water from the tailing impoundment pool can be utilized for cooling water rather than of fresh water which was used in the past. The new coolers required less water volume and pumping power requirements from the tailing impoundment pool are lower than from the fresh water slough. Total cost to replace the coolers was \$26,651.50 which included \$19,250 for the new coolers and \$7,401.50 for contractor labor costs. Annual power savings associated with the cooler replacement are estimated at 77,797 kWh.

If you have questions or concerns regarding either of the above described refund requests, please contact me.

Regards,

A handwritten signature in black ink that reads "Rick S. Jordan". The signature is written in a cursive style and is positioned above a horizontal line.

Rick S. Jordan  
Mill Superintendent  
Golden Sunlight Mines, Inc.  
Office: 406/287-2042  
Email: [rjordan@barrick.com](mailto:rjordan@barrick.com)

C: Dale Mahugh  
Key Account & Economic Development Representative

2/26/2018

Mr. Mark Schoenfeld  
Department of Revenue  
P.O. Box 5805  
Helena, Mt. 59604-5805

**Rec'd MT DOR**  
**FEB 28 2018**

Dear Mr. schoenfeld

Please see attached copies of Benefis Lab Remodel Phase B Project, We used 2016 carryover funds of 18,098.65 for. And attached copies of Benefis Endoscopy Remodel we used 2017 YTD funds of 18,710.42 for.

Total USB FUNDS 36,809.07

Sincerely



Gunnar VanderMars  
Benefis Health Systems  
Director of Facilities and Support Services

**BENEFIS HEALTH SYSTEM**

1101 26th Street South, Great Falls, MT 59405 | [www.benefis.org](http://www.benefis.org)

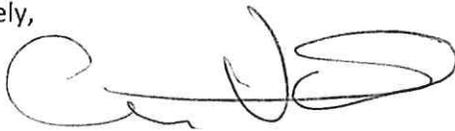
11/9/2017

NorthWestern Energy  
Attn: Rick Edwards  
Customer Services Department  
11 E. Park Street  
Butte, MT 59701

Dear Mr. Edwards,

Please see attached copies of the Benefis Lab Remodel Phase B, "Changed T-8 Fixtures to Led Fixtures" project. We would like to use the 2016 carryover USBC Credit of \$18,098.65.

Sincerely,



Gunnar VanderMars  
Benefis Health System  
Director of Facilities and Support Services

**FORM B - UNIVERSAL SYSTEMS BENEFITS (USB)  
LARGE CUSTOMER CREDIT REQUEST FORM**

Complete and mail to: NorthWestern Energy  
Attn: Rick Edwards  
Customer Services Department  
11 E. Park Street  
Butte, MT 59701  
Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                        |
|----------------------|------------------------|
| DATE:                | November 9 2017        |
| NAME OF BUSINESS:    | Benefis Healthcare     |
| CITY/TOWN LOCATION:  | Great falls, Mt.       |
| CONTACT PERSON:      | Gunnar VanderMars      |
| MAILING ADDRESS:     | 1101 26st south        |
| CITY, STATE AND ZIP: | Great falls, Mt. 59405 |
| PHONE NUMBER:        | 406-455-5132           |
| FAX NUMBER:          | 406-455-4994           |
| E-MAIL ADDRESS       | vandergunn@benefis.org |

|                             |                                      |
|-----------------------------|--------------------------------------|
| AMOUNT OF CREDIT REQUESTED: | 2016 Carryover USBC Credit 18,098.65 |
|-----------------------------|--------------------------------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):<br>Benefis Lab Remodel Phase B, Change T-8 Fixtures to Led Fixtures |
|---|

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |        |
|------------------------|--------|
| ESTIMATED kWh SAVINGS: | 34,111 |
| ESTIMATED KW SAVINGS:  |        |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: \_\_\_\_\_

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

# INVOICE



PO BOX 500  
EAST DUBUQUE, IL 61025-4418

FOR BILLING QUESTIONS, PLEASE CALL: 406-727-1039

|                          |              |                |
|--------------------------|--------------|----------------|
| INVOICE DATE             | CUSTOMER NO. | INVOICE NO.    |
| 09/21/17                 | 310851       | S504031552.010 |
| BRANCH                   |              | BRANCH NO.     |
| CRESCENT GREAT FALLS, MT |              | B065           |
| JOB NAME                 |              | PAGE NO.       |
| BENEFIS LAB PHASE B      |              | 1 of 1         |

SOLD TO: 192141

CASCADE ELECTRIC  
PO BOX 2909  
GREAT FALLS, MT 59403-2909

SHIP TO: 310851

CASCAD-BENEFIS LAB PHASE B  
903 10TH AVE N  
GREAT FALLS, MT 59401

| ORDERED BY        | CUST PO             | ORDER DATE                         | REFERENCE       |           |
|-------------------|---------------------|------------------------------------|-----------------|-----------|
|                   | BENEFIS LAB PHASE B | 09/05/17                           | 1               |           |
| ORDER WRITER      | SHIP VIA            | SHIP DATE                          | ACCOUNT MANAGER |           |
| BRANTLEY S LONDON | BEST WAY            | 09/21/17                           | DANIEL L BERTUS |           |
| ORDER QTY         | SHIP QTY            | DESCRIPTION                        | UNIT PRICE      | EXT PRICE |
| 21                | 21                  | TYPE A5I: LTGR22-35MWG-R-ESDU-C488 | 114.2860/ea     | 2400.01   |

|                                  |   |
|----------------------------------|---|
| <br>OK TO PAY _____<br>JOB _____ | <br><input type="checkbox"/> A/R <input type="checkbox"/> J/C<br><input type="checkbox"/> A/P |
|----------------------------------|---|

| INVOICE DUE | MERCHANDISE TOTAL | TOTAL S&H | TOTAL TAX | TOTAL AMOUNT |
|-------------|-------------------|-----------|-----------|--------------|
| 10/31/17    | \$2,400.01        | \$0.00    | \$0.00    | \$2,400.01   |



PLEASE DETACH AND RETURN WITH PAYMENT EXCEPT WHEN PAYING BY STATEMENT.  
A SERVICE CHARGE WILL BE ASSESSED ON AMOUNTS OVER 30 DAYS PAST DUE.



SOLD TO:  
CASCADE ELECTRIC  
PO BOX 2909  
GREAT FALLS, MT 59403-2909

PLEASE REMIT PAYMENT TO:  
CRESCENT ELECTRIC SUPPLY CO  
PO BOX 500  
EAST DUBUQUE, IL 61025-4418

|                      |                   |
|----------------------|-------------------|
| INVOICE NUMBER       | S504031552.010    |
| CUSTOMER NUMBER      | 310851            |
| INVOICE DATE         | 09/21/17          |
| DUE DATE             | 10/31/17          |
| SUBTOTAL             | \$2,400.01        |
| SHIPPING & HANDLING  | \$0.00            |
| TAX                  | \$0.00            |
| <b>INVOICE TOTAL</b> | <b>\$2,400.01</b> |

CHECK # \_\_\_\_\_ \$ \_\_\_\_\_



PO BOX 500  
EAST DUBUQUE, IL 61025-4418

FOR BILLING QUESTIONS, PLEASE CALL: 406-727-1039

# INVOICE

|                          |              |                |
|--------------------------|--------------|----------------|
| INVOICE DATE             | CUSTOMER NO. | INVOICE NO.    |
| 09/21/17                 | 310851       | S504031552.009 |
| BRANCH                   |              | BRANCH NO.     |
| CRESCENT GREAT FALLS, MT |              | B065           |
| JOB NAME                 |              | PAGE NO.       |
| BENEFIS LAB PHASE B      |              | 1 of 1         |

SOLD TO: 192141

CASCADE ELECTRIC  
PO BOX 2909  
GREAT FALLS, MT 59403-2909

SHIP TO: 310851  
CASCAD-BENEFIS LAB PHASE B  
903 10TH AVE N  
GREAT FALLS, MT 59401

JTCV

| ORDERED BY        | CUST PO             | ORDER DATE                         | REFERENCE       |           |
|-------------------|---------------------|------------------------------------|-----------------|-----------|
|                   | BENEFIS LAB PHASE B | 09/05/17                           | 1               |           |
| ORDER WRITER      | SHIP VIA            | SHIP DATE                          | ACCOUNT MANAGER |           |
| BRANTLEY S LONDON | BEST WAY            | 09/21/17                           | DANIEL L BERTUS |           |
| ORDER QTY         | SHIP QTY            | DESCRIPTION                        | UNIT PRICE      | EXT PRICE |
| 30                | 30                  | TYPE A2I: LTGR24-35VWG-R-ESDU-C488 | 125.7680/ea     | 3773.04   |

| INVOICE DUE | MERCHANDISE TOTAL | TOTAL S&H | TOTAL TAX | TOTAL AMOUNT |
|-------------|-------------------|-----------|-----------|--------------|
| 10/31/17    | \$3,773.04        | \$0.00    | \$0.00    | \$3,773.04   |



PLEASE DETACH AND RETURN WITH PAYMENT EXCEPT WHEN PAYING BY STATEMENT.  
A SERVICE CHARGE WILL BE ASSESSED ON AMOUNTS OVER 30 DAYS PAST DUE.



SOLD TO:  
CASCADE ELECTRIC  
PO BOX 2909  
GREAT FALLS, MT 59403-2909

PLEASE REMIT PAYMENT TO:  
CRESCENT ELECTRIC SUPPLY CO  
PO BOX 500  
EAST DUBUQUE, IL 61025-4418

|                     |                |
|---------------------|----------------|
| INVOICE NUMBER      | S504031552.009 |
| CUSTOMER NUMBER     | 310851         |
| INVOICE DATE        | 09/21/17       |
| DUE DATE            | 10/31/17       |
| SUBTOTAL            | \$3,773.04     |
| SHIPPING & HANDLING | \$0.00         |
| TAX                 | \$0.00         |
| INVOICE TOTAL       | \$3,773.04     |

CHECK # \_\_\_\_\_ \$ \_\_\_\_\_

# INVOICE



PO BOX 500  
EAST DUBUQUE, IL 61025-4418

FOR BILLING QUESTIONS, PLEASE CALL: 406-727-1039

|                          |              |                |
|--------------------------|--------------|----------------|
| INVOICE DATE             | CUSTOMER NO. | INVOICE NO.    |
| 09/25/17                 | 310851       | S504031552.014 |
| BRANCH                   |              | BRANCH NO.     |
| CRESCENT GREAT FALLS, MT |              | B065           |
| JOB NAME                 |              | PAGE NO.       |
| BENEFIS LAB PHASE B      |              | 1 of 1         |

SOLD TO: 192141

CASCADE ELECTRIC  
PO BOX 2909  
GREAT FALLS, MT 59403-2909

SHIP TO: 310851  
CASCAD-BENEFIS LAB PHASE B  
903 10TH AVE N  
GREAT FALLS, MT 59401

J/C

| ORDERED BY   | GUST PO             | ORDER DATE                         | REFERENCE       |              |
|--|---------------------|------------------------------------|-----------------|--------------|
|  | BENEFIS LAB PHASE B | 09/05/17                           | 1               |              |
| ORDER WRITER   | SHIP VIA            | SHIP DATE                          | ACCOUNT MANAGER |              |
| BRANTLEY S LONDON  | BEST WAY            | 09/25/17                           | DANIEL L BERTUS |              |
| ORDER QTY  | SHIP QTY            | DESCRIPTION                        | UNIT PRICE      | EXT PRICE    |
| 118  | 118                 | TYPE A3I: LTGR24-35MLG-R-ESDU-C488 | 134.7710/ea     | 15902.98     |
| <div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; padding: 5px; width: 45%;"> <p style="text-align: center;">CASCADE ELECTRIC CO., INC.</p> <p style="font-size: 2em; font-weight: bold; text-align: center;">RECEIVED</p> <p style="text-align: center; border: 1px solid black; padding: 2px;">SEP 27 2017</p> <p>OK TO PAY _____</p> <p>JOB _____</p> </div> <div style="border: 1px solid black; padding: 5px; width: 45%;"> <p style="text-align: center;">CASCADE ELECTRIC CO., INC.</p> <p style="font-size: 2em; font-weight: bold; text-align: center;">ENTERED</p> <p style="text-align: center; border: 1px solid black; padding: 2px;">SEP 27 2017</p> <p><input type="checkbox"/> A/R   <input type="checkbox"/> J/C</p> <p><input type="checkbox"/> A/P _____</p> </div> </div> |                     |                                    |                 |              |
| INVOICE DUE  | MERCHANDISE TOTAL   | TOTAL S&H                          | TOTAL TAX       | TOTAL AMOUNT |
| 10/31/17   | \$15,902.98         | \$0.00                             | \$0.00          | \$15,902.98  |



PLEASE DETACH AND RETURN WITH PAYMENT EXCEPT WHEN PAYING BY STATEMENT.  
A SERVICE CHARGE WILL BE ASSESSED ON AMOUNTS OVER 30 DAYS PAST DUE.



SOLD TO:  
CASCADE ELECTRIC  
PO BOX 2909  
GREAT FALLS, MT 59403-2909

PLEASE REMIT PAYMENT TO:  
CRESCENT ELECTRIC SUPPLY CO  
PO BOX 500  
EAST DUBUQUE, IL 61025-4418

|                      |                    |
|----------------------|--------------------|
| INVOICE NUMBER       | S504031552.014     |
| CUSTOMER NUMBER      | 310851             |
| INVOICE DATE         | 09/25/17           |
| DUE DATE             | 10/31/17           |
| SUBTOTAL             | \$15,902.98        |
| SHIPPING & HANDLING  | \$0.00             |
| TAX                  | \$0.00             |
| <b>INVOICE TOTAL</b> | <b>\$15,902.98</b> |

CHECK # \_\_\_\_\_ \$ \_\_\_\_\_

# Lighting Payback Calculator<sup>Basic</sup>

Advanced

## Existing Lighting

Fixture Category

Fluorescent Troffer 2x4 ▼

Fixture

2x4, 2 Lamp, F32 T8 Prismatic ▼

Quantity

21

Fixture Wattage

60.00

Total System Wattage

1,260.00

| HOURS OF OPERATION   | ELECTRICITY  | MAINTENANCE |
|--|--|-------------|
| <input type="radio"/> 24/7 Continuous<br><input checked="" type="radio"/> Schedule |  |             |
| <input type="text" value="70"/>  | <input type="text" value="Hours Per Week"/> <span>▼</span> |             |
| Annual Operating Hours<br><input type="text" value="3,650"/>                       |  |             |

## New Cree Lighting

Fixture Category

Troffer

Fixture

CR22 (20L)

Quantity

21

Price/Unit (\$)

114.2860

Fixture Wattage

22.00

Total System Wattage

462.00

TOTAL INVESTMENT (\$) 2,400.01

### ANALYZE MY SAVINGS

Analysis Period (Years)

10

Discount Rate (%)

6

Payback (Years)

6.9

Return on Investment (%)

33.67

Annual Electricity Savings (kWh)

2,912

Total Energy Cost Savings (\$)

3,495

|                                     |       |
|-------------------------------------|-------|
| Total Maintenance Cost Savings (\$) | 630   |
| Total Operating Savings (\$)        | 4,125 |
| NPV (\$)                            | 808   |
| IRR (%)                             | 14.81 |

**CALCULATE NOW**

[Email Me This Report](#)

# Lighting Payback Calculator<sup>Basic</sup> Advanced

## Existing Lighting

Fixture Category

Fluorescent Troffer 2x4 ▼

Fixture

2x4, 3 Lamp, F32 T8 Prismatic ▼

Quantity

30

Fixture Wattage

85.00

Total System Wattage

2,550.00

| HOURS OF OPERATION  | ELECTRICITY | MAINTENANCE |
|---|-------------|-------------|
| <input type="radio"/> 24/7 Continuous<br><input checked="" type="radio"/> Schedule<br><div style="display: flex; align-items: center;"> <input style="width: 50px; text-align: center;" type="text" value="70"/> <input style="margin-left: 10px;" type="text" value="Hours Per Week"/> <span>▼</span> </div> <p>Annual Operating Hours<br/>3,650</p> |             |             |

## New Cree Lighting

Fixture Category

Troffer

**Fixture**

CR24 (40L)

**Quantity**

30

**Price/Unit (\$)**

125.7680

**Fixture Wattage**

40.00

**Total System Wattage**

1,200.00

**TOTAL INVESTMENT (\$)** 3,773.04

## ANALYZE MY SAVINGS

Analysis Period (Years)

10

Discount Rate (%)

6

Payback (Years)

6.4

Return on Investment (%)

46.65

Annual Electricity Savings (kWh)

4,927

Total Energy Cost Savings (\$)

5,913

|                                     |       |
|-------------------------------------|-------|
| Total Maintenance Cost Savings (\$) | 1,200 |
| Total Operating Savings (\$)        | 7,113 |
| NPV (\$)                            | 1,760 |
| IRR (%)                             | 18.30 |

**CALCULATE NOW**

[Email Me This Report](#)

# Lighting Payback Calculator<sup>Basic</sup> Advanced

## Existing Lighting

Fixture Category

Fluorescent Troffer 2x4 ▼

Fixture

2x4, 4 Lamp, F32 T8 Prismatic ▼

Quantity

118

Fixture Wattage

111.00

Total System Wattage

13,098.00

| HOURS OF OPERATION   | ELECTRICITY  | MAINTENANCE |
|--|--|-------------|
| <input type="radio"/> 24/7 Continuous<br><input checked="" type="radio"/> Schedule |  |             |
| <input type="text" value="70"/>  | <input type="text" value="Hours Per Week"/> <span>▼</span> |             |
| Annual Operating Hours<br>3,650  |  |             |

## New Cree Lighting

Fixture Category

Troffer

Fixture

CR24 (50L)

Quantity

118

Price/Unit (\$)

134.771

Fixture Wattage

50.00

Total System Wattage

5,900.00

TOTAL INVESTMENT (\$) 15,902.98

### ANALYZE MY SAVINGS

Analysis Period (Years)

10

Discount Rate (%)

6

Payback (Years)

5.0

Return on Investment (%)

80.97

Annual Electricity Savings (kWh)

26,272

Total Energy Cost Savings (\$)

31,527

|                                     |        |
|-------------------------------------|--------|
| Total Maintenance Cost Savings (\$) | 5,664  |
| Total Operating Savings (\$)        | 37,191 |
| NPV (\$)                            | 12,876 |
| IRR (%)                             | 27.00  |

**CALCULATE NOW**

[Email Me This Report](#)



11/9/2017

NorthWestern Energy  
Attn: Rick Edwards  
Customer Service Department  
11 E. Park Street  
Butte, MT 59701

Dear Mr. Edwards,

Please see attached copies of the Benefis Endoscopy Remodel, "Changed T-8 Fixtures to Led Fixtures" project. We would like to use the 2016 carryover USBC Credit of \$18,710.42.

Sincerely,

A handwritten signature in black ink, appearing to read "Gunnar VanderMars", written over a white background.

Gunnar VanderMars  
Benefis Health System  
Director of Facilities and Support Services

**BENEFIS HEALTH SYSTEM**

1101 26th Street South, Great Falls, MT 59405 | [www.benefis.org](http://www.benefis.org)

Benefis Hospitals, Inc. | Benefis Medical Group, Inc. | Benefis Spectrum Medical, Inc. | Benefis Senior Services | Benefis Health System Foundation

**FORM B - UNIVERSAL SYSTEMS BENEFITS (USB)  
LARGE CUSTOMER CREDIT REQUEST FORM**

Complete and mail to: NorthWestern Energy  
Attn: Rick Edwards  
Customer Services Department  
11 E. Park Street  
Butte, MT 59701  
Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                        |
|----------------------|------------------------|
| DATE:                | November 9 2017        |
| NAME OF BUSINESS:    | Benefis Healthcare     |
| CITY/TOWN LOCATION:  | Great falls, Mt.       |
| CONTACT PERSON:      | Gunnar VanderMars      |
| MAILING ADDRESS:     | 1101 26st South        |
| CITY, STATE AND ZIP: | Great falls, Mt. 59405 |
| PHONE NUMBER:        | 406-455-5132           |
| FAX NUMBER:          | 406-455-4994           |
| E-MAIL ADDRESS       | vandergunn@benefis.org |

|                             |                           |
|-----------------------------|---------------------------|
| AMOUNT OF CREDIT REQUESTED: | USBC Credit YTD 18,710.42 |
|-----------------------------|---------------------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach): |
| Benefis Endoscopy Remodel, Change T-8 Fixture to Led Fixture        |

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |        |
|------------------------|--------|
| ESTIMATED kWh SAVINGS: | 30,618 |
| ESTIMATED KW SAVINGS:  |        |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: \_\_\_\_\_

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

CEB  
 901 RIVER DRIVE, SOUTH  
 GREAT FALLS, MT 59405  
 T:406 727-6151 F:406 727-0938

\*\*\*ORIGINAL\*\*\*

SOLD TO: CASCADE ELECTRIC  
 P.O. BOX 2909  
 GREAT FALLS, MT 59403

SHIP TO:

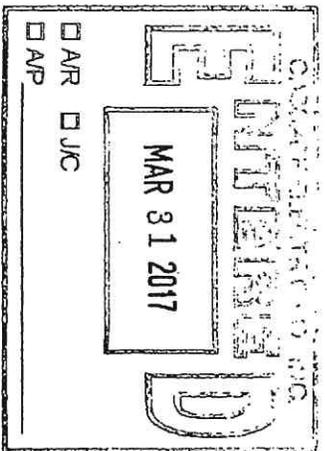
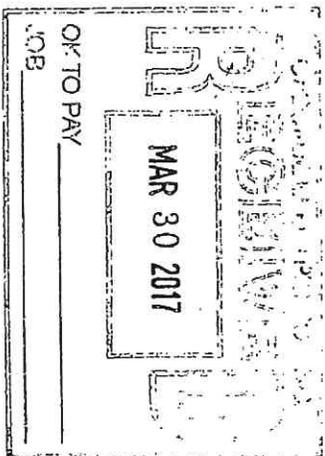
CASCADE ELECTRIC  
 TAG: BENEFIT ENDOSCOPY  
 903 10TH AVE NO  
 GREAT FALLS, MT 59401

|                                      |              |
|--------------------------------------|--------------|
| INVOICE NO                           | INVOICE DATE |
| 2808-713668                          | 03/29/17     |
| PLEASE SHOW INVOICE NO. AND RETN NO: |              |
| P.O. BOX 5580                        |              |
| KENT, WA 98054                       |              |
| T-253 852-1618 F-253 859-4463        |              |

512

\*\*\*EXALLED\*\*\*

|                       |   |                             |
|-----------------------|---|-----------------------------|
| ACCOUNT NO. GB-67001  | JOB NAME AND ADDRESS<br>BENEFIT ENDOSCOPY | CUSTOMER ORDER NO.<br>HEATH |
| SALESPERSON<br>0657 9 | SHIPPING INFORMATION<br>PREPAID           | SHIP DATE<br>03/24/17       |
| QUANTITY ORDERED      | PRODUCT CODE                              | DESCRIPTION                 |
| 8                     | PRESC IFA1ED7G4120DM1                     | TYPE DAD                    |
| 40                    | PRESC IFA1ED8G4120DM1                     | TYPE DSD                    |
|                       | QUANTITY SHIPPED                          | PRICE                       |
|                       | 8   | 82.50 E                     |
|                       | 40  | 105.20 E                    |
|                       |   | EXTENSION                   |
|                       |   | 660.00                      |
|                       |   | 4,208.00                    |
|                       |   | CD                          |



TITLE AND RISK OF LOSS OR DAMAGE TO MERCHANDISE PASSES AT POINT OF SHIPMENT. CLAIMS FOR SHORT OR DAMAGED MERCHANDISE SHOULD BE MADE TO CARRIER.  
 MERCHANDISE RETURNED WITHOUT OUR CONSENT WILL NOT BE ACCEPTED. A RESPOCKING CHARGE WILL BE MADE ON RETURNED GOODS UNLESS DEFECTIVE OR TEND ERROR ON OUR PART.  
 A SERVICE CHARGE OF 1.5% PER MONTH, BUT NOT TO EXCEED THE HIGHEST AMOUNT LAWFULLY ALLOWED BY CONTRACT IN THIS STATE, WILL BE MADE ON ALL PAST DUE ACCOUNTS.  
 THIS SALE IS SUBJECT TO OUR TERMS LOCATED AT SALES-OR-TERMS.COM, WHICH WE MAY CHANGE FROM TIME TO TIME WITHOUT PRIOR NOTICE.

CODE: TO ADVISE YOU PROMPTLY CONCERNING YOUR ORDER, THIS CODE IS USED ON OUR INVOICES.  
 B - BACK ORDERED. WILL SHIP AS SOON AS RECEIVED UNLESS INSTRUCTED TO CANCEL.  
 C - CANCELLED. NOT IN STOCK. UNABLE TO PURCHASE LOCALLY.

NEW PAYMENT IS DUE BY THE 15TH OF THE MONTH FOLLOWING PURCHASE

|                 |         |
|-----------------|---------|
| MERCHANDISE     | 4868.00 |
| SALES TAX       | .00     |
| SHIPPING CHARGE | .00     |
| TOTAL DUE       | 4868.00 |

CED  
 901 RIVER DRIVE, SOUTH  
 GREAT FALLS, MT 59405  
 T:406 727-6151 F:406 727-0938

\*\*\*ORIGINAL\*\*\*

|                                       |              |
|---------------------------------------|--------------|
| INVOICE NO                            | INVOICE DATE |
| 2808-713024                           | 03/17/17     |
| PLEASE SHOW INVOICE NO. AND REMIT TO: |              |
| P.O. BOX 5580                         |              |
| KENT, WA 98064                        |              |
| T:253 852-1618 F:253 859-4463         |              |

SOLD TO: CASCADE ELECTRIC

P.O. BOX 2909  
 GREAT FALLS, MT 59403

SHIP TO:

CASCADE ELECTRIC  
 TRG: BENEFITS ENDOSCOPY  
 903 10TH AVE NO  
 GREAT FALLS, MT 59401

\*\*\*EMAILED\*\*\*

ACCOUNT NO. GB-67001  
 BENEFITS ENDO  
 SALES PERSON 0657 SM

JOB NAME AND ADDRESS  
 BENEFITS ENDOSCOPY

CUSTOMER ORDER NO.

QUANTITY ORDERED

PRODUCT CODE

DESCRIPTION

39 COLUM ITRR2-35WAG-R-RSDJ-

C588 TYPE A51

SHIPPING INFORMATION

PREPAID

SHIP VIA  
BEST-RATE

QUANTITY SHIPPED

39

PRICE

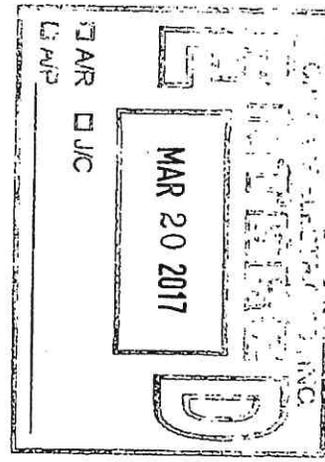
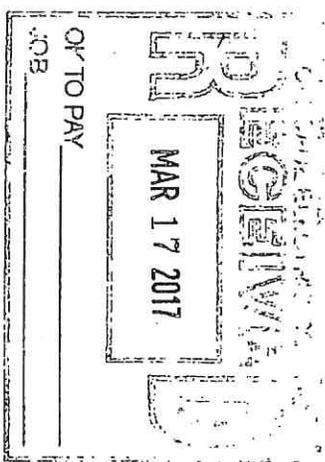
117.40 E

DISC.

EXTENSION

4,578.60

C/D



TITLE AND RISK OF LOSS OR DAMAGE TO MERCHANDISE PASSES AT POINT OF  
 SHIPMENT. CLAIMS FOR SHORT OR DAMAGED MERCHANDISE SHOULD BE MADE  
 TO CARRIER.  
 MERCHANDISE RETURNED WITHOUT OUR CONSENT WILL NOT BE ACCEPTED. A  
 RESPECTING CHANGE WILL BE MADE ON RETURNED GOODS UNLESS DEFECTIVE  
 OR TORN ERROR ON OUR PART.  
 A SERVICE CHARGE OF 1.5% PER MONTH, BUT NOT TO EXCEED THE HIGHEST  
 AMOUNT ALLOWED BY CONTRACT IN THIS STATE, WILL BE MADE ON  
 ALL PAID FOR ACCOUNTS.  
 THIS SALE IS SUBJECT TO OUR TERMS LOCATED AT SALES.OUR-TERMS.COM,  
 WHICH WE MAY CHANGE FROM TIME TO TIME WITHOUT PRIOR NOTICE.

CODE: TO ADVISE YOU PROPERLY CONCERNING YOUR ORDER, THIS CODE IS USED ON OUR  
 INVOICES.  
 B - BACK ORDERED. WILL SHIP AS SOON AS RECEIVED UNLESS INSTRUCTED TO CANCEL.  
 C - CANCELLED. NOT IN STOCK. UNABLE TO PURCHASE LOCALLY.

NEW PAYMENT IS DUE BY THE 15TH OF  
 THE MONTH FOLLOWING PURCHASE

|                 |         |
|-----------------|---------|
| MERCHANDISE     | 4578.60 |
| SALES TAX       | .00     |
| SHIPPING CHARGE | .00     |

TOTAL DUE 4578.60

CED  
 901 RIVER DRIVE, SOUTH  
 GREAT FALLS, MT 59405  
 T:406 727-6151 F:406 727-0938

\*\*\*ORIGINAL\*\*\*

INVOICE NO | INVOICE DATE  
 2808-713759 | 03/30/17

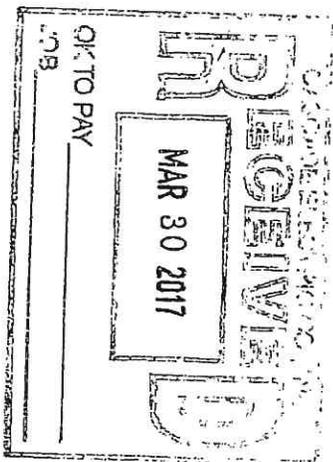
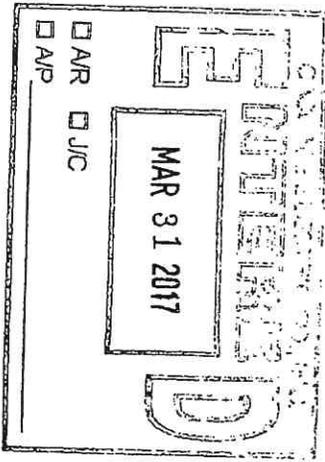
PLEASE SHOW INVOICE NO. AND REMIT TO:  
 P.O. BOX 5580  
 KENT, WA 98064  
 T:253 852-1618 F:253 859-4463

SOLD TO: CASCADE ELECTRIC  
 P.O. BOX 2909  
 GREAT FALLS, MT 59403

SHIP TO:  
 CASCADE ELECTRIC  
 TAG: BENEFITS ENDOSCOPY  
 903 10TH AVE NO  
 GREAT FALLS, MT 59401

\*\*\*EXALTED\*\*\*

5161

|  |  |  |                             |
|--|--|--|-----------------------------|
| ACCOUNT NO. GB-67001   | JOB NAME AND ADDRESS<br>BENEFITS ENDOSCOPY |  | CUSTOMER ORDER NO.<br>HEATH |
| BENEFITS ENDO  |  |  |                             |
| SALESPERSON<br>0657 SM   | SHIPPING INFORMATION<br>PREPAID            |  | SHIP VIA<br>BEST-WAY        |
| QUANTITY ORDERED   | PRODUCT CODE                               | DESCRIPTION  | QUANTITY SHIPPED            |
| 13   | C588                                       | C588 TYPE A31  | 13                          |
| 10   | C588                                       | C588 TYPE A31E   | 10                          |
| JOB COMPLETE   |  |  |                             |
|  |  | PRICE  | DISC                        |
|  |  | 145.60   | E                           |
|  |  | 145.60   | E                           |
|  |  | EXTENSION  | CID                         |
|  |  | 1,892.80   |                             |
|  |  | 1,456.00   |                             |
|   |  |    |                             |
| TITLE AND RISK OF LOSS ON DAMAGE TO MERCHANDISE PASSED AT POINT OF SHIPMENT. CLAIMS FOR SHORT OR DAMAGED MERCHANDISE SHOULD BE MADE TO CARRIER.<br>MERCHANDISE RETURNED WITHOUT OUR CONSENT WILL NOT BE ACCEPTED. A RESPOCKING CHARGE WILL BE MADE ON RETURNED GOODS UNLESS DEFECTIVE OR TENU ERROR ON OUR PART.<br>A SERVICE CHARGE OF 1.5% PER MONTH, BUT NOT TO EXCEED THE HIGHEST AMOUNT LAWFULLY ALLOWED BY CONTRACT IN THIS STATE, WILL BE MADE ON ALL PAST DUE ACCOUNTS.<br>THIS SALE IS SUBJECT TO OUR TERMS LOCATED AT SALES.CON-TERMS.COM, WHICH WE MAY CHANGE FROM TIME TO TIME WITHOUT PRIOR NOTICE. |  | CODE: NO ADVISE YOU PROMPTLY CONCERNING YOUR ORDER, THIS CODE IS USED ON OUR INVOICES.<br>B - BACK ORDERED, WILL SHIP AS SOON AS RECEIVED UNLESS INSTRUCTED TO CANCEL.<br>C - CANCELLED, NOT IN STOCK. UNABLE TO PURCHASE LOCALLY. |                             |
| MERCHANDISE 3348.80<br>SALES TAX .00<br>SHIPPING CHARGE .00  |  | NET PAYMENT IS DUE BY THE 15TH OF THE MONTH FOLLOWING PURCHASE<br>TOTAL DUE 3348.80  |                             |

CEB  
 901 RIVER DRIVE, SOUTH  
 GREAT FALLS, MT 59405  
 T:406 727-6151 F:406 727-0938

\*\*\*ORIGINAL\*\*\*

SOLD TO: CASCADE ELECTRIC  
 P.O. BOX 2909  
 GREAT FALLS, MT 59403

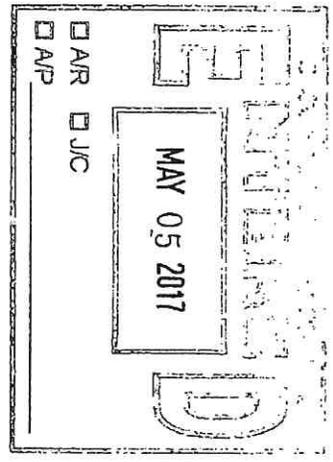
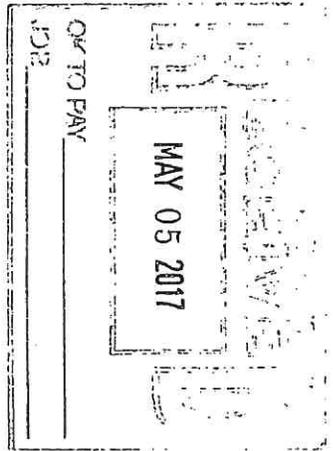
SHIP TO:

CASCADE ELECTRIC  
 TAG: BENEFITS ENDOSCOPY  
 903 10TH AVE NO  
 GREAT FALLS, MT 59401

|                                       |              |
|---------------------------------------|--------------|
| INVOICE NO                            | INVOICE DATE |
| 2808-715607                           | 05/04/17     |
| PLEASE SHOW INVOICE NO. AND REMIT NO: |              |
| P.O. BOX 5580                         |              |
| KENT, WA 98064                        |              |
| T:253 852-1618 F:253 859-4463         |              |

57C  
 \*\*\*EXALLED\*\*\*

|                  |                      |                            |                    |                    |           |
|------------------|----------------------|----------------------------|--------------------|--------------------|-----------|
| ACCOUNT NO.      | GB-67001             | JOB NAME AND ADDRESS       | BENEFITS ENDOSCOPY | CUSTOMER ORDER NO. | HEATH     |
| BENEFITS ENDO    |                      |                            |                    |                    |           |
| SALESPERSON      | 0657 SM              | SHIPPING INFORMATION       | PREPAID            | SHIP VIA           | BESTWAY   |
| QUANTITY ORDERED | PRODUCT CODE         | DESCRIPTION                | QUANTITY SHIPPED   | PRICE              | DISC.     |
| 11 MET           | METL-PAN-SG-2X4-40B- | 35K-U-4000IMS-STEP DIMMING | 11                 | 114.35             | E         |
| 25 MET           | METL-PAN-SG-1X4-40B- | 35K-U-4000IMS-STEP DIMMING | 25                 | 88.35              | E         |
| 22 MET           | METL-PAN-SG-2X4-50B- | 35K-U-5000IMS-STEP DIMMING | 22                 | 117.40             | E         |
|                  |                      |                            |                    |                    | EXTENSION |
|                  |                      |                            |                    |                    | CD        |
|                  |                      |                            |                    | SHIP DATE          | 05/01/17  |



TITLE AND RISK OF LOSS ON DAMAGE TO MERCHANDISE PASSES AT POINT OF SHIPMENT. CLAIMS FOR SHORT OR DAMAGED MERCHANDISE SHOULD BE MADE TO CARRIER.  
 MERCHANDISE RETURNED WITHOUT OUR CONSENT WILL NOT BE ACCEPTED. A RESTOCKING CHARGE WILL BE MADE ON RETURNED GOODS UNLESS DEFECTIVE OR THIS ERROR ON OUR PART.  
 A SERVICE CHARGE OF 1.5% PER MONTH, BUT NOT TO EXCEED THE HIGHEST AMOUNT LAWFULLY ALLOWED BY CONTRACT IN THIS STATE, WILL BE MADE ON ALL PAID FOR ACCOUNTS.  
 THIS SALE IS SUBJECT TO OUR TERMS LOCATED AT SALES OR-TERMS.COM, WHICH WE HAV CHANGE FROM TIME TO TIME WITHOUT PRIOR NOTICE.

CODE: TO ADVISE YOU PROBLEMS CONCERNING YOUR ORDER, THIS CODE IS USED ON OUR INVOICE.  
 B - BACK ORDERED, WILL BEP AS SOON AS RECEIVED UNLESS INSTRUCTED TO CANCEL.  
 C - CANCELLED, NOT IN STOCK, UNABLE TO PURCHASE LOCALTY.

NET PAYMENT IS DUE BY THE 15TH OF THE MONTH FOLLOWING PURCHASE

|                  |                |
|------------------|----------------|
| MERCHANDISE      | 6049.40        |
| SALES TAX        | .00            |
| SHIPPING CHARGE  | .00            |
| <b>TOTAL DUE</b> | <b>6049.40</b> |

# Lighting Payback Calculator<sup>Basic</sup> Advanced

## Existing Lighting

Fixture Category

Incandescent

Fixture

75w BR30 Incandescent

Quantity

8

Fixture Wattage

75.00

Total System Wattage

600.00

| HOURS OF OPERATION   | ELECTRICITY  | MAINTENANCE |
|--|--|-------------|
| <input type="radio"/> 24/7 Continuous<br><input checked="" type="radio"/> Schedule |  |             |
| <input type="text" value="70"/>  | <input type="text" value="Hours Per Week"/> <input type="button" value="v"/> |             |
| Annual Operating Hours<br>3,650  |  |             |

## New Cree Lighting

Fixture Category

Retrofit Downlight

**Fixture**

LR6 (10L)

**Quantity**

8

**Price/Unit (\$)**

82.5

**Fixture Wattage**

11.00

**Total System Wattage**

88.00

**TOTAL INVESTMENT (\$)** 660.00

## ANALYZE MY SAVINGS

|                                  |                                     |
|----------------------------------|-------------------------------------|
| Analysis Period (Years)          | 10 <input type="button" value="v"/> |
| Discount Rate (%)                | 6                                   |
| Payback (Years)                  | 2.9                                 |
| Return on Investment (%)         | 224.39                              |
| Annual Electricity Savings (kWh) | 1,868                               |
| Total Energy Cost Savings (\$)   | 2,243                               |

|                                     |       |
|-------------------------------------|-------|
| Total Maintenance Cost Savings (\$) | 588   |
| Total Operating Savings (\$)        | 2,830 |
| NPV (\$)                            | 1,481 |
| IRR (%)                             | 51.96 |

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# Lighting Payback Calculator<sup>Basic</sup> Advanced

## Existing Lighting

Fixture Category

Incandescent ▼

Fixture

100w BR40 Incandescent ▼

Quantity

40

Fixture Wattage

100.00

Total System Wattage

4,000.00

| HOURS OF OPERATION   | ELECTRICITY  | MAINTENANCE |
|--|--|-------------|
| <input type="radio"/> 24/7 Continuous<br><input checked="" type="radio"/> Schedule |  |             |
| <input type="text" value="70"/>  | <input type="text" value="Hours Per Week"/> <span>▼</span> |             |
| Annual Operating Hours<br>3,650  |  |             |

## New Cree Lighting

Fixture Category

Retrofit Downlight

Fixture

LR6 (18L)

Quantity

40

Price/Unit (\$)

105.20

Fixture Wattage

20.00

Total System Wattage

800.00

TOTAL INVESTMENT (\$) 4,208.00

### ANALYZE MY SAVINGS

|                                  |  |
|----------------------------------|--|
| Analysis Period (Years)          | <input type="button" value="10"/> <input type="button" value="v"/> |
| Discount Rate (%)                | <input type="button" value="6"/>                                   |
| Payback (Years)                  | 3.0  |
| Return on Investment (%)         | 257.91   |
| Annual Electricity Savings (kWh) | 11,680   |
| Total Energy Cost Savings (\$)   | 14,016   |

|                                     |        |
|-------------------------------------|--------|
| Total Maintenance Cost Savings (\$) | 5,880  |
| Total Operating Savings (\$)        | 19,896 |
| NPV (\$)                            | 10,853 |
| IRR (%)                             | 59.27  |

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# Lighting Payback Calculator <sup>Basic</sup> Advanced

## Existing Lighting

Fixture Category

Fluorescent Troffer 2x4 ▼

Fixture

2x4, 2 Lamp, F32 T8 Prismatic ▼

Quantity

39

Fixture Wattage

60.00

Total System Wattage

2,340.00

| HOURS OF OPERATION   | ELECTRICITY  | MAINTENANCE |
|--|--|-------------|
| <input type="radio"/> 24/7 Continuous<br><input checked="" type="radio"/> Schedule |  |             |
| <input type="text" value="70"/>  | <input type="text" value="Hours Per Week"/> <span style="float: right;">▼</span> |             |
| Annual Operating Hours<br>3,650  |  |             |

## New Cree Lighting

Fixture Category

Troffer

Fixture

CR22 (20L)

Quantity

39

Price/Unit (\$)

117.40

Fixture Wattage

22.00

Total System Wattage

858.00

TOTAL INVESTMENT (\$) 4,578.60

### ANALYZE MY SAVINGS

Analysis Period (Years)

10

Discount Rate (%)

6

Payback (Years)

7.1

Return on Investment (%)

30.12

Annual Electricity Savings (kWh)

5,409

Total Energy Cost Savings (\$)

6,491

|                                     |       |
|-------------------------------------|-------|
| Total Maintenance Cost Savings (\$) | 1,170 |
| Total Operating Savings (\$)        | 7,661 |
| NPV (\$)                            | 1,379 |
| IRR (%)                             | 13.87 |

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# Lighting Payback Calculator<sup>Basic</sup>

Advanced

## Existing Lighting

### Fixture Category

Fluorescent Troffer 2x4



### Fixture

2x4, 3 Lamp, F32 T8 Prismatic



### Quantity

23

### Fixture Wattage

85.00

### Total System Wattage

1,955.00

#### HOURS OF OPERATION

#### ELECTRICITY

#### MAINTENANCE

24/7 Continuous

Schedule

70

Hours Per Week

Annual Operating Hours

3,650

## New Cree Lighting

### Fixture Category

Troffer

Fixture

CR24 (40L)

Quantity

23

Price/Unit (\$)

145.60

Fixture Wattage

40.00

Total System Wattage

920.00

TOTAL INVESTMENT (\$) 3,348.80

## ANALYZE MY SAVINGS

Analysis Period (Years)

10

Discount Rate (%)

6

Payback (Years)

7.4

Return on Investment (%)

26.67

Annual Electricity Savings (kWh)

3,777

Total Energy Cost Savings (\$)

4,533

|                                     |       |
|-------------------------------------|-------|
| Total Maintenance Cost Savings (\$) | 920   |
| Total Operating Savings (\$)        | 5,453 |
| NPV (\$)                            | 893   |
| IRR (%)                             | 12.99 |

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# Lighting Payback Calculator<sup>Basic</sup>

Advanced

## Existing Lighting

Fixture Category

Fluorescent Troffer 2x4 ▼

Fixture

2x4, 3 Lamp, F32 T8 Prismatic ▼

Quantity

48

Fixture Wattage

85.00

Total System Wattage

4,080.00

| HOURS OF OPERATION   | ELECTRICITY  | MAINTENANCE |
|--|--|-------------|
| <input type="radio"/> 24/7 Continuous<br><input checked="" type="radio"/> Schedule |  |             |
| <input type="text" value="70"/>  | <input type="text" value="Hours Per Week"/> <span>▼</span> |             |
| Annual Operating Hours<br>3,650  |  |             |

## New Cree Lighting

Fixture Category

Troffer

Fixture

CR24 (40L)

Quantity

48

Price/Unit (\$)

126.02916

Fixture Wattage

40.00

Total System Wattage

1,920.00

TOTAL INVESTMENT (\$) 6,049.40

## ANALYZE MY SAVINGS

Analysis Period (Years)

10

Discount Rate (%)

6

Payback (Years)

6.4

Return on Investment (%)

46.34

Annual Electricity Savings (kWh)

7,884

Total Energy Cost Savings (\$)

9,461

|                                     |        |
|-------------------------------------|--------|
| Total Maintenance Cost Savings (\$) | 1,920  |
| Total Operating Savings (\$)        | 11,380 |
| NPV (\$)                            | 2,803  |
| IRR (%)                             | 18.22  |

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**Billings Clinic.**

**Facility Services**  
2800 Tenth Avenue North  
PO Box 37000  
Billings, MT 59107-7000

January 23, 2018

Mark Schoenfeld  
Montana Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

Re: Large Customer Universal System Benefits Program (USBP) Annual Report Summary for  
Billings Clinic

Dear Mr. Schoenfeld:

A large customer is required to submit an annual summary report, pursuant to 69-8-402, MCA, of its universal system benefits program activities and expenditures for the previous calendar year to the Montana Department of Revenue and to the large customer's electric utility.

This is the 2017 summary report for:

Billings Clinic  
P.O. Box 37000  
Billings, MT 59107

**Billings Clinic did not submit any new projects (Form B's) in 2016 and the 2010, 2011 & 2012 USB credit received in 2017 were all from projects Billings Clinic submitted in previous years.**

Sincerely,

Mitch Goplen  
Vice President Facility Services  
Billings Clinic

Cc: Rick Edwards  
NorthWestern Energy  
Deborah I. Singer  
NorthWestern Energy



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## BILLINGS CLINIC

| Account Summary                 |             | Payment Requests Made |      |                          |                |  |  |  |  |  |  |  |  | Payments Issued |            |            |
|---------------------------------|-------------|-----------------------|------|--------------------------|----------------|--|--|--|--|--|--|--|--|-----------------|------------|------------|
|                                 |             | Submitted By          | Date | Amount                   |                |  |  |  |  |  |  |  |  |                 | Date       | Amount     |
| 2016 Carryover Reservation:     | \$0.00      |                       |      | YTD Elec Revenue:        | \$2,536,572.87 |  |  |  |  |  |  |  |  |                 | 04/10/2017 | \$7,377.88 |
| Reservations Made YTD:          | \$0.00      |                       |      |                          |                |  |  |  |  |  |  |  |  |                 | 07/07/2017 | \$5,916.42 |
| 2016 Carryover Payment Request: | \$81,776.52 |                       |      | Total Payment Requests:  | \$81,776.52    |  |  |  |  |  |  |  |  |                 | 10/09/2017 | \$7,061.68 |
| Payment Requests Made YTD:      | \$0.00      |                       |      | Current Request Balance: | \$57,521.66    |  |  |  |  |  |  |  |  |                 | 12/06/2017 | \$3,898.88 |
| 2016 Carryover USBC Credit:     | \$1,831.89  |                       |      | Total USBC Credit:       | \$26,002.84    |  |  |  |  |  |  |  |  |                 |            |            |
| USBC Credit YTD:                | \$24,170.95 |                       |      | Payments Issued YTD:     | \$24,254.86    |  |  |  |  |  |  |  |  |                 |            |            |
| Average Monthly Credit Earned:  | \$2,014.25  |                       |      | USBC Credit Balance:     | \$1,747.98     |  |  |  |  |  |  |  |  |                 |            |            |
|                                 |             |                       |      | Payment Pending:         | \$1,747.98     |  |  |  |  |  |  |  |  |                 |            |            |

## Account Detail

| Account | Premise | Meter      | Jan                       | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total      |
|---------|---------|------------|---------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|----------------|
| 100604  | 1608    | DA06613312 | KWH > 1,206,256           | 1,205,982  | 1,127,477  | 1,268,501  | 1,312,870  | 1,498,528  | 1,617,380  | 1,830,650  | 1,898,421  | 1,402,775  | 1,298,594  | 1,166,082  | 16,633,486     |
|         |         |            | KW > 1,917                | 1,987      | 2,333      | 2,870      | 2,894      | 3,007      | 3,119      | 3,344      | 3,076      | 3,087      | 2,808      | 2,454      | 2,723          |
|         |         |            | Elec Revenue > 110,410.61 | 111,709.94 | 105,343.34 | 118,948.82 | 125,432.69 | 140,025.41 | 149,134.95 | 167,229.66 | 154,995.75 | 132,692.82 | 122,953.60 | 109,674.63 | \$1,548,552.22 |
| 614675  | 288293  | DG21141087 | KWH > 71,380              | 77,800     | 72,720     | 72,240     | 80,000     | 79,840     | 91,600     | 104,320    | 0          | 0          | 0          | 0          | 649,880        |
|         |         |            | KW > 138                  | 135        | 150        | 154        | 161        | 166        | 187        | 191        | 0          | 0          | 0          | 0          | 160            |
|         |         |            | Elec Revenue > \$6,828.03 | \$7,426.80 | \$6,957.17 | \$6,938.73 | \$7,681.27 | \$7,686.16 | \$8,711.61 | \$9,894.10 | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$61,923.87    |
| 619268  | 288943  | DD36237727 | KWH > 10,080              | 10,880     | 10,240     | 10,480     | 12,120     | 12,520     | 15,600     | 19,960     | 19,080     | 0          | 0          | 0          | 120,960        |
|         |         |            | KW > 26                   | 26         | 28         | 29         | 31         | 36         | 42         | 49         | 78         | 0          | 0          | 0          | 38             |
|         |         |            | Elec Revenue > \$1,042.93 | \$1,128.91 | \$1,054.18 | \$1,080.95 | \$1,241.19 | \$1,310.64 | \$1,599.00 | \$1,981.03 | \$1,844.54 | \$0.00     | \$0.00     | \$0.00     | \$12,393.37    |
| 721115  | 303183  | DG35855513 | KWH > 28,780              | 22,280     | 20,720     | 21,760     | 22,320     | 24,780     | 30,360     | 27,120     | 24,640     | 24,240     | 23,000     | 20,840     | 290,800        |
|         |         |            | KW > 58                   | 55         | 58         | 70         | 78         | 85         | 93         | 91         | 89         | 89         | 70         | 56         | 74             |
|         |         |            | Elec Revenue > \$2,901.64 | \$2,327.06 | \$2,201.14 | \$2,407.83 | \$2,541.06 | \$2,785.78 | \$3,288.33 | \$3,017.58 | \$2,811.81 | \$2,783.58 | \$2,502.32 | \$2,188.31 | \$31,757.44    |
| 722288  | 330974  | DA17754351 | KWH > 1,746               | 1,475      | 1,543      | 1,190      | 1,075      | 554        | 318        | 445        | 424        | 493        | 867        | 1,427      | 11,557         |
|         |         |            | KW > 8                    | 8          | 8          | 7          | 7          | 6          | 4          | 4          | 4          | 5          | 6          | 8          | 6              |
|         |         |            | Elec Revenue > \$232.35   | \$212.88   | \$209.02   | \$172.99   | \$168.60   | \$119.91   | \$79.81    | \$89.50    | \$90.00    | \$101.63   | \$144.65   | \$198.88   | \$1,818.20     |
| 722289  | 330975  | DS84042718 | KWH > 4,852               | 4,281      | 3,547      | 2,968      | 2,632      | 2,803      | 2,391      | 3,052      | 2,552      | 2,763      | 3,004      | 3,511      | 38,136         |
|         |         |            | KW > 14                   | 16         | 13         | 13         | 10         | 9          | 9          | 10         | 8          | 11         | 12         | 12         | 11             |
|         |         |            | Elec Revenue > \$540.34   | \$510.09   | \$422.34   | \$377.79   | \$314.94   | \$302.35   | \$282.47   | \$349.57   | \$292.80   | \$332.09   | \$371.12   | \$408.51   | \$4,504.41     |
| 723405  | 331895  | DA04587420 | KWH > 4,280               | 7,560      | 5,360      | 5,400      | 5,600      | 6,720      | 9,260      | 7,760      | 6,060      | 6,220      | 5,000      | 4,380      | 73,600         |
|         |         |            | KW > 6                    | 13         | 16         | 16         | 18         | 22         | 21         | 21         | 20         | 21         | 20         | 14         | 17             |
|         |         |            | Elec Revenue > \$483.51   | \$743.12   | \$588.74   | \$596.35   | \$634.33   | \$752.18   | \$841.74   | \$825.69   | \$684.71   | \$708.83   | \$804.74   | \$492.25   | \$8,056.19     |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan                 | Feb            | Mar            | Apr            | May            | Jun            | Jul            | Aug            | Sep            | Oct            | Nov            | Dec            | YTD Total        |              |
|---------|---------|------------|---------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|--------------|
| 723634  | 332212  | DS94408274 | KWH ><br>KW >       | 2,212<br>4     | 2,186<br>8     | 1,403<br>5     | 1,709<br>6     | 1,266<br>7     | 3,033<br>14    | 2,560<br>10    | 1,867<br>7     | 1,420<br>7     | 2,525<br>10    | 1,963<br>7     | 23,239<br>8      |              |
|         |         |            | Elec Revenue >      | \$268.24       | \$264.47       | \$170.98       | \$207.35       | \$181.44       | \$383.56       | \$310.33       | \$213.41       | \$198.22       | \$306.73       | \$234.58       | \$2,900.23       |              |
| 723640  | 332218  | DA03614155 | KWH ><br>KW >       | 143,820<br>103 | 133,200<br>198 | 119,460<br>202 | 137,220<br>199 | 129,300<br>195 | 133,020<br>195 | 126,420<br>198 | 134,400<br>198 | 121,080<br>203 | 131,100<br>211 | 125,280<br>216 | 1,556,700<br>194 |              |
|         |         |            | Elec Revenue >      | \$13,078.11    | \$12,038.29    | \$10,797.77    | \$12,197.73    | \$11,161.17    | \$11,766.66    | \$11,291.38    | \$11,914.46    | \$10,975.42    | \$11,814.09    | \$11,409.02    | \$139,971.42     |              |
| 724461  | 333005  | DG21203269 | KWH ><br>KW >       | 447,000<br>393 | 422,400<br>768 | 373,200<br>762 | 423,600<br>756 | 398,600<br>750 | 402,000<br>756 | 391,200<br>744 | 411,000<br>756 | 364,200<br>732 | 405,600<br>774 | 361,200<br>738 | 4,782,000<br>724 |              |
|         |         |            | Elec Revenue >      | \$41,747.01    | \$39,261.21    | \$34,769.47    | \$38,782.44    | \$35,884.08    | \$36,919.98    | \$36,001.82    | \$37,642.76    | \$33,982.95    | \$37,521.94    | \$33,824.40    | \$442,930.26     |              |
| 1084261 | 368753  | DG21316973 | KWH ><br>KW >       | 29,280<br>54   | 27,360<br>55   | 25,440<br>92   | 30,640<br>88   | 34,860<br>103  | 44,000<br>99   | 40,800<br>92   | 40,320<br>91   | 25,600<br>71   | 27,520<br>72   | 24,080<br>64   | 384,000<br>79    |              |
|         |         |            | Elec Revenue >      | \$2,898.44     | \$2,725.35     | \$2,898.81     | \$3,278.43     | \$3,404.93     | \$4,403.31     | \$4,081.66     | \$4,042.42     | \$2,710.48     | \$2,869.84     | \$2,521.74     | \$39,595.41      |              |
| 1658336 | 79097   | DA14692134 | KWH ><br>KW >       | 1,077<br>1     | 895<br>2       | 844<br>1       | 791<br>1       | 603<br>1       | 629<br>1       | 591<br>1       | 956<br>2       | 526<br>1       | 920<br>1       | 924<br>1       | 9,455<br>1       |              |
|         |         |            | Elec Revenue >      | \$115.15       | \$98.55        | \$92.45        | \$88.51        | \$73.17        | \$74.91        | \$71.99        | \$108.59       | \$67.22        | \$98.28        | \$98.05        | \$1,068.49       |              |
| 1682517 | 79096   | DA08154390 | KWH ><br>KW >       | 4,074<br>6     | 3,436<br>12    | 3,540<br>11    | 3,988<br>14    | 4,636<br>21    | 6,736<br>23    | 6,017<br>22    | 4,878<br>22    | 4,147<br>19    | 4,407<br>17    | 3,577<br>14    | 53,626<br>17     |              |
|         |         |            | Elec Revenue >      | \$460.99       | \$401.08       | \$400.41       | \$459.55       | \$580.69       | \$759.04       | \$694.80       | \$611.93       | \$525.63       | \$526.43       | \$427.29       | \$6,385.28       |              |
| 1709467 | 420271  | DG35953881 | KWH ><br>KW >       | 69,200<br>122  | 64,000<br>143  | 58,880<br>168  | 67,440<br>169  | 84,320<br>249  | 106,720<br>252 | 102,400<br>251 | 95,920<br>215  | 61,680<br>176  | 59,760<br>186  | 51,280<br>140  | 886,400<br>189   |              |
|         |         |            | Elec Revenue >      | \$6,778.84     | \$6,506.17     | \$6,257.88     | \$6,986.01     | \$7,012.97     | \$10,783.60    | \$10,441.23    | \$9,589.00     | \$6,572.76     | \$6,523.61     | \$5,407.03     | \$91,899.32      |              |
| 1936593 | 322782  | DG90055184 | KWH ><br>KW >       | 142,840<br>277 | 104,180<br>254 | 83,520<br>280  | 67,920<br>202  | 69,280<br>217  | 98,320<br>219  | 86,160<br>204  | 62,880<br>209  | 95,040<br>213  | 91,120<br>206  | 98,960<br>222  | 1,063,440<br>225 |              |
|         |         |            | Elec Revenue >      | \$14,210.24    | \$10,815.45    | \$9,288.49     | \$7,326.44     | \$7,573.44     | \$9,805.82     | \$8,720.71     | \$6,973.44     | \$8,529.89     | \$9,166.09     | \$8,166.09     | \$9,932.87       | \$110,259.21 |
| 3125069 | 388205  | DA04895558 | KWH ><br>KW >       | 0<br>0         | 18,520<br>68   | 19,000<br>68   | 16,880<br>50   | 14,880<br>46   | 69,280<br>58     |              |
|         |         |            | Elec Revenue >      | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$2,121.78     | \$2,168.25     | \$1,829.76     | \$1,629.56     | \$7,749.35       |              |
| 3373216 | 64623   | DD56118081 | KWH ><br>KW >       | 0<br>0         | 38,760<br>146  | 40,800<br>118  | 37,120<br>224  | 116,680<br>163   |              |
|         |         |            | Elec Revenue >      | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$4,480.45     | \$4,387.31     | \$5,141.53     | \$13,989.29      |              |
| 3373218 | 257035  | DG90072343 | KWH ><br>KW >       | 0<br>0         | 14,120<br>51   | 15,640<br>46   | 13,840<br>40   | 43,600<br>46     |              |
|         |         |            | Elec Revenue >      | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$1,618.08     | \$1,694.35     | \$1,491.11     | \$4,803.54       |              |
| 3461984 | 370680  | DD49232844 | KWH ><br>KW >       | 0<br>0         | 10,980<br>37   | 8,560<br>26    | 9,880<br>26    | 9,820<br>26    | 38,320<br>29     |              |
|         |         |            | Elec Revenue >      | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$1,228.54     | \$833.42       | \$1,016.30     | \$1,043.81     | \$4,242.07       |              |
| 3461985 | 380805  | DA04732484 | KWH ><br>KW >       | 0<br>0         | 1,358<br>6     | 1,042<br>5     | 1,105<br>4     | 1,107<br>3     | 4,612<br>5       |              |
|         |         |            | Elec Revenue >      | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$174.38       | \$139.95       | \$144.85       | \$127.35       | \$576.53         |              |
| 3461986 | 370879  | DG21490226 | KWH ><br>KW >       | 0<br>0         | 1,441<br>5     | 1,343<br>5     | 1,362<br>3     | 1,856<br>4     | 6,002<br>4       |              |
|         |         |            | Elec Revenue >      | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$0.00         | \$170.89       | \$163.16       | \$118.85       | \$193.77       | \$676.77         |              |
|         |         |            | Total KWH           | 2,166,637      | 2,087,675      | 1,907,894      | 2,115,857      | 2,346,410      | 2,561,367      | 2,749,455      | 2,535,475      | 2,193,009      | 2,139,084      | 1,942,197      | 26,866,573       |              |
|         |         |            | Combined Average KW | 3,125          | 3,681          | 4,127          | 4,394          | 4,874          | 5,034          | 5,232          | 4,891          | 4,916          | 4,640          | 4,289          | 4,770            |              |
|         |         |            | USBC Charge         | \$1,949.98     | \$1,878.90     | \$1,717.11     | \$1,904.28     | \$1,900.37     | \$2,305.23     | \$2,474.51     | \$2,281.94     | \$1,973.71     | \$1,925.17     | \$1,747.98     | \$24,170.95      |              |
|         |         |            | Total Elec Revenue  | 201,996.43     | 196,169.37     | 181,452.19     | 199,829.92     | 203,173.56     | 222,321.11     | 238,934.79     | 254,821.05     | 235,611.31     | 210,682.83     | 204,614.66     | 2,536,052.87     |              |



January 19, 2018

Mitch Goplen  
Vice President, Facility Services  
Billings Clinic  
P.O. Box 37000  
Billings, MT 59107

RE: "Self-Directed USBC Progress Report for 2017" for Department of Revenue Annual Report

Dear Mitch:

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2017, and I am contacting you regarding your 2017 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end "Self-Directed USBC Progress Report for 2017" showing a summary of your USB activity during 2017 including payment requests you submitted (Form B's), payments issued and any reservations (Form A's) you may have submitted to carry over all or a portion of your 2017 USB credits into 2018. If your final progress report shows a "Payment Pending", it reflects your December 2017 USB credits that were carried over into 2018, and these credits will be distributed when we issue our first quarter USB checks in mid-April. Please review the numbers provided, and notify me immediately of any differences you identify.

Your "Self-Directed USBC Progress Report for 2017" will be helpful as you prepare your required year-end USB report that you must file with the Montana Department of Revenue (DOR) by March 1, 2018. The annual USB reporting requirements are highlighted in yellow in the attached copy of the Montana Code Annotated (MCA) and Montana Administrative Rule 4.29.103. Here are some tips to assist you in preparing your annual report for DOR.

- ✓ A large customer claiming USB credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the Montana DOR and to the large customer's utility (NorthWestern Energy) by March 1<sup>st</sup> of the following year.
- ✓ In 2015, legislative changes to the MCA now impose penalties of not less than \$1,000 or more than \$5,000 if a large customer does not file an annual report on its USB credits with DOR by March 1.
- ✓ A report must be filed with the DOR even if a large customer is being reimbursed USB credits for a project submitted in previous years and the report should indicate if the USB credits were received for projects submitted in previous years.
- ✓ The annual report of a large customer must identify each qualifying project or expenditure for which it claimed a credit and the amount of the credit. So, if any new Form B's were submitted to the utility during 2017 to request credits, a copy of these forms should be submitted with your annual report to DOR. Large customers need to keep their own documentation on the project submitted as to the costs and energy savings claimed, etc. NorthWestern Energy does not qualify large customers' self-directed USB claims.
- ✓ The large customer's report must indicate the amount of USB funds earned and self-directed in 2017.
- ✓ We encourage large customers to make a copy of the "Self-Directed USBC Progress Report" and send it along with your other documentation to DOR.
- ✓ Also, as required by the MCA, please provide NorthWestern Energy with a copy of what you send to DOR, and send it to: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 or email: rick.edwards@northwestern.com.

You may want to send your report via certified mail to DOR by March 1, 2018 to the address below.

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805

Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

If you have any questions, please contact me at 406-655-2550.

Sincerely,

Deborah Singer  
Senior Key Account & Economic Development Specialist

# BLACKHAWK

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275 Manhattan South Rd. Manhattan, MT 59741 | 4062843860 | Chris.Rivenbark@vistaoutdoor.com

**2/22/2018**

Mark Schoenfeld  
Department of Revenue  
PO Box 5805  
Helena, MT 59604

**Rec'd MT DOR  
FEB 26 2018**

**Dear Mark Schoenfeld:**

This letter is to serve as the report of activities, planned activities and request to reserve credit. Included is a Progress Report provided by NorthWestern Energy of the credit and how it was earned. Also included is a copy of a form A showing our request to NorthWestern Energy to reserve the credit, originally estimated at \$4400, to be used in 2018 on an energy savings project. The project is to replace a fixed speed air compressor with a more efficient variable speed. The new air compressor has already been purchased but has not yet been delivered. We expect it to arrive and be installed by the middle of May 2018. This report is complete.

**Sincerely,**

**Rivenbark, Chris**

Maintenance Coordinator

BLACKHAWK

4066001728



## FORM A - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION

Complete and mail to: NorthWestern Energy  
Attn: Rick Edwards  
Customer Services Department  
11 E. Park Street  
Butte, MT 59701  
Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
FAX: (406) 497-4008

|                      |                                  |
|----------------------|----------------------------------|
| DATE:                | 11/3/17                          |
| NAME OF BUSINESS:    | BLACKHAWK                        |
| CITY/TOWN LOCATION:  | Manhattan, MT                    |
| CONTACT PERSON:      | Chris Rivenbark                  |
| MAILING ADDRESS:     | 275 So. Manhattan Rd.            |
| CITY, STATE AND ZIP: | Manhattan, MT 59741              |
| PHONE NUMBER:        | 4062843860                       |
| FAX NUMBER:          | 4062842286                       |
| E-MAIL ADDRESS       | Chris.Rivenbark@vistaoutdoor.com |

1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

We are replacing a fixed speed air compressor with a variable speed. We expect to take delivery and install the new compressor before 4/30/2018. We are claiming \$4400 in credit from 2017.

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:

Signature:



FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



1900 10th Street NE Great Falls, MT 59404  
Main Phone: 406-761-4100 Administration/Marketing/Main Office Fax: 406-761-0174 Refinery Office Fax: 406-761-0777  
www.calumetspecialty.com

February 26, 2018

Mr. Mark Schoenfeld  
Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

RE: USB Annual Report for 2017 for Calumet Montana Refining, LLC

Dear Mr. Schoenfeld

Please consider this the annual summary report for Calumet Montana Refining, LLC. Attached is a copy of the last USB report received from Northwestern Energy along with our Form B. We made a donation of \$85,360.33 to the Energy Share of Montana Endowment from the USBC credits that received in 2016.

Should you have any questions or require additional information, please contact me.

Sincerely,

A handwritten signature in blue ink, appearing to read "Wayne Leiker".

Wayne Leiker  
VP Montana Refining

Enclosures

Cc: Dale Mahugh, NW Energy  
Rick Edwards, NW Energy

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                                   |
|----------------------|-----------------------------------|
| DATE:                | 11/28/17                          |
| NAME OF BUSINESS:    | Calumet Montana Refining          |
| CITY/TOWN LOCATION:  | Great Falls                       |
| CONTACT PERSON:      | Wayne Leiker                      |
| MAILING ADDRESS:     | 1900 10 <sup>th</sup> Street NE   |
| CITY, STATE AND ZIP: | Great Falls, MT 59404-1955        |
| PHONE NUMBER:        | (406) 761-4100                    |
| FAX NUMBER:          |                                   |
| E-MAIL ADDRESS       | Wayne.lieker@calumetspecialty.com |

|                             |     |
|-----------------------------|-----|
| AMOUNT OF CREDIT REQUESTED: | \$0 |
|-----------------------------|-----|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):<br>Donate 2016 USB funds of \$85,360.33 USB credits to Energy Share of Montana. |
|---|

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |  |
|------------------------|--|
| ESTIMATED kWh SAVINGS: |  |
| ESTIMATED KW SAVINGS:  |  |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: 

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



# Self-Directed USBC Progress Report for 2017

Prepared by Rick Edwards on 10/10/2017

## CALUMET MONTANA REFINING, LLC

### Account Summary

|                                 |             |                          |              |
|---------------------------------|-------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$85,400.00 | YTD Elec Revenue:        | \$486,379.09 |
| Reservations Made YTD:          | \$0.00      |                          |              |
| 2016 Carryover Payment Request: | \$0.00      | Total Payment Requests:  | \$0.00       |
| Payment Requests Made YTD:      | \$0.00      | Current Request Balance: | \$0.00       |
| 2016 Carryover USBC Credit:     | \$85,360.33 | Total USBC Credit:       | \$158,287.84 |
| USBC Credit YTD:                | \$72,927.51 | Payments Issued YTD:     | \$0.00       |
| Average Monthly Credit Earned:  | \$8,103.06  | USBC Credit Balance:     | \$158,287.84 |
|                                 |             | Payment Pending:         | \$0.00       |

| Payment Requests Made |      | Payments Issued |        |
|-----------------------|------|-----------------|--------|
| Submitted By          | Date | Date            | Amount |
|                       |      |                 |        |

| Payment Requests Made |      | Payments Issued |        |
|-----------------------|------|-----------------|--------|
| Submitted By          | Date | Date            | Amount |
|                       |      |                 |        |

### Account Detail

| Account | Premise | Meter      | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct    | Nov    | Dec    | YTD Total    |
|---------|---------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------|--------|--------|--------------|
| 100327  | 1327    | DA13291234 | 7,057,395   | 9,333,122   | 8,107,691   | 9,414,419   | 9,339,845   | 9,572,324   | 9,130,419   | 9,477,729   | 9,497,876   | 0      | 0      | 0      | 80,930,820   |
|         |         |            | 12,618      | 13,050      | 12,942      | 13,248      | 13,464      | 13,320      | 13,338      | 13,158      | 13,248      | 0      | 0      | 0      | 13,154       |
|         |         |            | \$42,866.03 | \$54,375.66 | \$49,274.43 | \$54,941.01 | \$54,895.24 | \$53,667.41 | \$53,895.56 | \$54,598.06 | \$54,785.78 | \$0.00 | \$0.00 | \$0.00 | \$475,299.18 |
| 2119616 | 438712  | DG55885198 | 18,960      | 14,700      | 13,020      | 10,620      | 9,600       | 8,160       | 4,860       | 6,840       | 6,900       | 0      | 0      | 0      | 93,660       |
|         |         |            | 75          | 36          | 48          | 27          | 24          | 54          | 42          | 16          | 23          | 0      | 0      | 0      | 38           |
|         |         |            | \$2,154.23  | \$1,453.08  | \$1,416.56  | \$1,066.73  | \$963.74    | \$1,100.27  | \$746.99    | \$675.81    | \$741.54    | \$0.00 | \$0.00 | \$0.00 | \$10,318.95  |
|         |         |            | \$45,020.26 | \$55,828.74 | \$50,690.99 | \$56,007.74 | \$55,858.98 | \$56,767.68 | \$54,642.55 | \$55,273.87 | \$55,527.32 | \$0.00 | \$0.00 | \$0.00 | \$485,618.13 |
|         |         |            | 7,076,355   | 9,347,822   | 8,120,711   | 9,425,039   | 9,349,445   | 9,580,484   | 9,135,279   | 9,484,569   | 9,504,776   | 0      | 0      | 0      | 81,024,480   |
|         |         |            | 12,693      | 13,086      | 12,990      | 13,275      | 13,488      | 13,374      | 13,380      | 13,174      | 13,271      | 0      | 0      | 0      | 13,192       |
|         |         |            | \$6,368.72  | \$8,413.04  | \$7,308.64  | \$8,482.54  | \$8,414.50  | \$8,622.43  | \$8,221.75  | \$8,536.12  | \$8,554.30  | \$0.00 | \$0.00 | \$0.00 | \$72,922.04  |
|         |         |            | \$45,020.26 | \$55,828.74 | \$50,690.99 | \$56,007.74 | \$55,858.98 | \$56,767.68 | \$54,642.55 | \$55,273.87 | \$55,527.32 | \$0.00 | \$0.00 | \$0.00 | \$485,618.13 |



803 Highway 212, South  
P.O. Box 909  
Laurel, MT 59044-0909

406-628-5200  
chsinc.com

February 23, 2018

CERTIFIED MAIL RRR

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

RE: Self-Directed USBC Progress Report for 2017 – CHS

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2017. All the USB payments we received in 2017 were self-directed for energy efficiency projects previously submitted. During 2017, we received USB payments totaling \$315,959.49 that was composed of \$290,604.84 in 2017 USB credits and \$25,354.65 in 2016 credits that had been carried over into 2017.

We also had a request balance to carry over all remaining 2017 USB credits at year-end of \$26,441.89 into 2018.

Sincerely,

Keith A. Rae, P.E.  
Refinery Electrical Engineer  
CHS Inc.

Rec'd MT DOR  
FEB 28 2018

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email: rick.edwards@northwestern.com



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## CHS

### Account Summary

|                                 |                |                          |                |
|---------------------------------|----------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00         | YTD Elec Revenue:        | \$3,612,266.65 |
| Reservations Made YTD:          | \$0.00         |                          |                |
| 2016 Carryover Payment Request: | \$4,842,629.35 | Total Payment Requests:  | \$4,842,629.35 |
| Payment Requests Made YTD:      | \$0.00         | Current Request Balance: | \$4,526,669.86 |
| 2016 Carryover USBC Credit:     | \$25,354.65    | Total USBC Credit:       | \$342,401.38   |
| USBC Credit YTD:                | \$317,046.73   | Payments Issued YTD:     | \$315,959.49   |
| Average Monthly Credit Earned:  | \$26,420.56    | USBC Credit Balance:     | \$26,441.89    |
|                                 |                | Payment Pending:         | \$26,441.89    |

### Payment Requests Made

| Submitted By | Date       | Amount       |
|--------------|------------|--------------|
|              | 04/10/2017 | \$104,184.22 |
|              | 07/07/2017 | \$79,818.49  |
|              | 10/09/2017 | \$77,652.49  |
|              | 12/06/2017 | \$54,304.29  |

### Payments Issued

| Date       | Amount       |
|------------|--------------|
| 04/10/2017 | \$104,184.22 |
| 07/07/2017 | \$79,818.49  |
| 10/09/2017 | \$77,652.49  |
| 12/06/2017 | \$54,304.29  |

### Account Detail

| Account | Premise | Meter      | Jan                       | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total   |
|---------|---------|------------|---------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|
| 100339  | 1339    | DA06212512 | KWH > 473,901             | 535,878    | 416,678    | 390,571    | 445,645    | 541,962    | 490,478    | 404,389    | 274,898    | 394,730    | 290,007    | 303,553    | 4,962,690   |
|         |         |            | KW > 1,005                | 1,008      | 979        | 971        | 968        | 930        | 927        | 930        | 907        | 950        | 876        | 916        | 947         |
|         |         |            | Elec Revenue > \$3,671.66 | \$3,991.41 | \$3,458.08 | \$3,338.56 | \$3,558.20 | \$3,888.84 | \$3,674.04 | \$3,306.93 | \$2,748.16 | \$3,300.71 | \$2,758.35 | \$2,878.19 | \$40,573.13 |
| 100341  | 1341    | DG21120147 | KWH > 336,872             | 396,808    | 244,317    | 225,890    | 337,214    | 244,954    | 336,718    | 255,317    | 252,126    | 226,760    | 133,737    | 134,609    | 3,127,322   |
|         |         |            | KW > 914                  | 953        | 883        | 931        | 972        | 905        | 879        | 816        | 914        | 903        | 726        | 648        | 870         |
|         |         |            | Elec Revenue > \$7,626.86 | \$8,902.24 | \$6,791.01 | \$6,784.07 | \$8,280.93 | \$6,895.25 | \$7,866.24 | \$6,613.04 | \$7,006.26 | \$6,682.79 | \$4,785.92 | \$4,453.31 | \$82,697.92 |
| 100342  | 1342    | DA06183396 | KWH > 27,739,390          | 27,317,527 | 25,079,769 | 27,014,563 | 26,538,395 | 27,464,627 | 26,105,553 | 27,388,975 | 26,125,710 | 27,102,924 | 27,845,629 | 27,431,799 | 323,154,861 |
|         |         |            | KW > 39,908               | 40,115     | 39,890     | 39,147     | 40,400     | 40,409     | 40,124     | 39,683     | 39,718     | 40,184     | 40,461     | 41,947     | 40,166      |
|         |         |            | Elec Revenue > \$5,483.92 | \$6,434.64 | \$5,026.72 | \$6,667.60 | \$6,278.04 | \$6,334.02 | \$6,219.16 | \$5,331.77 | \$5,979.68 | \$5,166.57 | \$5,976.08 | \$5,450.18 | \$70,348.38 |
| 239790  | 73973   | DG16553126 | KWH > 3,200               | 3,040      | 3,200      | 1,440      | 1,920      | 3,440      | 1,120      | 480        | 1,520      | 4,400      | -2,400     | 1,040      | 22,400      |
|         |         |            | KW > 21                   | 21         | 21         | 20         | 22         | 19         | 0          | 0          | 0          | 22         | 1          | 1          | 12          |
|         |         |            | Elec Revenue > \$473.64   | \$466.53   | \$471.56   | \$327.49   | \$382.14   | \$467.59   | \$101.99   | \$52.48    | \$133.01   | \$573.18   | (\$162.75) | \$104.24   | \$3,391.10  |
| 239792  | 73975   | DG35630665 | KWH > 2,540               | 2,220      | 1,740      | 4,200      | 880        | 920        | 1,180      | 1,140      | 1,300      | 620        | 1,200      | 1,320      | 19,460      |
|         |         |            | KW > 3                    | 4          | 3          | 5          | 3          | 2          | 2          | 2          | 2          | 1          | 3          | 3          |             |
|         |         |            | Elec Revenue > \$251.67   | \$226.83   | \$178.25   | \$391.40   | \$106.33   | \$107.06   | \$120.64   | \$117.53   | \$129.99   | \$89.05    | \$134.83   | \$148.04   | \$1,999.68  |
| 341487  | 127435  | DS85573092 | KWH > 15,640              | 17,880     | 14,240     | 10,480     | 10,680     | 6,800      | 9,360      | 8,960      | 8,080      | 2,680      | 640        | 2,360      | 107,800     |
|         |         |            | KW > 106                  | 157        | 153        | 106        | 154        | 104        | 135        | 170        | 104        | 80         | 50         | 117        | 120         |
|         |         |            | Elec Revenue > \$2,284.42 | \$3,020.23 | \$2,648.67 | \$1,889.27 | \$2,391.00 | \$1,582.67 | \$2,084.49 | \$2,401.62 | \$1,681.39 | \$1,019.89 | \$565.64   | \$1,367.74 | \$22,937.03 |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan                                  | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total      |
|---------|---------|------------|--------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
| 341502  | 127449  | DS61269084 | KWH > 1,840                          | 2,560       | 1,840       | 1,280       | 4,040       | 2,440       | 320         | 240         | 240         | 240         | 720         | 1,200       | 16,960         |
|         |         |            | KW > 4                               | 30          | 15          | 26          | 31          | 31          | 23          | 31          | 15          | 15          | 23          | 23          | 22             |
|         |         |            | Elec Revenue > \$206.51              | \$512.99    | \$306.13    | \$370.69    | \$640.76    | \$513.91    | \$268.31    | \$342.17    | \$178.04    | \$182.09    | \$299.64    | \$332.84    | \$4,154.28     |
| 650546  | 286830  | DA11010378 | KWH > 1,563                          | 1,115       | 1,309       | 1,480       | 2,753       | 754         | 803         | 831         | 776         | 1,282       | 586         | 955         | 14,227         |
|         |         |            | KW > 52                              | 23          | 24          | 27          | 25          | 28          | 28          | 29          | 29          | 25          | 15          | 19          | 27             |
|         |         |            | Elec Revenue > \$650.35              | \$327.16    | \$354.33    | \$396.55    | \$481.60    | \$350.29    | \$353.79    | \$366.24    | \$362.08    | \$361.73    | \$208.79    | \$274.62    | \$4,487.55     |
| 658370  | 291042  | DG57404409 | KWH > 13,840                         | 10,800      | 28,000      | 77,040      | 75,840      | 81,920      | 86,160      | 72,320      | 72,640      | 85,840      | 70,880      | 11,840      | 687,120        |
|         |         |            | KW > 26                              | 25          | 124         | 296         | 283         | 282         | 285         | 268         | 254         | 312         | 265         | 25          | 204            |
|         |         |            | Elec Revenue > \$1,384.85            | \$1,109.91  | \$3,415.89  | \$9,002.42  | \$8,774.70  | \$9,190.28  | \$9,529.16  | \$8,291.26  | \$8,180.09  | \$9,808.91  | \$8,178.98  | \$8,185.63  | \$78,052.08    |
| 717591  | 223533  | DD39637311 | KWH > 37,200                         | 38,480      | 34,880      | 35,920      | 36,800      | 42,800      | 46,160      | 46,640      | 48,480      | 36,160      | 34,560      | 38,720      | 476,800        |
|         |         |            | KW > 60                              | 63          | 60          | 62          | 76          | 84          | 90          | 91          | 88          | 80          | 64          | 58          | 73             |
|         |         |            | Elec Revenue > \$3,599.85            | \$3,702.01  | \$3,318.49  | \$3,429.06  | \$3,661.45  | \$4,187.90  | \$4,482.54  | \$4,527.16  | \$4,640.89  | \$3,624.60  | \$3,339.02  | \$3,604.01  | \$46,116.98    |
| 789497  | 348794  | DG78971247 | KWH > 13,703                         | 7,890       | 6,188       | 10,005      | 4,459       | 3,166       | 2,964       | 3,743       | 4,103       | 6,100       | 7,912       | 10,859      | 81,092         |
|         |         |            | KW > 30                              | 24          | 23          | 27          | 21          | 15          | 11          | 14          | 20          | 23          | 24          | 30          | 22             |
|         |         |            | Elec Revenue > \$1,412.38            | \$874.55    | \$716.58    | \$1,066.03  | \$569.34    | \$405.06    | \$346.66    | \$442.99    | \$530.35    | \$714.33    | \$867.81    | \$1,156.26  | \$9,102.34     |
| 654961  | 352908  | DA13291242 | KWH > 491,801                        | 391,378     | 411,728     | 361,970     | 398,627     | 399,882     | 0           | 0           | 0           | 0           | 0           | 0           | 2,455,386      |
|         |         |            | KW > 1,023                           | 1,020       | 0           | 1,037       | 1,024       | 1,032       | 0           | 0           | 0           | 0           | 0           | 0           | 856            |
|         |         |            | Elec Revenue > \$41,720.77           | \$33,603.21 | \$34,664.92 | \$31,515.53 | \$34,030.06 | \$33,903.54 | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$209,438.03   |
| 854961  | 352908  | DA21325529 | KWH > 0                              | 0           | 0           | 0           | 0           | 0           | 307,155     | 290,415     | 322,200     | 256,825     | 294,721     | 339,478     | 1,810,794      |
|         |         |            | KW > 0                               | 0           | 0           | 0           | 0           | 0           | 1,063       | 747         | 734         | 743         | 972         | 1,011       | 878            |
|         |         |            | Elec Revenue > \$0.00                | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$27,561.04 | \$24,582.91 | \$26,744.48 | \$22,345.21 | \$26,303.22 | \$29,674.50 | \$157,211.36   |
| 957338  | 360251  | DA15843439 | KWH > 496,994                        | 403,337     | 469,854     | 567,454     | 499,959     | 564,003     | 462,073     | 379,361     | 483,467     | 401,198     | 583,816     | 480,919     | 5,792,435      |
|         |         |            | KW > 1,705                           | 1,512       | 1,685       | 1,620       | 1,706       | 1,706       | 1,642       | 1,426       | 1,620       | 1,706       | 1,728       | 1,728       | 1,649          |
|         |         |            | Elec Revenue > \$42,735.26           | \$35,004.13 | \$39,334.58 | \$46,007.46 | \$41,924.50 | \$46,102.67 | \$38,579.96 | \$32,118.85 | \$40,002.26 | \$34,732.52 | \$47,552.92 | \$40,385.02 | \$484,480.13   |
| 1463247 | 400884  | DA12994654 | KWH > 0                              | 0           | 364,480     | 134,080     | 147,040     | 147,040     | 176,640     | 154,400     | 102,400     | 0           | 0           | 0           | 1,226,080      |
|         |         |            | KW > 0                               | 0           | 684         | 316         | 315         | 372         | 384         | 364         | 380         | 0           | 0           | 0           | 402            |
|         |         |            | Elec Revenue > \$19,262.23           | \$0.00      | \$38,914.26 | \$13,690.51 | \$14,664.08 | \$15,141.37 | \$17,511.46 | \$15,600.75 | \$10,731.77 | \$0.00      | \$0.00      | \$0.00      | \$145,516.43   |
| 1576974 | 410164  | DA04364410 | KWH > 17,920                         | 16,480      | 18,240      | 14,560      | 12,160      | 12,800      | 12,320      | 13,440      | 14,400      | 12,320      | 14,720      | 16,480      | 175,840        |
|         |         |            | KW > 75                              | 81          | 65          | 65          | 57          | 59          | 62          | 67          | 67          | 65          | 70          | 70          | 67             |
|         |         |            | Elec Revenue > \$2,177.58            | \$2,138.83  | \$2,077.36  | \$1,797.72  | \$1,537.29  | \$1,596.27  | \$1,584.82  | \$1,719.32  | \$1,794.60  | \$1,620.80  | \$1,858.16  | \$1,993.97  | \$21,896.72    |
| 1579195 | 410404  | DA12999948 | KWH > 6,867                          | 5,516       | 6,099       | 5,021       | 4,219       | 3,630       | 2,750       | 3,137       | 423         | 3,660       | 4,985       | 3,630       | 49,937         |
|         |         |            | KW > 12                              | 12          | 12          | 12          | 12          | 12          | 11          | 9           | 9           | 9           | 9           | 9           | 11             |
|         |         |            | Elec Revenue > \$689.39              | \$567.95    | \$608.29    | \$527.02    | \$462.90    | \$414.37    | \$337.23    | \$349.37    | \$137.89    | \$388.92    | \$493.54    | \$388.78    | \$5,365.65     |
| 1640315 | 415307  | DA07544912 | KWH > 0                              | 0           | 40          | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 40             |
|         |         |            | KW > 0                               | 0           | 15          | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 15             |
|         |         |            | Elec Revenue > \$7.97                | \$7.35      | \$166.56    | \$163.47    | \$7.35      | \$7.35      | \$7.35      | \$7.35      | \$7.35      | \$7.35      | \$7.35      | \$7.35      | \$404.15       |
| 3087812 | 597892  | DA18683632 | KWH > 87,773                         | 87,829      | 65,583      | 73,829      | 87,270      | 58,602      | 55,157      | 42,464      | 39,589      | 56,792      | 96,458      | 82,536      | 833,882        |
|         |         |            | KW > 581                             | 567         | 553         | 556         | 553         | 562         | 544         | 510         | 559         | 562         | 556         | 968         | 589            |
|         |         |            | Elec Revenue > \$9,454.55            | \$9,526.19  | \$7,693.97  | \$8,246.99  | \$9,215.68  | \$7,312.96  | \$6,939.30  | \$5,904.96  | \$5,997.78  | \$7,162.47  | \$9,797.94  | \$11,222.24 | \$98,474.93    |
|         |         |            | <b>Total KWH</b> 30,339,982          | 29,908,841  | 27,704,049  | 29,636,598  | 29,260,418  | 30,218,355  | 28,703,748  | 29,607,736  | 28,402,471  | 29,175,914  | 29,936,106  | 29,379,864  | 352,274,082    |
|         |         |            | <b>Average KW</b> 47,383             | 47,784      | 46,831      | 47,444      | 48,739      | 48,738      | 48,405      | 46,989      | 47,381      | 47,313      | 48,029      | 49,534      | 48,929         |
|         |         |            | <b>USBC Charge</b> \$27,305.99       | \$26,917.94 | \$24,933.67 | \$26,672.93 | \$26,334.38 | \$27,196.53 | \$25,833.38 | \$26,646.98 | \$25,562.23 | \$26,258.31 | \$26,942.50 | \$26,441.89 | \$317,046.73   |
|         |         |            | <b>Total Elec Revenue</b> 317,333.55 | 287,461.73  | 317,701.08  | 309,842.00  | 311,301.04  | 316,526.48  | 299,686.73  | 287,283.85  | 287,164.91  | 272,655.24  | 291,280.49  | 283,701.21  | \$3,581,938.31 |

February 27, 2018

Mark Schoenfeld, Unit Manager, Misc Tax Unit  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805

Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov  
RE: Self-Directed USBC Progress Report for 2016 – City of Billings

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we receive from NorthWestern Energy that shows our USB activities during 2017. All the USB payments we received in 2017 were for energy efficiency projects submitted this year and a copy of our Form B (2) are attached.

- All the USB payments we received in 2017 were for energy efficiency projects submitted in previous years and a project we submitted this year. A copy of our Form B for that project is attached.
- During 2017, we received USB payments totaling \$29,894.47; composed of \$27,858.57 in 2017 USB credits and \$2,035.90 in 2016 credits that had been carried forward into 2017.
- We also have a reservation to carry over all remaining 2017 USB credits at year-end of \$4,025.67 into 2018 for a possible project this year.

Sincerely,

Saree Couture  
Facilities Manager

CC: Rick Edwards, NorthWestern Energy, 11 East Park,, Butte, MT 59701  
Bruce McCandless, Interim City Administrator, City of Billings  
Andy Zoeller – Interim Finance Director

## FORM A - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
 FAX: (406) 497-4008

|                      |                            |
|----------------------|----------------------------|
| DATE:                | 11-29-2017                 |
| NAME OF BUSINESS:    | City of Billings           |
| CITY/TOWN LOCATION:  | Billings, MT               |
| CONTACT PERSON:      | Saree Couture              |
| MAILING ADDRESS:     | PO Box 1178                |
| CITY, STATE AND ZIP: | Billings, MT 59013-1178    |
| PHONE NUMBER:        | 406-861-8100               |
| FAX NUMBER:          | 406-657-8211               |
| E-MAIL ADDRESS       | coutures@ci.billings.mt.us |

1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

We are designing a LED Exterior Lighting Retrofit for the 7 Fire Stations in the City of Billings. We would estimate completion by June of 2018 and request to reserve \$26,000 in USB funds. This would include some remaining 2017 funds and the rest in the 2018 USB funding.

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: \_\_\_\_\_ Signature: \_\_\_\_\_

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |  |
|----------------------|--|
| DATE:                | 11-29-2017   |
| NAME OF BUSINESS:    | City of Billings   |
| CITY/TOWN LOCATION:  | Billings, MT   |
| CONTACT PERSON:      | Saree Couture  |
| MAILING ADDRESS:     | PO Box 1178  |
| CITY, STATE AND ZIP: | Billings, MT 59103-1178  |
| PHONE NUMBER:        | 406-861-8100   |
| FAX NUMBER:          | 406-657-8211   |
| E-MAIL ADDRESS       | <a href="mailto:coutures@ci.billings.mt.us">coutures@ci.billings.mt.us</a> |

|                             |          |
|-----------------------------|----------|
| AMOUNT OF CREDIT REQUESTED: | \$23,547 |
|-----------------------------|----------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|  |
|--|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):<br>This project will pay for the replacement of exterior LED Lighting Replacement for 3 of our Parking Garages, Park 1, Park 2 and Park3 in downtown Billings. The amount requested is the project amount less the \$2,800 in rebates we will get, if approved, on this project. |
|--|

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |        |
|------------------------|--------|
| ESTIMATED kWh SAVINGS: | 29,989 |
| ESTIMATED KW SAVINGS:  | 6.82   |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:                      Signature: \_\_\_\_\_

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br><br>PROCESSED BY: _____<br><br>DISTRIBUTION: _____ |
|---|

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## CITY OF BILLINGS

### Account Summary

|                                 |             |                          |                |
|---------------------------------|-------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$3,334,106.13 |
| Reservations Made YTD:          | \$26,000.00 |                          |                |
| 2016 Carryover Payment Request: | \$6,347.47  | Total Payment Requests:  | \$29,894.47    |
| Payment Requests Made YTD:      | \$23,547.00 | Current Request Balance: | \$0.00         |
| 2016 Carryover USBC Credit:     | \$2,035.90  | Total USBC Credit:       | \$33,920.14    |
| USBC Credit YTD:                | \$31,884.24 | Payments Issued YTD:     | \$29,894.47    |
| Average Monthly Credit Earned:  | \$2,657.02  | USBC Credit Balance:     | \$4,025.67     |
|                                 |             | Payment Pending:         | \$0.00         |

### Payment Requests Made

| Submitted By  | Date       | Amount      |
|---------------|------------|-------------|
| Saree Couture | 11/30/2017 | \$23,547.00 |

### Payments Issued

| Date       | Amount      |
|------------|-------------|
| 04/10/2017 | \$6,347.47  |
| 12/06/2017 | \$23,547.00 |

### Account Detail

| Account | Premise | Meter          | Jan           | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|----------------|---------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100473  | 1483    | DG15004079     | KWH > 36,200  | 33,560      | 31,680      | 32,040      | 29,120      | 29,120      | 26,680      | 31,520      | 32,920      | 26,600      | 28,560      | 33,840      | 371,840      |
|         |         |                | KW > 89       | 93          | 86          | 82          | 80          | 79          | 80          | 79          | 80          | 76          | 79          | 84          | 82           |
|         |         | Elec Revenue > | \$3,758.79    | \$3,658.60  | \$3,352.24  | \$3,312.01  | \$3,095.35  | \$3,077.48  | \$2,876.33  | \$3,237.67  | \$3,362.28  | \$2,837.18  | \$3,027.91  | \$3,483.22  | \$39,079.06  |
| 100476  | 1485    | DA05479680     | KWH > 27,560  | 29,160      | 25,880      | 25,880      | 26,480      | 31,280      | 34,160      | 36,320      | 28,680      | 30,280      | 28,800      | 29,680      | 354,160      |
|         |         |                | KW > 55       | 56          | 54          | 54          | 59          | 71          | 77          | 75          | 70          | 78          | 66          | 60          | 65           |
|         |         | Elec Revenue > | \$2,762.05    | \$2,896.27  | \$2,557.05  | \$2,567.13  | \$2,675.87  | \$3,154.24  | \$3,422.20  | \$3,572.97  | \$2,936.35  | \$3,148.08  | \$2,914.37  | \$2,920.83  | \$35,527.41  |
| 100477  | 1487    | DG21486718     | KWH > 3,860   | 3,000       | 2,840       | 2,820       | 2,920       | 3,260       | 4,020       | 3,860       | 3,120       | 2,840       | 3,040       | 2,560       | 38,140       |
|         |         |                | KW > 14       | 13          | 14          | 15          | 12          | 19          | 14          | 16          | 17          | 13          | 16          | 12          | 15           |
|         |         | Elec Revenue > | \$467.19      | \$380.66    | \$369.35    | \$378.13    | \$361.98    | \$454.49    | \$462.37    | \$474.03    | \$421.16    | \$364.44    | \$409.95    | \$332.81    | \$4,876.56   |
| 100478  | 1489    | DD80999979     | KWH > 14,900  | -180        | 7,360       | 5,780       | 7,320       | 10,340      | 12,040      | 17,700      | 9,420       | 10,160      | 6,760       | 6,700       | 108,300      |
|         |         |                | KW > 100      | 84          | 89          | 20          | 36          | 37          | 43          | 130         | 143         | 120         | 29          | 20          | 71           |
|         |         | Elec Revenue > | \$2,207.78    | \$821.20    | \$1,467.88  | \$661.78    | \$948.53    | \$1,182.07  | \$1,374.89  | \$2,677.40  | \$2,168.17  | \$2,004.97  | \$827.32    | \$731.28    | \$17,073.27  |
| 100482  | 1492    | DA17677701     | KWH > 375,250 | 328,726     | 261,273     | 255,185     | 248,567     | 243,657     | 270,943     | 282,305     | 263,480     | 247,370     | 291,315     | 288,332     | 3,356,403    |
|         |         |                | KW > 794      | 719         | 654         | 564         | 586         | 529         | 643         | 614         | 644         | 586         | 712         | 654         | 642          |
|         |         | Elec Revenue > | \$36,141.40   | \$31,612.00 | \$25,361.77 | \$24,268.72 | \$24,051.80 | \$23,067.05 | \$26,011.19 | \$26,632.98 | \$25,474.38 | \$23,827.18 | \$28,267.08 | \$27,551.94 | \$322,267.50 |
| 100483  | 1493    | DG28586546     | KWH > 30,720  | 26,440      | 26,280      | 20,840      | 19,680      | 18,320      | 16,640      | 20,320      | 19,120      | 21,080      | 22,040      | 28,040      | 269,520      |
|         |         |                | KW > 87       | 87          | 92          | 88          | 78          | 58          | 60          | 59          | 56          | 68          | 73          | 86          | 74           |
|         |         | Elec Revenue > | \$3,322.34    | \$3,006.97  | \$2,969.42  | \$2,509.98  | \$2,340.87  | \$2,016.62  | \$1,899.08  | \$2,171.27  | \$2,051.38  | \$2,327.33  | \$2,457.26  | \$3,051.95  | \$30,124.47  |
| 100484  | 1494    | DG79201031     | KWH > 22,240  | 19,840      | 18,840      | 16,000      | 13,200      | 13,840      | 13,640      | 18,760      | 15,320      | 13,440      | 12,800      | 15,400      | 193,320      |
|         |         |                | KW > 55       | 43          | 50          | 42          | 36          | 37          | 36          | 44          | 40          | 36          | 36          | 34          | 41           |
|         |         | Elec Revenue > | \$2,335.36    | \$2,036.71  | \$1,968.31  | \$1,673.83  | \$1,407.85  | \$1,459.07  | \$1,430.80  | \$1,898.48  | \$1,601.19  | \$1,414.35  | \$1,369.00  | \$1,548.87  | \$20,143.82  |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan                        | Feb         | Mar         | Apr         | May         | Jun          | Jul          | Aug          | Sep          | Oct          | Nov         | Dec         | YTD Total      |
|---------|---------|------------|----------------------------|-------------|-------------|-------------|-------------|--------------|--------------|--------------|--------------|--------------|-------------|-------------|----------------|
| 100485  | 1495    | DD80999996 | KWH > 4,040                | 11,360      | 5,160       | 3,400       | 3,040       | 7,080        | 10,120       | 15,920       | 13,680       | 5,840        | 3,440       | 5,240       | 88,320         |
|         |         |            | KW > 29                    | 32          | 28          | 27          | 26          | 34           | 81           | 81           | 81           | 67           | 33          | 30          | 46             |
|         |         |            | Elec Revenue > \$623.55    | \$1,247.72  | \$695.60    | \$547.53    | \$514.22    | \$907.82     | \$1,606.87   | \$2,055.18   | \$1,878.65   | \$1,133.00   | \$611.68    | \$718.96    | \$12,540.78    |
| 100506  | 1515    | DA05131417 | KWH > 12,280               | 12,560      | 10,640      | 9,920       | 9,880       | 11,800       | 13,560       | 14,360       | 10,240       | 10,160       | 9,160       | 9,600       | 134,160        |
|         |         |            | KW > 46                    | 52          | 54          | 51          | 58          | 62           | 64           | 60           | 56           | 64           | 64          | 54          | 57             |
|         |         |            | Elec Revenue > \$1,453.61  | \$1,534.53  | \$1,380.16  | \$1,292.90  | \$1,366.30  | \$1,545.99   | \$1,696.70   | \$1,722.42   | \$1,368.61   | \$1,445.08   | \$1,369.09  | \$1,298.63  | \$17,474.02    |
| 100507  | 1516    | DG79201023 | KWH > 62,760               | 55,440      | 53,840      | 58,960      | 61,440      | 66,520       | 79,360       | 70,360       | 61,640       | 64,880       | 59,720      | 55,640      | 750,560        |
|         |         |            | KW > 128                   | 117         | 124         | 127         | 133         | 152          | 168          | 155          | 152          | 149          | 136         | 115         | 138            |
|         |         |            | Elec Revenue > \$6,314.36  | \$5,577.84  | \$5,423.71  | \$5,879.53  | \$6,159.12  | \$6,706.25   | \$7,830.90   | \$7,002.32   | \$6,300.99   | \$6,541.88   | \$6,017.23  | \$5,489.72  | \$75,243.85    |
| 100540  | 1549    | DA17801226 | KWH > 23,708               | 24,527      | 19,230      | 24,979      | 23,565      | 36,267       | 46,980       | 79,787       | 65,038       | 34,294       | 33,775      | 39,225      | 451,375        |
|         |         |            | KW > 197                   | 176         | 329         | 177         | 202         | 366          | 407          | 463          | 479          | 410          | 222         | 240         | 306            |
|         |         |            | Elec Revenue > \$3,815.45  | \$3,730.10  | \$4,790.65  | \$3,720.29  | \$3,877.54  | \$6,495.94   | \$7,714.71   | \$10,811.51  | \$9,834.92   | \$6,773.14   | \$4,859.32  | \$5,460.13  | \$71,883.70    |
| 100591  | 1595    | DA06183509 | KWH > 793,583              | 729,433     | 714,772     | 852,419     | 710,453     | 804,273      | 904,264      | 697,791      | 810,013      | 856,550      | 762,639     | 0           | 8,636,190      |
|         |         |            | KW > 1,260                 | 1,213       | 1,192       | 1,274       | 1,248       | 1,257        | 1,278        | 1,339        | 1,270        | 1,213        | 1,263       | 0           | 1,255          |
|         |         |            | Elec Revenue > \$64,729.71 | \$60,140.48 | \$56,711.33 | \$66,678.74 | \$57,409.45 | \$63,721.99  | \$70,196.13  | \$56,211.49  | \$63,608.96  | \$66,677.27  | \$60,707.18 | \$0.00      | \$686,792.73   |
| 100591  | 1595    | DA20155001 | KWH > 0                    | 0           | 0           | 0           | 0           | 0            | 0            | 0            | 0            | 0            | 0           | 0           | 810,012        |
|         |         |            | KW > 0                     | 0           | 0           | 0           | 0           | 0            | 0            | 0            | 0            | 0            | 0           | 0           | 1,343          |
|         |         |            | Elec Revenue > \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00       | \$0.00       | \$0.00       | \$0.00       | \$0.00       | \$0.00      | \$64,314.97 | \$64,314.97    |
| 100606  | 1610    | DA06183573 | KWH > 821,077              | 868,789     | 747,282     | 773,088     | 762,022     | 1,191,203    | 1,782,471    | 2,297,361    | 2,051,378    | 1,314,539    | 848,416     | 775,531     | 14,233,157     |
|         |         |            | KW > 1,416                 | 1,339       | 1,347       | 1,365       | 1,330       | 2,652        | 3,170        | 3,922        | 3,395        | 2,937        | 1,408       | 1,321       | 2,134          |
|         |         |            | Elec Revenue > \$76,014.15 | \$79,720.78 | \$68,160.14 | \$70,273.64 | \$69,889.86 | \$113,540.99 | \$162,117.52 | \$207,557.77 | \$184,508.59 | \$124,064.01 | \$76,757.27 | \$70,339.62 | \$1,303,744.34 |
| 712537  | 322858  | DA04147885 | KWH > 5,400                | 5,520       | 5,700       | 4,920       | 4,200       | 4,620        | 4,980        | 6,120        | 6,600        | 4,620        | 4,320       | 5,880       | 62,880         |
|         |         |            | KW > 14                    | 16          | 16          | 15          | 15          | 16           | 16           | 17           | 16           | 16           | 13          | 14          | 15             |
|         |         |            | Elec Revenue > \$578.65    | \$615.53    | \$614.17    | \$538.20    | \$492.96    | \$536.81     | \$555.54     | \$654.78     | \$679.96     | \$527.48     | \$481.92    | \$608.64    | \$6,884.64     |
| 712538  | 322859  | DG97282715 | KWH > 1,180                | 1,820       | 1,320       | 1,060       | 980         | 2,060        | 5,780        | 8,020        | 5,900        | 4,200        | 1,040       | 1,240       | 34,600         |
|         |         |            | KW > 4                     | 5           | 4           | 3           | 7           | 41           | 41           | 33           | 41           | 40           | 4           | 3           | 19             |
|         |         |            | Elec Revenue > \$147.47    | \$208.57    | \$149.94    | \$127.40    | \$230.82    | \$574.72     | \$844.95     | \$935.10     | \$861.92     | \$720.67     | \$120.75    | \$131.69    | \$5,054.00     |
| 712792  | 323113  | DS01543992 | KWH > 2,640                | 3,646       | 2,749       | 2,502       | 2,868       | 3,665        | 2,233        | 3,989        | 2,928        | 3,314        | 3,782       | 4,102       | 38,418         |
|         |         |            | KW > 10                    | 11          | 8           | 10          | 9           | 14           | 10           | 13           | 9            | 11           | 13          | 14          | 11             |
|         |         |            | Elec Revenue > \$326.18    | \$410.18    | \$305.53    | \$301.67    | \$327.56    | \$433.32     | \$285.18     | \$445.93     | \$324.02     | \$379.53     | \$437.16    | \$486.35    | \$4,442.61     |
| 712800  | 323120  | DG50574311 | KWH > 14,560               | 13,960      | 13,600      | 11,360      | 11,320      | 11,880       | 10,760       | 13,560       | 10,200       | 9,120        | 8,840       | 10,520      | 139,680        |
|         |         |            | KW > 39                    | 38          | 39          | 33          | 31          | 39           | 42           | 40           | 34           | 34           | 23          | 24          | 35             |
|         |         |            | Elec Revenue > \$1,557.53  | \$1,512.55  | \$1,457.99  | \$1,221.54  | \$1,212.24  | \$1,326.20   | \$1,260.05   | \$1,464.34   | \$1,144.93   | \$1,059.18   | \$928.35    | \$1,073.42  | \$15,218.32    |
| 719225  | 328323  | DA13291191 | KWH > 4,397                | 5,022       | 4,795       | 3,229       | 4,056       | 2,870        | 1,621        | 1,893        | 911          | 3,024        | 4,420       | 3,959       | 40,197         |
|         |         |            | KW > 12                    | 10          | 12*         | 9           | 10          | 8            | 7            | 6            | 7            | 8            | 10          | 9           | 9              |
|         |         |            | Elec Revenue > \$478.22    | \$522.19    | \$503.32    | \$356.58    | \$432.24    | \$318.57     | \$210.61     | \$223.58     | \$153.26     | \$330.49     | \$458.63    | \$407.26    | \$4,394.95     |
| 720817  | 329694  | DA19428727 | KWH > 2,759                | 2,714       | 2,319       | 1,918       | 1,675       | 1,986        | 2,685        | 4,695        | 3,578        | 2,557        | 1,925       | 2,213       | 31,024         |
|         |         |            | KW > 11                    | 10          | 11          | 12          | 10          | 12           | 13           | 12           | 13           | 12           | 11          | 10          | 11             |
|         |         |            | Elec Revenue > \$335.68    | \$336.62    | \$304.96    | \$279.27    | \$242.89    | \$289.28     | \$349.67     | \$494.33     | \$418.53     | \$331.04     | \$276.63    | \$288.20    | \$3,947.10     |
| 720821  | 329698  | DG90051183 | KWH > 320                  | 320         | 360         | 560         | 360         | 560          | 21,280       | 29,080       | 16,800       | 1,200        | 800         | 1,440       | 73,080         |
|         |         |            | KW > 1                     | 1           | 3           | 3           | 1           | 22           | 58           | 60           | 58           | 18           | 21          | 3           | 21             |
|         |         |            | Elec Revenue > \$46.40     | \$45.31     | \$71.35     | \$96.71     | \$47.63     | \$271.30     | \$2,242.72   | \$2,866.67   | \$1,891.32   | \$288.50     | \$285.84    | \$155.30    | \$8,289.05     |
| 720829  | 329705  | DS01563742 | KWH > 10,160               | 6,480       | 4,440       | 3,240       | 2,280       | 2,120        | 2,720        | 3,400        | 3,000        | 2,600        | 3,960       | 4,040       | 48,440         |
|         |         |            | KW > 33                    | 30          | 18          | 14          | 12          | 14           | 16           | 16           | 14           | 16           | 20          | 12          | 18             |
|         |         |            | Elec Revenue > \$1,158.19  | \$820.84    | \$531.45    | \$400.23    | \$306.06    | \$312.27     | \$377.87     | \$430.45     | \$379.77     | \$369.66     | \$515.71    | \$441.84    | \$6,044.34     |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan            | Feb           | Mar           | Apr           | May           | Jun           | Jul            | Aug            | Sep            | Oct            | Nov           | Dec           | YTD Total      |
|---------|---------|------------|----------------|---------------|---------------|---------------|---------------|---------------|----------------|----------------|----------------|----------------|---------------|---------------|----------------|
| 720834  | 329709  | DS68011844 | KWH ><br>KW >  | 31,960<br>71  | 27,640<br>64  | 23,000<br>52  | 20,600<br>50  | 21,720<br>47  | 20,360<br>43   | 18,640<br>42   | 11,920<br>36   | 28,280<br>59   | 28,200<br>69  | 27,840<br>67  | 301,200<br>56  |
|         |         |            | Elec Revenue > | \$3,977.03    | \$2,797.34    | \$2,320.32    | \$2,130.55    | \$2,173.76    | \$2,018.48     | \$1,869.34     | \$1,298.54     | \$2,878.96     | \$2,899.10    | \$2,850.17    | \$30,472.61    |
| 720840  | 329715  | DG89630437 | KWH ><br>KW >  | 4,020<br>12   | 3,570<br>12   | 2,970<br>11   | 3,270<br>12   | 2,970<br>10   | 2,970<br>11    | 3,840<br>11    | 3,450<br>10    | 3,570<br>13    | 3,450<br>12   | 3,210<br>11   | 40,650<br>11   |
|         |         |            | Elec Revenue > | \$447.82      | \$412.42      | \$349.60      | \$392.91      | \$343.68      | \$354.17       | \$421.44       | \$379.49       | \$416.69       | \$399.12      | \$371.07      | \$4,661.23     |
| 720841  | 329716  | DA17677821 | KWH ><br>KW >  | 1,560<br>1    | 1,520<br>2    | 1,360<br>2    | 1,240<br>2    | 5,160<br>40   | 14,640<br>42   | 14,600<br>42   | 8,400<br>42    | 1,920<br>25    | 1,120<br>3    | 1,200<br>2    | 54,080<br>17   |
|         |         |            | Elec Revenue > | \$161.24      | \$156.76      | \$141.13      | \$132.65      | \$817.45      | \$1,560.12     | \$1,556.80     | \$1,077.87     | \$412.65       | \$124.69      | \$126.59      | \$6,408.74     |
| 722251  | 330939  | DG93700374 | KWH ><br>KW >  | 0<br>0        | 0<br>0        | 0<br>0        | 421<br>21     | 1,184<br>11   | 1,461<br>21    | 2,120<br>15    | 2,960<br>20    | 1,041<br>14    | 740<br>5      | 383<br>2      | 10,330<br>14   |
|         |         |            | Elec Revenue > | \$0.00        | \$0.00        | \$0.00        | \$252.18      | \$203.30      | \$327.00       | \$318.49       | \$429.09       | \$224.18       | \$108.38      | \$51.83       | \$1,914.45     |
| 722252  | 330940  | DD33455510 | KWH ><br>KW >  | 2,720<br>6    | 2,400<br>6    | 2,080<br>6    | 960<br>105    | 5,920<br>105  | 11,840<br>102  | 22,080<br>105  | 15,200<br>102  | 7,040<br>105   | 1,120<br>6    | 4,800<br>105  | 78,080<br>72   |
|         |         |            | Elec Revenue > | \$288.80      | \$264.10      | \$220.27      | \$1,139.56    | \$1,526.04    | \$1,948.11     | \$2,771.70     | \$2,208.35     | \$1,610.27     | \$158.67      | \$1,437.36    | \$14,862.85    |
| 722257  | 81078   | DG23689620 | KWH ><br>KW >  | 314<br>0      | 308<br>0      | 351<br>5      | 285<br>0      | 1,274<br>24   | 3,188<br>24    | 2,779<br>29    | 4,486<br>30    | 1,163<br>29    | 301<br>1      | 316<br>0      | 15,135<br>14   |
|         |         |            | Elec Revenue > | \$38.17       | \$37.67       | \$90.23       | \$33.57       | \$345.53      | \$483.43       | \$503.84       | \$638.76       | \$385.03       | \$37.69       | \$36.01       | \$3,251.42     |
| 722260  | 330947  | DD82180941 | KWH ><br>KW >  | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 898<br>19     | 1,981<br>19    | 2,633<br>19    | 1,468<br>19    | 27<br>20       | 0<br>0        | 0<br>0        | 7,007<br>19    |
|         |         |            | Elec Revenue > | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$263.97      | \$344.15       | \$392.18       | \$306.18       | \$202.60       | \$0.00        | \$2.01        | \$1,511.09     |
| 722264  | 330951  | DG16604929 | KWH ><br>KW >  | 28,800<br>57  | 30,240<br>63  | 33,600<br>68  | 26,720<br>60  | 57,840<br>144 | 137,120<br>276 | 178,560<br>303 | 186,480<br>292 | 116,000<br>291 | 42,560<br>129 | 14,480<br>57  | 882,720<br>150 |
|         |         |            | Elec Revenue > | \$2,864.69    | \$3,090.12    | \$3,316.82    | \$2,675.34    | \$5,971.35    | \$13,394.81    | \$16,850.61    | \$17,361.80    | \$11,911.11    | \$4,619.20    | \$1,709.49    | \$86,783.89    |
| 722270  | 330957  | DA19272334 | KWH ><br>KW >  | 29,760<br>66  | 24,160<br>70  | 21,760<br>70  | 19,360<br>113 | 45,760<br>148 | 60,800<br>182  | 56,000<br>176  | 69,120<br>177  | 25,440<br>105  | 21,760<br>68  | 20,000<br>67  | 422,560<br>113 |
|         |         |            | Elec Revenue > | \$3,070.61    | \$2,608.73    | \$2,396.70    | \$2,658.87    | \$5,047.71    | \$6,535.16     | \$6,100.06     | \$7,138.80     | \$3,043.64     | \$2,388.60    | \$2,237.28    | \$46,596.19    |
| 722287  | 330973  | DD81892660 | KWH ><br>KW >  | 0<br>0        | 0<br>0        | 0<br>0        | 418<br>16     | 1,638<br>46   | 5,812<br>60    | 8,413<br>55    | 10,417<br>52   | 5,854<br>53    | 532<br>3      | 1,029<br>5    | 34,546<br>29   |
|         |         |            | Elec Revenue > | \$0.00        | \$0.00        | \$0.00        | \$364.74      | \$588.78      | \$1,040.58     | \$1,190.63     | \$1,307.63     | \$976.66       | \$78.30       | \$130.74      | \$5,730.81     |
| 723040  | 331655  | DA15191578 | KWH ><br>KW >  | 39,560<br>126 | 38,520<br>127 | 37,680<br>133 | 35,320<br>143 | 65,240<br>193 | 98,920<br>272  | 121,600<br>315 | 115,040<br>315 | 85,120<br>316  | 40,480<br>122 | 29,880<br>130 | 747,080<br>193 |
|         |         |            | Elec Revenue > | \$4,390.62    | \$4,399.13    | \$4,271.76    | \$4,177.48    | \$7,040.36    | \$10,384.93    | \$12,565.34    | \$12,060.45    | \$9,766.73     | \$4,362.40    | \$3,634.44    | \$81,399.40    |
| 723043  | 331658  | DA17236706 | KWH ><br>KW >  | 1,400<br>3    | 1,120<br>4    | 2,160<br>48   | 4,880<br>58   | 30,440<br>136 | 33,000<br>137  | 34,840<br>141  | 25,560<br>119  | 16,280<br>91   | 13,920<br>95  | 1,760<br>4    | 176,400<br>76  |
|         |         |            | Elec Revenue > | \$163.50      | \$137.33      | \$655.21      | \$974.44      | \$3,751.26    | \$3,933.26     | \$4,114.77     | \$3,178.14     | \$2,182.89     | \$2,048.85    | \$188.22      | \$22,934.62    |
| 723044  | 331659  | DG23689619 | KWH ><br>KW >  | 0<br>0        | 0<br>0        | 0<br>0        | 686<br>13     | 1,539<br>35   | 5,570<br>37    | 5,047<br>38    | 1,124<br>37    | 164<br>6       | 129<br>0      | 0<br>0        | 14,259<br>24   |
|         |         |            | Elec Revenue > | \$0.00        | \$0.00        | \$0.00        | \$186.58      | \$476.39      | \$795.60       | \$762.58       | \$463.47       | \$73.72        | \$12.57       | \$0.00        | \$2,770.91     |
| 723045  | 331660  | DG23689614 | KWH ><br>KW >  | 516<br>0      | 636<br>0      | 555<br>0      | 534<br>43     | 2,312<br>38   | 8,285<br>39    | 10,369<br>39   | 11,100<br>40   | 4,518<br>44    | 1,608<br>5    | 549<br>5      | 41,648<br>21   |
|         |         |            | Elec Revenue > | \$39.87       | \$74.41       | \$58.31       | \$56.69       | \$557.03      | \$1,018.40     | \$1,171.97     | \$1,239.87     | \$787.87       | \$173.87      | \$94.99       | \$6,197.57     |
| 723048  | 331662  | DG21220089 | KWH ><br>KW >  | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 95<br>7       | 530<br>7       | 637<br>7       | 408<br>7       | 212<br>6       | 0<br>0        | 0<br>0        | 1,882<br>7     |
|         |         |            | Elec Revenue > | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$81.07       | \$114.60       | \$122.23       | \$105.04       | \$80.43        | \$0.00        | \$0.00        | \$503.37       |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan            | Feb          | Mar           | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct          | Nov          | Dec         | YTD Total     |
|---------|---------|------------|----------------|--------------|---------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-------------|---------------|
| 723050  | 331664  | DA13025488 | KWH ><br>KW >  | 0<br>0       | 0<br>0        | 0<br>0       | 0<br>0       | 117<br>10    | 1,047<br>10  | 0<br>0       | 0<br>0       | 0<br>0       | 0<br>0       | 0<br>0      | 1,164<br>10   |
|         |         |            | Elec Revenue > | \$0.00       | \$0.00        | \$0.00       | \$0.00       | \$112.99     | \$183.29     | \$0.00       | \$0.00       | \$0.00       | \$0.00       | \$0.00      | \$286.28      |
| 723050  | 331664  | DA21076340 | KWH ><br>KW >  | 0<br>0       | 0<br>0        | 0<br>0       | 0<br>0       | 0<br>0       | 0<br>0       | 1,653<br>10  | 991<br>10    | 527<br>10    | 0<br>0       | 0<br>0      | 3,171<br>10   |
|         |         |            | Elec Revenue > | \$0.00       | \$0.00        | \$0.00       | \$0.00       | \$0.00       | \$0.00       | \$284.63     | \$133.54     | \$143.99     | \$0.00       | \$0.00      | \$562.16      |
| 723054  | 331668  | DG28887542 | KWH ><br>KW >  | 0<br>0       | 532<br>0      | 0<br>0       | -311<br>8    | 901<br>24    | 3,182<br>26  | 3,051<br>27  | 3,957<br>27  | 579<br>26    | 171<br>0     | 175<br>0    | 12,897<br>14  |
|         |         |            | Elec Revenue > | \$0.00       | \$0.00        | \$53.78      | \$151.28     | \$318.21     | \$506.60     | \$501.78     | \$574.42     | \$307.94     | \$15.44      | \$23.49     | \$2,513.99    |
| 723170  | 331777  | DA04750404 | KWH ><br>KW >  | 0<br>0       | 0<br>0        | 0<br>0       | 5,200<br>10  | 3,264<br>40  | 5,496<br>40  | 7,581<br>43  | 5,142<br>38  | 3,265<br>43  | 374<br>12    | 0<br>0      | 30,322<br>32  |
|         |         |            | Elec Revenue > | \$0.00       | \$0.00        | \$0.00       | \$498.49     | \$652.95     | \$823.07     | \$1,006.30   | \$775.11     | \$682.67     | \$155.42     | \$0.00      | \$4,594.01    |
| 723879  | 332451  | DA13291229 | KWH ><br>KW >  | 0<br>0       | 0<br>0        | 218<br>0     | 55<br>0      | 647<br>8     | 1,139<br>8   | 1,093<br>9   | 2,249<br>8   | 58<br>0      | 52<br>0      | 52<br>0     | 5,615<br>3    |
|         |         |            | Elec Revenue > | \$0.00       | \$0.00        | \$25.64      | \$8.97       | \$137.24     | \$174.41     | \$174.34     | \$258.56     | \$6.78       | \$4.72       | \$4.63      | \$809.12      |
| 793134  | 349162  | DD58543408 | KWH ><br>KW >  | 0<br>0       | 0<br>0        | 0<br>0       | 69<br>12     | 756<br>20    | 912<br>20    | 710<br>20    | 450<br>20    | 303<br>20    | 9<br>0       | 0<br>0      | 3,209<br>16   |
|         |         |            | Elec Revenue > | \$0.00       | \$0.00        | \$0.00       | \$125.97     | \$262.71     | \$273.04     | \$257.45     | \$237.84     | \$227.14     | \$0.98       | \$0.00      | \$1,385.13    |
| 871546  | 351410  | DA03451324 | KWH ><br>KW >  | 7,480<br>22  | 6,960<br>25   | 7,500<br>23  | 5,860<br>18  | 6,240<br>18  | 5,960<br>19  | 6,080<br>22  | 6,800<br>18  | 5,220<br>16  | 5,760<br>21  | 6,880<br>19 | 77,000<br>20  |
|         |         |            | Elec Revenue > | \$829.40     | \$820.49      | \$827.08     | \$853.61     | \$678.33     | \$658.56     | \$697.72     | \$713.65     | \$578.38     | \$668.38     | \$738.33    | \$8,599.14    |
| 925496  | 331631  | DA05551496 | KWH ><br>KW >  | 1,260<br>1   | 1,160<br>2    | 1,260<br>4   | 3,180<br>18  | 3,140<br>14  | 3,040<br>8   | 2,920<br>11  | 3,140<br>11  | 2,140<br>14  | 2,280<br>13  | 940<br>2    | 24,900<br>9   |
|         |         |            | Elec Revenue > | \$133.26     | \$128.21      | \$149.05     | \$445.02     | \$400.26     | \$330.58     | \$345.25     | \$364.46     | \$317.53     | \$315.07     | \$102.48    | \$3,192.56    |
| 975808  | 381443  | DG79751903 | KWH ><br>KW >  | 7,120<br>15  | 6,140<br>14   | 6,000<br>14  | 5,640<br>12  | 5,220<br>12  | 6,000<br>14  | 6,980<br>16  | 5,120<br>15  | 6,080<br>14  | 5,660<br>13  | 5,160<br>13 | 70,860<br>14  |
|         |         |            | Elec Revenue > | \$729.38     | \$645.47      | \$620.59     | \$569.99     | \$534.38     | \$617.61     | \$709.27     | \$557.69     | \$625.26     | \$586.36     | \$546.67    | \$7,335.93    |
| 1059093 | 279444  | DG21208863 | KWH ><br>KW >  | 2,440<br>3   | 560<br>3      | 400<br>2     | 440<br>2     | 600<br>6     | 760<br>13    | 600<br>12    | 520<br>15    | 640<br>13    | 480<br>7     | 2,120<br>8  | 10,080<br>8   |
|         |         |            | Elec Revenue > | \$267.23     | \$87.80       | \$58.38      | \$159.97     | \$122.07     | \$202.24     | \$173.84     | \$199.74     | \$189.20     | \$116.78     | \$256.38    | \$1,895.49    |
| 1116452 | 372359  | DG93778435 | KWH ><br>KW >  | 6,240<br>11  | 6,000<br>13   | 4,720<br>12  | 3,240<br>14  | 5,820<br>30  | 8,820<br>40  | 11,620<br>43 | 10,600<br>43 | 5,720<br>42  | 3,480<br>10  | 4,560<br>11 | 74,300<br>23  |
|         |         |            | Elec Revenue > | \$625.31     | \$627.22      | \$493.36     | \$401.81     | \$763.51     | \$1,097.99   | \$1,344.33   | \$1,263.99   | \$871.46     | \$382.59     | \$473.94    | \$8,743.14    |
| 1141284 | 331674  | DG23524403 | KWH ><br>KW >  | 0<br>0       | 0<br>0        | 0<br>0       | 803<br>3     | 81<br>4      | 190<br>5     | 2,174<br>7   | 2,003<br>8   | 264<br>3     | 79<br>0      | 79<br>0     | 5,673<br>3    |
|         |         |            | Elec Revenue > | \$0.00       | \$0.00        | \$0.00       | \$91.65      | \$53.84      | \$18.58      | \$236.29     | \$237.46     | \$50.30      | \$7.08       | \$7.08      | \$702.28      |
| 1160780 | 331770  | DA15269521 | KWH ><br>KW >  | 0<br>0       | 0<br>0        | 558<br>5     | 131<br>0     | 4,718<br>52  | 9,930<br>49  | 17,460<br>61 | 4,628<br>56  | 271<br>3     | 123<br>0     | 130<br>0    | 38,068<br>23  |
|         |         |            | Elec Revenue > | \$0.00       | \$0.00        | \$157.04     | \$20.15      | \$878.91     | \$1,240.99   | \$1,923.39   | \$914.48     | \$54.03      | \$11.21      | \$11.73     | \$5,233.70    |
| 1160802 | 381868  | DA19880570 | KWH ><br>KW >  | 10,380<br>20 | 9,000<br>21   | 8,420<br>20  | 8,000<br>22  | 8,220<br>28  | 9,640<br>33  | 12,920<br>37 | 8,420<br>28  | 9,160<br>33  | 7,200<br>20  | 7,520<br>18 | 106,700<br>25 |
|         |         |            | Elec Revenue > | \$1,041.56   | \$940.71      | \$864.25     | \$796.87     | \$928.37     | \$1,091.34   | \$1,378.82   | \$941.19     | \$1,050.38   | \$768.38     | \$790.21    | \$11,441.31   |
| 1160804 | 381869  | DG23747224 | KWH ><br>KW >  | 23,440<br>72 | 22,560<br>110 | 24,760<br>81 | 20,120<br>46 | 17,600<br>45 | 16,560<br>42 | 15,160<br>35 | 13,560<br>39 | 15,240<br>42 | 21,360<br>59 | 5,200<br>64 | 218,200<br>58 |
|         |         |            | Elec Revenue > | \$2,592.41   | \$2,920.00    | \$2,739.43   | \$2,046.40   | \$1,835.74   | \$1,708.69   | \$1,532.02   | \$1,453.05   | \$1,618.27   | \$2,263.70   | \$1,052.17  | \$24,156.11   |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter                      | Jan          | Feb           | Mar           | Apr           | May           | Jun           | Jul           | Aug           | Sep           | Oct           | Nov           | Dec           | YTD Total      |             |
|---------|---------|----------------------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|-------------|
| 1175972 | 377151  | DG90025399                 | 798<br>4     | 781<br>3      | 734<br>4      | 683<br>4      | 682<br>0      | 776<br>3      | 695<br>3      | 728<br>5      | 706<br>3      | 705<br>3      | 756<br>4      | 637<br>3      | 8,681<br>3     |             |
|         |         | Elec Revenue >             | \$113.04     | \$103.57      | \$104.34      | \$101.24      | \$64.11       | \$103.05      | \$93.18       | \$113.70      | \$94.99       | \$101.02      | \$113.27      | \$95.88       | \$1,201.39     |             |
| 1183483 | 377663  | DG15107552                 | 11,580<br>27 | 11,320<br>23  | 10,500<br>30  | 12,800<br>34  | 13,740<br>34  | 14,540<br>36  | 16,800<br>42  | 19,120<br>44  | 20,260<br>43  | 15,880<br>40  | 13,220<br>42  | 12,200<br>45  | 171,960<br>37  |             |
|         |         | Elec Revenue >             | \$1,195.49   | \$1,155.37    | \$1,127.27    | \$1,346.40    | \$1,433.01    | \$1,506.81    | \$1,729.84    | \$1,934.36    | \$2,008.78    | \$1,644.22    | \$1,461.28    | \$1,406.29    | \$17,949.12    |             |
| 1191404 | 378526  | DG23689621                 | 0<br>0       | 0<br>0        | 0<br>0        | 0<br>0        | 1,065<br>0    | 709<br>31     | 3,933<br>30   | 5,104<br>31   | 6,096<br>31   | 2,511<br>31   | 152<br>2      | 0<br>0        | 19,570<br>22   |             |
|         |         | Elec Revenue >             | \$0.00       | \$0.00        | \$0.00        | \$0.00        | \$83.61       | \$369.84      | \$601.18      | \$697.10      | \$770.00      | \$506.50      | \$39.83       | \$0.00        | \$3,068.06     |             |
| 1269391 | 380261  | DA04680721                 | 39,840<br>74 | 30,800<br>77  | 27,440<br>70  | 25,200<br>70  | 25,600<br>87  | 26,160<br>96  | 28,960<br>108 | 33,280<br>110 | 26,320<br>100 | 26,640<br>100 | 24,320<br>76  | 26,480<br>76  | 341,040<br>87  |             |
|         |         | Elec Revenue >             | \$3,935.50   | \$3,252.02    | \$2,839.12    | \$2,669.11    | \$2,888.71    | \$3,015.46    | \$3,336.46    | \$3,685.96    | \$3,053.01    | \$3,075.34    | \$2,670.43    | \$2,834.87    | \$37,255.99    |             |
| 1569636 | 1486    | DS49353753                 | 19,640<br>35 | 16,400<br>36  | 14,680<br>32  | 14,160<br>31  | 11,960<br>28  | 11,880<br>28  | 11,320<br>25  | 11,560<br>24  | 12,400<br>28  | 11,880<br>28  | 13,760<br>36  | 15,480<br>36  | 165,120<br>31  |             |
|         |         | Elec Revenue >             | \$1,942.16   | \$1,566.61    | \$1,464.85    | \$1,428.27    | \$1,224.44    | \$1,211.08    | \$1,135.12    | \$1,149.63    | \$1,251.82    | \$1,215.32    | \$1,438.55    | \$1,572.29    | \$16,700.14    |             |
| 1669567 | 81113   | DG21203263                 | 0<br>0       | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 8,780<br>22   | 6,820<br>23   | 5,860<br>21   | 5,320<br>17   | 5,220<br>13   | 32,000<br>19   |             |
|         |         | Elec Revenue >             | \$0.00       | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$906.53      | \$773.31      | \$680.16      | \$598.03      | \$549.27      | \$3,507.30     |             |
| 1669567 | 81113   | DS84193316                 | 6,980<br>16  | 6,220<br>17   | 5,880<br>15   | 5,160<br>17   | 5,520<br>18   | 6,880<br>21   | 6,600<br>22   | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 43,240<br>18   |             |
|         |         | Elec Revenue >             | \$728.66     | \$680.89      | \$617.31      | \$584.07      | \$626.83      | \$758.10      | \$746.10      | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$4,741.96     |             |
| 1984150 | 79279   | DG76643841                 | 3,832<br>4   | 2,901<br>9    | 2,501<br>12   | 3,160<br>11   | 2,646<br>10   | 3,113<br>12   | 2,394<br>12   | 2,455<br>12   | 2,412<br>10   | 1,748<br>19   | 2,120<br>9    | 2,672<br>9    | 31,954<br>11   |             |
|         |         | Elec Revenue >             | \$411.66     | \$331.20      | \$327.19      | \$370.96      | \$322.72      | \$378.47      | \$314.60      | \$318.32      | \$303.23      | \$339.43      | \$265.42      | \$310.35      | \$3,993.55     |             |
| 1984155 | 79281   | DG90051658                 | 4,235<br>5   | 3,433<br>10   | 2,714<br>9    | 2,140<br>8    | 3,105<br>8    | 2,473<br>9    | 2,951<br>14   | 2,115<br>14   | 2,219<br>13   | 1,511<br>13   | 1,575<br>8    | 1,855<br>8    | 30,326<br>10   |             |
|         |         | Elec Revenue >             | \$456.60     | \$385.14      | \$312.78      | \$264.27      | \$339.94      | \$298.08      | \$384.90      | \$311.53      | \$311.31      | \$260.95      | \$212.09      | \$241.68      | \$3,779.27     |             |
| 3039007 | 437588  | DA19249943                 | 60,400<br>70 | 51,520<br>144 | 49,200<br>172 | 62,320<br>184 | 60,800<br>188 | 81,440<br>198 | 94,560<br>254 | 94,400<br>239 | 83,200<br>226 | 58,000<br>176 | 60,080<br>191 | 53,600<br>148 | 809,520<br>183 |             |
|         |         | Elec Revenue >             | \$6,238.40   | \$5,529.15    | \$5,540.25    | \$6,718.68    | \$6,660.02    | \$8,324.93    | \$9,867.16    | \$9,702.37    | \$8,716.07    | \$6,278.62    | \$6,596.79    | \$5,659.67    | \$5,659.67     | \$85,832.11 |
|         |         | <b>Total KWH</b>           | 2,623,949    | 2,492,326     | 2,259,092     | 2,400,067     | 2,261,322     | 2,946,006     | 3,914,303     | 4,406,823     | 4,129,132     | 3,140,499     | 2,463,803     | 2,389,601     | 35,426,923     |             |
|         |         | <b>Combined Average KW</b> | 5,119        | 5,007         | 5,135         | 5,048         | 5,176         | 7,267         | 8,428         | 9,425         | 8,786         | 7,859         | 5,310         | 5,070         | 7,911          |             |
|         |         | <b>USBC Charge</b>         | \$2,361.53   | \$2,243.06    | \$2,033.18    | \$2,160.05    | \$2,035.21    | \$2,651.45    | \$3,522.87    | \$3,966.11    | \$3,716.26    | \$2,826.45    | \$2,217.43    | \$2,150.64    | \$31,884.24    |             |
|         |         | <b>Total Elec Revenue</b>  | 245,246.47   | 234,549.19    | 211,824.14    | 220,587.95    | 215,445.00    | 284,225.49    | 366,154.61    | 413,627.58    | 386,470.54    | 303,142.78    | 229,224.79    | 220,351.34    | \$3,330,849.88 |             |

Rec'd MT DOR

FEB 21 2018



P.O. Box 5021, 59403-5021

February 14, 2018

Mr. Mark Schoenfeld  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

Dear Mark,

This letter is to report the Universal System Benefits funds that were directed for the City of Great Falls. During 2017 the City of Great Falls had a significant carryover payment request balance: See the copy of the Self Directed USBC Progress Report (enclosed). All payments received were for payments in previous years. The last time the City of Great Falls has submitted a Form B under this program was in 2008.

For 2017 the City received \$18,055.54 with a pending payment of \$1,195.59. No new Form B's were submitted under this program.

If you have any questions please let me know.

Sincerely,

A handwritten signature in black ink that reads "Melissa Kinzler". The signature is written in a cursive style.

Melissa Kinzler  
Fiscal Service Director  
PO Box 5021  
Great Falls, MT 59403

Attachments:  
Self Directed USBC Progress Report for 2017  
City of Great Falls Qualifying Projects

cc: Rick Edwards



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

## CITY OF GREAT FALLS

### Account Summary

|                                 |                |                          |                |
|---------------------------------|----------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00         | YTD Elec Revenue:        | \$735,119.53   |
| Reservations Made YTD:          | \$0.00         |                          |                |
| 2016 Carryover Payment Request: | \$3,774,588.03 | Total Payment Requests:  | \$3,774,588.03 |
| Payment Requests Made YTD:      | \$0.00         | Current Request Balance: | \$3,756,532.49 |
| 2016 Carryover USBC Credit:     | \$1,272.58     | Total USBC Credit:       | \$19,251.13    |
| USBC Credit YTD:                | \$17,978.55    | Payments Issued YTD:     | \$18,055.54    |
| Average Monthly Credit Earned:  | \$1,498.21     | USBC Credit Balance:     | \$1,195.59     |
|                                 |                | Payment Pending:         | \$1,195.59     |

### Payment Requests Made

| Submitted By | Date | Amount |
|--------------|------|--------|
|              |      |        |
|              |      |        |
|              |      |        |
|              |      |        |

### Payments Issued

| Date       | Amount     |
|------------|------------|
| 04/10/2017 | \$5,148.90 |
| 07/07/2017 | \$4,020.35 |
| 10/09/2017 | \$6,273.99 |
| 12/06/2017 | \$2,612.30 |

### Account Detail

| Account | Premise | Meter      | Jan                          | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov      | Dec        | YTD Total   |
|---------|---------|------------|------------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|----------|------------|-------------|
| 100390  | 1393    | DD39206846 | KWH ><br>42,000              | 45,520     | 32,080     | 65,120     | 41,040     | 76,960     | 3,440      | 3,280      | 89,360     | 76,960     | 0        | 45,440     | 521,200     |
|         |         |            | KW ><br>205                  | 187        | 156        | 185        | 179        | 207        | 195        | 195        | 180        | 180        | 0        | 190        | 187         |
|         |         |            | Elec Revenue ><br>\$1,733.52 | \$1,706.22 | \$1,371.61 | \$1,885.77 | \$1,609.00 | \$2,145.75 | \$1,351.31 | \$1,349.65 | \$2,084.06 | \$1,964.34 | \$7.35   | \$1,724.48 | \$18,933.06 |
| 100391  | 1394    | DG78944355 | KWH ><br>10,560              | 13,920     | 10,560     | 9,480      | 9,120      | 9,000      | 10,080     | 9,480      | 9,360      | 8,520      | 9,360    | 9,600      | 119,040     |
|         |         |            | KW ><br>36                   | 44         | 34         | 36         | 33         | 33         | 34         | 34         | 36         | 31         | 31       | 33         | 35          |
|         |         |            | Elec Revenue ><br>\$352.62   | \$440.61   | \$343.53   | \$341.10   | \$321.50   | \$320.34   | \$338.52   | \$332.52   | \$339.43   | \$299.09   | \$307.20 | \$325.63   | \$4,062.09  |
| 100392  | 1395    | DG23747229 | KWH ><br>11,200              | 8,560      | 7,600      | 6,480      | 6,960      | 6,400      | 8,080      | 10,560     | 7,680      | 7,040      | 7,680    | 7,760      | 96,000      |
|         |         |            | KW ><br>29                   | 26         | 24         | 20         | 22         | 24         | 28         | 26         | 30         | 24         | 24       | 27         | 25          |
|         |         |            | Elec Revenue ><br>\$306.89   | \$267.71   | \$242.27   | \$209.91   | \$225.32   | \$230.63   | \$273.60   | \$286.55   | \$285.61   | \$241.84   | \$242.64 | \$264.90   | \$3,077.87  |
| 100398  | 1403    | DG52303327 | KWH ><br>33,120              | 27,840     | 25,920     | 26,320     | 29,960     | 31,160     | 35,600     | 39,400     | 27,680     | 29,800     | 27,920   | 27,360     | 362,080     |
|         |         |            | KW ><br>61                   | 55         | 56         | 58         | 76         | 77         | 87         | 83         | 77         | 76         | 52       | 58         | 68          |
|         |         |            | Elec Revenue ><br>\$724.89   | \$650.96   | \$640.38   | \$657.69   | \$813.86   | \$830.90   | \$940.25   | \$949.08   | \$795.63   | \$808.04   | \$626.06 | \$666.30   | \$9,104.06  |
| 100401  | 1404    | DG35953899 | KWH ><br>24,760              | 25,880     | 22,120     | 19,280     | 17,400     | 16,640     | 16,800     | 16,160     | 16,760     | 17,720     | 20,520   | 23,600     | 237,640     |
|         |         |            | KW ><br>51                   | 48         | 41         | 39         | 35         | 36         | 34         | 28         | 32         | 36         | 39       | 38         | 38          |
|         |         |            | Elec Revenue ><br>\$580.56   | \$583.58   | \$501.43   | \$460.42   | \$415.32   | \$410.63   | \$400.83   | \$354.05   | \$389.40   | \$422.83   | \$468.67 | \$493.04   | \$5,480.76  |
| 100448  | 1456    | DG93700236 | KWH ><br>4,080               | 3,360      | 2,800      | 3,440      | 2,880      | 2,880      | 2,680      | 3,360      | 2,720      | 3,120      | 2,920    | 3,240      | 37,480      |
|         |         |            | KW ><br>10                   | 9          | 8          | 9          | 9          | 10         | 10         | 11         | 11         | 11         | 11       | 10         | 10          |
|         |         |            | Elec Revenue ><br>\$118.23   | \$104.42   | \$90.94    | \$105.21   | \$99.77    | \$105.14   | \$105.88   | \$117.66   | \$111.49   | \$115.35   | \$113.42 | \$105.77   | \$1,293.28  |
| 100466  | 1475    | DA18484075 | KWH ><br>6,240               | -18,960    | 9,360      | 9,360      | 8,360      | 18,680     | 28,880     | 40,600     | 34,440     | 32,280     | 31,200   | -1,120     | 199,320     |
|         |         |            | KW ><br>65                   | 29         | 30         | 30         | 59         | 67         | 86         | 33         | 98         | 98         | 98       | 92         | 65          |
|         |         |            | Elec Revenue ><br>\$478.55   | \$43.83    | \$305.02   | \$305.02   | \$485.99   | \$639.90   | \$967.86   | \$625.08   | \$997.87   | \$977.02   | \$966.59 | \$616.93   | \$7,309.66  |



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

| Account | Premise | Meter      | Jan                        | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total   |
|---------|---------|------------|----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 100698  | 1662    | DA06196949 | KWH > 566,370              | 582,319     | 536,463     | 582,947     | 576,677     | 513,839     | 532,223     | 0           | 0           | 0           | 0           | 0           | 3,890,838   |
|         |         |            | KW > 1,288                 | 1,219       | 1,075       | 1,156       | 1,131       | 961         | 993         | 0           | 0           | 0           | 0           | 0           | 1,118       |
|         |         |            | Elec Revenue > \$13,516.97 | \$13,847.12 | \$12,435.06 | \$13,434.24 | \$13,201.49 | \$11,450.63 | \$11,841.20 | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$89,726.71 |
| 100698  | 1662    | DA18683608 | KWH > 0                    | 0           | 0           | 0           | 0           | 0           | 0           | 496,783     | 525,517     | 472,344     | 537,176     | 505,609     | 2,537,429   |
|         |         |            | KW > 0                     | 0           | 0           | 0           | 0           | 0           | 0           | 960         | 998         | 990         | 1,094       | 1,102       | 1,029       |
|         |         |            | Elec Revenue > \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$11,249.48 | \$11,784.74 | \$11,219.67 | \$12,541.89 | \$12,288.80 | \$59,084.58 |
| 715007  | 325033  | DA16528765 | KWH > 12,160               | 11,000      | 9,440       | 8,320       | 7,880       | 8,080       | 6,960       | 16,000      | 13,600      | 9,880       | 7,120       | 8,360       | 118,800     |
|         |         |            | KW > 36                    | 35          | 36          | 32          | 29          | 29          | 29          | 39          | 37          | 40          | 27          | 27          | 33          |
|         |         |            | Elec Revenue > \$1,325.02  | \$1,248.40  | \$1,101.01  | \$975.39    | \$918.44    | \$935.17    | \$842.23    | \$1,640.99  | \$1,431.61  | \$1,173.33  | \$834.22    | \$933.41    | \$13,359.22 |
| 715024  | 325044  | DG54580881 | KWH > 78,120               | 64,440      | 58,320      | 55,440      | 48,240      | 47,520      | 60,840      | 57,240      | 56,880      | 56,880      | 58,680      | 64,800      | 707,400     |
|         |         |            | KW > 154                   | 147         | 140         | 122         | 115         | 104         | 129         | 129         | 122         | 133         | 158         | 144         | 133         |
|         |         |            | Elec Revenue > \$7,480.48  | \$6,209.95  | \$5,626.54  | \$5,306.12  | \$4,680.65  | \$4,516.90  | \$5,731.92  | \$5,459.12  | \$5,377.25  | \$5,486.64  | \$5,832.22  | \$6,185.26  | \$67,903.05 |
| 715046  | 325060  | DA06183372 | KWH > 29,400               | 23,040      | 21,240      | 21,000      | 19,320      | 18,720      | 20,280      | 0           | 0           | 0           | 0           | 0           | 153,000     |
|         |         |            | KW > 63                    | 66          | 60          | 51          | 52          | 54          | 54          | 0           | 0           | 0           | 0           | 0           | 57          |
|         |         |            | Elec Revenue > \$2,855.43  | \$2,380.65  | \$2,138.29  | \$2,054.65  | \$1,950.10  | \$1,905.86  | \$2,014.64  | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$15,299.62 |
| 715046  | 325060  | DA20154990 | KWH > 0                    | 0           | 0           | 0           | 0           | 0           | 0           | 30,960      | 24,840      | 21,840      | 19,920      | 21,600      | 119,160     |
|         |         |            | KW > 0                     | 0           | 0           | 0           | 0           | 0           | 0           | 67          | 60          | 62          | 54          | 54          | 59          |
|         |         |            | Elec Revenue > \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$2,937.23  | \$2,412.91  | \$2,209.56  | \$1,997.07  | \$2,123.17  | \$11,679.94 |
| 715055  | 325066  | DA03890964 | KWH > 24,000               | 22,400      | 20,800      | 20,800      | 24,800      | 26,400      | 26,400      | 24,800      | 27,200      | 22,400      | 21,600      | 21,600      | 283,200     |
|         |         |            | KW > 47                    | 72          | 64          | 96          | 200         | 176         | 224         | 96          | 96          | 96          | 96          | 96          | 113         |
|         |         |            | Elec Revenue > \$551.33    | \$708.26    | \$639.01    | \$853.87    | \$1,591.00  | \$1,445.38  | \$1,766.76  | \$891.37    | \$914.54    | \$868.20    | \$860.47    | \$860.47    | \$11,950.66 |
| 715215  | 325168  | DG57908291 | KWH > 24,960               | 1,280       | 12,480      | 11,840      | 12,160      | 13,120      | 13,440      | 5,440       | 20,160      | 11,840      | 11,840      | 12,160      | 150,720     |
|         |         |            | KW > 21                    | 35          | 22          | 22          | 22          | 32          | 25          | 38          | 35          | 25          | 38          | 22          | 28          |
|         |         |            | Elec Revenue > \$387.11    | \$256.12    | \$278.91    | \$272.71    | \$275.81    | \$349.59    | \$309.47    | \$317.71    | \$438.33    | \$293.55    | \$379.50    | \$275.15    | \$3,833.96  |
| 715217  | 325170  | DA18997909 | KWH > 7,411                | 6,572       | 6,460       | 9,260       | 3,069       | 6,566       | 6,803       | 6,727       | 6,213       | 6,962       | 6,791       | 6,332       | 79,166      |
|         |         |            | KW > 15                    | 16          | 15          | 21          | 15          | 37          | 16          | 17          | 13          | 19          | 19          | 19          | 19          |
|         |         |            | Elec Revenue > \$182.49    | \$181.07    | \$174.07    | \$244.16    | \$142.28    | \$325.56    | \$182.00    | \$189.67    | \$159.26    | \$204.90    | \$203.25    | \$198.82    | \$2,387.53  |
| 715320  | 325263  | DA05147669 | KWH > 11,560               | 14,440      | 9,200       | 8,440       | 8,880       | 7,880       | 8,880       | 14,640      | 12,920      | 9,880       | 8,680       | 11,640      | 127,040     |
|         |         |            | KW > 39                    | 39          | 32          | 34          | 66          | 32          | 32          | 40          | 38          | 32          | 32          | 51          | 39          |
|         |         |            | Elec Revenue > \$1,327.76  | \$1,557.85  | \$1,040.86  | \$1,010.51  | \$1,389.01  | \$946.19    | \$1,022.56  | \$1,547.88  | \$1,387.43  | \$1,102.12  | \$1,007.94  | \$1,428.69  | \$14,748.80 |
| 715322  | 325264  | DG57850854 | KWH > 17,680               | 14,960      | 14,400      | 13,520      | 14,320      | 16,640      | 22,960      | 23,520      | 20,080      | 13,360      | 12,960      | 13,840      | 198,240     |
|         |         |            | KW > 37                    | 32          | 29          | 28          | 33          | 40          | 48          | 52          | 39          | 39          | 39          | 39          | 38          |
|         |         |            | Elec Revenue > \$1,801.67  | \$1,529.75  | \$1,419.57  | \$1,347.88  | \$1,466.66  | \$1,712.03  | \$2,271.76  | \$2,346.75  | \$1,953.94  | \$1,437.14  | \$1,408.95  | \$1,476.01  | \$20,172.11 |
| 715550  | 325468  | DA18979694 | KWH > 610                  | 1,970       | 375         | 489         | 251         | 250         | 244         | 987         | -622        | 237         | 302         | 297         | 5,390       |
|         |         |            | KW > 4                     | 7           | 4           | 15          | 10          | 20          | 16          | 33          | 2           | 3           | 5           | 5           | 10          |
|         |         |            | Elec Revenue > \$51.85     | \$73.67     | \$38.13     | \$116.64    | \$78.28     | \$150.11    | \$122.19    | \$244.70    | \$16.99     | \$33.54     | \$47.94     | \$47.89     | \$1,021.93  |
| 715568  | 325484  | DG36338704 | KWH > 3,000                | 3,880       | 2,960       | 3,080       | 2,920       | 2,800       | 3,000       | 2,680       | 2,600       | 3,080       | 3,040       | 3,240       | 36,280      |
|         |         |            | KW > 7                     | 6           | 8           | 8           | 9           | 15          | 15          | 8           | 11          | 9           | 9           | 9           | 10          |
|         |         |            | Elec Revenue > \$83.21     | \$88.00     | \$92.49     | \$90.97     | \$100.16    | \$139.29    | \$141.18    | \$86.94     | \$110.33    | \$101.55    | \$101.16    | \$103.09    | \$1,238.37  |
| 721400  | 308650  | DG15003051 | KWH > 433                  | 367         | 497         | 377         | 1,078       | 842         | 774         | 372         | 382         | 821         | 463         | 946         | 7,352       |
|         |         |            | KW > 14                    | 15          | 12          | 12          | 24          | 24          | 23          | 19          | 11          | 13          | 12          | 13          | 16          |
|         |         |            | Elec Revenue > \$113.95    | \$117.26    | \$97.92     | \$91.92     | \$180.09    | \$182.57    | \$175.60    | \$144.02    | \$87.11     | \$102.83    | \$97.24     | \$104.44    | \$1,494.95  |
| 724912  | 333416  | DA04801144 | KWH > 0                    | 0           | 0           | 0           | 0           | 10,294      | 4,506       | 4,118       | 5,131       | 3,932       | 0           | 0           | 27,981      |
|         |         |            | KW > 0                     | 0           | 0           | 0           | 0           | 8           | 6           | 6           | 5           | 7           | 0           | 0           | 6           |
|         |         |            | Elec Revenue > \$8.72      | \$7.35      | \$7.35      | \$7.35      | \$7.35      | \$162.21    | \$92.97     | \$89.69     | \$94.89     | \$95.74     | \$7.35      | \$7.35      | \$586.32    |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

| Account | Premise | Meter          | Jan        | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total   |            |
|---------|---------|----------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|------------|
| 724931  | 333434  | DG23524464     | 0          | 0          | 0          | 0          | 0          | 0          | 9,580      | 14,400     | 12,800     | 4,240      | 3,660      | -3,660     | 41,020      |            |
|         |         | KW >           | 0          | 0          | 0          | 0          | 0          | 0          | 39         | 23         | 23         | 35         | 35         | 0          | 26          |            |
|         |         | Elec Revenue > | \$0.00     | \$0.00     | \$7.35     | \$7.35     | \$7.35     | \$7.35     | \$1,144.78 | \$1,353.13 | \$1,229.70 | \$288.66   | \$283.05   | (\$27.98)  | \$4,300.74  |            |
| 725214  | 333704  | DA17487923     | 1,539      | 1,434      | 2,327      | 4,831      | 5,774      | 7,737      | 8,524      | 8,620      | 7,408      | 4,436      | 2,805      | 1,278      | 56,713      |            |
|         |         | KW >           | 3          | 4          | 14         | 17         | 21         | 24         | 22         | 24         | 25         | 25         | 17         | 3          | 17          |            |
|         |         | Elec Revenue > | \$54.73    | \$53.37    | \$129.11   | \$173.43   | \$207.58   | \$244.00   | \$244.04   | \$253.73   | \$250.16   | \$221.46   | \$152.00   | \$152.00   | \$46.40     | \$2,030.01 |
| 725215  | 333705  | DD55413459     | 0          | 160        | 0          | 0          | 0          | 4,280      | 1,680      | 1,760      | 1,640      | 960        | 920        | 0          | 11,400      |            |
|         |         | KW >           | 0          | 0          | 0          | 0          | 0          | 15         | 15         | 14         | 12         | 12         | 12         | 0          | 11          |            |
|         |         | Elec Revenue > | \$8.14     | \$8.90     | \$7.35     | \$7.35     | \$7.35     | \$153.65   | \$125.66   | \$118.34   | \$109.14   | \$102.56   | \$102.17   | \$7.35     | \$757.96    |            |
| 725219  | 333708  | DD33455515     | 0          | 0          | 0          | 4,760      | 0          | 13,680     | 19,400     | 19,160     | 15,040     | 7,560      | 6,280      | 0          | 85,880      |            |
|         |         | KW >           | 0          | 0          | 0          | 96         | 0          | 100        | 374        | 174        | 175        | 133        | 133        | 0          | 169         |            |
|         |         | Elec Revenue > | \$7.95     | \$7.35     | \$7.35     | \$698.13   | \$7.35     | \$816.97   | \$2,708.75 | \$1,365.98 | \$1,331.59 | \$977.37   | \$965.01   | \$7.35     | \$8,901.15  |            |
| 725220  | 333709  | DG90038814     | 2,074      | 770        | 1,492      | 6,039      | 6,200      | 14,820     | 17,765     | 29,937     | 17,938     | 7,639      | 3,754      | 561        | 108,989     |            |
|         |         | KW >           | 96         | 1          | 50         | 48         | 49         | 27         | 52         | 48         | 48         | 49         | 50         | 0          | 43          |            |
|         |         | Elec Revenue > | \$706.64   | \$26.17    | \$358.15   | \$393.25   | \$772.22   | \$355.28   | \$574.09   | \$661.99   | \$550.25   | \$456.37   | \$428.52   | \$19.21    | \$5,302.14  |            |
| 725221  | 333710  | DG16639320     | 0          | 3,360      | 720        | 4,560      | 320        | 8,800      | 13,920     | 27,280     | 11,520     | 5,200      | 2,720      | 1,600      | 80,000      |            |
|         |         | KW >           | 0          | 88         | 88         | 88         | 132        | 132        | 88         | 132        | 132        | 131        | 132        | 132        | 116         |            |
|         |         | Elec Revenue > | \$0.00     | \$1,333.60 | \$610.57   | \$647.85   | \$1,937.61 | \$1,125.22 | \$826.95   | \$1,296.45 | \$1,150.02 | \$1,078.72 | \$1,061.97 | \$909.08   | \$11,978.04 |            |
| 725229  | 333718  | DD99910450     | -890       | 838        | 821        | 3,906      | 5,678      | 6,946      | 9,604      | 7,728      | 6,122      | 4,588      | 1,704      | 625        | 47,670      |            |
|         |         | KW >           | 16         | 2          | 2          | 15         | 8          | 23         | 26         | 26         | 23         | 16         | 0          | 2          | 13          |            |
|         |         | Elec Revenue > | \$111.57   | \$35.29    | \$35.14    | \$151.63   | \$121.90   | \$229.88   | \$278.46   | \$260.23   | \$223.02   | \$163.09   | \$25.35    | \$30.44    | \$1,666.00  |            |
| 725464  | 333924  | DA07808268     | 200        | 160        | 160        | 120        | 160        | 1,560      | 15,000     | 15,640     | 14,640     | 3,560      | 120        | 200        | 51,520      |            |
|         |         | KW >           | 1          | 2          | 2          | 0          | 0          | 19         | 24         | 24         | 24         | 23         | 9          | 1          | 11          |            |
|         |         | Elec Revenue > | \$21.18    | \$22.33    | \$25.01    | \$8.52     | \$8.90     | \$154.09   | \$316.74   | \$322.19   | \$315.23   | \$200.18   | \$70.28    | \$20.03    | \$1,484.68  |            |
| 725565  | 334024  | DD79678272     | 566        | 622        | 527        | 542        | 616        | 666        | 639        | 522        | 471        | 369        | 605        | -13        | 6,132       |            |
|         |         | KW >           | 0          | 0          | 0          | 0          | 1          | 1          | 1          | 1          | 0          | 0          | 1          | 0          | 0           |            |
|         |         | Elec Revenue > | \$20.53    | \$19.90    | \$18.78    | \$19.13    | \$20.18    | \$20.59    | \$20.54    | \$19.31    | \$16.87    | \$15.89    | \$20.50    | \$12.53    | \$224.75    |            |
| 725959  | 334413  | DA20062890     | 0          | 0          | 0          | 0          | 1,200      | 2,400      | 1,200      | 1,200      | 1,200      | 1,200      | 3,600      | 2,400      | 14,400      |            |
|         |         | KW >           | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 156        | 0          | 35          |            |
|         |         | Elec Revenue > | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$19.00    | \$30.66    | \$19.00    | \$18.94    | \$421.80   | \$421.80   | \$1,089.53 | \$30.53    | \$2,051.26  |            |
| 827705  | 351134  | DG21120155     | 0          | 0          | 0          | 0          | 0          | 30,200     | 16,560     | 24,920     | 17,960     | 4,320      | 4,120      | 0          | 98,080      |            |
|         |         | KW >           | 0          | 0          | 0          | 0          | 0          | 113        | 141        | 126        | 131        | 84         | 84         | 0          | 113         |            |
|         |         | Elec Revenue > | \$8.14     | \$7.35     | \$7.35     | \$7.35     | \$7.35     | \$1,063.30 | \$1,115.61 | \$1,099.32 | \$1,064.35 | \$618.43   | \$616.50   | \$7.35     | \$5,622.40  |            |
| 917087  | 357114  | DG63924078     | 520        | 400        | 320        | 360        | 360        | 800        | 30,240     | 40,920     | 38,440     | 3,640      | 360        | 400        | 116,760     |            |
|         |         | KW >           | 1          | 1          | 1          | 0          | 0          | 36         | 153        | 152        | 150        | 146        | 12         | 0          | 54          |            |
|         |         | Elec Revenue > | \$21.62    | \$19.30    | \$18.52    | \$13.53    | \$16.21    | \$256.83   | \$1,329.42 | \$1,423.00 | \$1,388.31 | \$1,025.47 | \$96.76    | \$13.91    | \$5,622.88  |            |
| 920779  | 355986  | DA03705229     | 32,480     | 24,280     | 20,600     | 16,160     | 16,760     | 13,840     | 12,240     | 12,960     | 11,800     | 13,800     | 18,040     | 16,800     | 209,760     |            |
|         |         | KW >           | 54         | 47         | 39         | 30         | 30         | 27         | 22         | 19         | 21         | 27         | 40         | 37         | 33          |            |
|         |         | Elec Revenue > | \$671.98   | \$560.00   | \$473.23   | \$365.66   | \$371.49   | \$324.36   | \$278.96   | \$261.40   | \$263.61   | \$325.90   | \$452.78   | \$419.32   | \$4,768.69  |            |
| 1356777 | 392254  | DA03986632     | 26,320     | 23,280     | 20,240     | 19,840     | 17,840     | 16,560     | 18,880     | 17,760     | 17,520     | 19,120     | 18,880     | 20,000     | 236,240     |            |
|         |         | KW >           | 70         | 72         | 70         | 80         | 70         | 67         | 69         | 73         | 76         | 104        | 90         | 104        | 79          |            |
|         |         | Elec Revenue > | \$723.64   | \$722.18   | \$676.55   | \$737.12   | \$653.25   | \$619.32   | \$657.20   | \$672.99   | \$692.16   | \$890.24   | \$796.61   | \$904.10   | \$8,745.36  |            |
| 3106008 | 595942  | DG57908290     | 103,140    | 83,520     | 73,980     | 69,120     | 63,720     | 69,300     | 101,160    | 93,240     | 83,880     | 75,600     | 74,880     | 81,900     | 973,440     |            |
|         |         | KW >           | 209        | 210        | 192        | 192        | 154        | 151        | 208        | 219        | 212        | 176        | 181        | 199        | 192         |            |
|         |         | Elec Revenue > | \$9,920.77 | \$8,204.83 | \$7,253.81 | \$6,946.46 | \$6,211.58 | \$6,569.24 | \$9,461.21 | \$8,951.36 | \$8,188.25 | \$7,280.47 | \$7,266.12 | \$7,961.76 | \$84,215.86 |            |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

| Account             | Premise | Meter | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------------------|---------|-------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| Total KWH           |         |       | 1,569,543   | 1,421,141   | 1,310,381   | 1,441,853   | 1,336,580   | 1,683,821   | 2,179,110   | 2,482,024   | 2,309,988   | 1,522,119   | 1,380,420   | 1,328,438   | 19,965,418   |
| Combined Average KW |         |       | 3,716       | 3,599       | 3,412       | 3,803       | 4,005       | 4,507       | 6,015       | 5,542       | 5,261       | 4,785       | 3,963       | 3,608       | 6,796        |
| USBC Charge         |         |       | \$1,412.60  | \$1,278.98  | \$1,179.34  | \$1,297.69  | \$1,202.91  | \$1,515.43  | \$1,961.19  | \$2,233.82  | \$2,078.98  | \$1,369.93  | \$1,242.37  | \$1,195.59  | \$17,968.83  |
| Total Elec Revenue  |         |       | \$58,078.67 | \$54,603.05 | \$49,513.22 | \$52,783.94 | \$53,681.16 | \$59,363.18 | \$78,680.08 | \$79,759.34 | \$74,468.06 | \$61,079.67 | \$53,805.97 | \$52,152.58 | \$727,968.92 |

### City of Great Falls Qualifying Projects

| DATE  | LOCATION               | DESCRIPTION  | AMOUNT REQUESTED | BALANCE OF REQUEST |
|---|------------------------|--|------------------|--------------------|
| 11/30/2000  | Eagle Falls            | New irrigation pump & installation   | 83,043.02        | \$22,368.59        |
| 11/17/2000  | Parking Garage         | Light repairs & installation of new light system   | 15,355.60        | \$3,066.70         |
| 5/4/2001  | Water Plant/WWTP       | Installed premium efficient motor & variable frequency drive on Water Sample Pump; replacement of sludge | 8,272.00         | \$1,306.74         |
| 11/9/2005   | G.F. Housing Authority | Insulation of Heat Lines and Several Housing upgrade Projects  | 1,039,814.59     | \$854,788.37       |
| 9/13/2007   | G.F. Housing Authority | Sunrise Court Housing Project  | 2,345,851.83     | \$2,345,851.83     |
| 9/24/2008   | G.F. Housing Authority | Yeoman/Tynes Project   | 475,615.56       | \$475,615.56       |
| 11/28/2005  | City Shops             | Replaced 4 forced are furnaces with radiant heaters  | 11,941.00        | \$9,815.74         |
| 11/23/2005  | Civic Center           | Air conditioner in Theater and new ballasts in building  | 20,665.14        | \$15,688.59        |
| 11/10/2005  | P.W. Traffic Division  | Replaced signal displays with LED displays   | 24,217.30        | \$18,212.30        |
| 11/10/2005  | Library                | Lamp & ballast Replacement<br>Caulking of front windows  | 8,395.89         | \$4,312.64         |
| Balance left to be distributed with Large Customer Credit Checks from NW Energy |                        |  |                  | \$3,751,027.06     |

P O Box 823, Troy, Montana 59935

(406) 295-4151

FAX (406)295-7026

## THE CITY OF TROY

Dallas Carr, Mayor

### COUNCIL

Joe Arts  
Crystal Denton  
Shawna Kelsey  
Chuck Ekstedt

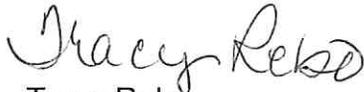
January 29, 2018

Mark Schoenfeld  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

RE: Universal Systems Benefit Programs-Annual Report for 2017

Enclosed is the 2017 Annual Report for the Universal System Benefit Program.  
Please contact me if you have any questions at 406-295-4151. Thank you.

Sincerely,



Tracy Rebo  
City Clerk/Treasurer

Encls.

**Rec'd MT DOR**

**JAN 31 2018**

**USBP Credit Activities Report**  
 Jan 1, 2017 to Dec 31, 2017

Reporting Cooperative Oky of Troy Electric Utility  
 Contact Person Clinton Taylor  
 1995 Electricity Sales Revenues \$ 722,745  
 A. Energy Conservation

Amount of  
 Credit  
Expenditure

|  |          |
|--|----------|
| 1. Energy Audits   | \$       |
| 2. Water heater programs   | \$       |
| 3. Grants or loans for lighting efficiency conversions   | \$       |
| 4. Grants for motor efficiency conversions   | \$       |
| 5. Expenses for consumer conservation education  | \$       |
| 6. Expenses for demand side management programs  | \$       |
| 7. Grants or low-interest loans for ground-source heat pumps used for energy efficiency savings  | \$       |
| 8. Irrigation audits to reduce power requirements  | \$       |
| 9. Programs such as Super Good Cents   | \$       |
| 10. Design/construction assistance for energy-efficient construction   | \$       |
| 11. Design/implementation assistance for retrofits of existing loads   | \$       |
| 12. Waste heat generation expenses   | \$       |
| 13. Street lighting - security lighting upgrades for efficiency  | \$       |
| 14. Incremental cost of distribution efficiency expenditures attributable to increases in energy efficiency above acceptable minimum industry standards that are documented and verified by an electrical engineer | \$       |
| 15. Peak-shaving devices applied in customer facilities for the purpose of reducing peak demands excluding interruptible service or payment for curtailment rates  | \$       |
| 16. Large customer conservation investments made pursuant to 69-8-101 et. seq  | \$       |
| 17. Conservation investments made through power purchases pursuant to 69-8-402(2)(b)   | \$43,354 |
| 18. Other  | \$       |

**B. Low-Income USBP Expenditures and Credits**

|  |         |
|--|---------|
| 1. Outreach for LEAP enrollment  | \$      |
| 2. Funds contributed to endowments that qualify for low-income USBP purposes   | \$      |
| 3. Safety/repairs related to low-income energy issues  | \$      |
| 4. Energy-efficient equipment/technologies that help low-income households meet the cost of home energy  | \$      |
| 5. Heating and energy crisis benefits including payments toward recipient household's energy costs <i>City of Troy Benefit Fund</i>  | \$ 1200 |
| 6. Payment toward recipient household weatherization costs   | \$      |
| 7. Purchase and delivery of fuels used by recipient households for home energy   | \$      |
| 8. Purchase, delivery, and installation of weatherization materials  | \$      |
| 9. Purchase and delivery of blankets, space heating devices, equipment and other tangible items that are provided to help low-income households meet the cost of home energy | \$      |
| 10. Discounted utility and bulk fuel prices for recipient households   | \$      |
| 11. Partial or full waivers of utility and other income home energy connection and reconnection fees, application fees, and late payment charges                             | \$      |
| 12. Partial or full waivers of utility and other home energy connection and reconnection fees, application fees, and late payment charges                                    | \$      |
| 13. Partial or full forgiveness of home energy bill arrearages   | \$      |
| 14. Discounts or reductions in the costs of home heating and weatherization materials  | \$      |
| 15. Services of paid staff donated by their employer to deliver fuel and other tangible items that help low-income households meet the cost of home energy                   | \$      |
| 16. Purchase, delivery, and installation of energy efficient equipment/technologies that help low-income households meet the cost of home energy                             | \$      |

|  |         |
|--|---------|
| 17. Low-income energy assistance investments made through power purchases pursuant to 69-8-402(2)(b) | \$ 1445 |
| 18. Other  | \$      |

**C. Renewable Resource Projects and Applications**

|   |           |
|---|-----------|
| 1. Photovoltaics conversion   | \$        |
| 2. Solar thermal applications   | \$        |
| 3. Geothermal projects  | \$        |
| 4. Wind power projects  | \$        |
| 5. Local micro hydro projects that are on streams outside protected areas as defined by the Northwest Power Planning Council or state or federal law, or that are irrigation ditch projects | \$        |
| 6. Renewable energy investments made through power purchases pursuant to 69-8-402(2)(b)   | \$ 12,284 |
| 7. Other  | \$        |

**D. Research & Development**

|    |    |
|----|----|
| 1. | \$ |
| 2. | \$ |
| 3. | \$ |
| 4. | \$ |

**E. Market Transformation**

|    |    |
|----|----|
| 1. | \$ |
| 2. | \$ |
| 3. | \$ |
| 4. | \$ |

ROSEBUD ENERGY CORP.  
Suite 200  
1087 West River Street  
Boise, Idaho 83702  
Telephone (208) 344-3570  
Telccopier (208) 344-3984

February 9, 2018

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756  
FAX: 406-444-7997  
Email: mschoenfeld@mt.gov

RE: Self-Directed USBC Progress Report for 2017 (Colstrip Energy Limited Partnership)

Mr. Schoenfeld,

As per Mont. Code Ann. § 69-8-402(8)(a), please find attached a copy of Colstrip Energy Limited Partnership's (CELP) 2017 Universal System Benefits Credits (USBC) Report detailing the project's USB activities during the year as received from NorthWestern Energy. These credits are for our facility located at 18 Snider Subdivision Road Colstrip, MT.

In 2017, the facility earned \$2,480.03 in USB credits. We have elected with NorthWestern Energy to carry over these USB credits earned at year-end of 2017 into 2018 for a potential energy efficiency project this year.

Sincerely,



Steven Bennett  
Colstrip Energy LTD Partnership  
1087 W River St, Suite 200  
Boise, ID 83702-7023

CC: Rick Edwards,  
NorthWestern Energy,  
11 East Park, Butte, MT 59701  
Email: rick.edwards@northwestern.com



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 2/6/2018

## COLSTRIP ENERGY LTD PARTNERSHIP

### Account Summary

|                                 |            |                          |              |
|---------------------------------|------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00     | YTD Elec Revenue:        | \$275,951.86 |
| Reservations Made YTD:          | \$2,500.00 |                          |              |
| 2016 Carryover Payment Request: | \$0.00     | Total Payment Requests:  | \$0.00       |
| Payment Requests Made YTD:      | \$0.00     | Current Request Balance: | \$0.00       |
| 2016 Carryover USBC Credit:     | \$0.00     | Total USBC Credit:       | \$2,480.03   |
| USBC Credit YTD:                | \$2,480.03 | Payments Issued YTD:     | \$0.00       |
| Average Monthly Credit Earned:  | \$206.67   | USBC Credit Balance:     | \$2,480.03   |
|                                 |            | Payment Pending:         | \$0.00       |

| Payment Requests Made |      | Payments Issued |        |
|-----------------------|------|-----------------|--------|
| Submitted By          | Date | Date            | Amount |
|                       |      |                 |        |

### Account Detail

| Account | Premise | Meter               | Jan        | Feb      | Mar         | Apr      | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|---------------------|------------|----------|-------------|----------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100629  | 1633    | DS86354086          | 0          | 0        | 318,648     | 0        | 0           | 119,045     | 120,643     | 370,037     | 353,842     | 421,925     | 398,098     | 653,356     | 2,755,594    |
|         |         | KWH >               | 0          | 0        | 3,974       | 0        | 0           | 4,378       | 3,053       | 3,744       | 1,459       | 1,517       | 1,939       | 1,824       | 2,736        |
|         |         | KW >                | 0          | 0        | \$36,957.63 | \$983.70 | \$983.70    | \$24,644.68 | \$20,014.68 | \$39,612.07 | \$30,481.87 | \$35,438.11 | \$35,441.96 | \$49,154.31 | \$275,951.86 |
|         |         | Elec Revenue >      | \$1,255.45 | \$983.70 | \$36,957.63 | \$983.70 | \$24,644.68 | \$20,014.68 | \$39,612.07 | \$30,481.87 | \$35,438.11 | \$35,441.96 | \$49,154.31 | \$588.02    | \$2,480.03   |
|         |         | Total KWH           | 0          | 0        | 318,648     | 0        | 0           | 119,045     | 120,643     | 370,037     | 353,842     | 421,925     | 398,098     | 653,356     | 2,755,594    |
|         |         | Combined Average KW | 0          | 0        | 3,974       | 0        | 0           | 4,378       | 3,053       | 3,744       | 1,459       | 1,517       | 1,939       | 1,824       | 2,736        |
|         |         | USBC Charge         | \$0.00     | \$0.00   | \$286.78    | \$0.00   | \$0.00      | \$107.14    | \$108.58    | \$333.03    | \$318.46    | \$379.73    | \$358.29    | \$588.02    | \$2,480.03   |
|         |         | Total Elec Revenue  | \$1,255.45 | \$983.70 | \$36,957.63 | \$983.70 | \$24,644.68 | \$20,014.68 | \$39,612.07 | \$30,481.87 | \$35,438.11 | \$35,441.96 | \$49,154.31 | \$588.02    | \$2,480.03   |



2827 Fort Missoula Rd  
Missoula, MT 59804

406-728-4100  
[www.communitymed.org](http://www.communitymed.org)

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February 13, 2018

Mark Schoenfeld  
Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805  
[mschoenfeld@mt.gov](mailto:mschoenfeld@mt.gov)

Community Medical Center submitted requests totaling \$18,693.00 against our USB funds. We were issued a check for \$15,103.93, which is what we had at the time. We have begun a lighting upgrade project around the hospital swapping out our lights with LED's. We did not have any funds to be rolled over into 2018.

Please let me know if you have any questions,



From day one.  
2827 Fort Missoula Rd.  
Missoula, MT 59804

*Steffanie Jirsa*

Facilities Supervisor  
office: 406-327-4137 | fax 406-327-4335  
email ; [sjirsa@communitymed.org](mailto:sjirsa@communitymed.org)

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# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/23/2018

## COMMUNITY MEDICAL CENTER

### Account Summary

|                                 |             |                          |              |
|---------------------------------|-------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$8,000.00  | YTD Elec Revenue:        | \$855,199.05 |
| Reservations Made YTD:          | \$0.00      |                          |              |
| 2016 Carryover Payment Request: | \$0.00      | Total Payment Requests:  | \$18,693.00  |
| Payment Requests Made YTD:      | \$18,693.00 | Current Request Balance: | \$3,589.07   |
| 2016 Carryover USBC Credit:     | \$7,859.25  | Total USBC Credit:       | \$15,677.07  |
| USBC Credit YTD:                | \$7,817.82  | Payments Issued YTD:     | \$15,103.93  |
| Average Monthly Credit Earned:  | \$651.49    | USBC Credit Balance:     | \$573.14     |
|                                 |             | Payment Pending:         | \$573.14     |

### Payment Requests Made

| Submitted By    | Date       | Amount      |
|-----------------|------------|-------------|
| Steffanie Jirsa | 11/30/2017 | \$18,693.00 |

### Payments Issued

| Date       | Amount      |
|------------|-------------|
| 12/06/2017 | \$15,103.93 |

### Account Detail

| Account | Premise | Meter          | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100037  | 1042    | DA06183580     | 564,441     | 577,811     | 512,631     | 585,337     | 577,340     | 648,406     | 678,216     | 764,564     | 727,750     | 619,498     | 598,045     | 532,657     | 7,386,696    |
|         |         | KWH >          | 965         | 977         | 949         | 983         | 1,029       | 1,181       | 1,279       | 1,299       | 1,234       | 1,143       | 1,053       | 973         | 1,089        |
|         |         | Elec Revenue > | \$54,437.26 | \$56,554.37 | \$49,276.93 | \$55,136.87 | \$55,671.26 | \$62,491.34 | \$65,277.11 | \$72,131.52 | \$68,650.18 | \$59,461.33 | \$57,159.82 | \$51,134.74 | \$707,382.73 |
| 477714  | 198984  | DA08581526     | 11,280      | 10,920      | 9,800       | 10,240      | 11,680      | 13,280      | 16,680      | 19,000      | 17,360      | 11,080      | 10,480      | 10,800      | 152,600      |
|         |         | KWH >          | 33          | 33          | 32          | 36          | 38          | 43          | 45          | 45          | 46          | 42          | 32          | 32          | 38           |
|         |         | Elec Revenue > | \$1,246.13  | \$1,212.13  | \$1,094.93  | \$1,165.49  | \$1,307.04  | \$1,476.77  | \$1,749.90  | \$1,933.17  | \$1,819.70  | \$1,292.47  | \$1,143.60  | \$1,167.81  | \$16,609.14  |
| 477745  | 199010  | DG90054875     | 13,920      | 13,520      | 14,320      | 14,000      | 15,920      | 13,040      | 13,680      | 15,120      | 13,200      | 11,120      | 12,240      | 14,000      | 164,080      |
|         |         | KWH >          | 29          | 32          | 31          | 31          | 32          | 31          | 29          | 29          | 27          | 24          | 29          | 29          | 29           |
|         |         | Elec Revenue > | \$1,416.34  | \$1,402.91  | \$1,429.11  | \$1,410.42  | \$1,583.27  | \$1,334.00  | \$1,361.73  | \$1,472.97  | \$1,301.51  | \$1,111.42  | \$1,256.62  | \$1,392.76  | \$16,473.06  |
| 613197  | 265363  | DG90052688     | 2,509       | 1,887       | 1,066       | 804         | 1,162       | 1,470       | 2,412       | 2,630       | 2,041       | 962         | 695         | 920         | 18,558       |
|         |         | KWH >          | 5           | 5           | 7           | 6           | 9           | 10          | 11          | 9           | 9           | 7           | 6           | 6           | 7            |
|         |         | Elec Revenue > | \$274.52    | \$216.57    | \$165.99    | \$135.13    | \$195.89    | \$228.10    | \$304.22    | \$303.12    | \$260.33    | \$160.46    | \$130.22    | \$135.67    | \$2,510.22   |
| 622256  | 270818  | DG93792775     | 1,376       | 1,701       | 1,510       | 1,277       | 1,328       | 1,208       | 1,238       | 1,435       | 1,257       | 766         | 947         | 1,623       | 15,666       |
|         |         | KWH >          | 8           | 10          | 13          | 8           | 8           | 7           | 8           | 7           | 6           | 6           | 9           | 11          | 8            |
|         |         | Elec Revenue > | \$211.02    | \$250.62    | \$259.16    | \$193.53    | \$194.31    | \$171.86    | \$186.08    | \$194.00    | \$167.71    | \$136.52    | \$174.66    | \$247.01    | \$2,388.48   |
| 646459  | 284571  | DG28550496     | 52,560      | 52,320      | 47,600      | 46,000      | 47,520      | 43,680      | 44,240      | 49,280      | 46,960      | 46,640      | 45,440      | 47,760      | 570,000      |
|         |         | KWH >          | 131         | 131         | 125         | 117         | 124         | 115         | 111         | 110         | 114         | 116         | 118         | 116         | 119          |
|         |         | Elec Revenue > | \$5,519.79  | \$5,481.61  | \$4,952.43  | \$4,768.37  | \$4,972.54  | \$4,558.17  | \$4,542.18  | \$4,923.54  | \$4,787.84  | \$4,799.64  | \$4,730.31  | \$4,883.88  | \$58,920.30  |
| 682349  | 303209  | DG99722644     | 3,982       | 3,596       | 3,903       | 3,553       | 3,645       | 4,054       | 4,473       | 4,733       | 4,732       | 3,607       | 3,523       | 3,439       | 47,240       |
|         |         | KWH >          | 9           | 9           | 10          | 10          | 10          | 12          | 11          | 12          | 12          | 11          | 11          | 11          | 10           |
|         |         | Elec Revenue > | \$426.47    | \$388.83    | \$412.33    | \$394.11    | \$399.71    | \$442.55    | \$467.80    | \$494.02    | \$501.99    | \$402.73    | \$392.70    | \$364.38    | \$5,087.62   |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/23/2018

| Account | Premise | Meter      | Jan                  | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug          | Sep         | Oct         | Nov         | Dec         | YTD Total     |
|---------|---------|------------|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|-------------|-------------|-------------|-------------|---------------|
| 863556  | 303210  | DD38466544 | KWH ><br>3,756<br>11 | 3,475<br>11 | 3,191<br>9  | 2,005<br>5  | 2,120<br>7  | 2,312<br>7  | 2,907<br>8  | 2,734<br>7   | 2,491<br>6  | 2,031<br>4  | 2,069<br>4  | 2,177<br>5  | 31,268<br>7   |
|         |         |            | KW ><br>\$421.58     | \$393.40    | \$352.78    | \$215.23    | \$245.45    | \$260.31    | \$313.46    | \$290.37     | \$269.20    | \$215.14    | \$218.29    | \$229.62    | \$3,424.83    |
|         |         |            | Elec Revenue >       |             |             |             |             |             |             |              |             |             |             |             |               |
| 1078450 | 360611  | DD82361679 | KWH ><br>9,120<br>24 | 9,040<br>23 | 8,880<br>25 | 7,960<br>23 | 7,800<br>22 | 7,720<br>29 | 9,200<br>31 | 10,720<br>32 | 9,560<br>32 | 8,040<br>28 | 7,160<br>22 | 7,640<br>20 | 102,840<br>26 |
|         |         |            | KW ><br>\$971.56     | \$977.49    | \$952.23    | \$855.47    | \$843.79    | \$903.14    | \$1,036.46  | \$1,164.63   | \$1,071.07  | \$918.61    | \$793.27    | \$809.47    | \$11,297.19   |
|         |         |            | Elec Revenue >       |             |             |             |             |             |             |              |             |             |             |             |               |
| 1268037 | 198983  | DG35787692 | KWH ><br>6,920<br>14 | 6,880<br>14 | 6,360<br>14 | 6,520<br>16 | 7,080<br>21 | 7,480<br>28 | 9,240<br>29 | 11,080<br>30 | 8,760<br>25 | 6,320<br>19 | 6,160<br>14 | 6,680<br>14 | 89,480<br>20  |
|         |         |            | KW ><br>\$709.21     | \$702.67    | \$644.24    | \$675.49    | \$778.40    | \$873.44    | \$1,018.31  | \$1,166.52   | \$941.73    | \$690.49    | \$635.09    | \$675.15    | \$9,512.74    |
|         |         |            | Elec Revenue >       |             |             |             |             |             |             |              |             |             |             |             |               |
| 1463766 | 199021  | DD38050681 | KWH ><br>2,317<br>8  | 2,003<br>8  | 1,511<br>6  | 1,308<br>8  | 1,423<br>10 | 1,658<br>9  | 1,265<br>7  | 1,547<br>8   | 1,409<br>9  | 1,455<br>7  | 1,617<br>7  | 2,042<br>8  | 19,555<br>8   |
|         |         |            | KW ><br>\$279.92     | \$251.53    | \$190.88    | \$196.34    | \$220.85    | \$233.59    | \$183.76    | \$215.55     | \$207.41    | \$190.64    | \$205.21    | \$252.99    | \$2,628.67    |
|         |         |            | Elec Revenue >       |             |             |             |             |             |             |              |             |             |             |             |               |
| 1772493 | 360127  | DA03936632 | KWH ><br>7,520<br>22 | 6,680<br>21 | 7,160<br>23 | 6,560<br>20 | 6,840<br>22 | 7,720<br>24 | 8,800<br>30 | 8,440<br>25  | 8,280<br>31 | 6,560<br>24 | 6,800<br>19 | 7,080<br>19 | 88,440<br>23  |
|         |         |            | KW ><br>\$829.12     | \$747.84    | \$794.11    | \$723.99    | \$771.24    | \$847.57    | \$996.23    | \$912.33     | \$964.80    | \$761.65    | \$732.68    | \$754.54    | \$9,836.10    |
|         |         |            | Elec Revenue >       |             |             |             |             |             |             |              |             |             |             |             |               |
|         |         |            | Total KWH            | 679,701     | 689,833     | 617,932     | 685,564     | 752,028     | 792,351     | 891,283      | 843,800     | 718,079     | 695,176     | 636,818     | 8,686,423     |
|         |         |            | Combined Average KW  | 1,259       | 1,274       | 1,244       | 1,263       | 1,496       | 1,599       | 1,613        | 1,551       | 1,431       | 1,324       | 1,240       | 1,386         |
|         |         |            | USBC Charge          | \$611.74    | \$620.85    | \$556.13    | \$617.00    | \$676.83    | \$713.12    | \$802.16     | \$759.41    | \$646.29    | \$625.66    | \$573.14    | \$7,817.82    |
|         |         |            | Total Elec Revenue   | \$66,742.92 | \$68,579.97 | \$60,525.12 | \$65,872.44 | \$73,820.84 | \$77,437.24 | \$85,203.74  | \$80,943.47 | \$70,141.10 | \$67,572.47 | \$62,048.02 | \$846,071.08  |



CRH US Trident Plant  
4070 Trident Road  
Three Forks, MT 59752

T. 406-285-3241  
F. 406-285-3100

02/19/2018

Mark Schoenfeld  
Department of Revenue  
PO Box 5805  
Helena MT 59604-5805  
(406)444-0756

RE: USB Summary of Activity 2017

Dear Mr. Schoenfeld,

Please find attached a summary of the USB credits and related activity for the Oldcastle Materials Cement Holdings (dba CRH US) cement plant at Trident outside of Three Forks, MT (formerly Holcim).

During 2017, no new projects were submitted. Credits of \$38,756.97 were earned during 2017 for projects submitted in previous years. Please see attached report prepared by NorthWestern Energy for details of credits received during 2017.

Please let me know if you require further information or have questions.

Sincerely,

A handwritten signature in black ink, appearing to read 'Riley Siddoway', written in a cursive style.

Riley Siddoway  
Controller  
CRH US Trident Plant

Cc: Rick Edwards, NWE



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## OLDCASTLE MATERIALS CEMENT HOLDINGS

### Account Summary

|                                 |              |                          |              |
|---------------------------------|--------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00       | YTD Elec Revenue:        | \$283,839.13 |
| Reservations Made YTD:          | \$0.00       |                          |              |
| 2016 Carryover Payment Request: | \$443,738.11 | Total Payment Requests:  | \$443,738.11 |
| Payment Requests Made YTD:      | \$0.00       | Current Request Balance: | \$408,251.44 |
| 2016 Carryover USBC Credit:     | \$3,138.87   | Total USBC Credit:       | \$38,756.97  |
| USBC Credit YTD:                | \$35,618.10  | Payments Issued YTD:     | \$35,486.67  |
| Average Monthly Credit Earned:  | \$2,968.18   | USBC Credit Balance:     | \$3,270.30   |
|                                 |              | Payment Pending:         | \$3,270.30   |

### Account Summary

| Payment Requests Made |            | Payments Issued |      |
|-----------------------|------------|-----------------|------|
| Submitted By          | Date       | Amount          | Date |
|                       | 04/10/2017 | \$11,211.25     |      |
|                       | 07/07/2017 | \$7,498.02      |      |
|                       | 10/09/2017 | \$10,394.56     |      |
|                       | 12/06/2017 | \$6,382.84      |      |

### Account Detail

| Account | Premise | Meter      | Jan                        | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|------------|----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 3237469 | 1039    | DA06183555 | 3,289,228                  | 2,932,837   | 2,747,245   | 3,417,269   | 2,418,017   | 2,495,844   | 3,753,686   | 3,585,877   | 4,209,946   | 3,722,337   | 3,369,708   | 3,633,664   | 39,575,658   |
|         |         |            | 5,998                      | 5,954       | 5,882       | 5,861       | 6,012       | 5,904       | 6,638       | 6,545       | 6,566       | 6,523       | 6,458       | 6,437       | 6,232        |
|         |         |            | \$22,774.26                | \$21,840.98 | \$20,966.75 | \$23,664.14 | \$19,836.79 | \$19,977.72 | \$26,304.61 | \$25,282.12 | \$27,828.28 | \$25,795.43 | \$24,269.96 | \$25,298.09 | \$283,839.13 |
|         |         |            | <b>Total KWH</b>           | 3,289,228   | 2,932,837   | 2,747,245   | 3,417,269   | 2,495,844   | 3,753,686   | 3,585,877   | 4,209,946   | 3,722,337   | 3,369,708   | 3,633,664   | 39,575,658   |
|         |         |            | <b>Combined Average KW</b> | 5,998       | 5,954       | 5,882       | 5,861       | 6,012       | 6,638       | 6,545       | 6,566       | 6,523       | 6,458       | 6,437       | 6,232        |
|         |         |            | <b>USBC Charge</b>         | \$2,960.31  | \$2,639.55  | \$2,472.52  | \$3,075.54  | \$2,176.22  | \$3,378.32  | \$3,227.29  | \$3,788.95  | \$3,350.10  | \$3,032.74  | \$3,270.30  | \$35,618.10  |
|         |         |            | <b>Total Elec Revenue</b>  | \$22,774.26 | \$21,840.98 | \$20,966.75 | \$23,664.14 | \$19,836.79 | \$26,304.61 | \$25,282.12 | \$27,828.28 | \$25,795.43 | \$24,269.96 | \$25,298.09 | \$283,839.13 |

Decker 8792201  
 Billing Period 0.0009

**Decker Coal Company Power Savings Project: High Efficiency, Low Consumption LED Replacements**

|                            | Usage      | USB Obligation | Date   | Work Order           | Equipment | Materials               | Labor                     | watts old fixture | watts new fixture |
|----------------------------|------------|----------------|--------|----------------------|-----------|-------------------------|---------------------------|-------------------|-------------------|
|                            | Jan-17     | 3,500,000      | 3150   | 4/7/2017             | 374465    | Change house LED        | \$ 3,424.72 \$ 2,298.00   | 1020              | 510               |
|                            | Feb-17     | 3,010,000      | 2709   | 4/10/2017            | 374482    | Bay 14 relamp           | \$ 8,702.70 \$ 880.70     | 16000             | 680               |
|                            | Mar-17     | 3,605,000      | 3244.5 | 2/24/2017            | 373796    | East Plant Loadout LED  | \$ 3,389.71 \$ 877.24     | 748               | 374               |
|                            | Apr-17     | 2,940,000      | 2646   | 4/17/2017            | 374572    | Warehouse               | \$ 1,670.15 \$ 3,199.52   | 1360              | 680               |
|                            | May-17     | 2,695,000      | 2425.5 | 4/24/2017            | 8011.06   | Warehouse               | \$ 770.00 \$ 1,532.00     | 680               | 340               |
|                            | Jun-17     | 2,100,000      | 1890   | 5/17/2017            | 375134    | Warehouse               | \$ 770.00 \$ 1,532.00     | 680               | 340               |
|                            | Jul-17     | 2,800,000      | 2520   | 1/1/2017             | 372671    | Warehouse               | \$ 770.00 \$ 1,532.00     | 680               | 340               |
|                            | Aug-17     | 2,940,000      | 2646   | 6/29/2017            | 375771    | Warehouse               | \$ 770.00 \$ 1,532.00     | 680               | 340               |
|                            | Sep-17     | 2,380,000      | 2142   | 7/14/2017            | 376039    | Warehouse               | \$ 770.00 \$ 1,532.00     | 680               | 340               |
|                            | Oct-17     | 3,325,000      | 2992.5 | 7/31/2017            | 376227    | Warehouse               | \$ 770.00 \$ 1,532.00     | 680               | 340               |
|                            | Nov-17     | 3,430,000      | 3087   | 3/28/2017            | 374291    | Komatsu hot start       | \$ 1,910.77 \$ 600.00     | 1600              | 312               |
|                            | Dec-17     | 4,025,000      | 3622.5 | 3/28/2017            | 374293    | Komatsu hot start       | \$ 1,910.77 \$ 600.00     | 1600              | 312               |
|                            |            |                |        | 12/16/2017           | 378806    | Rebuild Bay             | \$ 3,442.74 \$ 1,567.51   | 10000             | 2400              |
| total                      | 36,750,000 | \$ 33,075.00   |        | 12/16/2017           | 378808    | Rebuild Bay             | \$ 3,518.09 \$ 1,713.21   | 10000             | 2400              |
|                            |            |                |        | 1/9/2017             | 378722    | East plant sec building | \$ 8,610.00 \$ 653.14     | 2625              | 930               |
| Less USB Credit            |            | \$ 74,111.77   |        | 1/9/2017             | 378721    | East plant sec building | \$ 8,610.00 \$ 1,800.00   | 2625              | 930               |
|                            |            |                |        | 4/17/2017            | 374572    | Conex buildings         | \$ 308.00 \$ 612.80       | 272               | 136               |
| Amount (due) carry forward |            | \$ 41,036.77   |        |                      |           |                         |                           |                   |                   |
|                            |            |                |        |                      |           |                         | \$ 50,117.65 \$ 23,994.12 | 51930             | 11704             |
|                            |            |                |        | <b>Project Total</b> |           |                         | <b>\$74,111.77</b>        |                   |                   |



Rec'd MT DOR

FEB 23 2018

UNIVERSAL SYSTEM BENEFITS (USB)
LARGE CUSTOMER CREDIT FORM

Complete and mail to: Montana Dakota Utilities Co.
ATT: Tamie Aberle
Regulatory Affairs Department
400 North 4th Street
Bismarck, ND 58501
Email: tamie.aberle@mdu.com
FAX: (701) 222-7606

DATE: 2/8/18
NAME OF BUSINESS: DENBURY ONSHORE, LLC
CITY/TOWN LOCATION: BAKER
CONTACT PERSON: ANNA SCHULTZ
MAILING ADDRESS: PO BOX 1533
CITY, STATE AND ZIP: BAKER, MT 59313
PHONE NUMBER: (406)778-3361
FAX NUMBER: (406)778-3827
E-MAIL ADDRESS: anna.schultz@denbury.com

AMOUNT OF CREDIT REQUESTED: \$141,658.58

The amount of credit available at any given time will be limited by the amount of USBP funds paid by the Large Customer - less any previous credits processed during the calendar year. If request is greater than the Large Customer USBP funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated.

DESCRIPTION OF PROJECT(S) (if more space is needed please attach):
Install lines with heat tape at wells. Insulate treaters to prevent heat loss. Downsize sheaves
On pumping units which result in fewer startups and shutdowns.

ESTIMATED kWh and KW SAVINGS: 204925 kWh

Large customer, by signature below attests that Montana-Dakota Utilities Co. and the Large Customer submitting this request, have not mutually agreed that Montana-Dakota Utilities Co. will approve the credit and Montana-Dakota Utilities Co. does not approve the qualification of the requested USBP credit.

CUSTOMER

Signature: [Handwritten Signature]



Great Lakes Office  
Superior, WI 54880  
USA

February 27, 2018

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

RE: Self-Directed USBC Progress Report for 2017 – Express Pipeline

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 USBC Report that we receive from NorthWestern Energy showing our USB activities during 2017. In 2017 we earned \$45,252.45 in 2017 USB credits.

In 2017, we received \$45,607.98 in USB credit payments. These payments were composed of \$3,773.15 in 2016 USB credits that were carried over into 2017 and \$ 41,897.83 in 2017 USB credits.

These USB payments were self-directed towards the reimbursement of an energy efficiency project that had been submitted to NorthWestern Energy in 2015.

At year end we had \$3,354.62 in 2017 USB credits that were brought forward into 2018 since we have a current request balance of \$223,800.12 from that project previously submitted.

Sincerely,

Nick Kaneski  
Energy Management Specialist  
Enbridge Energy  
DBA Express Pipeline

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email: rick.edwards@northwestern.com



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## EXPRESS PIPELINE LLC

### Account Summary

|                                 |              |                          |                |
|---------------------------------|--------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00       | YTD Elec Revenue:        | \$3,967,745.41 |
| Reservations Made YTD:          | \$0.00       |                          |                |
| 2016 Carryover Payment Request: | \$269,471.10 | Total Payment Requests:  | \$269,471.10   |
| Payment Requests Made YTD:      | \$0.00       | Current Request Balance: | \$223,800.12   |
| 2016 Carryover USBC Credit:     | \$3,773.15   | Total USBC Credit:       | \$49,025.60    |
| USBC Credit YTD:                | \$45,252.45  | Payments Issued YTD:     | \$45,670.98    |
| Average Monthly Credit Earned:  | \$3,771.04   | USBC Credit Balance:     | \$3,354.62     |
|                                 |              | Payment Pending:         | \$3,354.62     |

### Payment Requests Made

Submitted By      Date      Amount

| Date       | Amount      |
|------------|-------------|
| 04/10/2017 | \$15,661.12 |
| 07/07/2017 | \$12,550.05 |
| 10/09/2017 | \$10,986.92 |
| 12/06/2017 | \$6,472.89  |

### Account Detail

| Account | Premise | Meter      | Jan                 | Feb                | Mar                | Apr                | May                | Jun                | Jul                | Aug                | Sep                | Oct                | Nov                | Dec                | YTD Total           |                |
|---------|---------|------------|---------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|----------------|
| 100731  | 1692    | DA18683614 | KWH ><br>KW >       | 30,205<br>74       | 27,695<br>67       | 21,669<br>67       | 19,481<br>60       | 15,740<br>47       | 13,274<br>40       | 9,823<br>40        | 10,532<br>47       | 10,618<br>34       | 11,370<br>470      | 17,578<br>67       | 198,754<br>87       |                |
|         |         |            | Elec Revenue >      | \$3,564.86         | \$3,134.60         | \$2,648.04         | \$2,475.31         | \$2,201.80         | \$2,006.63         | \$1,769.92         | \$1,841.31         | \$1,801.56         | \$3,388.22         | \$2,381.20         | \$29,026.53         |                |
| 100733  | 1693    | DA06212507 | KWH ><br>KW >       | 2,118.633<br>4,959 | 2,058.875<br>4,650 | 2,104.842<br>5,248 | 2,326.068<br>5,161 | 2,293.827<br>4,865 | 2,079.919<br>5,275 | 1,653.219<br>4,092 | 1,730.595<br>4,502 | 2,411.818<br>5,100 | 1,885.630<br>4,644 | 1,596.522<br>4,099 | 24,169,014<br>4,777 |                |
|         |         |            | Elec Revenue >      | 163,511.60         | 159,721.61         | 158,227.25         | 172,051.55         | 171,532.55         | 172,782.78         | 124,036.09         | 130,597.02         | 177,545.75         | 141,609.63         | 121,305.57         | 143,798.37          | \$1,821,719.77 |
| 933549  | 358344  | DA17677691 | KWH ><br>KW >       | 103,244<br>558     | 96,570<br>579      | 94,488<br>588      | 87,646<br>539      | 94,672<br>556      | 87,115<br>562      | 82,681<br>530      | 71,745<br>498      | 73,472<br>562      | 67,441<br>366      | 97,097<br>590      | 1,050,444<br>529    |                |
|         |         |            | Elec Revenue >      | \$10,405.09        | \$10,202.59        | \$9,812.99         | \$9,063.51         | \$9,731.03         | \$9,219.25         | \$8,679.09         | \$7,773.01         | \$8,257.44         | \$6,740.87         | \$10,036.27        | \$8,866.34          | \$108,787.48   |
| 2140805 | 439720  | DA19487978 | KWH ><br>KW >       | 0<br>0             | 0<br>0             | 0<br>0             | 0<br>0             | 0<br>0             | 1,952<br>6         | 1,798<br>6         | 1,979<br>7         | 2,497<br>7         | 2,322<br>7         | 2,402<br>7         | 14,915<br>7         |                |
|         |         |            | Elec Revenue >      | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$291.92           | \$212.69           | \$239.66           | \$280.52           | \$267.44           | \$273.41           | \$1,804.35          |                |
| 3322054 | 612606  | DA19066011 | KWH ><br>KW >       | 2,093,249<br>4,536 | 2,096,741<br>5,040 | 2,362,640<br>5,702 | 2,563,916<br>5,342 | 2,304,396<br>4,982 | 2,056,504<br>5,170 | 1,751,317<br>3,658 | 1,861,970<br>4,738 | 2,534,144<br>5,789 | 1,932,599<br>4,810 | 1,585,840<br>3,326 | 24,847,347<br>4,816 |                |
|         |         |            | Elec Revenue >      | 170,170.90         | 175,069.23         | 189,731.61         | 200,503.53         | 183,931.06         | 167,456.73         | 137,038.70         | 150,608.01         | 201,177.77         | 156,021.45         | 125,151.30         | 140,519.75          | \$1,997,380.04 |
|         |         |            | Total KWH           | 4,345,331          | 4,279,881          | 4,583,639          | 4,997,111          | 4,708,635          | 4,238,764          | 3,498,838          | 3,676,821          | 5,032,017          | 3,898,936          | 3,293,151          | 50,280,474          |                |
|         |         |            | Combined Average KW | 10,127             | 10,336             | 11,605             | 11,102             | 10,450             | 11,053             | 8,326              | 9,792              | 11,492             | 9,861              | 8,492              | 10,215              |                |
|         |         |            | USBC Charge         | \$3,910.79         | \$3,851.90         | \$4,125.28         | \$4,497.39         | \$4,237.77         | \$3,814.89         | \$3,148.96         | \$3,309.14         | \$4,528.82         | \$3,509.05         | \$2,963.84         | \$3,354.62          |                |
|         |         |            | Total Elec Revenue  | 347,652.45         | 348,128.03         | 360,419.89         | 384,093.90         | 367,396.44         | 336,757.31         | 271,736.49         | 291,059.01         | 389,021.23         | 306,465.55         | 260,148.80         | 295,839.07          | \$3,958,718.17 |



Great Lakes Office  
Superior, WI 54880  
USA

February 27, 2018

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

RE: Self-Directed USBC Progress Report for 2017 Cooperatives – Express Pipeline  
(Hill County Electric, Fergus Electric and Big Horn Rural Electric)

Dear Mr. Schoenfeld:

Please find our 2017 USBC Progress Report showing our USB activities for 2017. In 2017 we paid \$127,439.36 in USB payments to Montana Electrical Cooperatives. In September of 2017, Express Pipeline elected to self-direct its USB activities. The 2017 balance of the self-directed activities is \$21,981.16.

In 2017, Express Pipeline spent \$145,883.33 in energy efficiency projects that resulted in a reduction of consumed electrical energy (invoices and internal labor costs attached). The energy saving projects completed in 2017 were as follows:

| <u>Project Description</u>                                       | <u>Cost</u>  |
|--|--------------|
| -Pump and Motor Efficiency Upgrades:                             | \$138,213.33 |
| -Internal Process Improvement – Motor Peak Demand Limits Set     | \$6,608.00   |
| -Internal Process Improvement - Floating Tank Restriction Lifted | \$1,062.00   |

At year end we self-directed \$21,981.16 and implemented \$145,883.33 in energy efficiency projects. As a result, Express Pipeline has a balance of \$123,902.17 in USB credits to carry forward into 2018.

Sincerely,

Nick Kaneski  
Energy Management Specialist  
Enbridge Energy  
DBA Express Pipeline

Internal Labor Costs - Express Pipeline 2017 Energy  
Efficiency Projects (\$118/hr)

-Pump and Motor Efficiency Upgrades:

(2 employees x 56 hours each x \$118/hour) = \$13,216.00

-Internal Process Improvement – Motor Peak Demand Limits Set

(4 employees x 14 hours each x \$118/hour) = \$6,608.00

-Internal Process Improvement - Floating Tank Restriction Lifted

(3 employees x 3 hours each x \$118/hour) = \$1,062.00

# INVOICE

CAD, INC.  
**MONTANA SEALS AND PACKING**  
6837-A COMMERCIAL AVE.  
BILLINGS, MONTANA 59101  
(406) 245-3757 FAX (406) 245-2948

EP000008

INVOICE DATE 9/25/2017  
INVOICE NO. 1051268  
S0037373  
CUSTOMER NO. AEC-P  
SALES PERSON Chuck Duke  
PAGE 1

## SOLD TO:

EXPRESS PIPELINE, LLC  
247 EAST 2ND STREET  
POWELL, WY 82435

## SHIPPED TO:

EXPRESS PIPELINE, LLC  
247 EAST 2ND STREET  
POWELL, WY 82435

PO

| F.O.B. POINT                                   | CUSTOMER ORDER NO. | SHIP VIA  | TERMS        | OUR ORDER NO. |            |                |
|--|--------------------|-----------|--------------|---------------|------------|----------------|
| SHIPPING POINT                                 | 3100040175         | WILL CALL | NET 30 DAYS  | 00027353      |            |                |
| ITEM NO/SERIAL NO.                             | UNIT               | QUANTITY  |              |               | UNIT PRICE | EXTENDED PRICE |
|  |                    | ORDERED   | BACK ORDERED | SHIPPED       |            |                |
| 00001 B0034750-REPR<br>Flowserve UOW-4250-5N4X | EACH               | 1.000     | 0.00         | 1.000         | 7,148.00   | 7,148.00       |
| 00002 B0034750-REPR<br>Flowserve UOW-4250-5N4X | EACH               | 1.000     | 0.00         | 1.000         | 7,148.00   | 7,148.00       |

Notes:

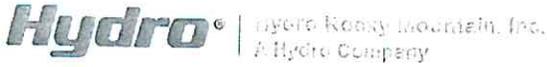
\*\*\*\* TAG: EAGLE BUTTESMP-1 \*\*\*\*

\*\*CUSTOMER UNDERSTANDS THAT UNBILLED TAX LIABILITY IS THEIR RESPONSIBILITY \*\*

Sales Total 14,296.00  
Shipping & Handling 0.00  
Misc. Charges 0.00  
Tax Total 0.00

**TOTAL**

**14,296.00**



**INVOICE 20024**

**HYDRO ROCKY MOUNTAIN**  
**115 W. 56TH AVE**  
**DENVER CO 80216**  
**United States**

**Phone: 303-293-8775**  
**Fax: 303-293-8843**

|                                |                     |                                |
|--------------------------------|---------------------|--------------------------------|
| SALES ORDER <b>16019</b>       |                     | PAGE <b>1 of 1</b>             |
| CUSTOMER PO <b>3100039320</b>  |                     | TAXCODE                        |
| TERMS <b>NET 30</b>            | PACK SLIP <b>71</b> | INVOICE DATE <b>09/29/2017</b> |
| SALES REP <b>Angelo Miller</b> |                     | SHIP DATE <b>09/29/2017</b>    |
| SHIP VIA <b>BEST WAY</b>       |                     | FOB <b>EXW</b>                 |

|                |  |                |   |
|----------------|--|----------------|---|
| <b>SOLD TO</b> | 700150<br>ENBRIDGE - EXPRESS PIPELINE LLC<br>P.O. BOX 2549<br>DETROIT, MI 48202-2549<br>DETROIT MI 48202-2549<br>United States | <b>SHIP TO</b> | 700150<br>ENBRIDGE - EAGLE BUTTES<br>928 EXPRESS ROAD<br>LOMA MT 59460<br>United States |
|----------------|--|----------------|---|

| Line | Part Number/Description                       | QTY Ordered | QTY Shipped | QTY B O | Unit Price | Ext Price |
|------|---|-------------|-------------|---------|------------|-----------|
| 1    | 2322199<br>DCI - FLOWSERVE 10X14X21 DVS 1 Stg | 1.00        | 1.00        | 0       | 65,127.00  | 65,127.00 |

*Repair of your Flowserve, Model: DVS, 1 Stage Pump  
 Serial Number: 96TC0061 "KIRBY CREEK"*

**Remit To:**  
 Routing # 102001017  
 Acct # 536997369

|               |                  |
|---------------|------------------|
| Sub Total     | <b>65,127.00</b> |
| Tax           | <b>0.00</b>      |
| Deposit       | <b>0.00</b>      |
| Misc charges  | <b>0.00</b>      |
| <b>Total:</b> | <b>65,127.00</b> |

**ORIGINAL**



**ORIGINAL INVOICE**

DUNS # 80-057-4167

PAGE NO: 1

|                                |            |
|--------------------------------|------------|
| CUSTOMER PURCHASE ORDER NUMBER | 3500017369 |
| OUR INVOICE NUMBER             | 8109969    |
| INVOICE DATE                   | 08/31/17   |

REMIT PAYMENT TO:  
 Integrated Power Services, LLC  
 P.O. Box 601492  
 Charlotte, NC 28260-1492

SOLD TO  
 SPECTRA ENERGY CORP  
 EMAIL INVOICES  
 APUSINVOICES@SPECTRA  
 ENERGY.COM

SHIP TO 000003  
 SPECTRA ENERGY  
 MOTOR STORAGE @IPS  
 635 E 52ND AVENUE  
 DENVER, CO 80216

CUSTOMER NO. 467825  
 TERRITORY: 729JS

TERMS: NET 45 DAYS

F.O.B. POINT OF ORIGIN

| FREIGHT   |          |     |      | SALES ORDER   | DATE SHIPPED | SHIPPED VIA  | #PKGS | TTL WGT          | DELIVERY REF#         |
|---|----------|-----|------|---|--------------|--------------|-------|------------------|-----------------------|
| P.P.  | COL.     | ALL | 3RD  | 799028  | 08/30/17     | STORAGE      |       |                  | 0009812               |
| ITEM  | QUANTITY |     |      | PRODUCT NO. / DESCRIPTION   |              |              |       | UNIT PRICE       | NET AMOUNT            |
|   | ORD      | B/O | SHIP |   |              |              |       |                  |                       |
|   |          |     |      | Nameplate Data:<br>HP/KW/T:4000HP, VOLTS:4000, SYNC<br>RPM:3600, FRAME:809,<br>WORKPLAN#:IPS09.PREPLAN,<br>ENCLOSURE:WP-II, PHASE:3,<br>HERTZ:60, MFG:SIEMENS, FULL<br>RPM:3585, AMPS:491, CODE:F,<br>AMBIENT:40, DUTY:CONT,<br>INSULATION:F, NEMA TYPE:FODS,<br>MOUNTING:F-1,<br>ID/SERIAL#:E08452-04-1, S.F.:1.15<br><br>RECONDITION MOTOR AS PER QUOTE.<br>In-House Labor NoTax<br>In-House Material<br><br><i>Approved for payment 10-25-17</i><br><i>J. Mark B. L.</i> |              |              |       |                  | 31,249.00<br>5,593.43 |
| NOTES:  |          |     |      |   |              | SUBTOTAL     |       | 36,842.43        |                       |
| INTEGRATED POWER SERVICES, LLC<br>DENVER SERVICE CENTER<br>1020 S. LIPAN STREET<br>DENVER, CO 80223 |          |     |      |   |              | TAX TOTAL    |       | 427.90           |                       |
|   |          |     |      |   |              | DISCOUNT     |       |                  |                       |
|   |          |     |      |   |              | SHIPPING     |       | 95.00            |                       |
|   |          |     |      |   |              | <b>TOTAL</b> |       | <b>37,365.33</b> |                       |

**E-MAILED**  
8-31-17

WHERE STATE OR LOCAL TAX DOES NOT APPLY. PLEASE DEDUCT "sales tax" AND SEND EXEMPTION CERTIFICATION WITH REMITTANCE we hereby certify that these codes were produced in compliance with all applicable requirements -- SECTIONS 67 AND 12 of the FAIR LABOR STANDARDS ACT, as amended, and of regulations and orders of the UNITED STATES DEPARTMENT OF LABOR, issued under Section 14, thereof.  
 This transaction is made subject to the standard condition of sale set forth on the reverse side hereof.

INQUIRIES CALL: 1-303-935-4615

CUSTOMER SERVICE  
LOCAL SALES OFFICE

UNLESS OTHERWISE STATED  
INVOICE AMOUNTS ARE  
PAYABLE IN US FUNDS



JM Services Crane & Rigging, Co.  
 5610 Interstate Ave.  
 Billings MT 59101

# Invoice

| Date      | Invoice # |
|-----------|-----------|
| 6/30/2017 | 3841      |

**Bill To**

Express Pipeline LLC  
 247 E 2nd Street  
 Powell, WY 82435

**Job Description**

Buffalo & Geraldine, MT

EP000008

| P.O. No.   | Terms            | Due Date  | Account # | Project  |
|--|------------------|-----------|-----------|----------|
| 51015  | Net 30           | 7/30/2017 |           |          |
| Item   | Description      | Qty       | Rate      | Amount   |
| CR-4   | Linkbelt 40 Ton  | 8         | 165.00    | 1,320.00 |
| Mob In   | Mobilization In  | 1         | 1,800.00  | 1,800.00 |
| Mob Out  | Mobilization Out | 1         | 1,800.00  | 1,800.00 |
| GL: 8630120<br>Project: 5617063<br>WBS: OH. 000087.008 |                  |           |           |          |

|                  |            |
|------------------|------------|
| Total            | \$4,920.00 |
| Payments/Credits | \$0.00     |
| Balance Due      | \$4,920.00 |

|                |
|----------------|
| <b>Phone #</b> |
| 406-839-5035   |



Crane and Rigging

Work Order

JMS Crane and Rigging  
5610 Interstate Ave.  
Billings, MT 59101  
Office: 406.839.5035  
Fax: 406.294.5269

|                           |   |
|---------------------------|---|
| PO#                       | Work Order Date: 6/27/17                |
| Bill To: Express Pipeline | Job Location: Buffalo + Geraldine, MT   |
| Address:                  | Job Description:                        |
| Phone:                    | trans load motor + valve<br>and replace |
| E-mail:                   |   |
| Fax:                      |   |

| Date | Unit # | Equipment  | Operator | Price              | Hours  | Total                 |
|------|--------|------------|----------|--------------------|--------|-----------------------|
| 6/27 | CR-4   | HTC 8640   | Nick     | 165. <sup>00</sup> | 8      | 1320 <sup>00</sup>    |
|      |        | mob in/out |          | \$8 per mi         | 450 mi | 3,600 <sup>00</sup>   |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    |        |                       |
|      |        |            |          |                    | Total  | \$4,920 <sup>00</sup> |

JMS Representative Signature:

Client Signature:



JM Services Crane & Rigging, Co.

5610 Interstate Ave.

Billings MT 59101

# Invoice

| Date      | Invoice # |
|-----------|-----------|
| 8/31/2017 | 4036      |

**Bill To**

Express Pipeline LLC  
 247 E 2nd Street  
 Powell, WY 82435

**Job Description**

Buffalo, MT

| P.O. No. | Terms                           | Due Date  | Account # | Project  |
|----------|---------------------------------|-----------|-----------|----------|
| 51018    | Net 30                          | 9/30/2017 |           |          |
| Item     | Description                     | Qty       | Rate      | Amount   |
| CR-4     | Linkbelt 40 Ton - Offload Motor | 8         | 165.00    | 1,320.00 |
| Mob In   | Mobilization In                 | 123       | 8.00      | 984.00   |
| Mob Out  | Mobilization Out                | 123       | 8.00      | 984.00   |

|                  |            |
|------------------|------------|
| Total            | \$3,288.00 |
| Payments/Credits | \$0.00     |
| Balance Due      | \$3,288.00 |

|                |
|----------------|
| <b>Phone #</b> |
| 406-839-5035   |



Crane and Rigging

Work Order

JMS Crane and Rigging
5610 Interstate Ave.
Billings, MT 59101
Office: 406.839.5035
Fax: 406.294.5269

PO# 51018 Work Order Date: 8-31-17
Bill To: Express Pipeline Job Location: Buffalo, mt
Address: Job Description: OFFLOAD WATER
Phone:
E-mail:
Fax:

Table with 7 columns: Date, Unit #, Equipment, Operator, Price, Hours, Total. Contains handwritten entries for dates 8-31-17 and 8/31, equipment CR4 and CR-4, and a total of \$3,288.00.

JMS Representative Signature: [Signature] Client Signature: [Signature]

**ExxonMobil Fuels & Lubricants Company**  
700 ExxonMobil Road  
P.O. Box 1163  
Billings, Montana 59101  
406 657 5380 Tel  
406 657 5374 Fax

**Chris B. Jessup**  
Billings Refinery Manager

**Rec'd MT DOR**  
**FEB 02 2018**

**ExxonMobil**

January 29, 2018

Mr. Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805

RE: Self – Directed USBC Progress Report for 2017 – ExxonMobil Refinery

Dear Mr. Schoenfeld,

Please find an attached copy of our 2017 Self – Directed USBC Report that we receive from NorthWestern Energy that shows our USB activities during 2017. This is to notify you that these USB payments we received in 2017 were for projects we submitted in previous years and were a combination of 2016 and 2017 USB credits. We did not submit any new projects in 2017.

We also have a request balance carry over for all remaining 2017 USB credits at year-end into 2018.

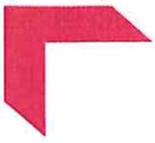
Regards,



Chris B. Jessup

CC: Mr. Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701





January 19, 2018

Brock Pearson  
ExxonMobil  
P.O. Box 1163  
Billings, MT 59103-1163

RE: "Self-Directed USBC Progress Report for 2017" for Department of Revenue Annual Report

Dear Brock:

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2017, and I am contacting you regarding your 2017 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end "Self-Directed USBC Progress Report for 2017" showing a summary of your USB activity during 2017 including payment requests you submitted (Form B's), payments issued and any reservations (Form A's) you may have submitted to carry over all or a portion of your 2017 USB credits into 2018. If your final progress report shows a "Payment Pending", it reflects your December 2017 USB credits that were carried over into 2018, and these credits will be distributed when we issue our first quarter USB checks in mid-April. Please review the numbers provided, and notify me immediately of any differences you identify.

Your "Self-Directed USBC Progress Report for 2017" will be helpful as you prepare your **required year-end USB report that you must file with the Montana Department of Revenue (DOR) by March 1, 2018**. The annual USB reporting requirements are highlighted in yellow in the attached copy of the Montana Code Annotated (MCA) and Montana Administrative Rule 4.29.103. Here are some tips to assist you in preparing your annual report for DOR.

- ✓ **A large customer claiming USB credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the Montana DOR and to the large customer's utility (NorthWestern Energy) by March 1<sup>st</sup> of the following year.**
- ✓ **In 2015, legislative changes to the MCA now impose penalties of not less than \$1,000 or more than \$5,000 if a large customer does not file an annual report on its USB credits with DOR by March 1.**
- ✓ **A report must be filed with the DOR even if a large customer is being reimbursed USB credits for a project submitted in previous years and the report should indicate if the USB credits were received for projects submitted in previous years.**
- ✓ **The annual report of a large customer must identify each qualifying project or expenditure for which it claimed a credit and the amount of the credit. So, if any new Form B's were submitted to the utility during 2017 to request credits, a copy of these forms should be submitted with your annual report to DOR. Large customers need to keep their own documentation on the project submitted as to the costs and energy savings claimed, etc. NorthWestern Energy does not qualify large customers' self-directed USB claims.**
- ✓ **The large customer's report must indicate the amount of USB funds earned and self-directed in 2017.**
- ✓ **We encourage large customers to make a copy of the "Self-Directed USBC Progress Report" and send it along with your other documentation to DOR.**
- ✓ **Also, as required by the MCA, please provide NorthWestern Energy with a copy of what you send to DOR, and send it to: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 or email: rick.edwards@northwestern.com.**

You may want to send your report via certified mail to DOR by **March 1, 2018** to the address below.

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805

Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

If you have any questions, please contact me at 406-655-2550.

Sincerely,

Deborah Singer  
Senior Key Account & Economic Development Specialist

RECEIVED  
FEB 15 2018 N  
MT DOR



**F. H. STOLTZE LAND & LUMBER CO.**

*Lumber Manufacturers*

Box 1429 COLUMBIA FALLS, MONTANA 59912

February 12, 2018

Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

We are filing this USBP report pursuant to MCA 69-8-414. The USBP data is on the spreadsheet accompanying this letter as supplied to us by Flathead Electric Coop. Please call if you have questions.

Sincerely,

A handwritten signature in black ink that reads "Jeff Clausen". The signature is fluid and cursive, with the first name being particularly prominent.

Jeff Clausen  
Plant Accountant  
F. H. Stoltze Land & Lumber Co

**Rec'd MT DOR**

**FEB 16 2018**

**Flathead Electric Cooperative, Inc.  
 Large Customer USB Information  
 January 1, 2017 - December 31, 2017**

|                               |   |  |  |  |  |   |
|-------------------------------|---|--|--|--|--|---|
| FEC Customer                  | 2017 kWh Purchases through Dec 31, 2017 | Conservation investments made through power purchases pursuant to 69-8-402(2)(b) | Low-income energy assistance investments made through power purchases pursuant to 69-8-402(2)(b) | Renewable energy investments made through power purchases pursuant to 69-8-402(2)(b) | Large customer conservation investments made pursuant to 69-8-101 et.seq | Power Supplier Reimbursements/Rebates for Energy Efficiency |
| FH Stotlize Land & Lumber Inc | 14,947,200                              | \$34,162   | \$1,357  | \$10,149   |  |   |



February 6, 2018

Attn: Mr. Mark Schoenfeld  
Department of Revenue  
P.O. Box 5805  
Helena MT 59604-5805  
[mschoenfeld@mt.gov](mailto:mschoenfeld@mt.gov)

RE: 2017 USBP Annual Report of qualified expenditures for General Mills Operations, LLC located in Great Falls Montana

In 2017, GMOL received credit in the amount of \$2,558.47 for the remaining balance on our FORM B submitted 10/25/2016 for upgrading office lighting from fluorescent bulbs to LED lights. GMOL retrofit, purchased and installed 460 LED bulbs.

The \$2,558.47 received in calendar 2017 consisted of \$1,409.81 carry over from 2016 and \$1,148.66 of 2017 funds. GMOL has requested the carryover of the earned 2017 fund balance of \$16,335.38 for use in 2018. We will continue to purchase energy efficient light fixtures in our office and manufacturing areas. We still have a large number in need of upgrade and will install as our budget and production schedules allow.

Attached is a copy of the Self-Directed USB Progress report for 2017.

Regards,

Lisa Blades  
Financial Operations Manager – Milling Platform  
General Mills Operations, LLC  
2500 9<sup>th</sup> Ave N  
Great Falls MT 59401  
406-455-9219



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

## GENERAL MILLS

### Account Summary

|                                 |             |                          |              |
|---------------------------------|-------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$391,698.73 |
| Reservations Made YTD:          | \$16,500.00 |                          |              |
| 2016 Carryover Payment Request: | \$2,558.47  | Total Payment Requests:  | \$2,558.47   |
| Payment Requests Made YTD:      | \$0.00      | Current Request Balance: | \$0.00       |
| 2016 Carryover USBC Credit:     | \$1,409.81  | Total USBC Credit:       | \$18,893.85  |
| USBC Credit YTD:                | \$17,484.04 | Payments Issued YTD:     | \$2,558.47   |
| Average Monthly Credit Earned:  | \$1,457.00  | USBC Credit Balance:     | \$16,335.38  |
|                                 |             | Payment Pending:         | \$0.00       |

### Payment Requests Made

| Submitted By | Date       | Amount     |
|--------------|------------|------------|
|              | 04/10/2017 | \$2,558.47 |

### Payments Issued

| Date       | Amount     |
|------------|------------|
| 04/10/2017 | \$2,558.47 |

### Account Detail

| Account | Premise | Meter      | Jan                            | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|------------|--------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100619  | 1623    | DA06183421 | KWH > 1,605,175                | 1,879,088   | 1,502,757   | 1,745,813   | 1,455,935   | 1,527,098   | 1,786,257   | 1,521,018   | 1,546,551   | 1,547,111   | 1,730,045   | 1,579,860   | 19,426,708   |
|         |         |            | KW > 3,136                     | 3,162       | 3,214       | 3,143       | 3,130       | 3,059       | 3,033       | 3,013       | 3,013       | 3,123       | 3,078       | 3,136       | 3,103        |
|         |         |            | Elec Revenue > \$31,205.99     | \$36,143.78 | \$31,921.51 | \$34,484.01 | \$30,998.48 | \$31,528.02 | \$34,478.80 | \$31,173.29 | \$31,473.92 | \$31,964.04 | \$33,920.10 | \$32,406.79 | \$391,698.73 |
|         |         |            | Total KWH 1,605,175            | 1,879,088   | 1,502,757   | 1,745,813   | 1,455,935   | 1,527,098   | 1,786,257   | 1,521,018   | 1,546,551   | 1,547,111   | 1,730,045   | 1,579,860   | 19,426,708   |
|         |         |            | Combined Average KW 3,136      | 3,162       | 3,214       | 3,143       | 3,130       | 3,059       | 3,033       | 3,013       | 3,013       | 3,123       | 3,078       | 3,136       | 3,103        |
|         |         |            | USBC Change \$1,444.66         | \$1,691.18  | \$1,352.48  | \$1,571.23  | \$1,310.34  | \$1,374.39  | \$1,607.63  | \$1,368.92  | \$1,391.90  | \$1,392.40  | \$1,557.04  | \$1,421.87  | \$17,484.04  |
|         |         |            | Total Elec Revenue \$31,205.99 | \$36,143.78 | \$31,921.51 | \$34,484.01 | \$30,998.48 | \$31,528.02 | \$34,478.80 | \$31,173.29 | \$31,473.92 | \$31,964.04 | \$33,920.10 | \$32,406.79 | \$391,698.73 |

Rec'd MT DOR

FEB 20 2018



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900 16<sup>th</sup> Street North, Great Falls, Montana 59401 406-727-7366 Fax: 406-761-3471

February 15, 2017

Montana Department of Revenue  
Mr. Mark Schoenfeld  
P.O. Box 5805  
Helena, MT 59604-5805

RE: Universal System Benefits Program (USBP) – 2017 Large Customer Credits

Dear Mark;

We have started a project to upgrade our metal halide lighting in the mill and cleaning house to LED lighting. In calendar year 2017 we spent a total of \$ 11,414.60 on our lighting upgrade project.

Attached is a copy of the USBC spread sheet we received from Northwestern Energy on funds that were issued.

Please call if you have any questions.

Sincerely,

A handwritten signature in black ink, appearing to read "T Devlin", written over a white background.

Travis Devlin  
Plant Manager  
Grain Craft  
Great Falls, MT

Rec'd MT DOR

FEB 21 2018

TD/lab  
Enclosures

CC: Rick Edwards  
Northwestern Energy



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

## GRAIN CRAFT

| Account Summary                 |             | Payment Requests Made    |                      |             |  |  |  |  |  |  |  |  |  | Payments Issued |  |            |            |        |
|---------------------------------|-------------|--------------------------|----------------------|-------------|--|--|--|--|--|--|--|--|--|-----------------|--|------------|------------|--------|
|                                 |             | Submitted By             | Date                 | Amount      |  |  |  |  |  |  |  |  |  |                 |  |            | Date       | Amount |
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$1,284,570.39       |             |  |  |  |  |  |  |  |  |  |                 |  | 04/10/2017 | \$3,548.54 |        |
| Reservations Made YTD:          | \$0.00      |                          |                      |             |  |  |  |  |  |  |  |  |  |                 |  | 07/07/2017 | \$2,895.39 |        |
| 2016 Carryover Payment Request: | \$18,529.99 | Total Payment Requests:  | \$18,529.99          |             |  |  |  |  |  |  |  |  |  |                 |  | 10/09/2017 | \$2,977.32 |        |
| Payment Requests Made YTD:      | \$0.00      | Current Request Balance: | \$7,115.39           |             |  |  |  |  |  |  |  |  |  |                 |  | 12/06/2017 | \$1,993.35 |        |
| 2016 Carryover USBC Credit:     |             | \$896.30                 | Total USBC Credit:   | \$12,349.69 |  |  |  |  |  |  |  |  |  |                 |  |            |            |        |
| USBC Credit YTD:                |             | \$11,453.39              | Payments Issued YTD: | \$11,414.60 |  |  |  |  |  |  |  |  |  |                 |  |            |            |        |
| Average Monthly Credit Earned:  |             | \$954.45                 | USBC Credit Balance: | \$935.09    |  |  |  |  |  |  |  |  |  |                 |  |            |            |        |
|                                 |             |                          | Payment Pending:     | \$935.09    |  |  |  |  |  |  |  |  |  |                 |  |            |            |        |

| Account             | Premise | Meter      | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total      |
|---------------------|---------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
| 100596              | 1600    | DA06183525 | 573,783     | 504,596     | 517,047     | 540,214     | 554,092     | 558,892     | 0           | 0           | 0           | 0           | 0           | 0           | 3,248,624      |
|                     |         | KWH >      | 1,171       | 1,109       | 1,181       | 1,136       | 1,135       | 1,102       | 0           | 0           | 0           | 0           | 0           | 0           | 1,139          |
|                     |         | KW >       | \$57,331.86 | \$51,621.30 | \$51,918.47 | \$53,284.64 | \$54,864.72 | \$54,636.64 | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$323,657.63   |
| 1255657             | 383712  | DA15063053 | 587,873     | 431,742     | 331,878     | 572,667     | 476,114     | 515,134     | 50,176      | 0           | 0           | 0           | 0           | 0           | 2,965,504      |
|                     |         | KWH >      | 1,263       | 1,221       | 1,205       | 1,219       | 1,225       | 1,181       | 1,158       | 0           | 0           | 0           | 0           | 0           | 1,210          |
|                     |         | KW >       | \$59,323.79 | \$47,065.83 | \$37,812.91 | \$56,599.23 | \$49,657.12 | \$52,065.11 | \$15,475.78 | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$317,999.77   |
| 3443810             | 1600    | DA06183525 | 0           | 0           | 0           | 0           | 0           | 0           | 603,755     | 626,620     | 0           | 0           | 0           | 0           | 1,230,375      |
|                     |         | KWH >      | 0           | 0           | 0           | 0           | 0           | 0           | 1,082       | 1,078       | 0           | 0           | 0           | 0           | 1,080          |
|                     |         | KW >       | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$57,540.96 | \$59,255.56 | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$116,796.52   |
| 3443810             | 1600    | DA19428664 | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 539,509     | 575,068     | 563,979     | 518,897     | 2,197,453      |
|                     |         | KWH >      | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 1,141       | 1,089       | 1,099       | 1,087       | 1,104          |
|                     |         | KW >       | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$53,175.22 | \$55,527.70 | \$54,938.75 | \$51,232.20 | \$214,873.87   |
| 3444118             | 383712  | DA15063053 | 0           | 0           | 0           | 0           | 0           | 0           | 409,547     | 0           | 0           | 0           | 0           | 0           | 409,547        |
|                     |         | KWH >      | 0           | 0           | 0           | 0           | 0           | 0           | 1,180       | 0           | 0           | 0           | 0           | 0           | 1,180          |
|                     |         | KW >       | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$41,135.91 | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$41,135.91    |
| 3444118             | 383712  | DA20154987 | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 492,030     | 586,487     | 492,318     | 583,466     | 520,092     | 2,674,393      |
|                     |         | KWH >      | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 1,237       | 1,224       | 1,224       | 1,226       | 1,241       | 986            |
|                     |         | KW >       | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$50,056.37 | \$57,759.04 | \$50,429.15 | \$57,745.83 | \$52,849.16 | \$266,839.55   |
| Total KWH           |         |            | 1,161,656   | 936,338     | 848,925     | 1,112,981   | 1,030,206   | 1,074,026   | 1,063,478   | 1,118,650   | 1,125,996   | 1,067,386   | 1,147,445   | 1,038,989   | 12,725,976     |
| Combined Average KW |         |            | 2,434       | 2,330       | 2,386       | 2,355       | 2,360       | 2,283       | 3,420       | 1,078       | 2,378       | 2,313       | 2,325       | 2,328       | 6,699          |
| USBC Charge         |         |            | \$1,045.50  | \$842.71    | \$764.03    | \$1,001.59  | \$927.18    | \$966.62    | \$957.13    | \$1,006.78  | \$1,013.40  | \$960.65    | \$1,032.70  | \$935.09    | \$11,453.39    |
| Total Elec Revenue  |         |            | 116,655.65  | \$98,687.13 | \$89,731.38 | 109,883.87  | 104,521.84  | 106,701.75  | 114,152.65  | 109,311.93  | 110,934.26  | 105,956.85  | 112,684.58  | 104,081.36  | \$1,283,303.25 |

**GRAYMONT WESTERN US INC.**

Indian Creek Plant  
PO Box 550  
Townsend, MT 59644

---

Telephone: (406) 266-5221  
Facsimile: (406) 266-3079  
www.graymont.com



**GRAYMONT**

**Rec'd MT DOR**

**FEB 27 2018**

February 23, 2018

Mark Schoenfeld  
Montana Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

Dear Mr. Schoenfeld;

We have been a Large USB customer for a number of years and have used these funds to complete energy saving projects at our Townsend, MT plant. Attached is our Form A, Form B, and USB Summary report. As you will note in the Summary report that we made a request for reimbursements totaling \$19,118.10 from our 2016 and 2017 USB funds. These improvements included replacing old lighting fixtures throughout the plant with new energy saving LED lighting. We have also requested our remaining 2017 funds to be carried forward to 2018 for projects and improvements that we will identify and complete in 2018. Please feel free to contact me if any questions.

Thank you,

Blake Bills  
Graymont Western US, Inc.



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

## GRAYMONT WESTERN US INC.

### Account Summary

|                                 |             |                          |                |
|---------------------------------|-------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$15,000.00 | YTD Elec Revenue:        | \$1,306,270.24 |
| Reservations Made YTD:          | \$10,000.00 |                          |                |
| 2016 Carryover Payment Request: | \$0.00      | Total Payment Requests:  | \$19,118.10    |
| Payment Requests Made YTD:      | \$19,118.10 | Current Request Balance: | \$0.00         |
| 2016 Carryover USBC Credit:     | \$14,744.10 | Total USBC Credit:       | \$29,041.97    |
| USBC Credit YTD:                | \$14,297.87 | Payments Issued YTD:     | \$19,118.10    |
| Average Monthly Credit Earned:  | \$1,191.49  | USBC Credit Balance:     | \$9,923.87     |
|                                 |             | Payment Pending:         | \$0.00         |

### Payment Requests Made

| Submitted By | Date       | Amount      |
|--------------|------------|-------------|
| Blake Bills  | 11/28/2017 | \$19,118.10 |

### Payments Issued

| Date       | Amount      |
|------------|-------------|
| 12/06/2017 | \$19,118.10 |

### Account Detail

| Account | Premise | Meter               | Jan        | Feb        | Mar         | Apr        | May         | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec         | YTD Total      |
|---------|---------|---------------------|------------|------------|-------------|------------|-------------|------------|------------|------------|------------|------------|------------|-------------|----------------|
| 100623  | 1627    | DA06183544          | 1,269,858  | 1,302,404  | 1,157,110   | 1,394,048  | 1,010,642   | 1,216,771  | 0          | 0          | 0          | 0          | 0          | 0           | 7,350,833      |
|         |         | KWH >               | 2,677      | 2,794      | 2,506       | 2,451      | 2,586       | 2,578      | 0          | 0          | 0          | 0          | 0          | 0           | 2,599          |
|         |         | Elec Revenue >      | 107,042.51 | 110,861.06 | \$95,022.12 | 111,055.86 | \$86,260.62 | 100,213.11 | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00      | \$610,455.28   |
| 100623  | 1627    | DA18618463          | 0          | 0          | 0           | 0          | 0           | 0          | 1,331,544  | 1,580,173  | 1,425,846  | 1,478,871  | 1,425,821  | 1,151,317   | 8,393,572      |
|         |         | KWH >               | 0          | 0          | 0           | 0          | 0           | 0          | 2,601      | 2,696      | 2,624      | 2,549      | 2,739      | 2,615       | 2,637          |
|         |         | Elec Revenue >      | \$0.00     | \$0.00     | \$0.00      | \$0.00     | \$0.00      | \$0.00     | 107,420.66 | 125,153.47 | 114,088.72 | 117,578.62 | 115,526.71 | \$95,406.82 | \$675,175.00   |
| 596774  | 255054  | DS82081027          | 16,120     | 17,160     | 9,520       | 11,000     | 8,800       | 8,920      | 8,400      | 11,240     | 10,920     | 13,080     | 13,360     | 13,600      | 142,120        |
|         |         | KWH >               | 65         | 66         | 60          | 67         | 87          | 53         | 82         | 84         | 88         | 91         | 98         | 98          | 78             |
|         |         | Elec Revenue >      | \$1,934.47 | \$2,045.70 | \$1,345.97  | \$1,537.68 | \$1,574.98  | \$1,239.50 | \$1,485.80 | \$1,717.29 | \$1,733.08 | \$1,935.00 | \$2,037.13 | \$2,053.36  | \$20,639.96    |
|         |         | Total KWH           | 1,285,978  | 1,319,564  | 1,166,630   | 1,405,048  | 1,019,442   | 1,225,691  | 1,339,944  | 1,591,413  | 1,436,766  | 1,491,951  | 1,439,181  | 1,164,917   | 15,886,525     |
|         |         | Combined Average KW | 2,742      | 2,860      | 2,566       | 2,518      | 2,673       | 2,631      | 2,683      | 2,780      | 2,712      | 2,640      | 2,837      | 2,713       | 5,314          |
|         |         | USBC Charge         | \$1,157.38 | \$1,187.60 | \$1,049.97  | \$1,264.54 | \$917.50    | \$1,103.12 | \$1,205.95 | \$1,432.28 | \$1,293.09 | \$1,342.75 | \$1,295.26 | \$1,048.43  | \$14,297.87    |
|         |         | Total Elec Revenue  | 108,976.98 | 112,906.76 | \$96,368.09 | 112,593.54 | \$87,835.60 | 101,452.61 | 108,906.46 | 126,870.76 | 115,821.80 | 119,513.62 | 117,563.84 | \$97,460.18 | \$1,306,270.24 |

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                     |
|----------------------|---------------------|
| DATE:                | 11/28/2017          |
| NAME OF BUSINESS:    | Graymont Western    |
| CITY/TOWN LOCATION:  | Townsend            |
| CONTACT PERSON:      | Blake Bills         |
| MAILING ADDRESS:     | PO Box 550          |
| CITY, STATE AND ZIP: | Townsend, MT 59644  |
| PHONE NUMBER:        | 406-521-6008        |
| FAX NUMBER:          | 406-266-3079        |
| E-MAIL ADDRESS       | bbills@graymont.com |

|                             |             |
|-----------------------------|-------------|
| AMOUNT OF CREDIT REQUESTED: | \$19,118.10 |
|-----------------------------|-------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

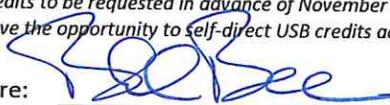
|  |
|--|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):<br>Lights at rail loading facility were upgraded with LED lighting. Additional areas of the plant's old lighting was changed out with new LED lighting. Costs for upgrades in 2017 totaled over \$19,000.00. |
|--|

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |                     |
|------------------------|---------------------|
| ESTIMATED kWh SAVINGS: | \$3,877.00 per year |
| ESTIMATED KW SAVINGS:  |                     |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:

Signature: 

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

## FORM A - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION

Complete and mail to: NorthWestern Energy  
Attn: Rick Edwards  
Customer Services Department  
11 E. Park Street  
Butte, MT 59701  
Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
FAX: (406) 497-4008

|                      |                     |
|----------------------|---------------------|
| DATE:                | 11/28/2017          |
| NAME OF BUSINESS:    | Graymont Western    |
| CITY/TOWN LOCATION:  | Townsend            |
| CONTACT PERSON:      | Blake Bills         |
| MAILING ADDRESS:     | PO Box 550          |
| CITY, STATE AND ZIP: | Townsend, MT 59644  |
| PHONE NUMBER:        | 406-521-6008        |
| FAX NUMBER:          | 406-266-3079        |
| E-MAIL ADDRESS       | bbills@graymont.com |

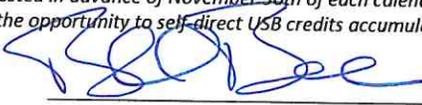
1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

We would like to reserve our remaining 2017 USB dollars, approximately \$9,876, for projects identified and planned in 2018.

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:

Signature: 

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



**IDAHO FOREST**  
G R O U P

PO Box 513  
162 Old Mill Loop  
St. Regis, MT 59866  
406-649-2495

RECEIVED  
JAN 31 2018 A  
MT DOR

Mark Schoenfeld  
Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

Rec'd MT DOR  
FEB 06 2018

January 29<sup>th</sup>, 2018

Dear Mr. Schoenfeld,

Idaho Forest Group is presenting this information on behalf of Tricon Timber that we purchased on December 1<sup>st</sup>, 2017, we are planning to participate in this program going forward.

Tricon replaced 6 lights with LED flood lights cutting the energy consumption 55% per light which results in a savings of \$1,380.00 per year.

I have attached all the information along with a copy of our 2017 USBC Progress Report. Please feel free to contact me with any questions you may have.

Sincerely,

A handwritten signature in cursive script that reads "Taunya Voll".

Taunya Voll  
Idaho Forest Group  
taunya.voll@idfg.com

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                                       |
|----------------------|---------------------------------------|
| DATE:                | 11/1/2017                             |
| NAME OF BUSINESS:    | Tricon Timber, LLC                    |
| CITY/TOWN LOCATION:  | 162 Old Mill Loop St. Regis, MT 59866 |
| CONTACT PERSON:      | Taunya Voll                           |
| MAILING ADDRESS:     | PO BOX 158                            |
| CITY, STATE AND ZIP: | St. Regis, MT 59866                   |
| PHONE NUMBER:        | 406-649-2485 EXT. 213                 |
| FAX NUMBER:          | 406-649-2653                          |
| E-MAIL ADDRESS:      | taunya@tricontimber.com               |

|                                |                            |
|--------------------------------|----------------------------|
| AMOUNT OF CREDIT REQUESTED: \$ | <del>2845.84</del> 2591.95 |
|--------------------------------|----------------------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach): |
| Replaced Lights w/ LED Lighting                                     |

|   |               |
|---|---------------|
| Estimated Savings in kWh and/or KW for project needs to be provided |               |
| ESTIMATED kWh SAVINGS:  | 288 per month |
| ESTIMATED KW SAVINGS:   | 36 per month  |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:                      Signature: Taunya Voll

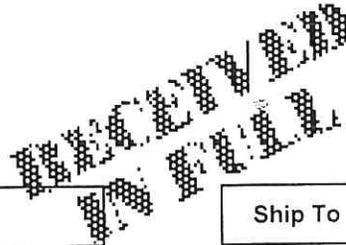
|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

**Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.**

# Tricon Timber, LLC

# Purchase Order

162 Old Mill Loop  
 PO Box 158  
 Saint Regis, MT 59866



|            |          |
|------------|----------|
| Date       | P.O. No. |
| 03/15/2017 | 30807    |

|                             |  |
|-----------------------------|--|
| <b>Vendor</b><br>E-conolite | <b>Ship To</b><br>Tricon Timber, LLC<br>162 Old Mill Loop<br>PO Box 158<br>Saint Regis, MT 59866 |
|-----------------------------|--|

|              |                 |            |                 |            |                 |                 |
|--------------|-----------------|------------|-----------------|------------|-----------------|-----------------|
| <b>Terms</b> | <b>Due Date</b> | 03/15/2017 | <b>Expected</b> | 03/17/2017 | <b>Ship Via</b> | Federal Expr... |
|--------------|-----------------|------------|-----------------|------------|-----------------|-----------------|

| Item        | Qty | Description   | Price     | Department | Amount    |
|-------------|-----|---|-----------|------------|-----------|
| Parts       | 6   | E-HL9F30CSZ LED Floodlight                              | 479.99    | 9999       | 2,879.94  |
| Discount    | 1   |   | -287.99   |            | -287.99   |
| Credit Card |     | Used MasterCard ending with #0841<br><br>invoice#718612 | -2,591.95 |            | -2,591.95 |

Purchase Order must be on the Packing List and the Invoice.  
 Order must ship complete.  
 Please call if a partial is shipped.

**Total** \$0.00



1501 96<sup>th</sup> Street Sturtevant, WI 53177  
 888.243.9445 [www.e-conolight.com](http://www.e-conolight.com)

Remit To: 1501 96th Street  
 Sturtevant WI 53177  
 United States

|                  |          |
|------------------|----------|
| INVOICE NO.      | 718612   |
| INVOICE DATE     | 03/15/17 |
| S.O.NUMBER       | 7206935  |
| CUSTOMER NO.     | 134744   |
| DATE SHIPPED     | 03/15/17 |
| INVOICE DUE DATE | 03/15/17 |

**Sold To:**  
 Attn: Accounts Payable  
 Tricon Timber  
 PO Box 158  
 SAINT REGIS MT 59866  
 United States

**Ship To:**  
 Tricon Timber  
 162 Old Mill Loop  
 SAINT REGIS MT 59866

**Job Name:** Agency: - **P.O. Number:** 30807  
**Carrier:** FEDEX  
**Pro/Tracking #:** 725703588415

| QTY ORDERED | QTY SHIPPED | BACK ORD. | ITEM NUMBER | DESCRIPTION              | UNIT PRICE | EXTENDED PRICE |
|-------------|-------------|-----------|-------------|--------------------------|------------|----------------|
| 6           | 6           | 0         | E-HL9F30CSZ | Deduction.18850048       | -48.00     | -287.99        |
| 6           | 6           | 0         | E-HL9F30CSZ | FLD LED 2 ADJ 300W CW BZ | 479.99     | 2,879.94       |

| PAYMENT TERMS | CARTONS | POLES | SKIDS        | EST. TOTAL WEIGHT | EST. TOTAL CUBIC FEET | SUB TOTAL   |          |
|---------------|---------|-------|--------------|-------------------|-----------------------|-------------|----------|
| PREPAY        | 6       |       |              | 190.2             | 12.9564               | FREIGHT     | 0.00     |
| FAX NUMBER    |         |       | PAYMENT TYPE |                   |                       | SALES TAX   | 0.00     |
|               |         |       |              |                   |                       | TOTAL       | 2,591.95 |
|               |         |       |              |                   |                       | BALANCE DUE | 0.00     |

Seller : E-conolight. Shipping Term :  
 All sales are subject to Seller's Sales Term and conditions at [www.e-conolight.com/terms](http://www.e-conolight.com/terms).  
 Check out [www.e-conolight.com](http://www.e-conolight.com) for web specials.



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/16/2018

## TRICON TIMBER

| Account Summary                     |             |
|-------------------------------------|-------------|
| 2016 Carryover Reservation:         | \$6,200.00  |
| Reservations Made YTD:              | \$1,200.00  |
| YTD Elec Revenue: \$869,487.34      |             |
| 2016 Carryover Payment Request:     | \$0.00      |
| Payment Requests Made YTD:          | \$11,876.61 |
| Total Payment Requests: \$11,876.61 |             |
| Current Request Balance: \$0.00     |             |
| 2016 Carryover USBC Credit:         | \$5,814.71  |
| USBC Credit YTD:                    | \$7,196.21  |
| Total USBC Credit: \$13,010.92      |             |
| Average Monthly Credit Earned:      | \$599.68    |
| Payments Issued YTD: \$1,134.31     |             |
| USBC Credit Balance: \$1,134.31     |             |
| Payment Pending: \$0.00             |             |

| Payment Requests Made |            | Payments Issued |            |
|-----------------------|------------|-----------------|------------|
| Submitted By          | Date       | Date            | Amount     |
| Taunya Erickson       | 07/07/2017 | 07/07/2017      | \$9,284.66 |
| Taunya Voll           | 11/01/2017 | 12/06/2017      | \$2,591.95 |

| Account Detail |      | Jan        | Feb                 | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total   |             |              |
|----------------|------|------------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100624         | 1628 | DG28395409 | KWH >               | 763,959     | 863,651     | 832,935     | 790,887     | 604,052     | 637,241     | 666,584     | 738,677     | 563,647     | 605,746     | 620,580     | 307,810     | 7,995,769    |
|                |      |            | KW >                | 2,500       | 2,497       | 2,519       | 2,506       | 2,328       | 2,341       | 2,385       | 2,303       | 2,251       | 2,462       | 2,480       | 0           | 2,214        |
|                |      |            | Elec Revenue >      | \$80,543.87 | \$88,547.15 | \$84,482.69 | \$81,388.31 | \$66,047.57 | \$68,385.54 | \$70,710.49 | \$75,502.52 | \$61,792.53 | \$66,900.14 | \$68,309.07 | \$56,877.46 | \$869,487.34 |
|                |      |            | Total KWH           | 763,959     | 863,651     | 832,935     | 790,887     | 604,052     | 637,241     | 666,584     | 738,677     | 563,647     | 605,746     | 620,580     | 307,810     | 7,995,769    |
|                |      |            | Combined Average KW | 2,500       | 2,497       | 2,519       | 2,506       | 2,328       | 2,341       | 2,385       | 2,303       | 2,251       | 2,462       | 2,480       | 0           | 2,214        |
|                |      |            | USBC Charge         | \$687.57    | \$777.29    | \$749.64    | \$711.80    | \$543.65    | \$573.52    | \$599.93    | \$664.81    | \$507.28    | \$545.17    | \$558.52    | \$277.03    | \$7,196.21   |
|                |      |            | Total Elec Revenue  | \$80,543.87 | \$88,547.15 | \$84,482.69 | \$81,388.31 | \$66,047.57 | \$68,385.54 | \$70,710.49 | \$75,502.52 | \$61,792.53 | \$66,900.14 | \$68,309.07 | \$56,877.46 | \$869,487.34 |



February 26, 2018

Mr. Mark Schoenfeld  
Department of Revenue (DOR)  
PO Box 5805  
Helena, MT 59604-5805

RE: Self-Directed USBC Progress Report for 2017 – Imerys Talc America

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we receive from NorthWestern Energy that shows our USB activities during 2017. During 2017 we received payments including \$22,362.35 in 2017 USB credits and \$1,952.78 in 2016 USB credits that were carried over into 2017. At year-end 2017, we had \$1,959.04 in remaining 2017 USB credits that will be carried forward into 2018 because we have a request balance for these funds from energy efficiency projects submitted in previous years.

Sincerely,

A handwritten signature in black ink, appearing to read "Austin Patrilli", written over a light blue horizontal line.

Austin Patrilli

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 or  
rick.edwards@northwestern.com



## Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

### IMERY'S TALC AMERICA, INC.

#### Account Summary

|                                 |                |                          |                |
|---------------------------------|----------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00         | YTD Elec Revenue:        | \$303,795.97   |
| Reservations Made YTD:          | \$0.00         |                          |                |
| 2016 Carryover Payment Request: | \$4,847,041.36 | Total Payment Requests:  | \$4,847,041.36 |
| Payment Requests Made YTD:      | \$0.00         | Current Request Balance: | \$4,822,726.23 |
| 2016 Carryover USBC Credit:     | \$1,952.78     | Total USBC Credit:       | \$26,274.17    |
| USBC Credit YTD:                | \$24,321.39    | Payments Issued YTD:     | \$24,315.13    |
| Average Monthly Credit Earned:  | \$2,026.78     | USBC Credit Balance:     | \$1,959.04     |
|                                 |                | Payment Pending:         | \$1,959.04     |

#### Payment Requests Made

| Submitted By | Date | Amount |
|--------------|------|--------|
|--------------|------|--------|

#### Payments Issued

| Date       | Amount     |
|------------|------------|
| 04/10/2017 | \$8,470.68 |
| 07/07/2017 | \$6,165.72 |
| 10/09/2017 | \$5,749.47 |
| 12/06/2017 | \$3,929.26 |

#### Account Detail

| Account | Premise | Meter      |                | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul        | Aug        | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|------------|----------------|-------------|-------------|-------------|-------------|-------------|-------------|------------|------------|-------------|-------------|-------------|-------------|--------------|
| 100322  | 1321    | DA06183423 | KWH >          | 780,578     | 863,845     | 796,395     | 891,741     | 738,158     | 752,003     | 687,613    | 695,307    | 805,779     | 696,534     | 808,695     | 762,176     | 9,278,924    |
|         |         |            | KW >           | 1,724       | 1,799       | 1,788       | 1,788       | 1,722       | 1,680       | 1,771      | 1,693      | 1,719       | 1,763       | 1,689       | 1,788       | 1,744        |
|         |         |            | Elec Revenue > | \$6,020.33  | \$6,620.30  | \$6,327.34  | \$6,716.06  | \$5,982.12  | \$5,969.97  | \$5,856.07 | \$5,723.90 | \$6,211.02  | \$5,843.15  | \$6,173.76  | \$6,148.19  | \$73,592.21  |
| 100325  | 1324    | DA15843440 | KWH >          | 1,502,304   | 1,607,120   | 1,287,449   | 1,478,014   | 1,405,192   | 1,277,715   | 1,237,446  | 1,272,585  | 1,461,911   | 1,255,398   | 1,407,609   | 1,293,997   | 16,486,740   |
|         |         |            | KW >           | 3,482       | 3,512       | 3,154       | 2,981       | 3,162       | 3,020       | 2,817      | 2,847      | 3,158       | 2,938       | 3,102       | 3,102       | 3,106        |
|         |         |            | Elec Revenue > | \$11,646.93 | \$12,448.08 | \$10,560.14 | \$11,054.55 | \$11,053.24 | \$10,301.62 | \$9,805.93 | \$9,932.02 | \$11,201.93 | \$10,011.45 | \$10,891.91 | \$10,434.62 | \$129,342.42 |
| 188337  | 47739   | DG62206298 | KWH >          | 10,980      | 7,640       | 6,260       | 5,320       | 4,740       | 4,200       | 4,420      | 3,700      | 4,220       | 4,380       | 4,720       | 10,440      | 71,020       |
|         |         |            | KW >           | 28          | 24          | 21          | 22          | 18          | 18          | 17         | 18         | 15          | 20          | 17          | 24          | 20           |
|         |         |            | Elec Revenue > | \$303.37    | \$244.02    | \$211.80    | \$208.06    | \$179.61    | \$170.33    | \$166.91   | \$165.27   | \$154.19    | \$185.27    | \$172.43    | \$271.99    | \$2,433.25   |
| 206570  | 55858   | DA19409930 | KWH >          | 13,760      | 11,160      | 10,680      | 8,960       | 9,000       | 7,080       | 5,160      | 6,360      | 5,440       | 7,800       | 10,040      | 10,960      | 106,200      |
|         |         |            | KW >           | 41          | 45          | 37          | 33          | 33          | 29          | 35         | 27         | 32          | 32          | 42          | 35          | 35           |
|         |         |            | Elec Revenue > | \$1,545.09  | \$1,337.03  | \$1,206.34  | \$1,041.86  | \$1,043.54  | \$848.61    | \$758.69   | \$771.50   | \$757.06    | \$919.32    | \$1,212.42  | \$1,213.26  | \$12,654.72  |
| 206573  | 55861   | DA19814683 | KWH >          | 3,120       | 3,280       | 3,200       | 3,520       | 2,800       | 2,320       | 1,360      | 1,120      | 1,920       | 2,000       | 2,080       | 2,320       | 29,040       |
|         |         |            | KW >           | 17          | 16          | 15          | 23          | 13          | 15          | 16         | 16         | 11          | 12          | 8           | 12          | 15           |
|         |         |            | Elec Revenue > | \$442.54    | \$424.18    | \$407.16    | \$515.43    | \$362.46    | \$339.36    | \$280.66   | \$254.11   | \$268.19    | \$291.17    | \$257.16    | \$316.14    | \$4,158.56   |
| 206575  | 55862   | DA19164785 | KWH >          | 17,400      | 16,540      | 15,740      | 13,240      | 6,780       | 2,740       | 1,600      | 1,420      | 5,100       | 10,080      | 7,620       | 9,220       | 107,480      |
|         |         |            | KW >           | 33          | 31          | 30          | 28          | 22          | 10          | 7          | 8          | 26          | 29          | 18          | 18          | 22           |
|         |         |            | Elec Revenue > | \$1,752.05  | \$1,617.96  | \$1,531.94  | \$1,333.29  | \$761.81    | \$327.92    | \$207.16   | \$167.23   | \$670.67    | \$1,082.38  | \$788.05    | \$913.60    | \$11,184.06  |
| 206579  | 55866   | DG28181022 | KWH >          | 75,891      | 62,193      | 52,453      | 69,372      | 50,050      | 42,120      | 36,988     | 38,102     | 35,299      | 45,661      | 55,198      | 51,672      | 614,799      |
|         |         |            | KW >           | 306         | 285         | 256         | 263         | 249         | 244         | 234        | 234        | 281         | 282         | 291         | 315         | 270          |
|         |         |            | Elec Revenue > | \$2,772.79  | \$2,524.75  | \$2,235.47  | \$2,446.73  | \$2,165.14  | \$2,054.58  | \$1,935.94 | \$1,946.36 | \$2,234.87  | \$2,341.62  | \$2,494.14  | \$2,621.24  | \$27,773.63  |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      |                            | Jan                | Feb                | Mar                | Apr                | May                | Jun                | Jul                | Aug                | Sep                | Oct                | Nov                | Dec                | YTD Total           |
|---------|---------|------------|----------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|
| 611286  | 264188  | DA19409931 | KWH >                      | 10,000             | 8,640              | 7,880              | 7,040              | 4,880              | 2,240              | 2,200              | 2,480              | 4,200              | 3,200              | 8,000              | 11,920             | 72,680              |
|         |         |            | KW >                       | 18                 | 22                 | 16                 | 23                 | 17                 | 10                 | 30                 | 28                 | 35                 | 16                 | 22                 | 28                 | 22                  |
|         |         |            | Elec Revenue >             | \$1,010.77         | \$903.66           | \$785.42           | \$795.31           | \$561.18           | \$281.13           | \$485.74           | \$483.40           | \$689.01           | \$424.63           | \$857.62           | \$1,215.97         | \$8,493.84          |
| 613766  | 265743  | DA19814682 | KWH >                      | 2,080              | 2,160              | 2,320              | 3,180              | 2,080              | 2,240              | 1,800              | 1,920              | 1,880              | 2,040              | 2,520              | 2,000              | 26,000              |
|         |         |            | KW >                       | 15                 | 12                 | 12                 | 14                 | 14                 | 13                 | 14                 | 15                 | 18                 | 18                 | 16                 | 15                 | 15                  |
|         |         |            | Elec Revenue >             | \$330.67           | \$300.47           | \$307.01           | \$403.13           | \$314.14           | \$317.16           | \$271.21           | \$307.98           | \$341.14           | \$354.32           | \$363.46           | \$319.25           | \$3,929.94          |
| 620119  | 269490  | DG62220735 | KWH >                      | 5,120              | 4,380              | 2,300              | 2,440              | 2,500              | 1,600              | 960                | 1,220              | 1,200              | 1,340              | 1,540              | 4,180              | 28,780              |
|         |         |            | KW >                       | 8                  | 8                  | 6                  | 5                  | 5                  | 5                  | 4                  | 4                  | 4                  | 4                  | 4                  | 8                  | 5                   |
|         |         |            | Elec Revenue >             | \$507.94           | \$433.15           | \$247.49           | \$254.32           | \$259.06           | \$187.53           | \$123.63           | \$149.75           | \$148.35           | \$159.66           | \$169.17           | \$420.93           | \$3,060.98          |
| 848917  | 285892  | DG28171513 | KWH >                      | 0                  | 0                  | 0                  | 0                  | 0                  | 0                  | 0                  | 0                  | 0                  | 507                | 364                | 626                | 1,497               |
|         |         |            | KW >                       | 0                  | 0                  | 0                  | 0                  | 0                  | 0                  | 0                  | 0                  | 0                  | 2                  | 2                  | 3                  | 2                   |
|         |         |            | Elec Revenue >             | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$72.65            | \$62.80            | \$91.04            | \$226.49            |
| 848917  | 285892  | DG68510405 | KWH >                      | 968                | 767                | 588                | 535                | 1,074              | 1,861              | 340                | 2,368              | 1,142              | 0                  | 0                  | 0                  | 9,843               |
|         |         |            | KW >                       | 2                  | 2                  | 2                  | 2                  | 12                 | 11                 | 11                 | 10                 | 0                  | 0                  | 0                  | 0                  | 7                   |
|         |         |            | Elec Revenue >             | \$113.70           | \$96.30            | \$73.99            | \$71.69            | \$217.96           | \$267.94           | \$147.24           | \$308.00           | \$203.82           | \$0.00             | \$0.00             | \$0.00             | \$1,500.64          |
| 851175  | 287203  | DD58429322 | KWH >                      | 6,840              | 5,880              | 5,800              | 3,920              | 6,840              | 7,360              | 8,240              | 8,600              | 7,840              | 6,760              | 8,200              | 5,440              | 81,720              |
|         |         |            | KW >                       | 37                 | 36                 | 42                 | 38                 | 44                 | 41                 | 50                 | 46                 | 43                 | 35                 | 41                 | 45                 | 42                  |
|         |         |            | Elec Revenue >             | \$933.81           | \$833.09           | \$880.72           | \$702.39           | \$991.05           | \$994.78           | \$1,149.04         | \$1,136.88         | \$1,051.00         | \$885.62           | \$1,057.54         | \$883.36           | \$11,499.28         |
| 711387  | 322052  | DD56126252 | KWH >                      | 5,500              | 3,920              | 3,600              | 3,080              | 3,280              | 3,600              | 3,880              | 2,420              | 1,180              | 1,300              | 2,100              | 5,580              | 39,420              |
|         |         |            | KW >                       | 15                 | 16                 | 16                 | 19                 | 17                 | 16                 | 17                 | 19                 | 9                  | 11                 | 8                  | 15                 | 15                  |
|         |         |            | Elec Revenue >             | \$611.74           | \$476.32           | \$450.15           | \$441.01           | \$436.04           | \$452.70           | \$476.00           | \$388.70           | \$190.83           | \$218.67           | \$256.71           | \$600.08           | \$4,998.95          |
| 962195  | 380825  | DA14082473 | KWH >                      | 5,740              | 5,180              | 4,560              | 4,400              | 5,220              | 6,380              | 7,220              | 7,220              | 7,340              | 3,980              | 6,360              | 6,180              | 69,760              |
|         |         |            | KW >                       | 24                 | 24                 | 17                 | 24                 | 22                 | 16                 | 22                 | 15                 | 27                 | 14                 | 24                 | 25                 | 21                  |
|         |         |            | Elec Revenue >             | \$711.32           | \$656.48           | \$534.51           | \$591.83           | \$644.07           | \$668.53           | \$793.93           | \$719.92           | \$846.12           | \$463.14           | \$748.27           | \$744.81           | \$8,122.93          |
|         |         |            | <b>Total KWH</b>           | <b>2,440,181</b>   | <b>2,602,685</b>   | <b>2,199,225</b>   | <b>2,494,742</b>   | <b>2,242,594</b>   | <b>2,113,459</b>   | <b>1,999,007</b>   | <b>2,044,822</b>   | <b>2,344,451</b>   | <b>2,040,780</b>   | <b>2,325,046</b>   | <b>2,176,711</b>   | <b>27,023,703</b>   |
|         |         |            | <b>Combined Average KW</b> | <b>5.750</b>       | <b>5.832</b>       | <b>5.412</b>       | <b>5.263</b>       | <b>5.350</b>       | <b>5.128</b>       | <b>5.045</b>       | <b>4.981</b>       | <b>5.388</b>       | <b>5.176</b>       | <b>5.294</b>       | <b>5.433</b>       | <b>5.340</b>        |
|         |         |            | <b>USBC Charge</b>         | <b>\$2,196.19</b>  | <b>\$2,342.41</b>  | <b>\$1,979.30</b>  | <b>\$2,245.27</b>  | <b>\$2,018.34</b>  | <b>\$1,902.11</b>  | <b>\$1,799.10</b>  | <b>\$1,840.35</b>  | <b>\$2,110.02</b>  | <b>\$1,836.70</b>  | <b>\$2,092.56</b>  | <b>\$1,959.04</b>  | <b>\$24,321.39</b>  |
|         |         |            | <b>Total Elec Revenue</b>  | <b>\$28,703.05</b> | <b>\$28,915.79</b> | <b>\$25,759.48</b> | <b>\$26,575.66</b> | <b>\$24,971.42</b> | <b>\$23,182.16</b> | <b>\$22,458.15</b> | <b>\$22,485.02</b> | <b>\$24,968.20</b> | <b>\$23,253.05</b> | <b>\$25,505.44</b> | <b>\$26,194.48</b> | <b>\$302,971.90</b> |

# Invenergy

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One South Wacker Drive | Suite 1800 | Chicago, Illinois 60606  
T 312-224-1400 | F 312-224-1444

February 16, 2018

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756  
FAX: 406-444-7997 Email: mschoenfeld@mt.gov

RE: Self-Directed USBC Progress Report for 2017 – Judith Gap Energy LLC

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we received from NorthWestern Energy that shows our USB activities during 2017.

- We had \$315.62 in 2016 credits brought forward into 2017. We earned \$1,208.45 in 2017 credits.
- In 2017, we received \$315.62 in USB payments for a donation we will be making to a qualified low income entity (Energy Share). We submitted a Form B request to NorthWestern Energy for this donation and a copy of the Form B is attached.
- At year-end we had \$1,208.45 in 2017 USB credits that were carried over into 2018 because we submitted a Reservation to NorthWestern Energy to reserve these remaining 2017 funds for a potential project in 2018.

Sincerely,

Judith Gap Energy LLC

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
Deborah Singer, NorthWestern Energy, PO Box 80330, Billings, MT 59108



## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                          |
|----------------------|--------------------------|
| DATE:                | 11/28/17                 |
| NAME OF BUSINESS:    | Judith Gap Energy Center |
| CITY/TOWN LOCATION:  | Harlowton                |
| CONTACT PERSON:      | Michael Prater           |
| MAILING ADDRESS:     | P.O. Box 890             |
| CITY, STATE AND ZIP: | Harlowton, MT 59036      |
| PHONE NUMBER:        | 406-632-4540             |
| FAX NUMBER:          | 406-632-4538             |
| E-MAIL ADDRESS:      | mprater@invenergyllc.com |

|                             |          |
|-----------------------------|----------|
| AMOUNT OF CREDIT REQUESTED: | \$315.62 |
|-----------------------------|----------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach): |
|---|

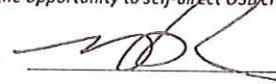
We request the funds be donated to Energy Share and used within Wheatland County if possible. The check MUST be made out to: Invenergy Wind Finance Co., LLC in order for it to be cashed by our bank.

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |  |
|------------------------|--|
| ESTIMATED kWh SAVINGS: |  |
| ESTIMATED KW SAVINGS:  |  |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:

Signature: 

Michael Prater  
O+M Manager

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

**Flathead Electric Cooperative, Inc.  
Large Customer USB Information  
January 1, 2017 - December 31, 2017**

| FEC Customer                      | 2017 kWh Purchases through Dec 31, 2017 | Conservation investments made through power purchases pursuant to 69-8-402(2)(b) | Low-income energy assistance investments made through power purchases pursuant to 69-8-402(2)(b) | Renewable energy investments made through power purchases pursuant to 69-8-402(2)(b) | Large customer conservation investments made pursuant to 69-8-101 et.seq | Power Supplier Reimbursements/Rebates for Energy Efficiency |
|-----------------------------------|---|--|--|--|--|---|
| Kalispell Regional Medical Center | 12,680,400                              | \$28,979   | \$1,150  | \$8,614  | \$79,287   | (\$79,287)  |



Mike Kadas  
Director

## Montana Department of Revenue



Steve Bullock  
Governor

Kalispell Regional Medical Center  
Anita Kauffman  
310 Sunnyview Lane  
Kalispell, MT 59901

2/10/2018

### Universal System Benefits Programs Utility & Large Customer Annual Report

#### **USB Program Summary Reports are due by March 1, 2018**

Public Utilities and large customers claiming universal system benefit (USB) credits for calendar year 2017 are required to submit an annual summary to the Montana Department of Revenue. The statewide cooperative utility office shall submit an annual summary report to the Montana Department of Revenue of the activities of individual cooperative utilities, including a summary of the pooling of statewide credits.

#### **The annual report of a public utility or of the statewide cooperative utility office should include:**

- (a) The types of internal utility and customer programs being used to satisfy the statute.
- (b) The level of funding for those programs relative to the annual funding requirements set forth in 69-8-402(2), MCA.
- (c) Any payments made to the statewide funds in the event that internal funding was below the prescribed annual funding requirements.

#### **The annual report of a large customer should identify:**

Each qualifying project or expenditure for which a credit is claimed, and the amount of each credit.

**You may request a protective order by filing a protective order request 30 days in advance of filing the annual report.** This allows an order to be issued by the department, prior to the annual report being filed. The request should specify the materials to be protected and the reason such materials should be considered confidential.

If you've requested and received a protective order from the department, please indicate (at the time you file the annual report), the information you wish be kept confidential, by using colored paper and label it confidential.

#### **Please send the annual report to:**

Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

If you have any questions, you can contact us at (406) 444-6900. Thank you for your continued cooperation.

Sincerely,

Mark Schoenfeld  
Unit Manager, Miscellaneous Tax Unit

# Malteurop

## North America

---

Jeremy Tweet  
2800 Great Bear Ave  
Great Falls MT 59404

February 19, 2018

Mark Schoenfeld  
Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

Mr. Schoenfeld,

This letter is to inform you of Malteurop's use of the USB credits received in 2017. We requested USB funds twice in 2017, receiving funds of \$28,000 and 14,873.52. The projects consisted of LED lighting upgrades throughout the plant and grounds, and the installation of VFDs on equipment. I have included copies of the Form B credit request forms submitted to NorthWestern Energy, project overviews, and the Self-Directed USBC Progress Report for 2017.

If you have any questions, or need any additional information please let me know.

Sincerely,



Jeremy Tweet  
Process Engineer  
Malteurop North America Inc.  
406-791-2804

---



Mike Kadas  
Director

## Montana Department of Revenue



Steve Bullock  
Governor

Malteurop North America  
Jim Cox / Shelly Siron  
415 US Highway 87  
Great Falls, MT 59404

2/10/2018

### Universal System Benefits Programs Utility & Large Customer Annual Report

#### **USB Program Summary Reports are due by March 1, 2018**

Public Utilities and large customers claiming universal system benefit (USB) credits for calendar year 2017 are required to submit an annual summary to the Montana Department of Revenue. The statewide cooperative utility office shall submit an annual summary report to the Montana Department of Revenue of the activities of individual cooperative utilities, including a summary of the pooling of statewide credits.

#### **The annual report of a public utility or of the statewide cooperative utility office should include:**

- (a) The types of internal utility and customer programs being used to satisfy the statute.
- (b) The level of funding for those programs relative to the annual funding requirements set forth in 69-8-402(2), MCA.
- (c) Any payments made to the statewide funds in the event that internal funding was below the prescribed annual funding requirements.

#### **The annual report of a large customer should identify:**

Each qualifying project or expenditure for which a credit is claimed, and the amount of each credit.

**You may request a protective order by filing a protective order request 30 days in advance of filing the annual report.** This allows an order to be issued by the department, prior to the annual report being filed. The request should specify the materials to be protected and the reason such materials should be considered confidential.

If you've requested and received a protective order from the department, please indicate (at the time you file the annual report), the information you wish be kept confidential, by using colored paper and label it confidential.

#### **Please send the annual report to:**

Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

If you have any questions, you can contact us at (406) 444-6900. Thank you for your continued cooperation.

Sincerely,

Mark Schoenfeld  
Unit Manager, Miscellaneous Tax Unit

Feb 27<sup>th</sup> 2017



## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                          |
|----------------------|--------------------------|
| DATE:                | 5-15-17                  |
| NAME OF BUSINESS:    | Matteurop                |
| CITY/TOWN LOCATION:  | Great Falls              |
| CONTACT PERSON:      | Jim Cox / Rick Slotness  |
| MAILING ADDRESS:     | 2800 Great Bear Ave.     |
| CITY, STATE AND ZIP: | Great Falls Mt. 59404    |
| PHONE NUMBER:        | 406-791-2806             |
| FAX NUMBER:          | 406-791-2824             |
| E-MAIL ADDRESS       | jimmie.cox@matteurop.com |

|                             |             |
|-----------------------------|-------------|
| AMOUNT OF CREDIT REQUESTED: | \$28,000.00 |
|-----------------------------|-------------|

The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.

|  |
|--|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):  |
| Labor to Install LED Lighting in Germ Building & Elevator Tracks<br>Labor for VFD Installs in Elev & Kiln projects - Grounds LED's |

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |             |
|------------------------|-------------|
| ESTIMATED kWh SAVINGS: | 190,000 kWh |
| ESTIMATED KW SAVINGS:  |             |

NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.

LARGE CUSTOMER: Signature: Jim Cox

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

GTF 1600316

GTF 1600316

**CAPEX Opening Submission**

# Malteurop

|                                   |  |                       |              |
|-----------------------------------|--|-----------------------|--------------|
| Project name<br>As per Capex list | GTF-RESOLVE GERM BUILDING-600 LIGHTS<br>REPLACE WITH LED | Project Start Date    | 8/17/2017    |
|                                   |  | Budget Category       | PRODUCTIVITY |
|                                   |  | Asset Class/GL Acct   | 01350000     |
|                                   |  | Useful Life           | 50,000 HRS   |
|                                   |  | Cost Center           | 3130E340     |
|                                   |  | Internal Order Number | 313017/NV13  |

|    |    |    |      |       |      |
|----|----|----|------|-------|------|
| FY | 18 | BU | MEVA | Plant | 3130 |
|----|----|----|------|-------|------|

**Project description & scope**

This project consists of replacing the existing 26 watt fluorescent bulbs with 15 watt LED bulbs. The LEDs are a direct replacement with an internal driver, the existing ballast will be removed. There are 222 fixtures (2 lights each) in the germination building on the catwalk area that will be replaced. An additional 100 lights are in the germination vessel sub and shared air compartments that will be replaced with a single 15 watt bulb, they are currently 2, smaller sized bulbs. The maintenance shop has 30 fixtures (2 bulbs each) that will be replaced as well. Replacing all the lighting with the same bulb will standardize the bulbs throughout the area, reducing the need for differing spares on hand. The bulbs are NSF certified for use in food facilities.

**Why this project & Objectives**

Expected savings for the change is over 80,000kwh annually, resulting in \$7400 in annual savings (@ \$0.093 kwh). The cost of the bulbs and installation material is \$10 each. The rebate available is \$5 per bulb. Payback is 2.9 years without the rebate and 2.5 years with the rebate. Additional benefits are common spares on hand, and with the ballast removed, less maintenance and part failures.

| Project timing  |        | Project cost breakdown |                                      |
|-----------------|--------|------------------------|--------------------------------------|
| Studies         |        | Parts and Materials    | \$6,100                              |
| Tender          |        | Labor                  | \$15,656                             |
| Purchase order  |        | 3% contingency         | <del>\$653</del> <del>\$22,409</del> |
| Purchase order  |        | Rebate                 | \$3,000                              |
| Purchase order  |        | Project capital        | <del>\$19,409</del><br>22,409        |
| Execution       |        |                        |                                      |
| Commissioning   | Aug 17 | Rebate Expected        | 12/1/17 (3,000)                      |
| Completion date | OCT 17 |                        |                                      |

**Project cash out**

|        |      |        |      |        |
|--------|------|--------|------|--------|
| <=FY17 | FY18 | 19,409 | FY19 | >=FY20 |
|--------|------|--------|------|--------|

**Comments**

|      |         |                 |                   |  |
|------|---------|-----------------|-------------------|--|
| Date | 7-13-17 | Jeremy Tweet    | Requestor         |  |
| Date | 7/13/17 | Rick Slotness   | Plant Mgr         |  |
| Date | 7/17/17 | Brenda Ketter   | Fin. Anal - Oper. |  |
| Date | 7/17/17 | Rabah Bellir    | FP&A Mgr, SC& Ops |  |
| Date | 7/26/17 | Andras Bogyay   | VP - Operations   |  |
| Date |         | Kevin Eikermann | President         |  |

7/17 rec'd from Jeremy

QTF 1600297

QTF 1600297

|  |  |   |                     |                  |                        |                         |    |
|--|--|---|---------------------|------------------|------------------------|-------------------------|----|
| <b>Malteurop</b>                             |  | <b>Malteurop North America / Malteurop Canada<br/>Project Appropriation Request</b> |                     |                  |                        |                         |    |
| <b>QTF RESOLVE MH EXTERIOR BELT VFDS (3)</b> |  |   |                     |                  |                        |                         |    |
| Project Title:                               | Exterior VFDS CB019, CB020, CB006                  |   | Project Start Date: | 6/1/17           | Project End Date:      | 6/30/17                 |    |
| Project Location:                            | Exterior Germination Transfer Equipment <b>QTF</b> |   | Cost Center:        | 31300330         | GL Account:            | 21500000                |    |
| Original Request:                            | Apr-17   |   | SAP Number:         | 1600297          | Internal Order Number: | 31301711107             |    |
| Project Type:                                | CAPEX  | Budget Category:  | ENVIR 215000000     | Asset Class:     | EQUIP                  | Useful Life:            | 10 |
| IRR:   |  | Payback:  | 2.2 years           | Safety Approval: |                        | Environmental Approval: |    |

|                      | Requested Amount | Previously Authorized Amount | Total Estimated Capital and Expense | Budgeted Amount |
|----------------------|------------------|------------------------------|-------------------------------------|-----------------|
| Project Capital      | \$5,500          |                              |                                     |                 |
| Project Expense      |                  |                              |                                     |                 |
| Rebates              | \$3,000          |                              |                                     |                 |
| <b>TOTAL PROJECT</b> | <b>\$8,500</b>   | <b>\$0</b>                   | <b>\$0</b>                          | <b>\$0</b>      |

|               |           |  |  |  |
|---------------|-----------|--|--|--|
| Payback (ROI) | 2.2 years |  |  |  |
|---------------|-----------|--|--|--|

**Project Description:**  
 Currently all exterior belts are kept running when temperatures are below freezing to prevent start up issues with the transfer equipment. One belt (of 3) in the kiln unloading equipment is lacking a VFD, and both belts for transfers of barley to the malthouse Jack VFDS. With three of the five exterior belts not being on VFDS, all the belts are kept running at maximum speeds during lower temperatures. By adding VFDS to the 3 belts, we would gain the ability to slow the belts to a minimum speed during no load running periods, approximately 80% of the time. By adding the VFDS, and slowing all 5 belts down we would see savings in electricity and potentially in maintenance.

**Project Benefits / Justification:**  
 The annual savings in electricity are calculated at ~32,000kwh. This results in electrical savings of ~\$2.2K annually (\$0.925/kwh). The Northwestern Energy rebate program results in a reimbursement of \$3k for the VFD installations. A 2.2 year payback is figured on savings calculations based on electrical savings, and the NWE rebate. Additional benefits will include reduced wear on equipment.

**Alternatives Considered:**

|          |   |          |          |          |
|----------|---|----------|----------|----------|
| <b>N</b> | <b>Y</b>  | <b>N</b> | <b>N</b> | <b>Y</b> |
|          | Is this project captured in the latest financial plan CAPEX spending?                 |          |          |          |
|          | Has all new equipment been scrutinized for code compliance?                           |          |          |          |
|          | Has all new equipment been added to planned maintenance list?                         |          |          |          |
|          | Will any existing assets be dispositioned? If Yes, include Fixed Asset Disposal Form. |          |          |          |
|          | Are there any energy or governmental credits associated with this project?            |          |          |          |

|                                  |              |                         |
|----------------------------------|--------------|-------------------------|
| <b>Budgetary Responsibility:</b> | <b>Date:</b> | <b>Project Manager:</b> |
| Rick Slotness                    |              | Jeremy Tweet            |

| APPROVALS                                 |                 |           |         |
|---|-----------------|-----------|---------|
| Title                                     | Name (Print)    | Signature | Date    |
| Project Manager                           | Jeremy Tweet    |           | 5-16-17 |
| Plant Manager                             | Rick Slotness   |           | 5/16/17 |
| SH&E Manager                              | Parrish Andrews |           | 5-16-17 |
| Financial Analyst                         | Brenda Ketter   |           | 5-16-17 |
| FP&A Manager, Supply Chain and Operations | Rabah Bellir    |           | 5/18/17 |
| VP Operations                             | Andras Bogay    |           | 5/19/17 |
| VP Finance                                | Karen Volz      |           |         |
| President                                 | Kevin Elkerman  |           |         |

5/18 Email - need amounts checked

GTF 1600319

# Malteurop

**CAPEX Opening Submission**

|  |                               |                       |          |
|--|-------------------------------|-----------------------|----------|
| <b>Project name</b><br>As per Capex list | GTF South Rail Track Lighting | Project Start Date    | 8/1/2017 |
|  |                               | Budget Category       | Safety   |
|  |                               | Asset Class/GL Acct   |          |
|  |                               | Useful Life           | 5-15 yrs |
|  |                               | Cost Center           |          |
|  |                               | Internal Order Number |          |

|           |           |           |             |              |             |
|-----------|-----------|-----------|-------------|--------------|-------------|
| <b>FY</b> | <b>18</b> | <b>BU</b> | <b>MENA</b> | <b>Plant</b> | <b>3130</b> |
|-----------|-----------|-----------|-------------|--------------|-------------|

**Project description & scope**

Contractor to install (5) 20' poles and (5) LED 1000 watt equivalent lights along South Rail Spur. Concrete bases to be poured in 18" Sona Tubes. We currently have no lighting in this area. This will adequately illuminate the S. Rail Spur for safer Rail CAR handling.

**Why this project & Objectives**

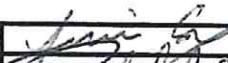
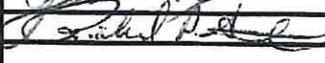
This will provide a well lit switching area for night time operations. Increased safety for employees.

| Project timing  |                               |        | Project cost breakdown |                    |
|-----------------|-------------------------------|--------|------------------------|--------------------|
| Studies         | Discussions with team on site |        | Material and Labor     | \$17,400.00        |
| Tender          |                               | 17-Sep |                        |                    |
| Purchase order  | Mission Electric              | 17-Oct | 3% Contingency         | \$522.00           |
| Purchase order  |                               |        |                        |                    |
| Purchase order  |                               |        |                        |                    |
| Execution       | Mission Electric              | 17-Oct |                        |                    |
| Commissioning   |                               | 17-Nov |                        |                    |
| Completion date |                               | 17-Oct | <b>Total</b>           | <b>\$17,922.00</b> |

**Project cash out**

|        |  |      |       |      |  |        |  |
|--------|--|------|-------|------|--|--------|--|
| <=FY17 |  | FY18 | 17922 | FY19 |  | >=FY20 |  |
|--------|--|------|-------|------|--|--------|--|

**Comments**

|      |           |                 |                   |  |
|------|-----------|-----------------|-------------------|--|
| Date | 9/14/2017 | Jim Cox         | Requestor         |  |
| Date | 9/14/2017 | Rick Slotness   | Plant Mgr         |  |
| Date |           | Brenda Ketter   | Fin. Anal - Oper. |  |
| Date |           | Rabah Bellir    | FP&A Mgr, SC& Ops |  |
| Date |           | Andras Bogyay   | VP - Operations   |  |
| Date |           | Kevin Eikermann | President         |  |

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                            |
|----------------------|----------------------------|
| DATE:                | 11-15-17                   |
| NAME OF BUSINESS:    | Maltewrap                  |
| CITY/TOWN LOCATION:  | Great Falls                |
| CONTACT PERSON:      | Jeremy Tweet               |
| MAILING ADDRESS:     | 2800 Great Bear Avenue     |
| CITY, STATE AND ZIP: | Great Falls MT 59404       |
| PHONE NUMBER:        | 406-791-2800               |
| FAX NUMBER:          |                            |
| E-MAIL ADDRESS       | Jeremy.tweet@maltewrap.com |

|                             |                            |
|-----------------------------|----------------------------|
| AMOUNT OF CREDIT REQUESTED: | <del>\$46,000</del> 34,000 |
|-----------------------------|----------------------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach): |
| LED lighting upgrades - see attached project                        |

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |         |
|------------------------|---------|
| ESTIMATED kWh SAVINGS: | 220,000 |
| ESTIMATED KW SAVINGS:  |         |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:                      Signature:                     Michael P. Slotnick                    

|                                   |       |
|-----------------------------------|-------|
| FOR NORTHWESTERN ENERGY USE ONLY: |       |
| PROCESSED BY:                     | _____ |
| DISTRIBUTION:                     | _____ |

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.





NorthWestern Corporation  
 d/b/a NorthWestern Energy  
 11 E Park St  
 Butte MT 59701-1711

Phone: (406) 497-3333  
 Toll-Free #: 1-800-663-2292  
 Fax: (406) 497-2960  
 Email: accountspayable@northwestern.com

1456931

MALTEUROP NORTH AMERICA INC  
 ATTN: RICHARD SLOTNES  
 415 US HIGHWAY 87  
 GREAT FALLS, MT 59404-6001

Payment No.: 201738332  
 Payment Date: 01/02/2018  
 Company Code: MTU  
 Vendor No.: 121601  
 Page: 1 of 1

| Invoice Number | Invoice Date | Document Number<br>Text   | Gross Amount | Discount | Net Amount   |
|----------------|--------------|---|--------------|----------|--------------|
| CKRDEC1487352  | 12/06/2017   | Please accept this check as settlement for the items listed below subject to the goods and services supplied and the invoice therefore being correct.<br>190439745<br>LARGE CUSTOMER USBC PMT 12/6/17 | 14,873.52    | 0.00     | 14,873.52    |
|                |              | Check Total.....  |              |          | \$ 14,873.52 |
|                |              | <i>phase 3 LEDs</i>   |              |          |              |

DETACH FROM CHECK AND KEEP FOR YOUR RECORDS



NorthWestern Corporation  
 d/b/a NorthWestern Energy  
 11 E Park St  
 Butte MT 59701-1711

US Bank  
 Miamisburg, Ohio  
 usbank.com  
 56-503/422

1456931

01/02/2018

PAY TO THE ORDER OF MALTEUROP NORTH AMERICA INC \$ \*\*\*14,873.52

\*\*\*FOURTEEN THOUSAND EIGHT HUNDRED SEVENTY-THREE & 52/100 \*\*\* DOLLARS

MALTEUROP NORTH AMERICA INC  
 ATTN: RICHARD SLOTNES  
 415 US HIGHWAY 87  
 GREAT FALLS, MT 59404-6001

GTF 1600329

GTF 1600329

# Malteurop

## CAPEX Opening Submission

|                                   |   |                       |                      |
|-----------------------------------|---|-----------------------|----------------------|
| Project name<br>As per Capex list | GTF <del>ISSUES</del> PLANT<br>LED lighting upgrade | Project Start Date    | 11/30/2017           |
|                                   |   | Budget Category       | Productivity Improve |
|                                   |   | Asset Class/GL Accr   | 218,50,000           |
|                                   |   | Useful Life           | 10 years             |
|                                   |   | Cost Center           | 3180 F350            |
|                                   |   | Internal Order Number | 312017 141421        |

|    |    |    |      |       |      |
|----|----|----|------|-------|------|
| FY | 18 | BU | MENA | Plant | 3130 |
|----|----|----|------|-------|------|

**Project description & scope**

The project consists of replacing existing fluorescent bulbs and fixtures with LED products. The project is to replace lighting in the office complex, kiln building and MCC rooms, the Boiler house, Steep and GV above floors, and all exterior lights. Similar lighting has recently been changed out in other areas of the germination building. Replacing the lighting with the same bulb will standardize the bulbs throughout the facility reducing the need for differing spares on hand. Additionally, all the exterior fixtures will be replaced with lower consumption LED units. This project should complete the LED upgrade in all areas, interior and exterior, except the elevator.

**Why this project & Objectives**

Expected savings for the change over is over 220,000kwh annually resulting in +\$20,000 in annual savings (\$0.093 kwh). The cost of the lights are ~\$44,000, with labor being \$15,720 Payback is 2.1 years with the projected rebate of \$14,500.

| Project timing  |                        |          | Project cost breakdown |            |
|-----------------|------------------------|----------|------------------------|------------|
| Studies         | .CTA meetings (Anseth) | 8/1/2017 | Lights/material        | 43391.76 ✓ |
| Tender          |                        |          | Labor/Installation     | 15720 ✓    |
| Purchase order  | 1000bulbs              | 17-Dec   | 3% contingency         | \$1,773 ✓  |
| Purchase order  | Mission Electric       | 17-Dec   | Total                  | \$60,885   |
| Purchase order  |                        |          | Rebate                 | -\$14,500  |
| Execution       |                        | 18-Mar   | Total less Rebate      | \$46,385 ✓ |
| Commissioning   |                        | 18-Mar   |                        |            |
| Completion date |                        | 18-Apr   |                        |            |

**Project cash out**

|        |      |          |      |        |
|--------|------|----------|------|--------|
| <=FY17 | FY18 | \$46,385 | FY19 | >=FY20 |
|--------|------|----------|------|--------|

**Comments**

|      |          |                 |                   |                     |
|------|----------|-----------------|-------------------|---------------------|
| Date | 11-0-17  | Jeremy Twest    | Requestor         |                     |
| Date | 11/8/17  | Rick Stolness   | Plant Mgr         |                     |
| Date | 11/13/17 | Branda Ketter   | Fin. Anal - Oper. | Branda Ketter       |
| Date | 11-13-17 | Rabah Bällir    | FR&A Mgr, SQ& Ops |                     |
| Date | 11-10-17 | Andras Bogysay  | VP - Operations   | See email attached. |
| Date |          | Kevin Elkermann | President         |                     |

11/9/17 Steve Bush EHS

11/8 email rec'd from Jeremy

Mr. Mark Schoenfeld  
Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

RECEIVED  
FEB 07 2018 N  
MT DOR

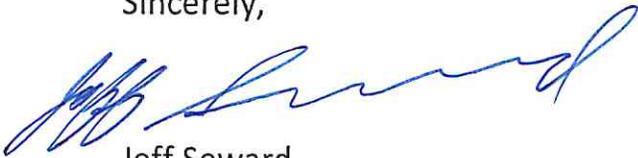
RE: MetraPark 2017 Annual USB Report

Dear Mr. Schoenfeld:

Per the requirements of the Montana Code Annotated 69-8-402 (2) this letter is to serve as our official summary report of our Universal Benefit program and the credits we received in 2017. For your reference, a copy of our "Self-Directed USBC Progress Report for 2017" from NorthWestern Energy is attached.

In 2017 we did not submit any new USBC projects, so all of the USB credit payments we received were from qualifying projects submitted in previous years. In 2017 we received a total of \$3341.92 in USB payments that were composed of \$227.11 in 2016 USB credits carried over into 2017 and \$3114.81 in 2017 USB credits. At year-end our remaining 2017 USB credits earned of \$225.73 were carried over into 2018.

Sincerely,



Jeff Seward

C.C. Rick Edwards – NorthWestern Energy, 40 East Broadway, Butte, MT

**DEPARTMENT OF CORRECTIONS**  
**Montana State Prison - Maintenance Department**

600 Conley Lake Road  
Deer Lodge, MT. 59722



Phone: (406) 846-1320 Ext. 2347 Fax: (406) 846-6052

From: Shane Morse Maintenance Manager  
RE: 2017 USB (Universal Systems Benefit)

---

Dear Mark:

This letter is to inform you that Montana State Prison has no documents to report for the year 2017 for any USB funds. We are in the process of figuring out the needs of the facility so I

Anticipate that I will have documents to report for the year 2018. If you have any questions please feel free to contact me my contact information is listed above.

Sincerely

Shane Morse



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/24/2018

| Account | Premise | Meter      | Jan                  | Feb                  | Mar                  | Apr                  | May                  | Jun                  | Jul                  | Aug                  | Sep                  | Oct                  | Nov                  | Dec                  | YTD Total            |
|---------|---------|------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| 1065150 | 311624  | DA19880569 | 6,760                | 5,640                | 5,560                | 6,320                | 6,080                | 7,400                | 7,480                | 8,720                | 6,400                | 8,320                | 6,240                | 5,640                | 80,560               |
|         |         |            | KWH >                |
|         |         |            | 21                   | 18                   | 21                   | 22                   | 22                   | 32                   | 34                   | 36                   | 34                   | 32                   | 19                   | 20                   | 26                   |
|         |         |            | \$756.89             | \$645.70             | \$650.41             | \$727.43             | \$712.35             | \$911.74             | \$934.20             | \$1,046.02           | \$847.02             | \$977.73             | \$689.44             | \$650.16             | \$9,549.09           |
|         |         |            | Elec Revenue >       |
|         |         |            | 858,794              | 758,536              | 692,285              | 764,136              | 674,123              | 708,873              | 676,710              | 645,683              | 604,227              | 649,348              | 628,749              | 754,398              | 8,415,862            |
|         |         |            | Combined Average KWH |
|         |         |            | 1,598                | 1,570                | 1,552                | 1,480                | 1,545                | 1,542                | 1,445                | 1,455                | 1,329                | 1,352                | 1,323                | 1,427                | 1,585                |
|         |         |            | USBC Charge          |
|         |         |            | \$772.91             | \$682.68             | \$623.06             | \$687.72             | \$606.70             | \$637.99             | \$609.03             | \$581.11             | \$543.82             | \$584.42             | \$565.87             | \$678.97             | \$7,574.28           |
|         |         |            | Total Elec Revenue   |
|         |         |            | \$80,709.84          | \$73,509.08          | \$65,990.23          | \$70,803.18          | \$65,395.23          | \$67,786.33          | \$64,079.88          | \$61,842.36          | \$57,486.66          | \$61,236.42          | \$59,534.89          | \$69,897.53          | \$798,271.63         |



# MONTANA

PRECISION PRODUCTS

ISO 9001:2008/AS9100C Certified

This is our second year of participating in the Self Directed USB program. We cared over 2016 funds in the amount of \$2920 to 2017 and a \$3025 was requested in November and we have since then received that check. We plan on using \$3104.04 for more LED lighting upgrades in 2018.

Thanks Justin Parnell



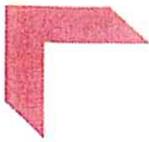
# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/24/2018

## MONTANA PRECISION PRODUCTS LLC

| Account Summary                 |              | Payment Requests Made |            |            |  |  |  |  |  |  |  |  |  | Payments Issued |            |
|---------------------------------|--------------|-----------------------|------------|------------|--|--|--|--|--|--|--|--|--|-----------------|------------|
|                                 |              | Submitted By          | Date       | Amount     |  |  |  |  |  |  |  |  |  | Date            | Amount     |
| 2016 Carryover Reservation:     | \$2,920.00   | Justin Parnell        | 11/30/2017 | \$3,025.00 |  |  |  |  |  |  |  |  |  | 12/06/2017      | \$3,025.00 |
| Reservations Made YTD:          | \$3,200.00   |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| YTD Elec Revenue:               | \$364,998.31 |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| 2016 Carryover Payment Request: | \$0.00       |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| Total Payment Requests:         | \$3,025.00   |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| Payment Requests Made YTD:      | \$3,025.00   |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| Current Request Balance:        | \$0.00       |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| 2016 Carryover USBC Credit:     | \$2,919.44   |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| Total USBC Credit:              | \$6,129.04   |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| USBC Credit YTD:                | \$3,209.60   |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| Payments Issued YTD:            | \$3,025.00   |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| Average Monthly Credit Earned:  | \$267.47     |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| USBC Credit Balance:            | \$3,104.04   |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |
| Payment Pending:                | \$0.00       |                       |            |            |  |  |  |  |  |  |  |  |  |                 |            |

| Account Detail |                     | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|----------------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| Account        | Premise Meter       |             |             |             |             |             |             |             |             |             |             |             |             |              |
| 1816576        | 405061 DA18683630   | 261,403     | 268,749     | 263,224     | 300,145     | 301,877     | 279,035     | 277,193     | 334,120     | 333,636     | 315,036     | 316,831     | 314,982     | 3,566,231    |
|                | KWH >               | 923         | 933         | 976         | 950         | 1,063       | 994         | 1,166       | 1,089       | 1,028       | 1,089       | 1,045       | 1,020       | 1,023        |
|                | KW >                |             |             |             |             |             |             |             |             |             |             |             |             |              |
|                | Elec Revenue >      | \$27,164.70 | \$28,165.63 | \$27,388.24 | \$29,871.13 | \$31,228.60 | \$28,841.38 | \$29,993.61 | \$33,505.40 | \$32,970.76 | \$32,184.12 | \$32,037.55 | \$31,647.19 | \$364,998.31 |
|                | Total KWH           | 261,403     | 268,749     | 263,224     | 300,145     | 301,877     | 279,035     | 277,193     | 334,120     | 333,636     | 315,036     | 316,831     | 314,982     | 3,566,231    |
|                | Combined Average KW | 923         | 933         | 976         | 950         | 1,063       | 994         | 1,166       | 1,089       | 1,028       | 1,089       | 1,045       | 1,020       | 1,023        |
|                | USBC Charge         | \$235.27    | \$241.87    | \$236.90    | \$270.13    | \$271.69    | \$251.13    | \$249.47    | \$300.71    | \$300.27    | \$283.53    | \$285.15    | \$283.48    | \$3,209.60   |
|                | Total Elec Revenue  | \$27,164.70 | \$28,165.63 | \$27,388.24 | \$29,871.13 | \$31,228.60 | \$28,841.38 | \$29,993.61 | \$33,505.40 | \$32,970.76 | \$32,184.12 | \$32,037.55 | \$31,647.19 | \$364,998.31 |



January 19, 2018

Rec'd MT DOR

MAR 05 2018

Justin Parnell  
Montana Precision Products (formerly Seacast)  
119800 Rick Jones Way  
Butte, MT 59701 (USA)

Dear Justin:

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2017, and I am contacting you regarding your 2017 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end "Self-Directed USBC Progress Report for 2017" showing a summary of your USB activity during 2017 including payment requests you submitted (Form B's), payments issued and any reservations (Form A's) you may have submitted to carry over all or a portion of your 2017 USB credits into 2018. If your final progress report shows a "Payment Pending", it reflects your December 2017 USB credits that were carried over into 2018, and these credits will be distributed when we issue our first quarter USB checks in mid-April. Please review the numbers provided, and notify me immediately of any differences you identify.

Your "Self-Directed USBC Progress Report for 2017" will be helpful as you prepare your required year-end USB report that you must file with the Montana Department of Revenue (DOR) by March 1, 2018. The annual USB reporting requirements are highlighted in yellow in the attached copy of the Montana Code Annotated (MCA) and Montana Administrative Rule 4.29.103. Here are some tips to assist you in preparing your annual report for DOR.

- ✓ A large customer claiming USB credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the Montana DOR and to the large customer's utility (NorthWestern Energy) by March 1<sup>st</sup> of the following year.
- ✓ In 2015, legislative changes to the MCA now impose penalties of not less than \$1,000 or more than \$5,000 if a large customer does not file an annual report on its USB credits with DOR by March 1.
- ✓ A report must be filed with the DOR even if a large customer is being reimbursed USB credits for a project submitted in previous years and the report should indicate if the USB credits were received for projects submitted in previous years.
- ✓ The annual report of a large customer must identify each qualifying project or expenditure for which it claimed a credit and the amount of the credit, including requests to donate USB credits to Energy Share. So, if any new Form B's were submitted to the utility during 2017 to request credits, a copy of these forms should be submitted with your annual report to DOR. Large customers need to keep their own documentation on the project submitted as to the costs and energy savings claimed, etc. NorthWestern Energy does not qualify large customers' self-directed USB claims.
- ✓ The large customer's report must indicate the amount of USB funds earned and self-directed in 2017.
- ✓ We encourage large customers to make a copy of the "Self-Directed USBC Progress Report" and send it along with your other documentation to DOR.
- ✓ Also, as required by the MCA, please provide NorthWestern Energy with a copy of what you send to DOR, and send it to: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 or email: rick.edwards@northwestern.com.

You may want to send your report via certified mail to DOR by March 1, 2018 to the address below.

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

If you have any questions, please contact me at 406-497-3756.

Sincerely,

Dale Mahugh  
Specialist, Key Accounts



Montana Resources, LLP (406) 496-3200  
600 Shields Ave. (406) 723-9542 fax  
Butte, Montana www.montanaresources.com  
USA 59701

February 14, 2018

Mark Schoenfeld  
Montana Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

**Rec'd MT DOR**  
**FEB 21 2018**

Mr. Schoenfeld

Enclosed you will find a copy of Montana Resources annual USB report for 2017.

In 2017 Montana Resources submitted one new USB credit request. A total of \$384,303.97 was requested and NorthWestern Energy issued payments totaling \$384,303.97, of this 172,286.80 was from carryovers requested from 2016. Montana Resources accrued an additional \$315,485.42 in 2017 which left a credit balance of \$103,468.25, all of which we have requested to be carried over for use in 2018. I have attached the credit requests, project descriptions, and the Self-Directed USBC Progress Report for 2017. If you have any questions or require more information please feel free to contact me.

Rob Sanderson  
Montana Resources  
406.496.3242  
600 Shields Ave.  
Butte, MT 59701



# Self-Directed USBC Progress Report for 2017

Prepared by Rick Edwards on 2/6/2018

## MONTANA RESOURCES

### Account Summary

|                                 |              |                          |                |
|---------------------------------|--------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$180,000.00 | YTD Elec Revenue:        | \$2,314,800.31 |
| Reservations Made YTD:          | \$350,000.00 |                          |                |
| 2016 Carryover Payment Request: | \$0.00       | Total Payment Requests:  | \$384,303.97   |
| Payment Requests Made YTD:      | \$384,303.97 | Current Request Balance: | \$0.00         |
| 2016 Carryover USBC Credit:     | \$172,286.80 | Total USBC Credit:       | \$487,772.22   |
| USBC Credit YTD:                | \$315,485.42 | Payments Issued YTD:     | \$384,303.97   |
| Average Monthly Credit Earned:  | \$26,290.45  | USBC Credit Balance:     | \$103,468.25   |
|                                 |              | Payment Pending:         | \$0.00         |

### Account Detail

| Account | Premise | Meter      | Jan                            | Feb             | Mar                  | Apr                  | May                  | Jun                  | Jul                  | Aug                  | Sep                | Oct                  | Nov                  | Dec                  | YTD Total             |
|---------|---------|------------|--------------------------------|-----------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|--------------------|----------------------|----------------------|----------------------|-----------------------|
| 100062  | 1068    | DA16344173 | KWH > 21,116,948<br>KW > 6,160 | 21,703,867<br>0 | 19,386,572<br>31,363 | 21,321,586<br>31,334 | 19,727,830<br>30,873 | 20,799,133<br>30,556 | 19,312,747<br>30,585 | 20,932,441<br>30,427 | 20,923,228<br>0    | 19,532,606<br>30,369 | 21,149,474<br>31,003 | 20,323,047<br>31,132 | 246,229,479<br>23,650 |
|         |         |            | Elec Revenue > \$95,705.70     | 139,418.72      | 130,417.92           | 138,259.94           | 131,009.68           | 134,860.03           | 128,847.05           | 134,103.39           | 134,395.53         | 128,374.98           | 135,917.60           | 132,802.86           | \$1,564,113.40        |
| 100062  | 1068    | DA17293382 | KWH > 1,146,265<br>KW > 1,918  | 1,123,392<br>0  | 936,999<br>1,737     | 1,099,658<br>1,693   | 976,983<br>1,842     | 1,011,688<br>1,572   | 949,998<br>1,529     | 1,050,631<br>1,642   | 1,028,350<br>1,737 | 1,012,612<br>1,624   | 1,110,696<br>1,849   | 1,062,657<br>1,840   | 12,511,929<br>1,565   |
|         |         |            | Elec Revenue > \$7,602.18      | \$7,727.00      | \$6,656.79           | \$7,248.09           | \$6,672.81           | \$6,691.84           | \$6,370.11           | \$6,910.29           | \$6,975.75         | \$6,727.87           | \$7,490.11           | \$7,282.04           | \$84,354.88           |
| 100062  | 1068    | DA17677708 | KWH > 513,456<br>KW > 962      | 594,982<br>0    | 531,124<br>953       | 586,058<br>933       | 553,258<br>1,296     | 606,475<br>959       | 487,718<br>982       | 576,526<br>1,358     | 472,159<br>0       | 369,502<br>975       | 585,162<br>1,302     | 595,563<br>966       | 6,471,983<br>891      |
|         |         |            | Elec Revenue > \$3,562.37      | \$3,928.17      | \$3,721.71           | \$3,913.02           | \$4,372.09           | \$4,038.72           | \$3,592.11           | \$4,538.23           | \$3,492.68         | \$3,079.48           | \$4,481.54           | \$3,974.69           | \$46,694.81           |
| 100062  | 1068    | DA18683600 | KWH > 1,061,332<br>KW > 2,093  | 1,032,636<br>0  | 895,250<br>2,012     | 988,880<br>2,051     | 922,250<br>2,024     | 895,458<br>1,943     | 784,682<br>1,824     | 846,861<br>1,789     | 836,862<br>0       | 815,986<br>1,912     | 902,147<br>1,789     | 905,454<br>1,862     | 10,887,798<br>1,610   |
|         |         |            | Elec Revenue > \$7,523.14      | \$7,639.50      | \$6,935.68           | \$7,381.09           | \$7,065.36           | \$6,823.84           | \$6,177.86           | \$6,330.17           | \$6,271.97         | \$6,406.78           | \$6,552.70           | \$6,717.90           | \$81,825.99           |
| 100062  | 1068    | DA18683602 | KWH > 2,025,520<br>KW > 3,825  | 2,120,029<br>0  | 1,876,477<br>4,009   | 1,973,840<br>4,020   | 1,787,967<br>4,257   | 1,879,415<br>3,957   | 1,912,830<br>4,061   | 2,074,180<br>4,067   | 1,909,659<br>0     | 1,706,416<br>3,583   | 2,185,014<br>4,072   | 1,975,503<br>3,894   | 23,426,850<br>3,312   |
|         |         |            | Elec Revenue > \$14,098.97     | \$14,898.02     | \$14,197.39          | \$14,612.30          | \$14,241.53          | \$14,124.44          | \$14,430.51          | \$14,990.27          | \$13,998.19        | \$12,719.61          | \$15,444.55          | \$14,310.58          | \$172,066.36          |
| 100062  | 1068    | DA18683605 | KWH > 1,672,999<br>KW > 2,491  | 1,726,366<br>0  | 1,661,760<br>2,894   | 2,006,680<br>3,053   | 1,857,989<br>3,024   | 1,786,439<br>2,837   | 1,626,530<br>2,707   | 1,839,355<br>2,923   | 1,885,460<br>0     | 1,853,251<br>2,981   | 2,072,376<br>3,341   | 2,036,174<br>3,240   | 22,025,379<br>2,458   |
|         |         |            | Elec Revenue > \$10,624.67     | \$11,130.87     | \$11,501.10          | \$13,167.00          | \$12,513.43          | \$11,916.34          | \$11,052.09          | \$12,176.87          | \$12,315.08        | \$12,327.53          | \$13,797.41          | \$13,486.75          | \$146,009.14          |
| 100062  | 1068    | DA18683622 | KWH > 1,783,919<br>KW > 3,456  | 1,841,472<br>0  | 1,631,567<br>3,456   | 1,812,578<br>3,514   | 1,675,825<br>3,730   | 1,781,442<br>3,586   | 1,783,210<br>3,672   | 1,937,225<br>3,758   | 1,815,750<br>0     | 1,633,410<br>3,370   | 2,021,638<br>3,701   | 1,827,180<br>3,557   | 21,545,216<br>2,983   |
|         |         |            | Elec Revenue > \$12,550.48     | \$13,292.02     | \$12,295.80          | \$13,128.50          | \$12,923.70          | \$13,119.13          | \$13,266.79          | \$13,934.41          | \$13,257.69        | \$12,077.93          | \$14,181.09          | \$13,163.24          | \$157,190.78          |

### Payment Requests Made

| Submitted By  | Date       | Amount       |
|---------------|------------|--------------|
| Rob Sanderson | 11/28/2017 | \$384,303.97 |

### Payments Issued

| Date       | Amount       |
|------------|--------------|
| 12/06/2017 | \$384,303.97 |

# Self-Directed USBC Progress Report for 2017

Prepared by Rick Edwards on 2/6/2018

| Account | Premise | Meter      | Jan                           | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total      |
|---------|---------|------------|-------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
| 100062  | 1068    | DA19312271 | KWH > 677,614                 | 706,625     | 581,658     | 602,923     | 595,959     | 617,341     | 556,077     | 576,526     | 620,546     | 628,342     | 670,626     | 606,493     | 7,440,730      |
|         |         |            | KW > 1,728                    | 0           | 1,693       | 1,590       | 1,598       | 1,780       | 1,469       | 1,358       | 0           | 1,668       | 1,737       | 1,659       | 1,357          |
|         |         |            | Elec Revenue > \$5,401.35     | \$5,885.76  | \$5,136.21  | \$5,054.71  | \$5,039.37  | \$5,423.77  | \$4,666.11  | \$4,538.23  | \$5,460.09  | \$5,253.04  | \$5,535.91  | \$5,150.40  | \$62,544.95    |
|         |         |            | Total KWH 29,998.053          | 30,849.369  | 27,501.407  | 30,392.203  | 28,100.061  | 29,377.391  | 27,413.792  | 29,833.745  | 29,492.014  | 27,552.125  | 30,697.133  | 29,332.071  | 350,539.364    |
|         |         |            | Combined Average KW 22.633    | 0           | 48.117      | 48.188      | 48.444      | 47.190      | 46.829      | 47.322      | 1.737       | 46.482      | 48.794      | 48.170      | 37.826         |
|         |         |            | USBC Charge \$26,998.25       | \$27,764.42 | \$24,751.26 | \$27,352.98 | \$25,290.05 | \$26,439.66 | \$24,672.42 | \$26,850.36 | \$26,542.82 | \$24,796.92 | \$27,627.42 | \$26,398.86 | \$315,485.42   |
|         |         |            | Total Elec Revenue 157,068.86 | 203,920.06  | 190,862.60  | 202,764.65  | 193,837.97  | 196,998.11  | 188,402.63  | 197,521.66  | 196,166.98  | 186,967.22  | 203,400.91  | 196,888.46  | \$2,314,800.31 |

## FORM A - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
 FAX: (406) 497-4008

|                      |                                 |
|----------------------|---------------------------------|
| DATE:                | 11/28/2017                      |
| NAME OF BUSINESS:    | Montana Resources               |
| CITY/TOWN LOCATION:  | Butte, MT                       |
| CONTACT PERSON:      | Rob Sanderson                   |
| MAILING ADDRESS:     | 600 Shields Ave.                |
| CITY, STATE AND ZIP: | Butte, MT 59701                 |
| PHONE NUMBER:        | 406-496-3242                    |
| FAX NUMBER:          |                                 |
| E-MAIL ADDRESS       | rsanderson@montanaresources.com |

1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

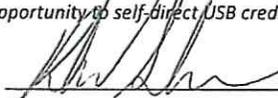
Replace existing Incandecent and HPS lighting in the Primary Crusher, Secondary Crusher and Conveying system buildings. Estimated completion date is November 2018 and it is estimated to cost \$350,000

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:

Signature:



FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

**NorthWestern**  
**Energy**  
 Delivering a Bright Future

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |  |
|----------------------|--|
| DATE:                | 11/28/2017   |
| NAME OF BUSINESS:    | Montana Resources  |
| CITY/TOWN LOCATION:  | Butte, MT  |
| CONTACT PERSON:      | Rob Sanderson  |
| MAILING ADDRESS:     | 600 Shields Ave.   |
| CITY, STATE AND ZIP: | Butte, MT 59701  |
| PHONE NUMBER:        | 406-496-3242   |
| FAX NUMBER:          |  |
| E-MAIL ADDRESS       | <a href="mailto:rsanderson@montanaresources.com">rsanderson@montanaresources.com</a> |

|                             |              |
|-----------------------------|--------------|
| AMOUNT OF CREDIT REQUESTED: | \$384,303.97 |
|-----------------------------|--------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| <b>DESCRIPTION OF PROJECT(S)</b> (if more space is needed, please attach):  |
| Replace all incandescent and HPS lighting in Concentrator, Moly, and Garage with more efficient LED units. There are 884 Fixtures that have been identified for replacement. All of the replacement units are on 24 hours a day 365 days a year. This results in a total energy savings of 1,442,465kWh per year. With a total project cost of \$384,303.97 this results in a simple payback period of about 5 years. Please see attached for more information. |

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |           |
|------------------------|-----------|
| ESTIMATED kWh SAVINGS: | 1,442,465 |
| ESTIMATED KW SAVINGS:  | 165       |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:                      Signature: 

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



| Fixture Model and Description  | # of Fixtures | LED Wattage | Existing Wattage | kWh/yr. savings |
|--------------------------------|---------------|-------------|------------------|-----------------|
| EV-U200W High Bay              | 303           | 200         | 400              | 530856          |
| 8L 5K Low Bay                  | 377           | 45          | 150              | 346764.6        |
| EV-U150 High Bay               | 8             | 150         | 400              | 17520           |
| OLVTCM Jelly Jar               | 37            | 15          | 100              | 27550.2         |
| ZY H5 165W High Bay            | 56            | 165         | 400              | 115281.6        |
| WP 70W Outdoor Flood Wall Pack | 5             | 70          | 200              | 5694            |
| FHB 45000L High Bay            | 73            | 450         | 1000             | 351714          |
| AR-FL-G1 Wall Pack             | 25            | 185         | 400              | 47085           |

**Total**            **1442465**  
**kW**                    **164.665**



# Montana Resources

600 Shields Ave., Butte, MT, 59701

## P.O. Number: 8-303355

Print Date: 11/17/17

Branch: 8

Page: 1 of 1

Ship To Montana Resources, LLP  
600 Shields Avenue  
Butte MT 59701

Date Ordered: 11/17/17  
Est. Delivery Date: 11/17/17  
Req. Written By: JOSH W.  
Freight:  
Delivery Inst.:

Shipped Anixter Inc.  
From PO Box 847428  
Dallas TX 75284-7428

Purchasing Agent: Galle, Cheri Lee

Supplier #: 443768 Phone #: (303) 373-9200

| Qty Recd/<br>Date Recd | Qty<br>Ordered | Qty<br>UM | Part Number / Description         | Cost<br>Code | Obj<br>Code | Sub<br>Acct | Equip # | WO #     | Unit Price   | Extension  |
|------------------------|----------------|-----------|-----------------------------------|--------------|-------------|-------------|---------|----------|--------------|------------|
|                        | 1.00           | EA        | LED Lighting in all Primary Areas | 9000         | 4415        |             |         | 00065002 | 382,590.0000 | 382,590.00 |

Payment Terms: 30 days, no discount

PO Total Value  
\$ 382,590.00

### Approvals

Date

Notes:

Materials are Non-Cancellable, Non-Returnable

Superintendent:

Vice President:

President:

Purchasing:

*J. Michelle*

*Cheri Galle*

11/17



## Montana Resources - Butte Mine

| Concentrator                        |     |         |           |                                      |            |               |
|-------------------------------------|-----|---------|-----------|--------------------------------------|------------|---------------|
| Item #                              | Qty | Voltage | Mfg       | Catalog #                            | Sell       | Ext           |
| 1                                   | 252 | 480     | Eparts    | EV-U200W-BDZ 5000K 480 W/ FEMALE REC | \$ 345.00  | \$ 86,940.00  |
| 2                                   | 21  | 120-277 | Holophane | BALED 8L 5K AS C G                   | \$ 477.50  | \$ 10,027.50  |
| 3                                   | 17  | 120     | Lithonia  | OLVTCM                               | \$ 105.00  | \$ 1,785.00   |
| 4                                   | 310 | 120-277 | Holophane | BALED 8L 5K AS C G                   | \$ 477.50  | \$ 148,025.00 |
|                                     |     |         |           |                                      | Total Sell | \$ 246,777.50 |
| Molly                               |     |         |           |                                      |            |               |
| 1                                   | 42  | 480     | Eparts    | EV-U200W-BDZ 5000K 480 W/ FEMALE REC | \$ 345.00  | \$ 14,490.00  |
| 2                                   | 46  | 120-277 | Holophane | BALED 8L 5K AS C G                   | \$ 477.50  | \$ 21,965.00  |
| 3                                   | 20  | 120     | Lithonia  | OLVTCM 1.5W                          | \$ 105.00  | \$ 2,100.00   |
|                                     |     |         |           |                                      | Total Sell | \$ 38,555.00  |
| A-Frame                             |     |         |           |                                      |            |               |
| 1                                   | 9   | 120-277 | Eparts    | EV-U200W-DBZ 5000 120/277 FEMALE REC | \$ 345.00  | \$ 3,105.00   |
| 2                                   | 8   | 120-277 | Eparts    | EV-U150W-DBZ 5000 120/277 FEMALE REC | \$ 330.00  | \$ 2,640.00   |
|                                     |     |         |           |                                      | Total Sell | \$ 5,745.00   |
| Garage                              |     |         |           |                                      |            |               |
| 1                                   | 33  | 120-277 | Eparts    | ZY H5 165W XDZ w/ Hanger kit         | \$ 310.00  | \$ 10,230.00  |
| 2                                   | 4   | 120-277 | Eparts    | WP 70W 27V50KDP1                     | \$ 130.00  | \$ 520.00     |
| 3                                   | 20  | 120-277 | Eparts    | ZY H5 165W XDZ w/ Hanger kit         | \$ 310.00  | \$ 6,200.00   |
| 4                                   | 3   | 120-277 | Eparts    | ZY H5 165W XDZ w/ Hanger kit         | \$ 310.00  | \$ 930.00     |
| 5                                   | 1   | 120-277 | Eparts    | WP 70W 27V50KDP1                     | \$ 130.00  | \$ 130.00     |
|                                     |     |         |           |                                      | Total Sell | \$ 18,010.00  |
| Tire Shop                           |     |         |           |                                      |            |               |
| 1                                   | 73  | 120-277 | Eparts    | FHB 45000L 5000K 90° LENS            | \$ 780.00  | \$ 56,940.00  |
|                                     |     |         |           |                                      | Total Sell | \$ 56,940.00  |
| Outside around the garage/tire shop |     |         |           |                                      |            |               |
| 1                                   | 10  | 120-277 | Eparts    | AR FL G1 185 100 277 T               | \$ 662.50  | \$ 6,625.00   |
| 2                                   | 8   | 120-277 | Eparts    | AR FL G1 185 100 277 Y               | \$ 662.50  | \$ 5,300.00   |
| 3                                   | 7   | 120-277 | Eparts    | AR FL G1 185 100 277 FPM             | \$ 662.50  | \$ 4,637.50   |
|                                     |     |         |           |                                      | Total Sell | \$ 16,562.50  |

**\$ 362,590**

**Notes:**

1. All EV Round High bays will include a female recepticle and Anixter will install to fixture at no additional charge.
2. Manufacturer terms and conditions apply to sale
3. Unit prices are for accounting purposes only. Lot price is based on bill of material as shown any alternation will void quote
4. Quoting standard factory finishes only, unless otherwise noted
5. Lead times for EV high bays & BALED is 4-6 weeks after receipt of order, balance of material 3-4 weeks
6. Counts are best estimate and not guaranteed

## Cheri Galle

---

**From:** Michele Brazil <michele.brazil@anixter.com>  
**Sent:** Tuesday, November 14, 2017 4:23 PM  
**To:** Cheri Galle  
**Subject:** Lighting PO from Josh

Hello Cheri! When you send the lighting PO to us that Josh sent you, will you please put on the PO: "materials are non-cancellable, non-returnable".

Thank you,



---

### Michele Brazil

Mining & Industrial Sales, Electrical & Electronic Solutions  
Anixter Inc.  
1359 South Maple Grove Road  
Boise | ID | 83709  
Tel: 208-854-8451  
Fax: 208-377-8716  
[michele.brazil@anixter.com](mailto:michele.brazil@anixter.com)



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## Cheri Galle

---

**From:** Justin Shields <Justin.Shields@anixter.com>  
**Sent:** Friday, November 17, 2017 3:46 PM  
**To:** Cheri Galle  
**Subject:** FW: PO# 303355.pdf  
**Attachments:** PO# 303355.pdf

Hello Cheri

Thank you for the order. I'll get everything moving for you.  
Have a great weekend.

Justin

---

### Justin Shields

Location Manager  
Anixter  
1359 S. Maple Grove Rd  
Boise | ID | 83709  
Tel: 208.854.8453  
Mob: 208.870.6996  
Fax: 208.377.8716  
[Justin.Shields@anixter.com](mailto:Justin.Shields@anixter.com)



**From:** Cheri Galle [<mailto:CGalle@montanaresources.com>]  
**Sent:** Friday, November 17, 2017 2:35 PM  
**To:** Michele Brazil <[michele.brazil@anixter.com](mailto:michele.brazil@anixter.com)>  
**Subject:** PO# 303355.pdf

Good afternoon Michele,  
Please see attached our PO# 8-303355 for the LED Lightning Order.  
I did note the PO as you requested.  
Feel free to contact me with any questions.

Thank You,

*Cheri Galle*

Buyer  
Montana Resources  
406.496.3222 phone  
1-800-486-6940 fax  
[chgalle@montanaresources.com](mailto:chgalle@montanaresources.com)



**Arc Electric, Inc**

P O Box 4094  
Butte, MT 59702

406-494-4006



**Invoice**

|            |           |
|------------|-----------|
| Date       | Invoice # |
| 10/30/2017 | 30463     |

|   |
|---|
| Bill To                                 |
| M R I<br>600 Shields<br>Butte, MT 59701 |

*1095260*

|               |                |                              |
|---------------|----------------|------------------------------|
| P.O. No.      | Terms          | Project                      |
| <i>302935</i> | Due on receipt | MRI/Cable Tray, Mill Light.. |

| Description  | Quantity | U/M | Rate         | Amount          |
|--|----------|-----|--------------|-----------------|
| Mill Lights<br>Run sealtite between line side ballast j boxes and load side ballast j box for future LED lights, pull wire between boxes, run conduit and pull wire on last bank of ballasts, install cord caps on new lights, remove and replace 5 lights on 10/17/17 and 10/19/17. |          |     |              |                 |
| Journeyman   | 9        | Hr. | 71.00        | 639.00          |
| sealtite, lbs w/cover, gasket, 6x6x4 j boxes w/covers  |          |     | 97.97        | 97.97           |
| Thank you for your business!   |          |     | <b>Total</b> | <b>\$736.97</b> |

*To Carole 10/30/17*





February 22, 2018

Mr. Mark Schoenfeld  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

**Rec'd MT DOR**  
**FEB 26 2018**

RE: Self-Directed USBC Progress Report for 2017 – Montana State University Bozeman

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2017. All the USB payments we received in 2017 were self-directed for energy efficiency projects previously submitted. During 2017, we received USB payments totaling \$48,609.33 that was composed of \$44,575.67 in 2017 USB credits and \$4,033.66 in 2016 credits that had been carried over into 2017.

We also have a request balance to carry over all remaining 2017 USB credits at year-end, of \$3,999.97 into 2018.

If you have any questions, please don't hesitate to call me at (406) 994-1885 or Megan Sterl at (406) 994-6544.

Sincerely,

Jill R. Zimbric  
Accounting Associate Manager

#### Facilities Services

6th & Grant St., Plew Building  
P.O. Box 172760  
Bozeman, MT 59717-2760  
[www.montana.edu/us/fs](http://www.montana.edu/us/fs)

|                         |          |
|-------------------------|----------|
| Telephones              |          |
| Work Control Center     | 994-2107 |
| Administration          | 994-2001 |
| Accounting              | 994-1885 |
| Engineering & Utilities | 994-2001 |
| Campus Stores           | 994-2098 |
| Landscape & Grounds     | 994-3442 |
| Custodial Services      | 994-6868 |
| Mail Services           | 994-2672 |
| Fax                     | 994-6572 |

#### Enclosures

Pc: Megan Sterl, Engineering & Utilities Manager, University Services  
Rick Edwards, Manager of Key Accounts & Customer Education, NWE  
Chris Catlett, Director, University Services



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## MONTANA STATE UNIVERSITY - BOZEMAN

### Account Summary

|                                 |              |                          |                |
|---------------------------------|--------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00       | YTD Elec Revenue:        | \$3,539,426.78 |
| Reservations Made YTD:          | \$0.00       |                          |                |
| 2016 Carryover Payment Request: | \$635,993.11 | Total Payment Requests:  | \$635,993.11   |
| Payment Requests Made YTD:      | \$0.00       | Current Request Balance: | \$587,363.78   |

|                                |             |                      |             |
|--------------------------------|-------------|----------------------|-------------|
| 2016 Carryover USBC Credit:    | \$4,033.66  | Total USBC Credit:   | \$52,609.30 |
| USBC Credit YTD:               | \$48,575.64 | Payments Issued YTD: | \$48,609.33 |
| Average Monthly Credit Earned: | \$4,047.97  | USBC Credit Balance: | \$3,999.97  |

Payment Pending: \$3,999.97

### Payment Requests Made

| Submitted By | Date       | Amount      |
|--------------|------------|-------------|
|              | 04/10/2017 | \$15,591.30 |
|              | 07/07/2017 | \$12,000.47 |
|              | 10/09/2017 | \$12,479.72 |
|              | 12/06/2017 | \$8,537.84  |

### Payments Issued

| Date       | Amount      |
|------------|-------------|
| 04/10/2017 | \$15,591.30 |
| 07/07/2017 | \$12,000.47 |
| 10/09/2017 | \$12,479.72 |
| 12/06/2017 | \$8,537.84  |

### Account Detail

| Account | Premise | Meter      | Jan                       | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total      |
|---------|---------|------------|---------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|----------------|
| 100611  | 1615    | DA18683714 | KWH > 3,565,711           | 3,727,357  | 3,601,531  | 4,014,287  | 3,930,581  | 3,758,614  | 3,821,687  | 4,160,959  | 4,187,118  | 4,191,181  | 4,174,599  | 3,891,920  | 47,025,545     |
|         |         |            | KW > 6,966                | 7,147      | 7,394      | 7,588      | 8,068      | 7,815      | 7,906      | 7,912      | 8,975      | 8,826      | 8,573      | 7,342      | 7,876          |
|         |         |            | Elec Revenue > 187,607.15 | 196,770.80 | 189,211.40 | 224,029.20 | 234,522.98 | 251,956.70 | 250,450.27 | 268,419.99 | 269,055.37 | 277,875.95 | 275,168.63 | 215,118.08 | \$2,840,186.52 |
| 163370  | 34943   | DA06344948 | KWH > 2,180               | 2,280      | 2,100      | 1,800      | 1,820      | 1,940      | 2,520      | 2,560      | 3,640      | 2,940      | 2,980      | 2,660      | 29,420         |
|         |         |            | KW > 11                   | 11         | 10         | 10         | 10         | 10         | 9          | 9          | 12         | 14         | 14         | 11         | 11             |
|         |         |            | Elec Revenue > \$293.52   | \$305.96   | \$278.22   | \$249.24   | \$252.24   | \$258.66   | \$298.39   | \$301.41   | \$417.15   | \$375.60   | \$379.60   | \$332.27   | \$3,742.26     |
| 176372  | 40615   | DG61832469 | KWH > 98                  | 89         | 161        | 25         | 89         | 87         | 2,620      | 2,241      | 84         | 83         | 82         | 87         | 5,746          |
|         |         |            | KW > 0                    | 0          | 0          | 0          | 0          | 0          | 33         | 32         | 0          | 9          | 0          | 0          | 6              |
|         |         |            | Elec Revenue > \$22.30    | \$20.03    | \$22.83    | \$11.89    | \$23.40    | \$8.71     | \$536.81   | \$495.15   | \$8.51     | \$97.53    | \$7.82     | \$9.68     | \$1,264.66     |
| 176374  | 40617   | DA05507285 | KWH > 3,600               | 3,040      | 2,640      | 2,400      | 1,920      | 1,480      | 1,040      | 1,560      | 1,600      | 1,560      | 1,720      | 2,080      | 24,640         |
|         |         |            | KW > 11                   | 12         | 12         | 18         | 18         | 8          | 8          | 10         | 16         | 13         | 15         | 12         | 13             |
|         |         |            | Elec Revenue > \$412.42   | \$380.82   | \$340.23   | \$377.48   | \$342.32   | \$211.02   | \$171.88   | \$232.06   | \$295.25   | \$264.43   | \$297.52   | \$297.07   | \$3,622.50     |
| 176376  | 40619   | DG15027060 | KWH > 0                   | 0          | 0          | 0          | 0          | 0          | 4,945      | 6,401      | 0          | 650        | 0          | 0          | 11,996         |
|         |         |            | KW > 0                    | 0          | 0          | 0          | 0          | 0          | 35         | 37         | 0          | 29         | 0          | 0          | 34             |
|         |         |            | Elec Revenue > \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$728.42   | \$853.12   | \$0.00     | \$348.41   | \$0.00     | \$0.00     | \$1,929.95     |
| 199197  | 52018   | DG93700285 | KWH > 2,280               | 2,160      | 1,940      | 1,740      | 1,820      | 1,380      | 1,280      | 1,320      | 1,440      | 1,640      | 1,520      | 2,320      | 20,840         |
|         |         |            | KW > 18                   | 19         | 18         | 18         | 14         | 13         | 12         | 12         | 15         | 18         | 14         | 18         | 16             |
|         |         |            | Elec Revenue > \$368.66   | \$370.41   | \$345.89   | \$330.65   | \$298.27   | \$245.03   | \$234.47   | \$229.54   | \$272.92   | \$314.76   | \$273.88   | \$373.89   | \$3,656.37     |
| 199552  | 52106   | DG93700196 | KWH > 3,220               | 2,780      | 2,440      | 2,180      | 2,060      | 1,620      | 1,540      | 1,620      | 1,600      | 1,660      | 2,060      | 2,160      | 24,940         |
|         |         |            | KW > 17                   | 16         | 16         | 16         | 16         | 15         | 14         | 12         | 12         | 12         | 15         | 15         | 15             |
|         |         |            | Elec Revenue > \$438.56   | \$398.01   | \$362.63   | \$342.79   | \$337.12   | \$283.77   | \$268.60   | \$254.73   | \$255.27   | \$262.26   | \$325.96   | \$331.41   | \$3,861.11     |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan                 | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |                |
|---------|---------|------------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|----------------|
| 413082  | 165380  | DA11667864 | KWH >               | 198         | 167         | 160         | 255         | 564         | 3,240       | 4,267       | 2,219       | 450         | 247         | 331         | 13,960       |                |
|         |         |            | KW >                | 17          | 0           | 2           | 4           | 20          | 21          | 20          | 20          | 17          | 1           | 0           | 12           |                |
|         |         |            | Elec Revenue >      | \$198.68    | \$24.77     | \$41.96     | \$72.94     | \$260.90    | \$469.48    | \$539.74    | \$381.61    | \$220.32    | \$42.98     | \$40.43     | \$2,618.65   |                |
| 413091  | 165387  | DB82361657 | KWH >               | 3,920       | 2,280       | 2,240       | 1,800       | 1,560       | 1,400       | 0           | 3,600       | 3,080       | 2,280       | 3,240       | 27,240       |                |
|         |         |            | KW >                | 12          | 13          | 8           | 8           | 8           | 8           | 0           | 8           | 8           | 12          | 12          | 10           |                |
|         |         |            | Elec Revenue >      | \$442.24    | \$318.98    | \$264.85    | \$228.23    | \$267.50    | \$203.70    | \$7.35      | \$370.26    | \$331.06    | \$304.86    | \$379.69    | \$3,335.27   |                |
| 615185  | 266623  | DA15843412 | KWH >               | 309,000     | 297,600     | 292,800     | 256,800     | 168,000     | 264,600     | 253,200     | 281,400     | 250,800     | 287,400     | 271,200     | 3,184,800    |                |
|         |         |            | KW >                | 660         | 672         | 648         | 624         | 450         | 492         | 528         | 672         | 648         | 600         | 660         | 607          |                |
|         |         |            | Elec Revenue >      | \$29,914.51 | \$28,566.95 | \$27,694.00 | \$24,966.68 | \$16,603.15 | \$24,260.58 | \$23,699.61 | \$27,081.24 | \$24,627.23 | \$27,018.49 | \$26,302.10 | \$305,350.96 |                |
| 710867  | 321643  | DA04203289 | KWH >               | 163,840     | 146,240     | 102,880     | 104,960     | 160,320     | 102,560     | 117,760     | 109,760     | 91,840      | 97,920      | 122,880     | 1,425,120    |                |
|         |         |            | KW >                | 295         | 294         | 224         | 225         | 249         | 264         | 265         | 281         | 243         | 244         | 246         | 281          |                |
|         |         |            | Elec Revenue >      | \$16,034.65 | \$14,648.11 | \$10,224.15 | \$10,417.06 | \$15,548.99 | \$10,625.30 | \$10,583.12 | \$11,772.52 | \$11,319.71 | \$9,567.78  | \$10,085.04 | \$12,027.70  | \$142,864.13   |
| 710869  | 321645  | DS63328248 | KWH >               | 14,480      | 14,240      | 11,680      | 8,880       | 6,720       | 8,880       | 12,720      | 10,160      | 14,320      | 9,920       | 8,560       | 132,720      |                |
|         |         |            | KW >                | 25          | 26          | 26          | 20          | 19          | 26          | 32          | 23          | 20          | 20          | 25          | 23           |                |
|         |         |            | Elec Revenue >      | \$1,427.46  | \$1,410.29  | \$1,176.91  | \$897.28    | \$726.77    | \$1,123.43  | \$1,311.32  | \$1,025.79  | \$1,326.71  | \$988.27    | \$929.11    | \$13,301.83  |                |
| 711575  | 322182  | DG94373902 | KWH >               | 4,355       | 4,653       | 3,476       | 2,588       | 2,084       | 1,390       | 1,672       | 1,535       | 1,457       | 1,683       | 2,761       | 29,185       |                |
|         |         |            | KW >                | 13          | 14          | 11          | 11          | 10          | 5           | 5           | 5           | 6           | 8           | 9           | 9            |                |
|         |         |            | Elec Revenue >      | \$484.35    | \$528.93    | \$387.86    | \$320.91    | \$274.13    | \$206.44    | \$169.32    | \$188.89    | \$182.33    | \$183.13    | \$223.77    | \$3,466.74   |                |
| 715994  | 325877  | DG28992284 | KWH >               | 0           | 0           | 0           | 0           | 840         | 6,640       | 8,200       | 120         | 0           | 0           | 0           | 21,120       |                |
|         |         |            | KW >                | 0           | 0           | 0           | 0           | 2           | 67          | 55          | 0           | 0           | 0           | 0           | 38           |                |
|         |         |            | Elec Revenue >      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$87.88     | \$1,070.00  | \$1,172.92  | \$9.04      | \$0.00      | \$0.00      | \$0.00      | \$3,511.50   |                |
| 719536  | 328585  | DG64792474 | KWH >               | 11,160      | 12,280      | 16,440      | 12,640      | 17,280      | 14,720      | 14,880      | 12,960      | 11,440      | 30,760      | -6,360      | 162,520      |                |
|         |         |            | KW >                | 21          | 22          | 30          | 28          | 35          | 30          | 30          | 27          | 26          | 28          | 30          | 28           |                |
|         |         |            | Elec Revenue >      | \$1,114.21  | \$1,209.53  | \$1,585.89  | \$1,277.42  | \$1,719.49  | \$1,431.94  | \$1,454.28  | \$1,458.35  | \$1,282.52  | \$1,159.27  | \$2,687.70  | (\$189.54)   | \$16,191.06    |
| 721021  | 329867  | DG36300741 | KWH >               | 440         | 520         | 660         | 560         | 620         | 260         | 620         | 500         | 300         | 320         | 460         | 5,540        |                |
|         |         |            | KW >                | 1           | 2           | 3           | 4           | 5           | 2           | 4           | 5           | 5           | 2           | 2           | 3            |                |
|         |         |            | Elec Revenue >      | \$65.33     | \$76.95     | \$88.52     | \$92.88     | \$108.04    | \$49.19     | \$53.48     | \$96.08     | \$80.67     | \$52.31     | \$65.13     | \$925.91     |                |
| 1987509 | 269040  | DG55271826 | KWH >               | 16,760      | 14,560      | 12,400      | 11,200      | 13,960      | 15,200      | 10,480      | 10,120      | 9,120       | 9,520       | 7,640       | 143,960      |                |
|         |         |            | KW >                | 40          | 42          | 35          | 38          | 49          | 50          | 39          | 38          | 38          | 30          | 30          | 39           |                |
|         |         |            | Elec Revenue >      | \$1,752.80  | \$1,601.16  | \$1,324.81  | \$1,261.65  | \$1,431.69  | \$1,691.57  | \$1,214.15  | \$1,178.83  | \$1,103.36  | \$1,057.18  | \$901.63    | \$901.63     | \$16,110.86    |
| 2075251 | 135993  | DA18484023 | KWH >               | 0           | 155,520     | 156,160     | 142,400     | 149,760     | 117,280     | 139,520     | 126,720     | 141,600     | 139,360     | 132,480     | 1,538,560    |                |
|         |         |            | KW >                | 0           | 370         | 371         | 356         | 342         | 308         | 313         | 340         | 342         | 332         | 336         | 341          |                |
|         |         |            | Elec Revenue >      | \$0.00      | \$16,300.62 | \$15,835.68 | \$14,596.71 | \$15,199.67 | \$12,171.08 | \$13,935.19 | \$13,220.13 | \$14,408.22 | \$14,198.33 | \$13,665.33 | \$13,665.33  | \$157,729.21   |
| 2075251 | 135993  | DG86173472 | KWH >               | 145,120     | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 145,120      |                |
|         |         |            | KW >                | 348         | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 348          |                |
|         |         |            | Elec Revenue >      | \$14,950.80 | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$14,950.80  |                |
|         |         |            | Total KWH           | 4,246,362   | 4,385,766   | 4,209,708   | 4,564,515   | 4,544,616   | 4,371,802   | 4,739,980   | 4,754,576   | 4,724,121   | 4,762,371   | 4,444,419   | 53,972,972   |                |
|         |         |            | Combined Average KW | 8,455       | 8,660       | 8,608       | 8,968       | 9,527       | 9,100       | 9,315       | 10,449      | 10,274      | 9,908       | 8,748       | 9,687        |                |
|         |         |            | USBC Charge         | \$3,821.72  | \$3,947.18  | \$3,788.74  | \$4,108.04  | \$4,090.17  | \$3,934.63  | \$4,265.97  | \$4,279.12  | \$4,251.72  | \$4,286.12  | \$3,999.97  | \$48,575.64  |                |
|         |         |            | Total Elec Revenue  | 255,527.64  | 262,932.32  | 249,185.83  | 279,473.01  | 296,081.75  | 300,341.07  | 305,875.60  | 326,183.37  | 326,452.01  | 332,546.69  | 333,112.34  | 270,900.66   | \$3,538,612.29 |



Facilities Services

January 23, 2018

Mr. Mark Schoenfeld  
Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

**Rec'd MT DOR**

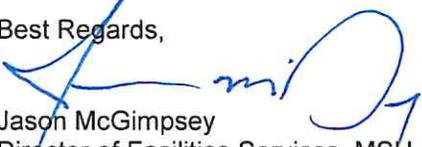
**JAN 29 2018**

RE: USBC Large Customer Annual Report for 2017

Dear Mark,

Enclosed is the MSU-Billings Self-Directed USBC Progress Report for 2017. I believe that everything should be in order, should you have any questions please feel free to call me at 406-657-2197. Thank you for your time.

Best Regards,

  
Jason McGimpsey  
Director of Facilities Services, MSU-B

cc: Rick Edwards, Northwestern Energy



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## MONTANA STATE UNIVERSITY - BILLINGS

### Account Summary

|                                 |             |                          |              |
|---------------------------------|-------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$883,039.71 |
| Reservations Made YTD:          | \$0.00      |                          |              |
| 2016 Carryover Payment Request: | \$48,525.79 | Total Payment Requests:  | \$48,525.79  |
| Payment Requests Made YTD:      | \$0.00      | Current Request Balance: | \$40,628.40  |
|                                 |             | Total USBC Credit:       | \$8,507.21   |
| 2016 Carryover USBC Credit:     | \$632.23    | Payments Issued YTD:     | \$7,897.39   |
| USBC Credit YTD:                | \$7,874.98  | USBC Credit Balance:     | \$609.82     |
| Average Monthly Credit Earned:  | \$656.25    | Payment Pending:         | \$609.82     |

### Payment Requests Made

### Payments Issued

| Submitted By | Date       | Amount     | Date | Amount |
|--------------|------------|------------|------|--------|
|              | 04/10/2017 | \$2,551.66 |      |        |
|              | 07/07/2017 | \$1,858.70 |      |        |
|              | 10/09/2017 | \$2,157.16 |      |        |
|              | 12/06/2017 | \$1,329.87 |      |        |

### Account Detail

| Account | Premise | Meter      | Jan                           | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|------------|-------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100631  | 1635    | DG00000283 | KWH ><br>523,826              | 620,742     | 507,305     | 591,864     | 519,268     | 531,730     | 609,122     | 656,613     | 605,951     | 572,456     | 574,491     | 507,278     | 6,820,646    |
|         |         |            | KW ><br>1,099                 | 1,163       | 1,260       | 1,374       | 1,361       | 1,614       | 1,648       | 1,499       | 1,656       | 1,395       | 1,371       | 1,124       | 1,380        |
|         |         |            | Elec Revenue ><br>\$50,488.10 | \$57,758.04 | \$49,125.99 | \$56,928.68 | \$51,341.39 | \$54,128.50 | \$60,152.27 | \$62,516.78 | \$60,043.66 | \$55,470.46 | \$55,429.81 | \$48,252.29 | \$661,635.97 |
| 228127  | 67210   | DA18647576 | KWH ><br>92,000               | 102,960     | 104,560     | 90,160      | 94,000      | 95,120      | 86,080      | 146,720     | 122,480     | 114,080     | 97,120      | 116,480     | 1,261,760    |
|         |         |            | KW ><br>334                   | 283         | 304         | 359         | 349         | 312         | 340         | 345         | 342         | 456         | 380         | 384         | 349          |
|         |         |            | Elec Revenue ><br>\$10,546.94 | \$11,169.04 | \$11,180.89 | \$10,578.55 | \$10,884.34 | \$10,567.82 | \$10,087.98 | \$14,812.47 | \$12,907.92 | \$13,411.67 | \$11,383.92 | \$12,905.62 | \$140,437.16 |
| 252225  | 79210   | DG28214380 | KWH ><br>5,720                | 5,900       | 5,480       | 3,720       | 3,740       | 1,500       | 1,840       | 1,900       | 1,840       | 2,860       | 4,720       | 5,560       | 44,780       |
|         |         |            | KW ><br>6                     | 22          | 32          | 27          | 29          | 9           | 8           | 11          | 16          | 16          | 25          | 42          | 20           |
|         |         |            | Elec Revenue ><br>\$589.91    | \$695.51    | \$760.18    | \$575.51    | \$592.67    | \$214.10    | \$229.74    | \$264.40    | \$317.95    | \$397.70    | \$626.98    | \$866.30    | \$6,130.95   |
| 260086  | 82733   | DA08261258 | KWH ><br>1,190                | 1,142       | 1,046       | 1,080       | 1,033       | 1,048       | 1,520       | 2,199       | 1,754       | 988         | 927         | 1,005       | 14,932       |
|         |         |            | KW ><br>3                     | 4           | 4           | 3           | 4           | 9           | 9           | 9           | 10          | 5           | 3           | 3           | 6            |
|         |         |            | Elec Revenue ><br>\$146.75    | \$142.67    | \$130.08    | \$129.57    | \$129.59    | \$181.39    | \$221.01    | \$276.00    | \$247.35    | \$140.13    | \$114.61    | \$121.30    | \$1,980.45   |
| 260195  | 82802   | DG83128345 | KWH ><br>7,520                | 7,600       | 6,880       | 6,760       | 5,920       | 5,560       | 5,040       | 6,040       | 6,720       | 5,880       | 6,480       | 7,120       | 77,520       |
|         |         |            | KW ><br>22                    | 22          | 22          | 24          | 24          | 22          | 21          | 24          | 23          | 22          | 23          | 21          | 23           |
|         |         |            | Elec Revenue ><br>\$831.15    | \$845.74    | \$764.96    | \$776.00    | \$712.36    | \$669.30    | \$813.41    | \$718.63    | \$759.53    | \$687.63    | \$744.46    | \$777.06    | \$8,900.23   |
| 260372  | 82912   | DA17237077 | KWH ><br>5,160                | 5,020       | 4,680       | 4,820       | 4,660       | 6,180       | 6,580       | 7,260       | 6,040       | 4,620       | 4,400       | 4,780       | 64,200       |
|         |         |            | KW ><br>13                    | 11          | 11          | 12          | 14          | 17          | 17          | 17          | 15          | 15          | 12          | 11          | 14           |
|         |         |            | Elec Revenue ><br>\$553.67    | \$528.50    | \$484.30    | \$507.39    | \$521.35    | \$663.61    | \$690.51    | \$744.92    | \$630.84    | \$519.85    | \$476.31    | \$497.05    | \$6,818.30   |
| 260420  | 82943   | DG87256754 | KWH ><br>1,791                | 1,724       | 1,474       | 1,540       | 1,449       | 1,877       | 2,164       | 2,895       | 2,456       | 1,576       | 1,640       | 1,764       | 22,350       |
|         |         |            | KW ><br>8                     | 6           | 5           | 7           | 7           | 12          | 14          | 13          | 13          | 12          | 8           | 8           | 9            |
|         |         |            | Elec Revenue ><br>\$236.23    | \$212.26    | \$179.38    | \$197.68    | \$192.87    | \$275.58    | \$315.76    | \$367.95    | \$335.52    | \$256.90    | \$220.43    | \$224.94    | \$3,015.50   |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter               | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 1631000 | 414555  | DG64922893          | 41,000      | 42,200      | 35,800      | 31,600      | 30,800      | 29,800      | 31,200      | 41,200      | 41,200      | 43,000      | 42,400      | 33,600      | 443,800      |
|         |         | KWH >               | 80          | 83          | 94          | 104         | 94          | 236         | 226         | 284         | 186         | 256         | 194         | 140         | 161          |
|         |         | KW >                | \$4,055.79  | \$4,259.17  | \$3,729.30  | \$3,493.29  | \$4,699.48  | \$4,686.69  | \$5,735.52  | \$4,855.50  | \$5,901.69  | \$5,252.00  | \$4,019.87  | \$54,053.94 |              |
|         |         | Elec Revenue >      |             |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         | Total KWH           | 678,207     | 787,288     | 667,225     | 731,544     | 660,870     | 672,815     | 743,546     | 864,827     | 788,441     | 745,460     | 732,178     | 677,587     | 8,749,988    |
|         |         | Combined Average KW | 1,565       | 1,594       | 1,732       | 1,910       | 1,882       | 2,231       | 2,283       | 2,172       | 2,241       | 2,177       | 2,016       | 1,733       | 1,961        |
|         |         | USBC Charge         | \$610.38    | \$708.56    | \$600.49    | \$658.39    | \$594.78    | \$605.53    | \$669.20    | \$778.35    | \$709.61    | \$670.91    | \$658.96    | \$609.82    | \$7,874.98   |
|         |         | Total Elec Revenue  | \$67,448.54 | \$75,610.93 | \$66,355.08 | \$73,186.67 | \$67,740.21 | \$71,399.78 | \$76,997.37 | \$85,436.67 | \$80,098.27 | \$76,796.03 | \$74,248.52 | \$67,664.43 | \$882,972.50 |



National Institutes of Health  
Bethesda, Maryland 20892  
[www.nih.gov](http://www.nih.gov)

Rocky Mountain Laboratories  
903 S 4th Street  
Hamilton, MT 59840

February 22, 2018

**Rec'd MT DOR**

**FEB 26 2018**

Mr. Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805

Re: 2017 Large Customer Universal System Benefits Program (USBP) Annual Report

Dear Mr. Schoenfeld,

Pursuant to 69-8-402, MCA, I hereby submit the USBP Annual Summary Report for the **NIH - Rocky Mountain Laboratories facility in Hamilton, MT.**

Please note the following:

- Projects (Payment Requests) totaling \$99,864.07 were filed in **2014**, which were a result of a multi-year facility-wide lighting upgrade to replace and install new energy efficient LED lighting. Total investment over time is projected to be over 7 million dollars.
- Of the original amount, **\$42,017.00** carried over in 2017. No new requests were filed in 2017.
- Payments issued in 2017 totaled **\$15,552.11**.

Attached you will find a copy of our Self Directed USB Report. If you have any questions, feel free to contact me.

Sincerely,

Bryan Kercher  
Rocky Mountain Laboratories  
National Institutes of Health  
903 S. 4<sup>th</sup> St  
Hamilton, MT 59840



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

## NATIONAL INSTITUTE OF HEALTH

### Account Summary

|                                 |             |                          |                |
|---------------------------------|-------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$1,594,566.39 |
| Reservations Made YTD:          | \$0.00      |                          |                |
| 2016 Carryover Payment Request: | \$42,017.00 | Total Payment Requests:  | \$42,017.00    |
| Payment Requests Made YTD:      | \$0.00      | Current Request Balance: | \$26,464.89    |

|                                |             |                      |             |
|--------------------------------|-------------|----------------------|-------------|
| 2016 Carryover USBC Credit:    | \$1,149.75  | Total USBC Credit:   | \$16,694.86 |
| USBC Credit YTD:               | \$15,545.11 | Payments Issued YTD: | \$15,552.11 |
| Average Monthly Credit Earned: | \$1,295.43  | USBC Credit Balance: | \$1,142.75  |
|                                |             | Payment Pending:     | \$1,142.75  |

### Payment Requests Made

| Submitted By | Date       | Amount     | Date | Amount |
|--------------|------------|------------|------|--------|
|              | 04/10/2017 | \$4,644.04 |      |        |
|              | 07/07/2017 | \$3,856.48 |      |        |
|              | 10/09/2017 | \$4,523.29 |      |        |
|              | 12/06/2017 | \$2,528.30 |      |        |

### Account Detail

| Account | Premise | Meter      | Jan                 | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total      |
|---------|---------|------------|---------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|----------------|
| 1923677 | 430537  | DA21629752 | 0                   | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 1,368,766  | 1,269,726  | 2,638,492      |
|         |         |            | KWH >               | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 2,860      | 2,333      | 2,597          |
|         |         |            | KW >                | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 2,860      | 2,333      | 2,597          |
|         |         |            | Elec Revenue >      | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | 128,664.81 | 116,668.24 | \$245,333.05   |
| 1923677 | 430537  | DG21353928 | 1,425,864           | 1,247,247  | 1,209,429  | 1,320,797  | 1,474,299  | 1,489,873  | 1,773,613  | 1,678,041  | 1,574,223  | 1,440,459  | 0          | 0          | 14,633,845     |
|         |         |            | KWH >               | 1,425,864  | 1,247,247  | 1,209,429  | 1,320,797  | 1,474,299  | 1,773,613  | 1,678,041  | 1,574,223  | 1,440,459  | 0          | 0          | 14,633,845     |
|         |         |            | KW >                | 2,211      | 2,411      | 2,575      | 2,445      | 2,851      | 3,110      | 3,102      | 2,964      | 2,791      | 0          | 0          | 2,468          |
|         |         |            | Elec Revenue >      | 130,682.64 | 117,228.00 | 113,535.67 | 121,465.76 | 135,951.67 | 160,929.21 | 153,610.67 | 144,673.52 | 133,415.95 | \$0.00     | \$0.00     | \$1,349,233.34 |
|         |         |            | Total KWH           | 1,425,864  | 1,247,247  | 1,209,429  | 1,320,797  | 1,489,873  | 1,773,613  | 1,678,041  | 1,574,223  | 1,440,459  | 1,368,766  | 1,269,726  | 17,272,337     |
|         |         |            | Combined Average KW | 2,211      | 2,411      | 2,575      | 2,445      | 2,851      | 3,110      | 3,102      | 2,964      | 2,791      | 2,860      | 2,333      | 5,064          |
|         |         |            | USBC Charge         | \$1,283.28 | \$1,122.52 | \$1,088.49 | \$1,188.72 | \$1,340.89 | \$1,598.25 | \$1,510.24 | \$1,416.80 | \$1,296.41 | \$1,231.89 | \$1,142.75 | \$15,545.11    |
|         |         |            | Total Elec Revenue  | 130,682.64 | 117,228.00 | 113,535.67 | 121,465.76 | 135,951.67 | 160,929.21 | 153,610.67 | 144,673.52 | 133,415.95 | 128,664.81 | 116,668.24 | \$1,594,566.39 |



UNIVERSAL SYSTEM BENEFITS (USB)
LARGE CUSTOMER CREDIT FORM

Complete and mail to: Montana Dakota Utilities Co.
ATT: Tamie Aberle
Regulatory Affairs Department
400 North 4th Street
Bismarck, ND 58501
Email: tamie.aberle@mdu.com
FAX: (701) 222-7606

DATE: 2-13-18
NAME OF BUSINESS: Oneok Bakken Pipeline, LLC
CITY/TOWN LOCATION: Baker, MT
CONTACT PERSON: Jennifer Koch
MAILING ADDRESS: PO Box 871
CITY, STATE AND ZIP: Tulsa, OK 74107
PHONE NUMBER: 918.595.1574
FAX NUMBER:
E-MAIL ADDRESS: jennifer.koch@oneok.com
AMOUNT OF CREDIT REQUESTED: \$14,865.12

The amount of credit available at any given time will be limited by the amount of USBP funds paid by the Large Customer - less any previous credits processed during the calendar year. If request is greater than the Large Customer USBP funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated.

DESCRIPTION OF PROJECT(S) (if more space is needed please attach):
CHANGED OUT TRANSFORMER INSTALLED IN 1940'S FROM
OVERHEAD TO PAD MOUNTED. CHANGED WIRING
FROM DELTA TO Y.

ESTIMATED kWh and KW SAVINGS: APPX 40,000 KWH/MO 250 KW/MO

Large customer, by signature below attests that Montana-Dakota Utilities Co. and the Large Customer submitting this request, have not mutually agreed that Montana-Dakota Utilities Co. will approve the credit and Montana-Dakota Utilities Co. does not approve the qualification of the requested USBP credit.

CUSTOMER

Signature: [Handwritten Signature]



Pasta Montana, L.L.C.  
One Pasta Place  
Great Falls, MT 59401  
(406) 761-1516  
Fax: (406) 761-1403

Mr. Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805

02/28/2018

Re: Large Customer Universal System Benefits Program (USBP) Annual Summary Report for Pasta Montana, LLC.

Mr. Schoenfeld,

A large customer is required to submit an annual summary report, pursuant to 69-8-402, MCA, of its universal system benefits program activities and expenditures for the previous calendar year to the Montana Department of Revenue and to the large customer's electric utility.

This 2017 year summary report is from:  
Pasta Montana LLC, One Pasta Place, Great Falls, MT 59404

A copy of our USBC Progress Report for 2017 from NorthWestern Energy is attached for your reference. In 2017, Pasta Montana LLC had carryover credits of \$4,314.31 from 2016 and received new credits for \$6,364.51. We submitted claims for \$16,596.77 for installation of variable speed fans on our production line 3. Pasta Montana has a USBC Credit Balance of \$541.46.

Attached are several supporting documents outlining our 2017 self-directed USBC funds. Among those documents you will find a copy of the Form A Universal System Benefits (USB) Large Customer Progress Report Form or Reservation. We have replaced a 40-year old production line with a brand new, efficient production line, and we are strategically replacing older T8 lighting in our warehouse and production areas with more efficient LED lights. The old line has been removed from the facility and the new line is fully installed (installation was completed in November 2017). The lighting project is ongoing, so we requested to reserve our remaining 2017 USB funds for this project.

Please consider this letter fulfillment of our obligation, pursuant to 69-8-402, MCA, to submit an annual summary report of large customer USBP activities and expenditures for the year 2017.

Sincerely,

A handwritten signature in blue ink, appearing to read "Daniel Bateman". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

C. Daniel Bateman  
Executive Vice President & Chief Financial Officer  
Pasta Montana, LLC  
One Pasta Place, Great Falls, MT 59401  
(406) 771-2206

# FORM A - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
 FAX: (406) 497-4008

|                      |                       |
|----------------------|-----------------------|
| DATE:                | 11/29/2017            |
| NAME OF BUSINESS:    | Pasta Montana, LLC    |
| CITY/TOWN LOCATION:  | Great Falls           |
| CONTACT PERSON:      | Dan Bateman           |
| MAILING ADDRESS:     | One Pasta Place       |
| CITY, STATE AND ZIP: | Great Falls, MT 59401 |
| PHONE NUMBER:        | 406-771-2206          |
| FAX NUMBER:          | 406-761-1403          |
| E-MAIL ADDRESS       | danb@pastamontana.com |

1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

Replaced 40-year old production line with brand new, efficient production line \$6,500,000<sup>est</sup>  
 Plant lighting upgrades, 10 lights per year, should complete by 09/30/2018 \$6,000<sup>est</sup> . Compl. Nov. 21

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: \_\_\_\_\_ Signature: *Daniel Bateman*

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                       |
|----------------------|-----------------------|
| DATE:                | 11/30/2017            |
| NAME OF BUSINESS:    | Pasta Montana, LLC    |
| CITY/TOWN LOCATION:  | Great Falls           |
| CONTACT PERSON:      | Dan Bateman           |
| MAILING ADDRESS:     | One Pasta Place       |
| CITY, STATE AND ZIP: | Great Falls, MT 59401 |
| PHONE NUMBER:        | 406-771-2206          |
| FAX NUMBER:          | 406-761-1403          |
| E-MAIL ADDRESS:      | danb@pastamontana.com |

|                             |  |
|-----------------------------|--|
| AMOUNT OF CREDIT REQUESTED: |  |
|-----------------------------|--|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|  |
|--|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):  |
| Replaced Line 3 fans w/ variable speed fans to reduce energy consumption.<br>A-section fans decreased from 60 Hz to 30 Hz, B-section fans decreased from 60 Hz to 30 Hz, and C-section fans decreased from 60 Hz to 20 Hz. |

Total = 16,596.77

Please apply all 2016 credits and 2017 credits available

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |                         |
|------------------------|-------------------------|
| ESTIMATED kWh SAVINGS: | 13,283 kWh to 6,111 kWh |
| ESTIMATED KW SAVINGS:  | 4,310.72                |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: 

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/26/2018

## PASTA MONTANA

### Account Summary

|                                    |                   |                             |                    |
|------------------------------------|-------------------|-----------------------------|--------------------|
| 2016 Carryover Reservation:        | \$11,000.00       | YTD Elec Revenue:           | \$663,451.59       |
| Reservations Made YTD:             | \$0.00            |                             |                    |
| 2016 Carryover Payment Request:    | \$0.00            | Total Payment Requests:     | \$16,596.77        |
| Payment Requests Made YTD:         | \$16,596.77       | Current Request Balance:    | \$6,459.41         |
| <b>2016 Carryover USBC Credit:</b> | <b>\$4,314.31</b> | <b>Total USBC Credit:</b>   | <b>\$10,678.82</b> |
| <b>USBC Credit YTD:</b>            | <b>\$6,364.51</b> | <b>Payments Issued YTD:</b> | <b>\$10,137.36</b> |
| Average Monthly Credit Earned:     | \$530.38          | USBC Credit Balance:        | \$541.46           |
|                                    |                   | Payment Pending:            | \$541.46           |

### Payment Requests Made

Submitted By: Dan Bateman  
Date: 11/30/2017  
Amount: \$16,596.77

### Payments Issued

Date: 12/06/2017  
Amount: \$10,137.36

### Account Detail

| Account | Premise | Meter      | Jan                        | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|------------|----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100630  | 1634    | DA06183419 | 550.087                    | 661.909     | 600.037     | 689.467     | 631.557     | 457.206     | 554.158     | 570.786     | 494.524     | 617.844     | 642.479     | 601.618     | 7,071.672    |
|         |         |            | 1.159                      | 1.128       | 1.199       | 1.205       | 1.173       | 1,063       | 1,251       | 1,147       | 1,296       | 1,309       | 1,277       | 1,264       | 1,206        |
|         |         |            | \$53,039.96                | \$60,671.20 | \$55,659.33 | \$62,964.25 | \$58,393.75 | \$43,816.93 | \$52,640.74 | \$53,036.61 | \$48,537.13 | \$58,215.58 | \$59,836.60 | \$56,639.51 | \$663,451.59 |
|         |         |            | <b>Total KWH</b>           | 661,909     | 600,037     | 689,467     | 631,557     | 457,206     | 554,158     | 570,786     | 494,524     | 617,844     | 642,479     | 601,618     | 7,071,672    |
|         |         |            | <b>Combined Average KW</b> | 1,159       | 1,128       | 1,199       | 1,173       | 1,063       | 1,251       | 1,147       | 1,296       | 1,309       | 1,277       | 1,264       | 1,206        |
|         |         |            | <b>USBC Charge</b>         | \$495.06    | \$595.72    | \$540.03    | \$668.40    | \$411.49    | \$498.74    | \$513.71    | \$445.07    | \$556.06    | \$578.23    | \$541.46    | \$6,364.51   |
|         |         |            | <b>Total Elec Revenue</b>  | \$53,039.96 | \$60,671.20 | \$55,659.33 | \$62,964.25 | \$43,816.93 | \$52,640.74 | \$53,036.61 | \$48,537.13 | \$58,215.58 | \$59,836.60 | \$56,639.51 | \$663,451.59 |



February 23, 2018

CERTIFIED MAIL RRR

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

RE: Self-Directed USBC Progress Report for 2017 – Phillips 66 Pipeline

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2017. All the USB payments we received in 2017 were self-directed for energy efficiency projects we submitted in previous years. During 2017, we received USB payments totaling \$99,163.46 that that included \$9,437.43 in 2016 credits that had been carried over into 2017.

We also had a request balance to carry over all remaining 2017 USB credits at year-end of \$8,360.50 into 2018.

Sincerely,

A handwritten signature in black ink, appearing to read "Tim Tomlinson", with a horizontal line extending to the right.

Tim Tomlinson  
Energy Manager  
Phillips 66 Pipeline LLC

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email: rick.edwards@northwestern.com



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## PHILLIPS66 PIPELINE

### Account Summary

|                                 |                |                          |                |
|---------------------------------|----------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00         | YTD Elec Revenue:        | \$1,370,823.89 |
| Reservations Made YTD:          | \$0.00         |                          |                |
| 2016 Carryover Payment Request: | \$7,496,894.68 | Total Payment Requests:  | \$7,496,894.68 |
| Payment Requests Made YTD:      | \$0.00         | Current Request Balance: | \$7,397,731.22 |
| 2016 Carryover USBC Credit:     | \$9,437.43     | Total USBC Credit:       | \$107,523.96   |
| USBC Credit YTD:                | \$98,086.53    | Payments Issued YTD:     | \$99,163.46    |
| Average Monthly Credit Earned:  | \$8,173.88     | USBC Credit Balance:     | \$8,360.50     |
|                                 |                | Payment Pending:         | \$8,360.50     |

### Payment Requests Made

Submitted By      Date      Amount

|            |             |
|------------|-------------|
| 04/10/2017 | \$36,137.72 |
| 07/07/2017 | \$19,732.31 |
| 10/09/2017 | \$24,477.64 |
| 12/06/2017 | \$18,815.79 |

### Payments Issued

Date      Amount

|            |             |
|------------|-------------|
| 04/10/2017 | \$36,137.72 |
| 07/07/2017 | \$19,732.31 |
| 10/09/2017 | \$24,477.64 |
| 12/06/2017 | \$18,815.79 |

### Account Detail

| Account | Premise | Meter          | Jan        | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total   |
|---------|---------|----------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|
| 100012  | 1017    | DG54713481     | 4,482      | 3,435      | 2,866      | 1,678      | 1,201      | 989        | 1,207      | 1,157      | 1,231      | 1,158      | 1,907      | 2,300      | 23,611      |
|         |         | KWH >          | 4          | 9          | 6          | 5          | 3          | 2          | 3          | 2          | 4          | 3          | 7          | 11         | 5           |
|         |         | KW >           |            |            |            |            |            |            |            |            |            |            |            |            |             |
|         |         | Elec Revenue > | \$109.44   | \$102.00   | \$77.34    | \$60.63    | \$44.06    | \$31.25    | \$42.81    | \$38.20    | \$46.77    | \$44.84    | \$73.97    | \$104.02   | \$775.33    |
| 100013  | 1019    | DG57847005     | 70,849     | 83,538     | 58,989     | 81,389     | 87,363     | 84,397     | 81,231     | 75,393     | 81,103     | 89,530     | 71,430     | 63,978     | 929,190     |
|         |         | KWH >          | 177        | 188        | 199        | 176        | 173        | 159        | 151        | 164        | 166        | 166        | 164        | 117        | 167         |
|         |         | KW >           |            |            |            |            |            |            |            |            |            |            |            |            |             |
|         |         | Elec Revenue > | \$764.04   | \$808.09   | \$725.98   | \$779.75   | \$799.21   | \$764.24   | \$738.27   | \$731.78   | \$758.03   | \$791.95   | \$715.84   | \$609.08   | \$8,986.26  |
| 100015  | 1021    | DA06212503     | 751,976    | 746,860    | 588,974    | 688,784    | 687,128    | 456,344    | 581,251    | 620,660    | 552,622    | 643,907    | 634,257    | 485,626    | 7,408,389   |
|         |         | KWH >          | 2,125      | 2,042      | 2,059      | 1,829      | 2,088      | 2,082      | 1,826      | 2,013      | 2,146      | 1,696      | 2,071      | 1,930      | 1,992       |
|         |         | KW >           |            |            |            |            |            |            |            |            |            |            |            |            |             |
|         |         | Elec Revenue > | \$6,515.66 | \$6,540.18 | \$5,924.25 | \$5,833.26 | \$6,371.79 | \$5,421.07 | \$5,512.25 | \$5,946.03 | \$5,889.37 | \$5,521.92 | \$6,095.48 | \$5,266.97 | \$70,838.23 |
| 100016  | 1023    | DA17677698     | 1,586      | 1,586      | 1,431      | 1,588      | 1,556      | 1,615      | 1,687      | 1,884      | 1,823      | 1,646      | 1,514      | 1,724      | 19,640      |
|         |         | KWH >          | 3          | 3          | 3          | 3          | 3          | 5          | 5          | 5          | 4          | 4          | 3          | 13         | 5           |
|         |         | KW >           |            |            |            |            |            |            |            |            |            |            |            |            |             |
|         |         | Elec Revenue > | \$215.95   | \$171.87   | \$171.24   | \$171.88   | \$171.74   | \$175.24   | \$175.54   | \$176.25   | \$174.38   | \$173.66   | \$171.49   | \$188.67   | \$2,137.91  |
| 100017  | 1022    | DA06212514     | 630,385    | 690,878    | 604,124    | 695,657    | 412,788    | 287,148    | 447,040    | 513,504    | 471,370    | 0          | 0          | 0          | 4,752,894   |
|         |         | KWH >          | 1,367      | 1,283      | 1,179      | 1,194      | 1,160      | 1,190      | 1,117      | 1,140      | 1,175      | 0          | 0          | 0          | 1,201       |
|         |         | KW >           |            |            |            |            |            |            |            |            |            |            |            |            |             |
|         |         | Elec Revenue > | \$4,862.44 | \$5,072.44 | \$4,548.90 | \$4,946.58 | \$3,737.81 | \$3,274.55 | \$3,807.23 | \$4,089.05 | \$3,976.62 | \$0.00     | \$0.00     | \$0.00     | \$38,315.62 |
| 100017  | 1022    | DA21551134     | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 517,871    | 546,949    | 397,291    | 1,462,111   |
|         |         | KWH >          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 1,175      | 1,171      | 1,106      | 1,151       |
|         |         | KW >           |            |            |            |            |            |            |            |            |            |            |            |            |             |
|         |         | Elec Revenue > | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$4,163.79 | \$4,274.30 | \$3,565.77 | \$12,003.86 |
| 100018  | 1025    | DG15089803     | 245,320    | 227,671    | 171,165    | 183,334    | 233,666    | 557,443    | 545,263    | 499,055    | 447,804    | 524,704    | 553,565    | 459,846    | 4,648,886   |
|         |         | KWH >          | 517        | 516        | 507        | 485        | 533        | 1,415      | 1,473      | 1,353      | 1,356      | 1,362      | 1,255      | 1,227      | 1,000       |
|         |         | KW >           |            |            |            |            |            |            |            |            |            |            |            |            |             |
|         |         | Elec Revenue > | \$1,994.55 | \$1,931.38 | \$1,686.31 | \$1,700.20 | \$1,983.59 | \$4,744.00 | \$4,789.05 | \$4,378.74 | \$4,177.35 | \$4,496.57 | \$4,438.11 | \$4,015.16 | \$40,335.11 |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan                       | Feb        | Mar        | Apr        | May         | Jun         | Jul        | Aug        | Sep         | Oct        | Nov         | Dec        | YTD Total    |
|---------|---------|------------|---------------------------|------------|------------|------------|-------------|-------------|------------|------------|-------------|------------|-------------|------------|--------------|
| 100020  | 1026    | DA19066006 | KWH > 1,012,027           | 1,012,433  | 700,364    | 736,534    | 773,222     | 322,659     | 692,957    | 902,213    | 827,402     | 816,508    | 879,836     | 768,316    | 9,444,481    |
|         |         |            | KW > 3,107                | 2,707      | 3,006      | 2,520      | 2,612       | 2,474       | 2,594      | 3,098      | 3,093       | 2,897      | 3,049       | 2,713      | 2,823        |
|         |         |            | Elec Revenue > \$9,076.20 | \$8,709.24 | \$7,926.05 | \$7,278.69 | \$7,578.85  | \$5,516.20  | \$7,223.39 | \$8,852.64 | \$8,542.05  | \$8,178.45 | \$8,682.55  | \$7,683.49 | \$95,247.80  |
| 100022  | 1028    | DA06183417 | KWH > 592,295             | 607,053    | 402,892    | 462,779    | 370,052     | 63,749      | 326,211    | 507,281    | 394,899     | 448,977    | 552,376     | 470,614    | 5,199,178    |
|         |         |            | KW > 1,650                | 2,557      | 1,542      | 2,514      | 2,527       | 1,443       | 2,458      | 2,488      | 2,475       | 2,462      | 2,493       | 2,514      | 2,260        |
|         |         |            | Elec Revenue > \$5,139.30 | \$6,811.23 | \$4,321.28 | \$6,152.79 | \$5,795.98  | \$2,776.92  | \$5,504.55 | \$6,265.38 | \$5,791.82  | \$5,988.25 | \$6,455.07  | \$6,160.26 | \$67,162.83  |
| 100023  | 1029    | DA19272290 | KWH > 843,570             | 833,245    | 663,536    | 818,965    | 806,791     | 590,039     | 745,945    | 763,727    | 736,414     | 768,728    | 778,717     | 627,345    | 8,977,022    |
|         |         |            | KW > 1,378                | 1,400      | 1,395      | 1,395      | 1,369       | 1,374       | 1,331      | 1,348      | 1,344       | 1,365      | 1,369       | 1,352      | 1,368        |
|         |         |            | Elec Revenue > \$5,748.39 | \$5,843.94 | \$5,143.87 | \$5,777.56 | \$5,685.47  | \$4,809.93  | \$5,375.34 | \$5,435.88 | \$5,319.41  | \$5,483.78 | \$5,530.52  | \$4,893.48 | \$65,047.57  |
| 100024  | 1031    | DA18683621 | KWH > 619,209             | 672,142    | 415,296    | 488,226    | 440,060     | 154,181     | 461,611    | 508,943    | 421,511     | 443,235    | 535,479     | 488,417    | 5,648,310    |
|         |         |            | KW > 1,834                | 1,823      | 1,747      | 1,799      | 1,830       | 1,680       | 1,806      | 1,834      | 1,834       | 1,814      | 1,827       | 1,832      | 1,805        |
|         |         |            | Elec Revenue > \$5,530.01 | \$5,877.92 | \$4,706.65 | \$5,088.89 | \$4,943.14  | \$3,532.65  | \$4,991.82 | \$5,204.05 | \$4,845.60  | \$4,906.91 | \$5,299.42  | \$5,118.17 | \$60,045.23  |
| 100026  | 1033    | DA06212515 | KWH > 1,213,672           | 1,226,144  | 1,012,393  | 1,138,629  | 1,079,493   | 837,021     | 1,011,427  | 1,144,657  | 1,048,986   | 0          | 0           | 0          | 9,712,422    |
|         |         |            | KW > 2,634                | 2,580      | 2,435      | 2,519      | 2,557       | 2,035       | 2,296      | 2,304      | 2,546       | 0          | 0           | 0          | 2,434        |
|         |         |            | Elec Revenue > \$9,175.26 | \$9,372.82 | \$8,264.55 | \$8,916.40 | \$8,737.36  | \$6,896.34  | \$8,033.61 | \$8,530.34 | \$8,540.47  | \$0.00     | \$0.00      | \$0.00     | \$76,467.15  |
| 100026  | 1033    | DA21551135 | KWH > 0                   | 0          | 0          | 0          | 0           | 0           | 0          | 0          | 0           | 1,118,015  | 1,065,988   | 837,769    | 3,021,772    |
|         |         |            | KW > 0                    | 0          | 0          | 0          | 0           | 0           | 0          | 0          | 0           | 2,373      | 2,193       | 2,262      | 2,276        |
|         |         |            | Elec Revenue > \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00      | \$0.00      | \$0.00     | \$0.00     | \$0.00      | \$8,535.79 | \$8,032.43  | \$7,226.53 | \$23,794.75  |
| 100028  | 1034    | DA06183418 | KWH > 632,231             | 586,241    | 438,428    | 435,674    | 516,904     | 219,860     | 393,149    | 687,538    | 596,722     | 534,333    | 685,473     | 493,824    | 6,220,377    |
|         |         |            | KW > 2,493                | 2,553      | 1,814      | 2,480      | 2,544       | 1,810       | 2,471      | 3,097      | 2,877       | 2,804      | 2,912       | 2,488      | 2,529        |
|         |         |            | Elec Revenue > \$6,589.41 | \$6,719.84 | \$4,910.37 | \$5,986.77 | \$6,422.44  | \$4,012.73  | \$5,798.68 | \$7,985.46 | \$7,260.66  | \$6,890.33 | \$7,675.04  | \$6,211.22 | \$76,462.95  |
| 100029  | 1035    | DA06212509 | KWH > 111,666             | 112,450    | 92,539     | 95,288     | 88,698      | 80,057      | 79,071     | 81,503     | 83,801      | 84,855     | 91,338      | 89,867     | 1,091,133    |
|         |         |            | KW > 444                  | 455        | 461        | 405        | 427         | 314         | 413        | 396        | 390         | 431        | 435         | 463        | 420          |
|         |         |            | Elec Revenue > \$3,128.12 | \$3,349.95 | \$3,140.84 | \$2,927.18 | \$2,945.94  | \$2,347.01  | \$2,770.54 | \$2,720.26 | \$2,720.94  | \$2,913.58 | \$3,007.49  | \$3,113.27 | \$35,085.12  |
| 100030  | 1038    | DA06183392 | KWH > 832,545             | 779,236    | 459,687    | 529,866    | 484,865     | 59,126      | 582,596    | 1,066,388  | 627,562     | 996,078    | 1,247,829   | 1,169,079  | 8,834,857    |
|         |         |            | KW > 2,782                | 2,765      | 2,704      | 2,778      | 2,700       | 877         | 2,743      | 2,817      | 2,860       | 2,700      | 2,834       | 2,756      | 2,610        |
|         |         |            | Elec Revenue > \$7,847.41 | \$7,852.88 | \$6,450.47 | \$6,857.44 | \$6,546.60  | \$1,833.76  | \$7,015.27 | \$9,053.07 | \$7,357.03  | \$8,579.01 | \$9,811.15  | \$9,366.78 | \$88,570.87  |
| 100031  | 1037    | DA13299772 | KWH > 567,647             | 591,947    | 443,198    | 407,663    | 367,865     | 57,623      | 394,932    | 414,362    | 387,287     | 408,974    | 439,782     | 442,254    | 4,923,534    |
|         |         |            | KW > 1,420                | 1,480      | 1,400      | 1,434      | 1,440       | 1,284       | 1,426      | 1,426      | 1,426       | 1,426      | 1,431       | 1,426      | 1,418        |
|         |         |            | Elec Revenue > \$4,687.58 | \$4,990.82 | \$4,253.72 | \$4,164.37 | \$4,011.91  | \$2,492.29  | \$4,099.40 | \$4,157.07 | \$4,048.09  | \$4,130.48 | \$4,267.54  | \$4,269.33 | \$49,572.60  |
| 100033  | 1040    | DA06212513 | KWH > 187,209             | 228,892    | 32,987     | 294,438    | 174,100     | 5,927       | 127,598    | 38,513     | 209,790     | 155,374    | 108,333     | 37,457     | 1,600,618    |
|         |         |            | KW > 892                  | 882        | 903        | 883        | 861         | 14          | 863        | 832        | 853         | 842        | 833         | 778        | 786          |
|         |         |            | Elec Revenue > \$2,330.27 | \$2,534.06 | \$1,769.66 | \$2,802.93 | \$2,276.38  | \$207.52    | \$2,090.07 | \$1,674.22 | \$2,397.91  | \$2,160.93 | \$1,956.89  | \$1,581.79 | \$23,782.63  |
| 100034  | 1041    | DA18683631 | KWH > 615,369             | 619,233    | 404,117    | 407,054    | 493,289     | 147,653     | 385,396    | 517,190    | 414,438     | 444,265    | 573,487     | 495,449    | 5,516,940    |
|         |         |            | KW > 2,514                | 2,562      | 1,555      | 2,497      | 2,557       | 1,473       | 2,484      | 2,497      | 2,488       | 2,484      | 2,506       | 2,488      | 2,342        |
|         |         |            | Elec Revenue > \$6,562.73 | \$6,869.04 | \$4,347.52 | \$5,897.84 | \$6,347.41  | \$3,167.99  | \$5,788.31 | \$6,319.97 | \$5,891.69  | \$6,005.22 | \$6,561.27  | \$6,217.76 | \$69,966.75  |
| 100036  | 1044    | DA18683634 | KWH > 906,956             | 922,351    | 674,818    | 767,619    | 606,077     | 81,819      | 622,372    | 1,105,118  | 708,323     | 1,093,436  | 1,304,433   | 1,154,277  | 9,947,599    |
|         |         |            | KW > 1,934                | 1,888      | 1,882      | 1,899      | 1,912       | 1,634       | 2,971      | 3,017      | 2,929       | 2,932      | 3,010       | 3,021      | 2,419        |
|         |         |            | Elec Revenue > \$6,855.85 | \$7,004.17 | \$5,985.19 | \$6,391.30 | \$5,753.91  | \$3,162.52  | \$7,549.76 | \$9,535.58 | \$7,794.77  | \$9,349.75 | \$10,326.39 | \$9,739.98 | \$89,449.17  |
| 100594  | 1598    | DA06183391 | KWH > 82,680              | 84,535     | 75,882     | 82,409     | 106,964     | 113,451     | 91,981     | 84,354     | 98,950      | 76,750     | 74,258      | 0          | 972,214      |
|         |         |            | KW > 345                  | 344        | 345        | 344        | 338         | 336         | 330        | 328        | 334         | 334        | 339         | 0          | 338          |
|         |         |            | Elec Revenue > \$9,260.15 | \$9,612.41 | \$8,689.80 | \$9,162.73 | \$11,103.20 | \$11,542.01 | \$9,782.10 | \$9,185.14 | \$10,346.72 | \$8,669.75 | \$8,550.86  | \$0.00     | \$105,904.87 |
| 100594  | 1598    | DA21629733 | KWH > 0                   | 0          | 0          | 0          | 0           | 0           | 0          | 0          | 0           | 0          | 0           | 16,530     | 16,530       |
|         |         |            | KW > 0                    | 0          | 0          | 0          | 0           | 0           | 0          | 0          | 0           | 0          | 0           | 284        | 284          |
|         |         |            | Elec Revenue > \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00      | \$0.00      | \$0.00     | \$0.00     | \$0.00      | \$0.00     | \$0.00      | \$3,666.94 | \$3,666.94   |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan            | Feb           | Mar           | Apr           | May           | Jun           | Jul           | Aug           | Sep           | Oct           | Nov           | Dec           | YTD Total      |
|---------|---------|------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| 710047  | 321077  | DD56126244 | KWH ><br>KW >  | 38,500<br>140 | 29,300<br>112 | 26,300<br>119 | 21,600<br>111 | 17,100<br>92  | 22,200<br>88  | 18,200<br>85  | 19,900<br>85  | 30,200<br>132 | 36,000<br>137 | 43,300<br>137 | 356,400<br>115 |
|         |         |            | Elec Revenue > | \$5,767.93    | \$3,396.65    | \$3,256.17    | \$2,808.67    | \$2,254.51    | \$2,604.97    | \$2,265.75    | \$2,399.51    | \$3,678.89    | \$4,178.27    | \$4,750.08    | \$41,791.35    |
| 710048  | 321078  | DG89606254 | KWH ><br>KW >  | 3,362<br>31   | 4,894<br>29   | 3,630<br>24   | 3,871<br>23   | 4,082<br>26   | 4,415<br>23   | 3,431<br>30   | 3,828<br>31   | 3,600<br>30   | 4,595<br>34   | 4,201<br>38   | 46,574<br>29   |
|         |         |            | Elec Revenue > | \$588.23      | \$689.25      | \$548.06      | \$544.46      | \$592.20      | \$584.99      | \$577.98      | \$618.14      | \$589.78      | \$711.98      | \$714.76      | \$7,204.24     |
| 712192  | 322631  | DG28586554 | KWH ><br>KW >  | 27,720<br>229 | 0<br>0        | 27,720<br>229  |
|         |         |            | Elec Revenue > | \$4,065.74    | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$4,065.74     |
| 712192  | 322631  | DG68838851 | KWH ><br>KW >  | 0<br>0        | 21,240<br>230 | 24,120<br>226 | 25,560<br>226 | 42,840<br>219 | 22,680<br>216 | 19,080<br>216 | 15,480<br>216 | 12,240<br>180 | 27,360<br>219 | 20,880<br>216 | 278,640<br>216 |
|         |         |            | Elec Revenue > | \$0.00        | \$3,618.71    | \$3,758.03    | \$3,874.24    | \$5,161.08    | \$3,557.73    | \$3,284.18    | \$3,011.50    | \$2,465.35    | \$3,956.89    | \$3,429.02    | \$41,558.68    |
| 712364  | 322728  | DG53952830 | KWH ><br>KW >  | 28,320<br>102 | 23,440<br>101 | 0<br>0        | 51,760<br>102  |
|         |         |            | Elec Revenue > | \$3,298.65    | \$2,875.32    | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$6,173.97     |
| 712364  | 322728  | DG68838859 | KWH ><br>KW >  | 0<br>0        | 19,080<br>100 | 24,560<br>99  | 22,960<br>101 | 29,280<br>101 | 23,960<br>100 | 24,160<br>100 | 20,560<br>99  | 16,080<br>100 | 6,320<br>100  | 320<br>100    | 187,280<br>90  |
|         |         |            | Elec Revenue > | \$0.00        | \$0.00        | \$2,494.06    | \$2,917.49    | \$2,822.17    | \$2,861.28    | \$2,876.75    | \$2,592.41    | \$2,266.98    | \$1,499.93    | \$44.29       | \$23,654.33    |
| 713779  | 323922  | DS00971838 | KWH ><br>KW >  | 6,291<br>11   | 4,931<br>11   | 3,757<br>11   | 2,056<br>8    | 1,409<br>7    | 555<br>6      | 490<br>2      | 438<br>2      | 1,522<br>7    | 1,835<br>10   | 3,363<br>8    | 27,003<br>7    |
|         |         |            | Elec Revenue > | \$626.37      | \$515.86      | \$408.58      | \$247.52      | \$187.90      | \$64.92       | \$70.26       | \$66.27       | \$195.63      | \$250.33      | \$348.96      | \$3,093.21     |
| 713818  | 323958  | DS01496798 | KWH ><br>KW >  | 153<br>1      | 165<br>1      | 144<br>1      | 128<br>1      | 132<br>1      | 137<br>2      | 183<br>1      | 92<br>1       | 160<br>1      | 163<br>1      | 204<br>1      | 1,778<br>1     |
|         |         |            | Elec Revenue > | \$34.84       | \$30.25       | \$28.51       | \$32.39       | \$32.68       | \$37.96       | \$36.51       | \$29.50       | \$29.82       | \$30.03       | \$33.24       | \$387.17       |
| 715059  | 325070  | DA14613585 | KWH ><br>KW >  | 21,520<br>81  | 17,240<br>86  | 21,440<br>84  | 15,880<br>79  | 13,520<br>71  | 18,200<br>73  | 16,680<br>75  | 15,840<br>75  | 13,400<br>44  | 16,520<br>79  | 16,600<br>82  | 204,800<br>75  |
|         |         |            | Elec Revenue > | \$2,536.98    | \$2,240.60    | \$2,512.82    | \$2,043.19    | \$1,779.02    | \$2,140.35    | \$2,151.65    | \$2,050.02    | \$1,986.45    | \$2,497.32    | \$2,089.72    | \$25,147.92    |
| 717588  | 223503  | DG82831546 | KWH ><br>KW >  | 9,680<br>51   | 8,600<br>50   | 8,760<br>46   | 4,840<br>14   | 4,480<br>45   | 3,480<br>41   | 3,600<br>29   | 3,600<br>9    | 3,840<br>40   | 4,600<br>48   | 6,640<br>15   | 65,320<br>35   |
|         |         |            | Elec Revenue > | \$1,289.97    | \$1,201.90    | \$1,150.55    | \$528.37      | \$814.98      | \$692.85      | \$568.71      | \$382.10      | \$713.95      | \$845.93      | \$680.04      | \$9,419.39     |
| 719434  | 328497  | DA18524884 | KWH ><br>KW >  | 3,184<br>8    | 2,906<br>10   | 3,058<br>7    | 2,074<br>7    | 2,123<br>8    | 3,039<br>10   | 4,370<br>9    | 3,916<br>8    | 2,352<br>8    | 2,369<br>7    | 2,972<br>7    | 36,051<br>8    |
|         |         |            | Elec Revenue > | \$344.90      | \$348.50      | \$320.79      | \$242.82      | \$254.79      | \$391.09      | \$444.99      | \$391.96      | \$276.01      | \$267.78      | \$316.51      | \$3,951.76     |
| 720100  | 280106  | DG28659896 | KWH ><br>KW >  | 8,651<br>18   | 8,025<br>18   | 8,617<br>19   | 5,569<br>19   | 2,658<br>14   | 2,088<br>13   | 2,036<br>9    | 2,331<br>8    | 2,646<br>13   | 5,333<br>18   | 7,896<br>19   | 58,240<br>15   |
|         |         |            | Elec Revenue > | \$884.19      | \$830.16      | \$870.06      | \$633.08      | \$357.39      | \$303.57      | \$259.08      | \$272.57      | \$343.18      | \$609.38      | \$815.15      | \$6,482.60     |
| 797092  | 321910  | DG50526221 | KWH ><br>KW >  | 5,920<br>17   | 4,960<br>16   | 3,840<br>14   | 4,000<br>14   | 3,200<br>12   | 3,200<br>14   | 3,360<br>12   | 3,040<br>12   | 3,360<br>12   | 3,200<br>14   | 4,480<br>14   | 45,440<br>14   |
|         |         |            | Elec Revenue > | \$654.30      | \$563.98      | \$449.12      | \$462.53      | \$386.46      | \$399.00      | \$395.29      | \$370.73      | \$396.28      | \$400.70      | \$499.83      | \$5,338.11     |
| 797094  | 321909  | DS84910816 | KWH ><br>KW >  | 17,920<br>79  | 16,640<br>84  | 11,520<br>76  | 16,480<br>78  | 11,520<br>72  | 10,560<br>70  | 11,520<br>73  | 12,320<br>73  | 13,280<br>76  | 11,680<br>80  | 16,480<br>80  | 161,600<br>76  |
|         |         |            | Elec Revenue > | \$2,219.11    | \$2,186.16    | \$1,668.90    | \$2,073.53    | \$1,631.55    | \$1,534.87    | \$1,647.43    | \$1,697.42    | \$1,806.93    | \$1,717.70    | \$2,089.51    | \$21,907.96    |
| 906878  | 356475  | DA05479669 | KWH ><br>KW >  | 5,240<br>4    | 3,080<br>5    | 2,560<br>5    | 2,000<br>5    | 1,400<br>5    | 640<br>5      | 200<br>3      | 720<br>5      | 1,800<br>5    | 2,560<br>5    | 2,760<br>5    | 23,200<br>5    |
|         |         |            | Elec Revenue > | \$486.19      | \$305.10      | \$257.59      | \$215.89      | \$168.96      | \$109.04      | \$58.85       | \$115.15      | \$199.47      | \$258.49      | \$274.30      | \$2,514.97     |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter               | Jan              | Feb              | Mar              | Apr              | May              | Jun              | Jul              | Aug              | Sep              | Oct              | Nov              | Dec              | YTD Total          |
|---------|---------|---------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| 933571  | 358346  | DA1329761           | 649,031<br>2,634 | 655,178<br>2,523 | 651,267<br>2,520 | 726,808<br>2,569 | 471,200<br>2,664 | 166,218<br>1,362 | 568,178<br>2,465 | 631,686<br>2,246 | 430,485<br>2,206 | 645,980<br>2,218 | 704,544<br>2,301 | 650,033<br>2,321 | 6,950,608<br>2,336 |
|         |         | Elec Revenue >      | \$4,820.34       | \$4,870.40       | \$4,861.98       | \$5,010.00       | \$4,935.08       | \$2,534.34       | \$4,697.38       | \$4,396.89       | \$4,150.49       | \$4,364.03       | \$4,552.29       | \$4,535.89       | \$53,729.11        |
| 1213184 | 380450  | DG3577927           | 1,834            | 1,165            | 880              | 608              | 544              | 361              | 325              | 384              | 341              | 1,157            | 1,689            | 473              | 9,761              |
|         |         | KWH >               |                  |                  |                  |                  |                  |                  |                  |                  |                  |                  |                  |                  |                    |
|         |         | KW >                | 1                | 3                | 3                | 2                | 1                | 2                | 1                | 2                | 1                | 4                | 4                | 3                | 2                  |
|         |         | Elec Revenue >      | \$192.50         | \$136.96         | \$112.65         | \$75.17          | \$69.27          | \$60.34          | \$43.20          | \$60.37          | \$44.78          | \$146.29         | \$187.57         | \$83.00          | \$1,212.10         |
| 1319986 | 388952  | DA05023395          | 6,460            | 5,220            | 4,660            | 3,400            | 2,540            | 3,080            | 4,880            | 4,900            | 4,280            | 2,500            | 3,680            | 4,500            | 50,100             |
|         |         | KWH >               |                  |                  |                  |                  |                  |                  |                  |                  |                  |                  |                  |                  |                    |
|         |         | KW >                | 15               | 14               | 13               | 15               | 16               | 17               | 19               | 19               | 17               | 9                | 10               | 10               | 15                 |
|         |         | Elec Revenue >      | \$683.22         | \$566.06         | \$506.39         | \$431.10         | \$370.41         | \$418.88         | \$574.95         | \$580.48         | \$512.95         | \$293.88         | \$393.80         | \$457.71         | \$5,789.83         |
|         |         | Total KWH           | 10,770,760       | 10,846,054       | 8,040,519        | 9,150,352        | 8,338,079        | 4,429,843        | 8,262,642        | 10,277,600       | 8,649,209        | 9,922,461        | 10,979,399       | 9,287,065        | 108,953,983        |
|         |         | Combined Average KW | 31,045           | 31,358           | 28,403           | 30,438           | 31,004           | 23,631           | 31,905           | 33,070           | 33,144           | 32,146           | 32,969           | 31,738           | 34,999             |
|         |         | USBC Charge         | \$9,693.66       | \$9,761.46       | \$7,236.49       | \$8,235.34       | \$7,504.28       | \$3,986.84       | \$7,436.37       | \$9,249.81       | \$7,784.29       | \$8,930.22       | \$9,881.46       | \$8,358.34       | \$98,058.56        |
|         |         | Total Elec Revenue  | 124,876.22       | 125,583.44       | 106,388.73       | 113,385.09       | 113,581.66       | \$86,782.06      | 111,766.90       | 119,840.07       | 114,521.61       | 116,248.85       | 123,876.60       | 110,190.76       | \$1,367,041.99     |



Ray Rigdon  
 Phillips 66  
 Billings Refinery Manager

P.O. Box 30198  
 Billings, MT 59107  
 406-255-2551

February 12th, 2018

Mark Schoenfeld  
 Montana Department of Revenue  
 P.O Box 5805  
 Helena, MT 59604-5805

Rick Edwards  
 Customer Services Dept.  
 Northwestern Energy  
 11 East Park  
 Butte, MT 59701

**USBP Annual Report**

Phillips 66, as a qualified "large customer" is required to file an annual summary report of the company's Universal System Benefits program activities and expenditures. The summary table below is submitted in accordance with the requirements of 69-8-402, MCA. A donation was made to Energy Share of Montana (see attached) and a Form B was submitted to Northwestern Energy.

**USBP Annual Report  
 2017 Phillips 66**

| USB Claim  | Qualifying Project or Expenditure | Credit Request |                    | USBP Payment made                |                     | USBP Credit Receipt |                     |
|--|-----------------------------------|----------------|--------------------|----------------------------------|---------------------|---------------------|---------------------|
|  |                                   | Date Submitted | Amount             | Date                             | Amount              | Date                | Amount              |
| 1  | Energy Share                      | 10/5/2017      | \$20,000           | 2016<br>Carryover<br>USBC Credit | \$23,398.73         |                     |                     |
| 2  |                                   |                |                    |                                  |                     |                     |                     |
| 3  |                                   |                |                    |                                  |                     |                     |                     |
| 4  |                                   |                |                    |                                  |                     |                     |                     |
| 5  |                                   |                |                    |                                  |                     |                     |                     |
| 6  |                                   |                |                    |                                  |                     |                     |                     |
| 7  |                                   |                |                    |                                  |                     |                     |                     |
| All request forms attached                                 |                                   |                |                    | January                          | \$24,727.36         | 04/10/17            | \$94,183.59         |
|  |                                   |                |                    | February                         | \$24,253.13         | 07/07/17            | \$45,921.44         |
|  |                                   |                |                    | March                            | \$21,794.47         | 10/09/17            | \$72,026.26         |
|  |                                   |                |                    | April                            | \$24,223.92         | 12/06/17            | \$50,839.10         |
|  |                                   |                |                    | May                              | \$17,734.35         |                     |                     |
|  |                                   |                |                    | June                             | \$3,983.17          |                     |                     |
|  |                                   |                |                    | July                             | \$22,051.39         |                     |                     |
|  |                                   |                |                    | August                           | \$25,624.17         |                     |                     |
|  |                                   |                |                    | September                        | \$24,350.70         |                     |                     |
|  |                                   |                |                    | October                          | \$25,279.13         |                     |                     |
|  |                                   |                |                    | November                         | \$25,559.97         |                     |                     |
|  |                                   |                |                    | December                         | \$24,617.10         |                     |                     |
| <b>Total</b>   |                                   |                | <b>\$20,000</b>    |                                  | <b>\$287,787.59</b> |                     | <b>\$262,970.49</b> |
| USBP Credit Balance Carryover to 2017                      |                                   |                | <b>\$24,817.10</b> |                                  |                     |                     |                     |
| Carryover Balance includes \$23,398.73 in pending payments |                                   |                |                    |                                  |                     |                     |                     |

|      |                           |              |
|------|---------------------------|--------------|
| 2015 | Carryover Payment Request | \$276,795.41 |
| 2016 | USBP Credits              | \$262,970.49 |
| 2016 | Request Balance           | \$33,824.92  |

We submitted one Form B in 2017, we have provided an end of year request balance for the showing the USB carry over credits. 2017 was a mega turnaround year for the Billings Refinery and thus USB projects were not performed.

- We had \$23,398.73 in 2016 credits brought forward into 2017. We earned \$262,970.49 in 2017 credits.
- In 2017, we submitted one request for USB credits totaling \$20,000. This request included a \$20,000 donation to Energy Share (see the attached Form B).
- In 2017, we received \$262,970.49 total in USB payments. These payments were composed of \$20,000 in 2016 USB funds we donated to Energy Share, with \$219,571.76 remaining.
- At year end we had \$24,817.10 in 2017 USB credits that were carried over for payment in 2017 because we have a request balance of \$33,824.92 remaining for energy efficiency projects submitted in 2017.

If you have any questions, please direct them to:

Pete Larson  
Phillips 66  
P.O. Box 30198  
Billings, MT 59107-0198

Sincerely,



Ray Rigdon  
Phillips 66  
Billings Refinery Manager

Encls: (5 sheets)  
Cc: Pete Larson  
Steve Kelley  
Ryan Wegner  
Blake Holiday

**FORM B**



**UNIVERSAL SYSTEM BENEFITS (USB)  
LARGE CUSTOMER CREDIT REQUEST FORM**

Complete and mail to: NorthWestern Energy  
Attn: Rick Edwards  
Customer Services Department  
40 East Broadway  
Butte, MT 59701  
Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
FAX: (406) 497-4033

DATE: October, 2017  
NAME OF BUSINESS: Phillips 66  
CITY/TOWN LOCATION: Billings, MT  
CONTACT PERSON: Pete Larson  
MAILING ADDRESS: P.O. Box 30198  
CITY, STATE AND ZIP: Billings, MT 59107-0198  
  
PHONE NUMBER: 406-255-2631  
FAX NUMBER: 406-255-2627  
E-MAIL ADDRESS: Pete.J.Larson@Phillips66.com

\*AMOUNT OF CREDIT REQUESTED: \$20,000

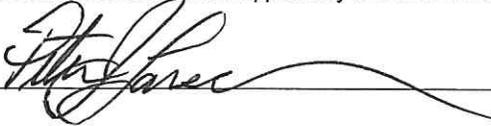
\*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.

DESCRIPTION OF PROJECT(S) (if more space is needed please attach)

**Low Income Energy Assistance**  
Corporate Donation in support of the Energy Share of Montana Endowment fund.  
Energy Share of Montana is a private nonprofit organization whose purpose is to help low income Montanans faced with energy emergencies meet their needs and move toward self reliance. As such, ConocoPhillips' contribution qualifies for reimbursement as a USBP expenditure

ESTIMATED kWh SAVINGS: N/A  
ESTIMATED KW SAVINGS N/A

NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.

LARGE CUSTOMER: Signature: 

FOR NORTHWESTERN ENERGY USE ONLY:  
PROCESSED BY: \_\_\_\_\_  
DISTRIBUTION: \_\_\_\_\_



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 2/12/2018

## PHILLIPS66 REFINERY

### Account Summary

|                                 |              |                          |                |
|---------------------------------|--------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00       | YTD Elec Revenue:        | \$2,072,089.68 |
| Reservations Made YTD:          | \$10,992.18  |                          |                |
| 2016 Carryover Payment Request: | \$276,795.41 | Total Payment Requests:  | \$276,795.41   |
| Payment Requests Made YTD:      | \$0.00       | Current Request Balance: | \$13,824.92    |
| 2016 Carryover USBC Credit:     | \$23,398.73  | Total USBC Credit:       | \$287,787.59   |
| USBC Credit YTD:                | \$264,388.86 | Payments Issued YTD:     | \$262,970.49   |
| Average Monthly Credit Earned:  | \$22,032.41  | USBC Credit Balance:     | \$24,817.10    |
|                                 |              | Payment Pending:         | \$13,824.92    |

### Payment Requests Made

Submitted By Date Amount

|            |             |
|------------|-------------|
| 04/10/2017 | \$94,183.69 |
| 07/07/2017 | \$45,921.44 |
| 10/09/2017 | \$72,026.26 |
| 12/06/2017 | \$50,839.10 |

### Payments Issued

Date Amount

|            |             |
|------------|-------------|
| 04/10/2017 | \$94,183.69 |
| 07/07/2017 | \$45,921.44 |
| 10/09/2017 | \$72,026.26 |
| 12/06/2017 | \$50,839.10 |

### Account Detail

| Account | Premise | Meter      | Jan            | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total      |
|---------|---------|------------|----------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|----------------|
| 1867843 | 428078  | DA11830935 | KWH >          | 3,413      | 3,165      | 3,004      | 2,728      | 4,401      | 3,674      | 5,347      | 5,418      | 3,767      | 2,398      | 3,326      | 43,603         |
|         |         |            | KW >           | 10         | 7          | 9          | 9          | 14         | 14         | 16         | 16         | 15         | 16         | 9          | 12             |
|         |         |            | Elec Revenue > | \$383.70   | \$336.96   | \$331.73   | \$316.86   | \$498.61   | \$441.16   | \$561.80   | \$587.67   | \$451.71   | \$357.92   | \$361.08   | \$5,024.06     |
| 2077210 | 1018    | DA15843411 | KWH >          | 27,266,205 | 26,785,243 | 24,084,816 | 26,919,652 | 19,588,490 | 24,427,349 | 28,395,815 | 26,958,356 | 28,052,926 | 28,330,464 | 27,502,417 | 292,495,434    |
|         |         |            | KW >           | 39,398     | 39,268     | 39,009     | 39,268     | 16,264     | 41,083     | 41,990     | 41,990     | 42,184     | 41,666     | 40,953     | 38,528         |
|         |         |            | Elec Revenue > | 171,532.02 | 173,492.71 | 162,059.78 | 173,632.99 | 144,151.54 | 166,842.63 | 183,027.00 | 177,241.23 | 181,964.34 | 182,234.85 | 177,737.91 | \$1,938,103.74 |
| 2077216 | 80379   | DG35882442 | KWH >          | 98,400     | 77,920     | 53,360     | 36,960     | 40,320     | 16,480     | 10,480     | 32,320     | -15,920    | 10,320     | 11,520     | 415,360        |
|         |         |            | KW >           | 201        | 192        | 147        | 120        | 107        | 56         | 32         | 110        | 25         | 28         | 28         | 97             |
|         |         |            | Elec Revenue > | \$9,869.47 | \$8,148.67 | \$5,615.77 | \$4,092.01 | \$4,219.38 | \$1,850.54 | \$1,146.11 | \$3,613.96 | (\$966.77) | \$1,099.24 | \$1,183.51 | \$44,484.41    |
| 2077221 | 80382   | DG28611525 | KWH >          | 52,240     | 44,320     | 34,640     | 26,400     | 38,400     | 27,360     | 29,680     | 30,240     | 23,440     | 26,560     | 25,520     | 392,480        |
|         |         |            | KW >           | 124        | 115        | 84         | 77         | 86         | 83         | 84         | 92         | 77         | 68         | 68         | 86             |
|         |         |            | Elec Revenue > | \$5,422.14 | \$4,698.01 | \$3,540.56 | \$2,838.05 | \$3,425.50 | \$2,956.34 | \$3,143.38 | \$3,268.81 | \$2,604.27 | \$2,764.17 | \$2,680.65 | \$41,203.60    |
| 2077222 | 80405   | DA16854166 | KWH >          | 6,662      | 5,982      | 5,739      | 5,469      | 9,869      | 6,427      | 7,140      | 6,751      | 4,936      | 5,243      | 4,665      | 77,587         |
|         |         |            | KW >           | 16         | 15         | 15         | 17         | 20         | 19         | 19         | 21         | 19         | 51         | 13         | 20             |
|         |         |            | Elec Revenue > | \$702.58   | \$644.67   | \$611.24   | \$611.82   | \$891.26   | \$698.64   | \$755.11   | \$740.29   | \$582.92   | \$933.55   | \$502.87   | \$8,653.32     |
| 2077224 | 422548  | DA08154404 | KWH >          | 1,629      | 3,119      | 1,362      | 778        | 791        | 872        | 795        | 874        | 728        | 850        | 856        | 13,415         |
|         |         |            | KW >           | 3          | 3          | 3          | 2          | 2          | 1          | 1          | 1          | 1          | 2          | 2          | 2              |
|         |         |            | Elec Revenue > | \$175.12   | \$289.60   | \$150.15   | \$94.37    | \$86.57    | \$94.72    | \$88.77    | \$94.46    | \$82.50    | \$99.51    | \$94.50    | \$1,439.50     |
| 2077225 | 80406   | DG35882441 | KWH >          | 46,280     | 39,280     | 33,160     | 23,480     | 26,040     | 19,400     | 22,040     | 22,360     | 18,040     | 24,120     | 26,240     | 327,480        |
|         |         |            | KW >           | 83         | 85         | 72         | 62         | 61         | 42         | 49         | 52         | 53         | 53         | 53         | 62             |
|         |         |            | Elec Revenue > | \$4,538.77 | \$3,999.47 | \$3,305.73 | \$2,454.73 | \$2,876.71 | \$1,936.31 | \$2,208.26 | \$2,266.55 | \$1,940.70 | \$2,422.06 | \$2,584.54 | \$33,181.05    |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 2/12/2018

| Account | Premise | Meter               | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total      |
|---------|---------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
|         |         | Total KWH           | 27,474,829  | 26,959,029  | 24,216,081  | 26,915,467  | 19,704,837  | 4,403,522   | 24,501,562  | 28,471,297  | 27,056,319  | 28,087,917  | 28,399,955  | 27,574,544  | 293,765,359    |
|         |         | Combined Average KW | 39,835      | 39,685      | 39,339      | 39,555      | 39,574      | 16,554      | 41,298      | 42,191      | 42,282      | 42,374      | 41,884      | 41,126      | 38,808         |
|         |         | USBC Charge         | \$24,727.36 | \$24,263.13 | \$21,794.47 | \$24,223.92 | \$17,734.35 | \$3,963.17  | \$22,051.39 | \$25,624.17 | \$24,350.70 | \$25,279.13 | \$25,559.97 | \$24,817.10 | \$264,388.86   |
|         |         | Total Elec Revenue  | 192,623.80  | 191,610.09  | 175,614.96  | 184,040.83  | 158,417.96  | \$56,482.27 | 174,820.34  | 190,950.43  | 187,812.97  | 186,659.67  | 189,911.30  | 185,145.06  | \$2,072,089.68 |

Project Spokane, LLC  
PO Box 1019  
Bonner, MT 59823

26<sup>th</sup> February 2018

Mr. Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805

Dear Mark

I am writing you to inform you that in 2017 we became a new participant in the Self Directed USBC program at NorthWestern Energy.

In 2017 we made a request for \$497,498.24 for the upgrade of power supply units in our datacenter to increase power efficiency. I have attached Form B that was submitted with our request showing that we purchased 8,064 power supply units that raised the average power efficiency from 90-91% to 93.5-94%. This equated to an estimated 500 KW savings.

We received the first reimbursement check in December 2017 in the amount of \$68,351.50

I have also attached the Self-Directed USBC Progress Report for 2017 provided by NorthWestern Energy.

If you have any questions, please feel free to contact me

Thank you,

Jason Vaughan  
Site Manager  
Project Spokane LLC  
406-370-1859  
[jason@projectspokane.co](mailto:jason@projectspokane.co)



# Self-Directed USBC Progress Report for 2017

Prepared by Rick Edwards on 2/6/2018

## PROJECT SPOKANE LLC

### Account Summary

|                                 |              |                          |              |
|---------------------------------|--------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00       | YTD Elec Revenue:        | \$335,535.96 |
| Reservations Made YTD:          | \$0.00       |                          |              |
| 2016 Carryover Payment Request: | \$0.00       | Total Payment Requests:  | \$497,498.24 |
| Payment Requests Made YTD:      | \$497,498.24 | Current Request Balance: | \$429,146.74 |
| 2016 Carryover USBC Credit:     | \$0.00       | Total USBC Credit:       | \$79,739.30  |
| USBC Credit YTD:                | \$79,739.30  | Payments Issued YTD:     | \$68,351.50  |
| Average Monthly Credit Earned:  | \$6,644.94   | USBC Credit Balance:     | \$11,387.80  |
|                                 |              | Payment Pending:         | \$11,387.80  |

| Payment Requests Made |            | Payments Issued |              |
|-----------------------|------------|-----------------|--------------|
| Submitted By          | Date       | Date            | Amount       |
| Dan Stivers           | 11/22/2017 | 12/06/2017      | \$68,351.50  |
|                       |            |                 | \$497,498.24 |

### Account Detail

| Account | Premise | Meter               | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 3312323 | 612016  | DA19312275          | 0           | 0           | 6,002,946   | 7,250,126   | 7,835,720   | 7,920,611   | 7,965,135   | 7,872,497   | 9,786,990   | 9,358,096   | 11,953,985  | 12,653,108  | 88,599,214   |
|         |         | KWH >               | 0           | 0           | 9,305       | 11,236      | 11,172      | 11,081      | 12,351      | 12,325      | 13,919      | 14,066      | 18,403      | 18,282      | 13,214       |
|         |         | KW >                | 0           | 0           | \$20,758.89 | \$25,034.80 | \$25,457.33 | \$25,385.12 | \$27,499.19 | \$27,373.36 | \$31,699.52 | \$31,553.58 | \$40,972.52 | \$41,404.12 | \$335,535.96 |
|         |         | Elec Revenue >      | \$17,675.39 | \$20,722.14 | \$20,758.89 | \$25,034.80 | \$25,457.33 | \$25,385.12 | \$27,499.19 | \$27,373.36 | \$31,699.52 | \$31,553.58 | \$40,972.52 | \$41,404.12 | \$335,535.96 |
|         |         | Total KWH           | 0           | 0           | 6,002,946   | 7,250,126   | 7,835,720   | 7,920,611   | 7,965,135   | 7,872,497   | 9,786,990   | 9,358,096   | 11,953,985  | 12,653,108  | 88,599,214   |
|         |         | Combined Average KW | 0           | 0           | 9,305       | 11,236      | 11,172      | 11,081      | 12,351      | 12,325      | 13,919      | 14,066      | 18,403      | 18,282      | 13,214       |
|         |         | USBC Charge         | \$0.00      | \$0.00      | \$5,402.65  | \$6,525.11  | \$7,052.15  | \$7,128.55  | \$7,168.62  | \$7,085.25  | \$8,808.29  | \$8,422.29  | \$10,758.59 | \$11,387.80 | \$79,739.30  |
|         |         | Total Elec Revenue  | \$17,675.39 | \$20,722.14 | \$20,758.89 | \$25,034.80 | \$25,457.33 | \$25,385.12 | \$27,499.19 | \$27,373.36 | \$31,699.52 | \$31,553.58 | \$40,972.52 | \$41,404.12 | \$335,535.96 |

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |  |
|----------------------|--|
| DATE:                | 11-22-17   |
| NAME OF BUSINESS:    | Project Spokane LLC  |
| CITY/TOWN LOCATION:  | Missoula   |
| CONTACT PERSON:      | Dan Stivers  |
| MAILING ADDRESS:     | PO Box 1019  |
| CITY, STATE AND ZIP: | Missoula, MT 59823   |
| PHONE NUMBER:        | 606-375-1716   |
| FAX NUMBER:          |  |
| E-MAIL ADDRESS       | <a href="mailto:dan@projectspokane.co">dan@projectspokane.co</a> |

|                             |              |
|-----------------------------|--------------|
| AMOUNT OF CREDIT REQUESTED: | \$497,498.24 |
|-----------------------------|--------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):                   |
| Upgraded 8,064 power supply units from average power efficiency of 90-91% to 93.5-94% |

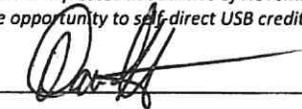
Estimated Savings in kWh and/or KW for project needs to be provided

|                        |        |
|------------------------|--------|
| ESTIMATED kWh SAVINGS: |        |
| ESTIMATED KW SAVINGS:  | 500 KW |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

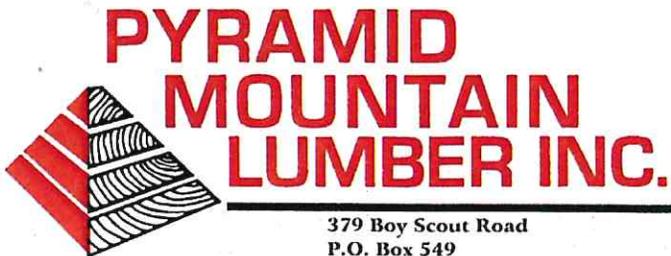
LARGE CUSTOMER:

Signature: \_\_\_\_\_



|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



379 Boy Scout Road  
P.O. Box 549  
Seeley Lake, Montana 59868  
(406) 677-2201

RECEIVED  
FEB 22 2018 N  
MT DOR

February 20, 2018

Mark Schoenfeld, Auditor  
Montana Department of Revenue  
P. O. Box 5805  
Helena, MT 59604-5805

Mark:

Last March Pyramid Mountain Lumber filed its' first USB report, a copy of which is included. That report indicated we had total credits to carry forward of \$1,265,820.64.

Pyramid Mountain Lumber's USB charge for 2017 purchased energy is \$10,647.63 (0.9 mills per kilowatt hour times 11,830,699 Kwh). Applying the 2017 USB charges to the carry forward leaves a balance of \$1,255,173.01 to carry forward.

Mark, please let me know if there is anything else required.

Respectfully,

Loren Rose  
Chief Operating Officer  
Pyramid Mountain Lumber, Inc.

Rec'd MT P  
FEB 23 2018

Cc: Mark Hayden, General Manager, MEC

March 22, 2017

Mark Schoenfeld, Auditor  
Montana Department of Revenue  
P. O. Box 5805  
Helena, MT 59604-5805

Mark:

It has come to our attention that annually Pyramid Mountain Lumber needs to file a Universal System Benefits (USB) report. Missoula Electric Cooperative, our local utility has provided some information to assist in filing this report.

As I read MCA 69-8-402, Pyramid Mountain Lumber should pay a charge of the product of 0.9 mills per kilowatt hour multiplied by our total kilowatt hour purchases, less qualifying credits. Attached are spreadsheets calculating our annual charges from 2011 through 2016, which total \$69,086.00.

In 2011, Pyramid took on three energy savings projects. When you look at the summary page outlining the USB charges, you will see that our usage every year since 2011 is lower than 2011.

The three projects were:

New Compressors plant wide - \$725,619.62  
New Lighting plant wide - \$260,499.18  
New Sawmill Transformer - \$190,311.14

In addition, in 2016 we updated the power to our dry kilns and swapped out old motors with variable frequency drives. This project was designed to reduce power consumption at the dry kilns by at least 20%. Total cost of the project was \$158,476.70.

Pyramid is of the opinion that these four projects qualify as credits against the USB charge. The total of the credits is \$1,334,906.64. Applying the USB charges since 2011 of \$69,086.00 leaves total credits remaining to carry forward of \$1,265,820.64.

Of course we have the invoices and documentation on those four projects. The reporting guidelines do not specify whether they are to be included with the report or not. Due to the volume of invoices, they were not included. If necessary, we can provide and accounting of the projects, or make the files available for an onsite visit. That would be our preferred choice.

Mark, please let me know if there is anything else required. Also, thank you for your patience as this is foreign to us. Now that it is on our calendar, future years reporting should be timely.

Respectfully,

Loren Rose  
Chief Operating Officer  
Pyramid Mountain Lumber, Inc.

Cc: Mark Hayden, General Manager, MEC

REC Advanced Silicon Materials LLC  
119140 Rick Jones Way  
Silver Bow, MT 59750 USA  
Phone +1 406 496 9898  
Fax +1 406 496 9793  
www.recsilicon.com



## Memorandum

**To:** Mark Schoenfeld  
Specialist Large Customer Team  
Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

**CC:** Rick Edwards  
Director of Key Accounts & Economic Development  
NorthWestern Energy  
11 East Park  
Butte, MT 59701

**From:** Cody Carpenter  
REC Silicon  
119140 Rick Jones Way  
Silver Bow, MT 59750

**Date:** 2/13/2018

**Re:** 2017 USBC REPORT

---

Dear Mr. Schoenfeld:

The 2017 USB charges to REC Silicon total \$500,000. REC Silicon submitted 4 projects for credit in 2017. These projects qualify for USBC expenditures because of electricity savings. The attached files were submitted to NorthWestern Energy as claim for reimbursement. As noted on the attached Self-Directed USBC Progress Report for 2017, the current request balance from NorthWestern Energy as of 1/1/18 is \$440,280.93.

REC Silicon continues to evaluate other potential projects that should qualify for USB funds in the near future. In fact, REC Silicon continues to develop a plant wide initiative to run our operations with efficiency and energy as a higher focus.

If you require explanations or any further information, please call 406-496-9729.

Sincerely,

A handwritten signature in black ink, appearing to read "Cody D. Carpenter". The signature is fluid and cursive, written over a light blue horizontal line.

Cody D. Carpenter  
Electrical Engineer, P.E.  
REC Silicon



# Self-Directed USBC Progress Report for 2017

Prepared by Rick Edwards on 2/6/2018

## REC SILICON

### Account Summary

|                                 |              |                          |              |
|---------------------------------|--------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00       | YTD Elec Revenue:        | \$500,000.00 |
| Reservations Made YTD:          | \$0.00       |                          |              |
| 2016 Carryover Payment Request: | \$239,968.47 | Total Payment Requests:  | \$940,280.93 |
| Payment Requests Made YTD:      | \$700,312.46 | Current Request Balance: | \$440,280.93 |
| 2016 Carryover USBC Credit:     | \$0.00       | Total USBC Credit:       | \$500,000.00 |
| USBC Credit YTD:                | \$500,000.00 | Payments Issued YTD:     | \$500,000.00 |
| Average Monthly Credit Earned:  | \$41,666.67  | USBC Credit Balance:     | \$0.00       |
|                                 |              | Payment Pending:         | \$0.00       |

| Payment Requests Made |            | Payments Issued |              |
|-----------------------|------------|-----------------|--------------|
| Submitted By          | Date       | Date            | Amount       |
| Cody Carpenter        | 11/27/2017 | 04/10/2017      | \$158,296.14 |
|                       |            | 07/07/2017      | \$81,672.33  |
|                       |            | 12/06/2017      | \$260,031.53 |
|                       |            |                 |              |

### Account Detail

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                             |                               |
|-----------------------------|-------------------------------|
| <b>DATE:</b>                | November 27, 2017             |
| <b>NAME OF BUSINESS:</b>    | REC Silicon                   |
| <b>CITY/TOWN LOCATION:</b>  | Butte Plant                   |
| <b>CONTACT PERSON:</b>      | Cody Carpenter                |
| <b>MAILING ADDRESS:</b>     | 119140 Rick Jones Way         |
| <b>CITY, STATE AND ZIP:</b> | Silver Bow, MT 59750          |
| <b>PHONE NUMBER:</b>        | 406-496-9729                  |
| <b>FAX NUMBER:</b>          | 406-496-9793                  |
| <b>E-MAIL ADDRESS:</b>      | cody.carpenter@recsilicon.com |

|                                    |              |
|------------------------------------|--------------|
| <b>AMOUNT OF CREDIT REQUESTED:</b> | \$700,312.46 |
|------------------------------------|--------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| <b>DESCRIPTION OF PROJECT(S)</b> (if more space is needed, please attach):<br>In 2017, REC Silicon completed projects related to improving process equipment efficiency, variable frequency drives, and installing new lighting technologies. A detailed description of each project is included on the USB Request Form B Attachment document. |
|---|

Estimated Savings in kWh and/or KW for project needs to be provided

|                               |                     |
|-------------------------------|---------------------|
| <b>ESTIMATED kWh SAVINGS:</b> | 14,789,195 kWh/year |
| <b>ESTIMATED KW SAVINGS:</b>  | 1688.3 kW           |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

**LARGE CUSTOMER:** Signature: 

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

## **USB REQUEST FORM B ATTACHMENT**

### **BACKGROUND**

REC Silicon is a major supplier of high purity polycrystalline silicon and silane gas to the semiconductor and photovoltaic industries. REC Silicon has production facilities in Butte, MT and Moses Lake, WA.

### **REACTOR POLISHING PROJECT DESCRIPTION**

The emissivity program at REC Silicon was developed to improve product quality and reduce energy costs during process operation. Normal equipment use and minor damage has diminished operational efficiency of these systems. By restoring the process equipment to better than original condition, energy costs of operating the process systems have been greatly reduced. Improvements include removing discoloration and surface damage of reflective surfaces of the equipment as well as re-application of a specific surface finish to reflective bodies within the process equipment. Specialized equipment to make these improvements was designed and developed by REC Silicon but fabricated by outside contractors. In 2017, (9) reactors had their process equipment worked on to improve quality and reduce energy.

Each month, the reactors produce between 3 and 4 growth cycles where each cycle saves between 20 and 24 MWh. Yearly energy savings are calculated as follows (9 units\* 3.5 runs per month \* 12 months per year \* 22 MWh each) = 8,316 MWh per year.

### **REACTOR POLISHING PROJECT JUSTIFICATION AND COSTS**

As described above, the project will save an estimated 8,316,000 kWh in electricity annually. The following is a summary of the project cost where each polished tube bundle cost \$8950:

|   |                 |
|---|-----------------|
| Tube Bundle Polish, Pattern, Related Supplies & Tasks = | \$80,550        |
| <b>TOTAL =</b>  | <b>\$80,550</b> |

### **PARALLEL AIR COOLED QUENCH CONDENSER PROJECT DESCRIPTION**

REC Silicon replaced the existing Vertical Quench Condensers with (4) Air Cooled Quench Condensers (ACQC). New fans and bases were mounted to the existing ACQC's. The additional power added with the new fans (upgraded from 15HP to 25HP) was essentially canceled by the 125HP Methanol Circulation Pump now running at 33% (4\*10HP~33% of 125HP). In addition, because of the improved efficiency of this project, an 800HP refrigeration compressor no longer needs to run to cool the process and saves (800HP\*.746kW/HP) \* 8760 hrs) = 5,227,968 kWh.

## **PARALLEL AIR COOLED QUENCH CONDENSER JUSTIFICATION AND COSTS**

The project will save an estimated 5,227,968 kWh in electricity annually. The following is a summary of the project cost:

|                                 |                     |
|---------------------------------|---------------------|
| Project Materials =             | \$193,950           |
| Crane Rental =                  | \$17,430            |
| Project Installation Labor =    | \$153,720           |
| Consulting Engineering Labor =  | \$25,000            |
| Project Engineering/Oversight = | \$55,000            |
| <b>TOTAL =</b>                  | <b>\$445,100.00</b> |

## **GLYCOL PUMP VFD PROJECT DESCRIPTION**

REC Silicon replaced the existing motors for glycol pumps P-1406 and P-1407 and added variable frequency drives (VFDs). The VFDs allow each motor to run at a much slower speed and the system at a much lower pressure. This project is not only saving energy but is also reducing wear and tear on piping, valves, and pumps. The VFDs will save an estimated 1,207,804 kWh annually due the 300 HP motors running at a half speed average.

## **GLYCOL PUMP VFD JUSTIFICATION AND COSTS**

The project will save an estimated 1,207,804 kWh in electricity annually. The following is a summary of the project cost:

|                     |                     |
|---------------------|---------------------|
| Project Materials = | \$107,578.22        |
| Contractor Labor =  | \$47,714.24         |
| Project Labor =     | \$7997.27           |
| <b>TOTAL =</b>      | <b>\$163,289.73</b> |

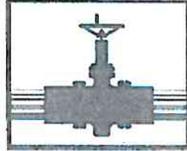
## **LIGHT BULB UPGRADE PROJECT DESCRIPTION**

This project involved replacing existing light bulbs with more energy efficient bulbs. Per maintenance work orders, the light bulbs took 146 hours to replace. Because these lights are located both interior and exterior, they are estimated to be turned on 75% of the time.

## **LIGHT BULB UPGRADE PROJECT JUSTIFICATION AND COSTS**

348 existing light bulbs were replaced and saved an estimated 5696 watts. Assuming an average operating time of 75%, this reduction will save an estimated 37,423 kWh annually (5.696kW\*6570hrs).

|                                   |                    |
|-----------------------------------|--------------------|
| Project Materials =               | \$3780.73          |
| Project Labor = \$52/hr * 146 hrs | \$7592.00          |
| <b>TOTAL =</b>                    | <b>\$11,372.73</b> |



**PLAINS**  
ALL AMERICAN

Angelica C. Aghili  
Plains All American  
333 Clay Street, Suite 1600  
Houston, Texas, 77002

February 21, 2018

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

RE: Self-Directed USBC Progress Report for 2017 – Rocky Mountain Pipeline

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 USBC Report that we receive from NorthWestern Energy showing our Large Customer USB activities during 2017.

In 2017, we did not receive any in USB credit payments and took no action to reserve our credits. At year end our \$662 in 2016 credits and \$884.73 in 2017 credits were reallocated by NorthWestern Energy, since we took no action.

We were also notified by NorthWestern Energy that at year-end 2017 our largest account no longer averaged 1,000 kW per month, which is a requirement to be on the Large Customer USB rate. So, our accounts have been moved to a standard USB rate and unless our kW average increases we will not be a part of the Large USB rate and reporting requirements from this year forward.

Sincerely,

Angelica C. Aghili  
Energy Management Engineer  
Rocky Mountain Pipeline

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email: rick.edwards@northwestern.com



# ROCKY MOUNTAIN POWER

Hardin Generating Station  
Route 1 Box 1144A  
Hardin, MT 59034

**Rec'd MT DOR**

**FEB 23 2018**

CERTIFIED MAIL RRR

February 19, 2018

Mr. Mark Schoenfeld  
Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

RE: Self-Directed USBC Progress Report for 2017 – Rocky Mountain Power

Dear Mr. Schoenfeld:

Please find enclosed a copy of our 2017 Self-Directed USBC Progress Report that we receive from NorthWestern Energy showing our USB activities during 2017. All the USB payments we received in 2017 were self-directed for energy efficiency projects we submitted in previous years. During 2017, we received USB payments totaling \$607.86 that was composed entirely of 2016 Carryover USB Credits.

We also had a request balance of \$ -0- and a Reservation to carry the remaining 2017 USB credits at year-end of \$1,578.33 into 2018.

Sincerely,



Ronald D. Frank  
Plant Manager

c: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
Deborah Singer, Northwestern Energy, PO Box 80330, Billings, MT 59108-0330



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## ROCKY MOUNTAIN POWER

| Account Summary                 |            | YTD Elec Revenue:        |              |
|---------------------------------|------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$600.00   | YTD Elec Revenue:        | \$236,692.94 |
| Reservations Made YTD:          | \$1,600.00 |                          |              |
| 2016 Carryover Payment Request: | \$40.92    | Total Payment Requests:  | \$607.86     |
| Payment Requests Made YTD:      | \$566.94   | Current Request Balance: | \$0.00       |
| 2016 Carryover USBC Credit:     | \$607.86   | Total USBC Credit:       | \$2,186.19   |
| USBC Credit YTD:                | \$1,578.33 | Payments Issued YTD:     | \$607.86     |
| Average Monthly Credit Earned:  | \$131.53   | USBC Credit Balance:     | \$1,578.33   |
|                                 |            | Payment Pending:         | \$0.00       |

| Payment Requests Made |            | Payments Issued |          |
|-----------------------|------------|-----------------|----------|
| Submitted By          | Date       | Date            | Amount   |
| Ron Frank             | 09/18/2017 | 04/10/2017      | \$40.92  |
|                       |            | 10/09/2017      | \$566.94 |

| Account Detail  |                     | Jan         | Feb         | Mar         | Apr      | May      | Jun      | Jul      | Aug      | Sep      | Oct      | Nov         | Dec         | YTD Total    |
|-----------------|---------------------|-------------|-------------|-------------|----------|----------|----------|----------|----------|----------|----------|-------------|-------------|--------------|
| Account Premise | Meter               |             |             |             |          |          |          |          |          |          |          |             |             |              |
| 2049844         | 395353 DD80693488   | 460,000     | 701,100     | 162,300     | 0        | 0        | 0        | 0        | 0        | 0        | 0        | 124,600     | 305,700     | 1,753,700    |
|                 | KWH >               | 3,999       | 6,800       | 6,400       | 0        | 0        | 0        | 0        | 0        | 0        | 0        | 6,400       | 6,800       | 6,080        |
|                 | KW >                |             |             |             |          |          |          |          |          |          |          |             |             |              |
|                 | Elec Revenue >      | \$46,157.60 | \$72,697.66 | \$34,146.92 | \$983.70 | \$983.70 | \$983.70 | \$983.70 | \$983.70 | \$983.70 | \$983.70 | \$31,712.26 | \$45,092.60 | \$236,692.94 |
|                 | Total KWH           | 460,000     | 701,100     | 162,300     | 0        | 0        | 0        | 0        | 0        | 0        | 0        | 124,600     | 305,700     | 1,753,700    |
|                 | Combined Average KW | 3,999       | 6,800       | 6,400       | 0        | 0        | 0        | 0        | 0        | 0        | 0        | 6,400       | 6,800       | 6,080        |
|                 | USBC Charge         | \$414.00    | \$630.99    | \$146.07    | \$0.00   | \$0.00   | \$0.00   | \$0.00   | \$0.00   | \$0.00   | \$0.00   | \$112.14    | \$275.13    | \$1,578.33   |
|                 | Total Elec Revenue  | \$46,157.60 | \$72,697.66 | \$34,146.92 | \$983.70 | \$983.70 | \$983.70 | \$983.70 | \$983.70 | \$983.70 | \$983.70 | \$31,712.26 | \$45,092.60 | \$236,692.94 |

## Hensley, Nicole

---

**From:** Schoenfeld, Mark  
**Sent:** Thursday, February 22, 2018 2:25 PM  
**To:** Hensley, Nicole  
**Subject:** FW: Roseburg's - 2017 Year End Summary Report for USBC Program  
**Attachments:** 2017 Year End Self Directed USBC Progress Report.pdf; 2017 Form B Air Knives Roseburg.pdf

**From:** Minta Johnson [mailto:MintaJ@rfpco.com]  
**Sent:** Thursday, February 22, 2018 8:56 AM  
**To:** Schoenfeld, Mark <mschoenfeld@mt.gov>; Mahugh, Dale E <Dale.Mahugh@northwestern.com>  
**Subject:** Roseburg's - 2017 Year End Summary Report for USBC Program

Good Morning Mr. Schoenfeld,

I am writing to you to comply with the rules described in the MCA which requires Roseburg Forest Products to explain how we used the funds (\$48,685) we received from Northwestern Energy through the 2017 USBC program. By removing the compressed air system line blow offs and replacing them with the squirrel cage motor blow offs we reduced electrical energy consumption the compressors use. Each compressed blow line uses approximately 130 cfm of air per unit with 8760 hrs. of use per year. 4 units will save approximately 100hp of inefficient compressed air.

Thanks,

Minta

Minta Johnson  
Plant Controller  
406.829.4372 (w) | 406.210.9054(c)  
[Mintaj@rfpco.com](mailto:Mintaj@rfpco.com)

"See it, Own it, Solve It and Do it"  
The Oz Principle – Roger Connors, Tom Smith & Craig Hickman





# Self-Directed USBC Progress Report for 2017

Prepared by Rick Edwards on 2/13/2018

## ROSEBURG FOREST PRODUCTS

### Account Summary

|                                 |              |                          |              |
|---------------------------------|--------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$150,000.00 | YTD Elec Revenue:        | \$964,136.89 |
| Reservations Made YTD:          | \$43,000.00  |                          |              |
| 2016 Carryover Payment Request: | \$0.00       | Total Payment Requests:  | \$48,685.00  |
| Payment Requests Made YTD:      | \$48,685.00  | Current Request Balance: | \$0.00       |
| 2016 Carryover USBC Credit:     | \$44,527.66  | Total USBC Credit:       | \$89,368.24  |
| USBC Credit YTD:                | \$44,840.58  | Payments Issued YTD:     | \$48,685.00  |
| Average Monthly Credit Earned:  | \$3,736.72   | USBC Credit Balance:     | \$40,683.24  |
|                                 |              | Payment Pending:         | \$0.00       |

| Payment Requests Made |            | Payments Issued |             |
|-----------------------|------------|-----------------|-------------|
| Submitted By          | Date       | Date            | Amount      |
| Minta Johnson         | 08/14/2017 | 10/19/2017      | \$48,685.00 |

### Account Detail

| Account | Premise | Meter               | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 1120533 | 223500  | DG16558725          | 8,483       | 7,869       | 8,409       | 7,624       | 7,597       | 7,355       | 618         | 544         | 557         | 452         | 1,108       | 8,269       | 58,885       |
|         |         | KWH >               | 13          | 13          | 11          | 11          | 11          | 11          | 1           | 1           | 1           | 1           | 10          | 11          | 8            |
|         |         | Elec Revenue >      | \$174.59    | \$172.72    | \$165.88    | \$158.25    | \$158.39    | \$154.89    | \$23.21     | \$22.39     | \$22.54     | \$20.37     | \$89.02     | \$163.80    | \$1,326.05   |
| 1120571 | 223488  | DG64556859          | 9,320       | 9,000       | 10,520      | 8,880       | 8,680       | 10,640      | 11,400      | 11,840      | 11,240      | 9,480       | 8,840       | 10,000      | 119,840      |
|         |         | KWH >               | 87          | 108         | 84          | 83          | 76          | 93          | 94          | 92          | 87          | 91          | 69          | 80          | 87           |
|         |         | Elec Revenue >      | \$665.53    | \$819.88    | \$673.49    | \$654.88    | \$601.91    | \$736.43    | \$754.30    | \$742.07    | \$701.36    | \$713.90    | \$560.02    | \$641.04    | \$8,264.61   |
| 1120644 | 1686    | DA06183388          | 4,012,139   | 4,259,445   | 4,061,379   | 4,520,826   | 4,091,825   | 4,401,130   | 4,154,800   | 3,633,420   | 4,256,442   | 4,424,143   | 3,921,492   | 0           | 45,737,041   |
|         |         | KWH >               | 6,882       | 6,908       | 7,160       | 7,122       | 7,128       | 7,044       | 7,050       | 6,856       | 7,115       | 7,024       | 7,147       | 0           | 7,040        |
|         |         | Elec Revenue >      | \$74,007.31 | \$80,763.45 | \$79,528.70 | \$84,795.53 | \$79,748.12 | \$83,037.00 | \$80,150.04 | \$72,938.30 | \$81,412.32 | \$82,986.78 | \$77,609.27 | \$0.00      | \$876,976.82 |
| 1120644 | 1686    | DA21629764          | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 3,907,071   | 3,907,071    |
|         |         | KWH >               | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 7,083       | 7,083        |
|         |         | Elec Revenue >      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$77,158.14 | \$77,158.14  |
|         |         | Total KWH           | 4,029,942   | 4,276,314   | 4,000,308   | 4,537,330   | 4,108,102   | 4,419,125   | 4,166,818   | 3,645,804   | 4,268,239   | 4,434,075   | 3,931,440   | 3,925,340   | 49,822,837   |
|         |         | Combined Average KW | 6,982       | 7,029       | 7,255       | 7,216       | 7,215       | 7,148       | 7,145       | 6,949       | 7,203       | 7,116       | 7,226       | 7,174       | 14,218       |
|         |         | USBC Charge         | \$3,626.96  | \$3,848.68  | \$3,672.28  | \$4,083.59  | \$3,697.29  | \$3,977.22  | \$3,750.14  | \$3,281.23  | \$3,841.42  | \$3,990.67  | \$3,538.30  | \$3,532.80  | \$44,840.58  |
|         |         | Total Elec Revenue  | \$74,847.43 | \$81,756.05 | \$80,368.07 | \$85,608.66 | \$80,508.42 | \$83,928.32 | \$80,927.55 | \$73,702.76 | \$82,136.22 | \$83,721.05 | \$78,258.31 | \$77,962.98 | \$963,725.82 |

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                          |
|----------------------|--------------------------|
| DATE:                | 8-14-17                  |
| NAME OF BUSINESS:    | Roseburg Forest Products |
| CITY/TOWN LOCATION:  | Missoula                 |
| CONTACT PERSON:      | Minta Johnson            |
| MAILING ADDRESS:     | 3300 Raser Drive         |
| CITY, STATE AND ZIP: | Missoula, MT 59808       |
| PHONE NUMBER:        | 406 728 3910             |
| FAX NUMBER:          |                          |
| E-MAIL ADDRESS:      | MintaJ@RFPCO.com         |

|                             |        |
|-----------------------------|--------|
| AMOUNT OF CREDIT REQUESTED: | 48,685 |
|-----------------------------|--------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach): |
| Air Knives for clearing sawdust                                     |

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |           |
|------------------------|-----------|
| ESTIMATED kWh SAVINGS: | 10950 kWh |
| ESTIMATED KW SAVINGS:  | 30 kW     |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:                      Signature: \_\_\_\_\_

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) if a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

# GreCon

## Quotation

Roseburg Forest Products  
3300 Raser Dr.  
Missoula, MT 59806

Quotation No.: 1000140-0  
Date: 8/30/2017  
Customer No.: ROSMT1  
Contact Person: Jon Pierson  
Phone No.: (503)641-7731  
E-Mail: [jpierson@grecon.us](mailto:jpierson@grecon.us)

Dear Mr. Mann,

Thank you for your enquiry. We are pleased to offer you the following quotation.

| Item  | Part / Description                 | Quantity | Unit | Unit Price | Total      |
|---|------------------------------------|----------|------|------------|------------|
| <b>Spare Parts for GreCon Superscan SPM 6000, SN A257552</b>  |                                    |          |      |            |            |
| 1.0   | 204257<br>Airknife                 | 1.0      | EA   | \$1,245.00 | \$1,245.00 |
| Time of delivery: 2 Weeks   |                                    |          |      |            |            |
| 2.0   | 503808<br>High pressure ventilator | 1.0      | EA   | \$5,710.00 | \$5,710.00 |
| Time of delivery: 4 Weeks   |                                    |          |      |            |            |
| This quotation does not include any services. If you require technical support for installation or start-up operations, we would be pleased to carry out these operations according to our currently valid installation rates. If you require an individual quotation on the service operations, please do not hesitate to contact us. All parts in stock quoted EXW Tigard, OR. All parts to be special ordered in Germany quoted FCA Alfeld, Germany. All parts quoted USD. Freight Pre-pay & Add. Quote valid for 60 days. |                                    |          |      |            |            |
| Quotation Value:  |                                    |          |      |            | \$6,955.00 |
| TOTAL:  |                                    |          |      |            | \$6,955.00 |

7 units @ 7

\$ 48,1685<sup>00</sup>

GreCon, Inc. • 15875 S.W. 74th Ave • Tigard, Oregon 97224-7934 • 503-641-7731  
[www.grecon-us.com](http://www.grecon-us.com) • e-mail: [jpierson@grecon.us](mailto:jpierson@grecon.us)

Dear Mark

We here at RY Timber did not use any of our 2016 dollars, we are reserving our 2017 dollars to carry over hoping to be able use In 2018.



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

## R Y TIMBER

### Account Summary

2016 Carryover Reservation: \$12,200.00 YTD Elec Revenue: \$1,391,666.19  
 Reservations Made YTD: \$13,100.00

2016 Carryover Payment Request: \$0.00 Total Payment Requests: \$0.00  
 Payment Requests Made YTD: \$0.00 Current Request Balance: \$0.00

2016 Carryover USBC Credit: \$12,112.57 Total USBC Credit: \$25,177.90

USBC Credit YTD: \$13,065.33 Payments Issued YTD: \$0.00

Average Monthly Credit Earned: \$1,088.78 USBC Credit Balance: \$25,177.90

Payment Pending: \$0.00

### Payment Requests Made

Submitted By Date Amount

### Payments Issued

Date Amount

### Account Detail

| Account | Premise | Meter      | Jan                        | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total      |
|---------|---------|------------|----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
| 100587  | 1591    | DA18663742 | KWH > 623,547              | 595,732     | 576,163     | 462,072     | 444,829     | 476,414     | 410,726     | 455,587     | 429,577     | 488,961     | 554,496     | 516,346     | 6,034,450      |
|         |         |            | KW > 1,721                 | 1,731       | 1,712       | 1,585       | 1,601       | 1,607       | 1,535       | 1,509       | 1,534       | 1,649       | 1,719       | 1,696       | 1,633          |
|         |         |            | Elec Revenue > \$55,040.58 | \$52,785.19 | \$50,025.78 | \$41,505.58 | \$40,658.11 | \$42,660.03 | \$37,458.65 | \$40,411.80 | \$38,781.88 | \$43,684.59 | \$48,751.71 | \$45,925.17 | \$537,689.07   |
| 100598  | 1602    | DA06183534 | KWH > 997,120              | 890,146     | 759,952     | 783,980     | 577,847     | 597,298     | 583,361     | 425,265     | 575,124     | 0           | 0           | 0           | 6,190,093      |
|         |         |            | KW > 2,141                 | 2,280       | 2,213       | 2,102       | 1,960       | 1,840       | 1,655       | 1,653       | 1,652       | 0           | 0           | 0           | 1,944          |
|         |         |            | Elec Revenue > \$95,598.94 | \$89,655.37 | \$76,410.58 | \$77,251.70 | \$61,012.56 | \$61,265.19 | \$58,255.04 | \$46,221.41 | \$57,614.96 | \$0.00      | \$0.00      | \$0.00      | \$623,285.75   |
| 100598  | 1602    | DA19428671 | KWH > 0                    | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0              |
|         |         |            | KW > 0                     | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0              |
|         |         |            | Elec Revenue > \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$59,745.39 | \$77,321.06 | \$79,293.71 | \$216,360.16   |
| 709823  | 320884  | DG51083805 | KWH > 19,640               | 18,360      | 17,120      | 13,000      | 11,480      | 7,800       | 5,560       | 5,480       | 5,200       | 6,960       | 9,960       | 10,400      | 130,960        |
|         |         |            | KW > 39                    | 39          | 36          | 38          | 36          | 28          | 20          | 20          | 16          | 24          | 29          | 32          | 30             |
|         |         |            | Elec Revenue > \$1,975.37  | \$1,883.60  | \$1,703.11  | \$1,395.78  | \$1,269.03  | \$896.62    | \$637.64    | \$631.28    | \$573.73    | \$787.27    | \$1,075.82  | \$1,143.83  | \$13,973.08    |
|         |         |            | Total KWH                  | 1,640,307   | 1,504,238   | 1,353,235   | 1,259,052   | 1,034,156   | 999,647     | 886,332     | 1,009,901   | 1,077,754   | 1,350,249   | 1,320,695   | 14,517,078     |
|         |         |            | Combined Average KW        | 3,901       | 4,050       | 3,961       | 3,725       | 3,475       | 3,210       | 3,182       | 3,202       | 3,507       | 3,792       | 3,950       | 5,640          |
|         |         |            | USBC Charge                | \$1,476.27  | \$1,353.81  | \$1,217.92  | \$1,133.14  | \$973.36    | \$899.67    | \$797.70    | \$908.91    | \$969.97    | \$1,215.22  | \$1,186.62  | \$13,065.33    |
|         |         |            | Total Elec Revenue         | 152,614.89  | 144,324.16  | 128,139.47  | 120,153.06  | 104,821.84  | \$96,351.33 | \$87,264.49 | \$96,970.57 | 104,217.25  | 127,148.59  | 126,362.71  | \$1,391,308.06 |

## FORM A - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
 FAX: (406) 497-4008

|                      |                     |
|----------------------|---------------------|
| DATE:                | 11/30/2017          |
| NAME OF BUSINESS:    | R4 Timber, Inc.     |
| CITY/TOWN LOCATION:  | Timberland          |
| CONTACT PERSON:      | Andre Proulx        |
| MAILING ADDRESS:     | P.O. Box 220        |
| CITY, STATE AND ZIP: | Timberland MT 59644 |
| PHONE NUMBER:        | 406-266-3111        |
| FAX NUMBER:          |                     |
| E-MAIL ADDRESS:      | andre@R4Timber.com  |

1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

R4 Timber wishes to carry its 2017 USB funds forward to 2018 for projects we hope to identify & complete in 2018 - approx 13,100 #

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:

Signature:

*Andre Proulx*

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

**Flathead Electric Cooperative, Inc.  
 Large Customer USB Information  
 January 1, 2017 - December 31, 2017**

|                                | 2017 kWh Purchases through Dec 31, 2017 | Conservation investments made through power purchases pursuant to 69-8-402(2)(b) | Low-income energy assistance investments made through power purchases pursuant to 69-8-402(2)(b) | Renewable energy investments made through power purchases pursuant to 69-8-402(2)(b) | Large customer conservation investments made pursuant to 69-8-101 et.seq | Power Supplier Reimbursements/Rebates for Energy Efficiency |
|--------------------------------|---|--|--|--|--|---|
| FEC Customer<br>Semitool, Inc. | 7,936,200                               | \$18,130   | \$719  | \$5,405  |  |   |



**UNIVERSAL SYSTEM BENEFITS (USB)  
LARGE CUSTOMER CREDIT FORM**

Complete and mail to: Montana Dakota Utilities Co.  
ATT: Tamie Aberle  
Regulatory Affairs Department  
400 North 4th Street  
Bismarck, ND 58501  
Email: [tamie.aberle@mdu.com](mailto:tamie.aberle@mdu.com)  
FAX: (701) 222-7606

DATE: 15 February 2018  
NAME OF BUSINESS: Sidney Sugars, Inc.  
CITY/TOWN LOCATION: Sidney, MT  
CONTACT PERSON: Chad Williams  
MAILING ADDRESS: 35140 CR 125  
CITY, STATE AND ZIP: Sidney, MT 59270  
PHONE NUMBER: 406-433-9330  
FAX NUMBER: 406-433-9317  
E-MAIL ADDRESS: cwilliam@crystalsugar.com

AMOUNT OF CREDIT REQUESTED: 17390.45

The amount of credit available at any given time will be limited by the amount of USBP funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USBP funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated.

DESCRIPTION OF PROJECT(S) (if more space is needed please attach):

LED Lighting Upgrades

Replaced 20 metal halide, 4 incandescent and 287 T-8 fluorescent bulbs with LED lights.

Total cost of new lights: \$24,395.61

ESTIMATED kWh and KW

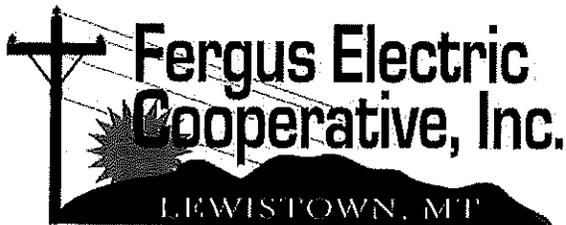
SAVINGS: 12.4 kW running 75% of the year equates to 81,468 kWh per year

Large customer, by signature below attests that Montana-Dakota Utilities Co. and the Large Customer submitting this request, have not mutually agreed that Montana-Dakota Utilities Co. will approve the credit and Montana-Dakota Utilities Co. does not approve the qualification of the requested USBP credit.

CUSTOMER

Signature: 

| List of Lights |     | Replaced                       |     | Total Cost |                       | Watts |                     | Watts |       | Watts Reduced |                  |
|----------------|-----|--------------------------------|-----|------------|-----------------------|-------|---------------------|-------|-------|---------------|------------------|
| Qty.           | UOM | Description                    | Qty | UOM        | Description           | Watts | Watts               | Watts | Watts | Watts         | Watts Reduced    |
| 23             | ea  | Cree LS8 LED Surface Luminaire | 23  | ea         | 2-lamp T8 Fluorescent | 100   | \$ 5,674.18         | 158   | 1334  |               |                  |
| 264            | ea  | Cree 4' LED Troffer lights     | 264 | ea         | T8 Fluorescent        | 22    | \$ 1,972.08         | 44    | 5808  |               |                  |
| 2              | ea  | Dialight HZF9C2N               | 4   | ea         | 200 W Incandescent    | 58    | \$ 1,249.35         | 200   | 684   |               |                  |
| 4              | ea  | Cree HBY EHO High Bay LED      | 4   | ea         | 400 W Metal Halide    | 421   | \$ 7,500.00         | 400   | -84   |               |                  |
| 12             | ea  | Hubbell LWL P30                | 12  | ea         | 400 W Metal Halide    | 71    | \$ 6,000.00         | 400   | 3948  |               |                  |
| 4              | ea  | Hubbell LWL P30                | 4   | ea         | 250 W Metal Halide    | 71    | \$ 2,000.00         | 250   | 716   |               |                  |
| <b>Total</b>   |     |                                |     |            |                       |       | <b>\$ 24,395.61</b> |       |       |               | <b>12.406 kW</b> |



February 1, 2018

Your Touchstone Energy® Partner 

Joseph A. Farinelli, PE  
Vice President Engineering  
Signal Peak Energy  
100 Portal Drive  
Roundup, MT 59072

Re: USB program Agreement

Dear Joe,

Attached is the Agreement between Signal Peak Energy LLC, a large customer and member of the co-op, and Fergus Electric Co-op, which is necessary to comply with state law that requires large loads to report USB energy conservation activities to the Montana Department of Revenue. Scott has signed and dated the attached Agreement.

When we spoke on the phone today, you indicated that Signal Peak has maintained records confirming they have completed energy conservation projects totaling approximately \$85,000, therefore Option B best describes Signal Peak's ability to meet the USB program requirements in 2017.

Based on Signal Peak's usage for 2017, the billing for the USB program for 2017 is \$84,390.13. Signal Peak's 2017 usage calculation is as follows:

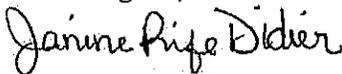
Account #321969, 50 kV total kWh usage for 2017 was 7,446,816 and Account #383962, 100 kV total kWh usage for 2017 was 86,320,000.

93,766,816 kWh (Usage in 2017)  
X \$.0009/kWh  
\$84,390.13/Yr. – USB

Please review the Agreement and if satisfactory, please sign, date and scan/email it to [fergusmgr@ferguselectric.coop](mailto:fergusmgr@ferguselectric.coop) and Cc me at [fergusap@ferguselectric.coop](mailto:fergusap@ferguselectric.coop) or mail it to Scott Sweeney, General Manager, Fergus Electric Cooperative, 84423 US Highway 87, Lewistown, MT 59457-2058.

Thank you in advance for signing and returning the Agreement. Please contact Scott or me if you have any additional questions concerning the Agreement. We will do our best to help.

Best regards,



Janine Rife Didier  
Financial Analyst

enclosure

---

84423 US Highway 87 · Lewistown MT 59457-2058 · 406-538-3465  
102 Railroad Ave. East · Roundup MT 59072-2951 · 406-323-1602  
fax 406-538-7391 · e-mail [ferguselectric@ferguselectric.coop](mailto:ferguselectric@ferguselectric.coop)  
web site <http://www.ferguselectric.coop>  
*Fergus Electric is an Equal Opportunity Provider and Employer*

## Agreement

This agreement is made and entered into this 1<sup>st</sup> day of February, 2018, by and between Signal Peak Energy LLC doing business at Roundup, Montana, hereinafter called ("**Member**") and Fergus Electric Cooperative, Inc., of Lewistown, Montana, hereinafter called ("**Co-op**").

**Whereas** there exists a Montana statute, § 69-8-402 of the Montana Code Annotated, implementing a Universal Systems Benefits program, hereinafter called ("**USB**") program to provide funding for energy conservation and assistance programs,

**Whereas** the USB program in Montana imposes requirements on every "large customer" of Montana electric cooperatives, it being understood that a large customer is defined in the USB statutes as a customer with an individual load greater than a monthly average of 1,000 kilowatt demand in the previous calendar year for that individual load,

**Whereas** Member understands that it may qualify as such a large customer of the Co-op,

**Whereas**, effective March 1, 2017, electric cooperatives in Montana will be required to report to the Montana Department of Revenue certain information involving USB activities, which report will include the names of all large customers which utilized credits to eliminate or minimize a charge for USB benefits or which received benefits related to USB program expenditures , and

**Whereas** such large customers are obligated to submit reports of USB activities to the Montana Department of Revenue,

Member and Co-op do therefore agree as follows:

1. Member has selected the following option ("A" or "B") in order to comply with the requirements of the Montana USB law, § 69-8-402 of the Montana Code Annotated :

**Option A.** Member requests Co-op to add a .9 mill per kilowatt hour charge, up to a maximum \$500,000.00 per year, to its rate for electric service and advises Co-op as follows [*Check one*]:

- 1. Member will provide a report both to the Co-op and to the Montana Department of Revenue detailing such internal qualifying Activities consistent with § 69-8-402(10) of the Montana Code Annotated;

or

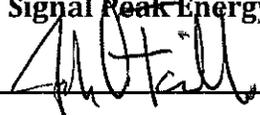
- 2. Member will not utilize any credits or request any credit back for USB activities and on such basis, Member acknowledges that Co-op is not required to report Member as a large customer utilizing credits to the Montana Department of Revenue, as would otherwise be required by § 69-8-402(8)(a)(iv) of the Montana Code Annotated and agrees that it will determine whether to make any report to the Montana Department of Revenue, as may otherwise be required by § 69-8-402(10) of the Montana Code Annotated

or

**Option B.** Member requests Co-op not add .9 mills per kilowatt hour to its rate and hereby certifies that Member will maintain qualifying internal activities to meet the Montana universal systems benefits law funding requirement for large customers and that a report of the program and activities will be provided annually consistent with § 69-8-402(10) of the Montana Code Annotated both to the Montana Department of Revenue and to the Co-op.

2. Member acknowledges and Co-op agrees that Co-op will not approve of, nor take responsibility for, the Member's internal or other activities for the purpose of Member's complying with the USB requirements of § 69-8-402(10) of the Montana Code Annotated .

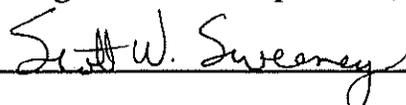
**Signal Peak Energy LLC**

By: 

Title: VICE PRESIDENT ENGINEERING

Date: 2/14/18

**Fergus Electric Cooperative, Inc.**

By: 

Title: General Manager

Date: Feb. 1, 2018

# **SIGNAL PEAK ENERGY POWER EFFICIENCY, VOLTAGE CORRECTION AND POWER SAVINGS PROJECTS - UPDATED THRU 2017**

## **PROJECTS IN 2012-2013**

- 1) 2400 KVAR LONGWALL SECTION CAPACITOR BANK FOR UNDERGROUND
  - a. USED TO MINIMIZE VOLTAGE FLUCTUATIONS AND INCREASE POWER FACTOR AT THE LONGWALL.
  - b. \$98,860 – COMPLETED APR 2013 – AFE 14-2012
- 2) 15 MVA ISOLATION SUBSTATION 21.6KV PRI: 21.6KV SEC
  - a. USED TO REDUCE VOLTAGE DROP TO REMOTE MINE POWER FEED BOREHOLE AND MITIGATE HEAVY START LOADS ON OVERALL SYSTEM
  - b. \$387,068 – COMPLETED JAN 2014 – AFE 14-2012

## **PROJECTS 2013-2014**

- 1) DUAL 2400 KVAR SURFACE ENCLOSED CAPACITOR BANKS FOR 100KV SUBSTATION
  - a. SPE WAS SEEING SIGNIFICANT VOLTAGE FLUCTUATIONS ON INCOMING FEED THAT CAUSED THE MINE TO HAVE INCONSISTENT VOLTAGE AND POWER FACTOR. SPE INSTALLED DUAL CAPACITOR BANKS TO STABILIZE VOLTAGE AND INCREASE OVERALL POWER FACTOR.
  - b. \$174,259 – COMPLETED APR 2015 – AFE 19-2014

## **PROJECTS 2014-2015**

- 1) LONGWALL HIGH PRESSURE PUMPS VFD'S
  - a. CONVERTED 5 300HP 480VAC HIGH PRESSURE PUMPS FROM ACROSS-THE-LINE STARTERS TO VARIABLE FREQUENCY DRIVES TO HELP WITH POWER CONSUMPTION AND EFFICIENCY.
  - b. \$365,900 – COMPLETED MAY 2015 – AFE 20-2014
- 2) 1 EAST BELT DRIVE VFD PURCHASE
  - a. INSTALLED 4 500HP AND 1 250HP VFD'S ON 1 EAST BELT DRIVE TO INCREASE EFFICIENCY.
  - b. \$253,000 – COMPLETED MAY 2015
- 3) 3 EAST BELT DRIVE VFD PURCHASE
  - a. INSTALLED 4 500HP AND 1 250 HP VFD'S ON NEW 3 EAST BELT DRIVE TO INCREASE EFFICIENCY
  - b. \$253,000 – COMPLETED MAY 2015
- 4) UPGRADE 2 EAST BELT DRIVE VFD'S
  - a. UPGRADED 2 EAST BELT DRIVE VFD'S TO HEAVY DUTY TO COMPENSATE FOR INCREASED LOAD ON BELTS. THIS INCREASED THEIR EFFICIENCY AND POWERFACTOR AND REDUCED THEIR POWER CONSUMPTION
  - b. \$101,980 – COMPLETED NOV 2015

- 5) TRANSITION TO HIGH EFFICIENCY, LOW CONSUMPTION LED LIGHTS ON THE SURFACE AND UNDERGROUND
  - a. 2015 EXPENDITURE \$36,931

**PROJECTS 2016**

- 1) FRESH WATER PUMP SYSTEM
  - a. INSTALLED 3 X 200HP VFD'S ON FRESH WATER MINE PUMPS. COMPLETED DEC 2016.
  - b. \$221,940 – COMPLETED DEC 2016
- 2) LED LIGHTS \$52,564

**PROJECTS 2017**

- 1) INSTALLED VFD ON 125 HP PLANT FEED PUMP \$14,000.
- 2) UPGRADED 100KV CAPACITOR BANK COMMS \$26,000.
- 3) REPLACED 25KV CAPACITORS UNDERGROUND ON LW POWER CENTER \$19,000
- 4) REPLACED PANCAKE REACTORS AT 100KV SUB \$9,000.
- 5) INSTALLED VFD ON PREP PLANT HEAVY MEDIA 250 HP PUMP \$24,000

**TOTAL YEAR EXPENDITURES**

- 1) 2012 – 2013 : \$485,928
- 2) 2013 – 2014 : \$174,259
- 3) 2014 – 2015 : \$1,010,811
- 4) 2016: \$274,504
- 5) 2017: \$92,000



January 22, 2018

Montana Department of Revenue  
Attn: Mark Schoenfeld

Via e-mail to: [mschoenfeld@mt.gov](mailto:mschoenfeld@mt.gov)

**Report on 2017 Universal System Benefit Credits  
from Spring Creek Coal LLC as a Large Customer**

This report constitutes the report of Spring Creek Coal LLC, under § 69-8-402(10) of the Montana Code Annotated, as a large customer claiming credits under Montana's universal system benefits programs for calendar year 2017. Below is a summary report of Spring Creek Coal LLC's universal system benefits programs activities and expenditures in calendar year 2017.

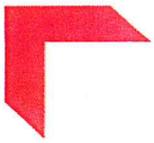
As set forth in our previous letter dated January 24, 2017, Spring Creek Coal LLC's prior expenditures that resulted in a reduction in the consumption of electrical energy at Spring Creek Coal LLC's facility exceeded the amount that Spring Creek Coal LLC would have owed as universal system benefits as a large customer under § 69-8-402 of the Montana Code Annotated, resulting in carry forward of credits into 2017 in the amount of **\$216,509.76** pursuant to § 69-8-402(7)(b) of the Montana Code Annotated.

In 2017, Spring Creek Coal LLC's expenditures that resulted in a reduction in the consumption of electrical energy at Spring Creek Coal LLC's facility totaled **\$10,950.00**. A summary of the qualifying expenditures is contained below.

January through December 2017 – Transition from incandescent and halogen lights to high efficiency, low consumption LED lights in various areas. Total expenditure in 2017 of \$10,950.00

The \$10,950.00 in qualifying expenditures in 2017, plus the carry forward credit of \$216,509.76 exceeded the **\$48,699.00** that Spring Creek Coal LLC would have owed as universal system benefits as a large customer under § 69-8-402 of the Montana Code Annotated. This leaves a carry forward credit in the amount of **\$178,760.76** for use with respect to universal system benefits in 2018.





January 19, 2018

Saint James Healthcare  
400 South Clark Street  
Butte, MT 59701 or email: [dale.mahugh@northwestern.com](mailto:dale.mahugh@northwestern.com)

Dear :

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2017, and I am contacting you regarding your 2017 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end "*Self-Directed USBC Progress Report for 2017*" showing a summary of your USB activity during 2017 including payment requests you submitted (Form B's), payments issued and any reservations (Form A's) you may have submitted to carry over all or a portion of your 2017 USB credits into 2018. If your final progress report shows a "Payment Pending", it reflects your December 2017 USB credits that were carried over into 2018, and these credits will be distributed when we issue our first quarter USB checks in mid-April. Please review the numbers provided, and notify me immediately of any differences you identify.

Your "*Self-Directed USBC Progress Report for 2017*" will be helpful as you prepare your **required year-end USB report that you must file with the Montana Department of Revenue (DOR) by March 1, 2018**. The annual USB reporting requirements are highlighted in yellow in the attached copy of the Montana Code Annotated (MCA) and Montana Administrative Rule 4.29.103. Here are some tips to assist you in preparing your annual report for DOR.

- ✓ A large customer claiming USB credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the Montana DOR and to the large customer's utility (NorthWestern Energy) by March 1<sup>st</sup> of the following year.
- ✓ In 2015, legislative changes to the MCA now impose penalties of not less than \$1,000 or more than \$5,000 if a large customer does not file an annual report on its USB credits with DOR by March 1.
- ✓ A report must be filed with the DOR even if a large customer is being reimbursed USB credits for a project submitted in previous years and the report should indicate if the USB credits were received for projects submitted in previous years.
- ✓ The annual report of a large customer must identify each qualifying project or expenditure for which it claimed a credit and the amount of the credit, including requests to donate USB credits to Energy Share. So, if any new Form B's were submitted to the utility during 2017 to request credits, a copy of these forms should be submitted with your annual report to DOR. Large customers need to keep their own documentation on the project submitted as to the costs and energy savings claimed, etc. NorthWestern Energy does not qualify large customers' self-directed USB claims.
- ✓ The large customer's report must indicate the amount of USB funds earned and self-directed in 2017.
- ✓ We encourage large customers to make a copy of the "*Self-Directed USBC Progress Report*" and send it along with your other documentation to DOR.
- ✓ Also, as required by the MCA, please provide NorthWestern Energy with a copy of what you send to DOR, and send it to: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 or email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com).

You may want to send your report via certified mail to DOR by March 1, 2018 to the address below.

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: [mschoenfeld@mt.gov](mailto:mschoenfeld@mt.gov)

If you have any questions, please contact me at 406-497-3756.

Sincerely,

Dale Mahugh  
Specialist, Key Accounts



Mike Kadas  
Director

## Montana Department of Revenue



Steve Bullock  
Governor

Saint James Healthcare  
Michael Wilson  
400 S Clark St  
Butte, MT 59701

2/10/2018

### Universal System Benefits Programs Utility & Large Customer Annual Report

#### **USB Program Summary Reports are due by March 1, 2018**

Public Utilities and large customers claiming universal system benefit (USB) credits for calendar year 2017 are required to submit an annual summary to the Montana Department of Revenue. The statewide cooperative utility office shall submit an annual summary report to the Montana Department of Revenue of the activities of individual cooperative utilities, including a summary of the pooling of statewide credits.

#### **The annual report of a public utility or of the statewide cooperative utility office should include:**

- (a) The types of internal utility and customer programs being used to satisfy the statute.
- (b) The level of funding for those programs relative to the annual funding requirements set forth in 69-8-402(2), MCA.
- (c) Any payments made to the statewide funds in the event that internal funding was below the prescribed annual funding requirements.

#### **The annual report of a large customer should identify:**

Each qualifying project or expenditure for which a credit is claimed, and the amount of each credit.

**You may request a protective order by filing a protective order request 30 days in advance of filing the annual report.** This allows an order to be issued by the department, prior to the annual report being filed. The request should specify the materials to be protected and the reason such materials should be considered confidential.

If you've requested and received a protective order from the department, please indicate (at the time you file the annual report), the information you wish be kept confidential, by using colored paper and label it confidential.

#### **Please send the annual report to:**

Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

If you have any questions, you can contact us at (406) 444-6900. Thank you for your continued cooperation.

Sincerely,

Mark Schoenfeld  
Unit Manager, Miscellaneous Tax Unit

**JAN 30 2018**

Mr. Mark Schoenfeld,

Attached you will find the 2017 Self Directed  
USB Report from Providence St. Patrick  
Hospital.



Tim Chopp

Facilities Manager

Providence St. Patrick Hospital

500 W. Broadway

Missoula, MT

Ph: 406-329-2605, Fx: 406-329-5855



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/23/2018

## SAINT PATRICK HOSPITAL

### Account Summary

|                                 |             |                          |                |
|---------------------------------|-------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$1,350,209.03 |
| Reservations Made YTD:          | \$0.00      |                          |                |
| 2016 Carryover Payment Request: | \$1,455.85  | Total Payment Requests:  | \$14,196.85    |
| Payment Requests Made YTD:      | \$12,741.00 | Current Request Balance: | \$1,051.98     |
| 2016 Carryover USBC Credit:     | \$1,020.25  | Total USBC Credit:       | \$14,189.34    |
| USBC Credit YTD:                | \$13,169.09 | Payments Issued YTD:     | \$13,144.87    |
| Average Monthly Credit Earned:  | \$1,097.42  | USBC Credit Balance:     | \$1,044.47     |
|                                 |             | Payment Pending:         | \$1,044.47     |

### Payment Requests Made

| Submitted By | Date       | Amount      |
|--------------|------------|-------------|
| Tim Chopp    | 10/26/2017 | \$12,741.00 |

### Payments Issued

| Date       | Amount      |
|------------|-------------|
| 04/10/2017 | \$1,455.85  |
| 12/06/2017 | \$11,689.02 |

### Account Detail

| Account | Premise | Meter      | Jan                        | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|------------|----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100027  | 1036    | DA06183487 | KWH > 142,755              | 139,229     | 128,076     | 165,233     | 155,940     | 168,616     | 173,938     | 185,822     | 184,584     | 174,081     | 0           | 0           | 1,618,274    |
|         |         |            | KW > 255                   | 244         | 281         | 292         | 277         | 290         | 299         | 305         | 296         | 276         | 0           | 0           | 282          |
|         |         |            | Elec Revenue > \$13,877.92 | \$13,718.79 | \$12,756.26 | \$15,714.92 | \$15,032.87 | \$16,084.81 | \$16,456.28 | \$17,429.43 | \$17,247.68 | \$16,266.65 | \$0.00      | \$0.00      | \$154,585.61 |
| 100027  | 1036    | DA19428668 | KWH > 0                    | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 155,830     | 145,507     | 301,337      |
|         |         |            | KW > 0                     | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 280         | 284         | 282          |
|         |         |            | Elec Revenue > \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$14,955.61 | \$14,156.11 | \$29,111.72  |
| 100621  | 1625    | DA06183493 | KWH > 967,693              | 834,309     | 842,058     | 1,009,649   | 871,040     | 996,532     | 1,035,264   | 980,965     | 1,041,245   | 1,005,197   | 0           | 0           | 9,583,952    |
|         |         |            | KW > 1,456                 | 1,438       | 1,496       | 1,584       | 1,540       | 1,594       | 1,625       | 1,614       | 1,645       | 1,622       | 0           | 0           | 1,561        |
|         |         |            | Elec Revenue > \$87,715.24 | \$78,170.45 | \$76,633.36 | \$90,049.97 | \$80,078.91 | \$89,805.36 | \$92,347.18 | \$88,123.51 | \$92,989.48 | \$90,214.52 | \$0.00      | \$0.00      | \$866,127.98 |
| 100621  | 1625    | DA19428670 | KWH > 0                    | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 946,469     | 911,744     | 1,858,213    |
|         |         |            | KW > 0                     | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 1,552       | 1,499       | 1,526        |
|         |         |            | Elec Revenue > \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$85,484.37 | \$82,213.58 | \$167,697.95 |
| 512426  | 214091  | DG36066757 | KWH > 31,360               | 30,080      | 34,240      | 37,200      | 47,040      | 52,320      | 52,160      | 53,920      | 54,880      | 42,080      | 34,160      | 31,520      | 500,960      |
|         |         |            | KW > 65                    | 105         | 86          | 91          | 104         | 108         | 111         | 111         | 106         | 99          | 91          | 64          | 95           |
|         |         |            | Elec Revenue > \$3,175.62  | \$3,464.09  | \$3,525.41  | \$3,816.98  | \$4,744.60  | \$5,169.17  | \$5,154.84  | \$5,290.32  | \$5,320.46  | \$4,268.58  | \$3,580.09  | \$3,099.78  | \$50,609.94  |
| 697838  | 311978  | DA19272482 | KWH > 31,680               | 27,200      | 29,120      | 27,280      | 30,000      | 35,120      | 40,320      | 53,200      | 52,160      | 36,720      | 46,080      | 46,720      | 455,600      |
|         |         |            | KW > 109                   | 112         | 112         | 114         | 114         | 116         | 141         | 192         | 145         | 140         | 139         | 135         | 131          |
|         |         |            | Elec Revenue > \$3,625.68  | \$3,298.37  | \$3,392.87  | \$3,276.66  | \$3,504.57  | \$3,902.28  | \$4,543.25  | \$6,051.29  | \$5,502.19  | \$4,260.60  | \$4,988.70  | \$4,994.75  | \$51,341.21  |
| 1505900 | 404330  | DA05771291 | KWH > 23,440               | 23,040      | 22,480      | 22,240      | 21,840      | 24,080      | 22,560      | 24,080      | 22,320      | 20,480      | 22,800      | 21,280      | 270,640      |
|         |         |            | KW > 33                    | 33          | 34          | 34          | 33          | 34          | 33          | 34          | 34          | 35          | 32          | 32          | 33           |
|         |         |            | Elec Revenue > \$2,229.95  | \$2,176.09  | \$2,093.38  | \$2,084.46  | \$2,055.77  | \$2,225.61  | \$2,088.62  | \$2,213.96  | \$2,079.62  | \$1,950.67  | \$2,110.51  | \$1,991.44  | \$25,300.08  |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/23/2018

| Account | Premise | Meter               | Jan        | Feb        | Mar         | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total      |
|---------|---------|---------------------|------------|------------|-------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|----------------|
| 3363139 | 395466  | DA04750358          | 3,887      | 3,784      | 3,809       | 3,341      | 3,574      | 3,356      | 3,313      | 3,569      | 3,715      | 3,558      | 3,661      | 3,743      | 43,310         |
|         |         | KWH >               | 8          | 14         | 16          | 12         | 13         | 12         | 12         | 11         | 12         | 12         | 12         | 13         | 12             |
|         |         | KW >                |            |            |             |            |            |            |            |            |            |            |            |            |                |
|         |         | Elec Revenue >      | \$488.68   | \$455.33   | \$468.29    | \$390.00   | \$420.82   | \$389.28   | \$387.39   | \$396.96   | \$422.99   | \$406.01   | \$415.14   | \$435.33   | \$5,076.22     |
|         |         | Total KWH           | 1,200,815  | 1,057,642  | 1,059,783   | 1,264,943  | 1,129,434  | 1,280,024  | 1,327,555  | 1,301,556  | 1,358,904  | 1,282,116  | 1,209,000  | 1,160,514  | 14,632,286     |
|         |         | Combined Average KW | 1,926      | 1,946      | 2,025       | 2,127      | 2,081      | 2,154      | 2,221      | 2,267      | 2,238      | 2,184      | 2,106      | 2,027      | 3,922          |
|         |         | USBC Charge         | \$1,080.75 | \$951.89   | \$953.81    | \$1,138.45 | \$1,016.51 | \$1,152.02 | \$1,194.79 | \$1,171.40 | \$1,223.01 | \$1,153.90 | \$1,088.09 | \$1,044.47 | \$13,169.09    |
|         |         | Total Elec Revenue  | 111,113.09 | 101,283.12 | \$98,869.57 | 115,332.99 | 105,837.54 | 117,576.51 | 120,977.56 | 119,505.47 | 123,562.42 | 117,367.03 | 111,534.42 | 106,890.99 | \$1,349,850.71 |

January 22, 2018

CERTIFIED MAIL RRR

Mr. Mark Schoenfeld  
Specialist Large Customer Team  
Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

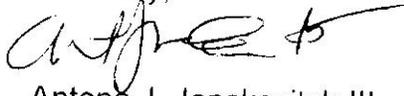
RE: Self-Directed USBC Progress Report for 2017 – SAINT VINCENT HEALTHCARE

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we receive from NorthWestern Energy that shows our USB activities during 2017. All the USB payments we received in 2017 were for projects previously submitted. During 2017 we received \$19,931.41 in USB payments that were a combination of carried over 2016 USB credits (\$1435.17) and 2017 USB (\$18,496.24).

At year-end we have \$1,435.17 in 2017 USB credits remaining that will be carried over into 2018 because we have a request balance from previous projects we submitted to protect these funds.

Sincerely,



Antone J. Janskovitch III

CC: Rick Edwards, NorthWestern Energy, 40 East Broadway, Butte, MT 59701



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## SAINT VINCENT HEALTHCARE

### Account Summary

|                                 |             |                          |                |
|---------------------------------|-------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$2,113,471.94 |
| Reservations Made YTD:          | \$0.00      |                          |                |
| 2016 Carryover Payment Request: | \$36,597.84 | Total Payment Requests:  | \$36,597.84    |
| Payment Requests Made YTD:      | \$0.00      | Current Request Balance: | \$16,666.43    |
| 2016 Carryover USBC Credit:     | \$1,479.13  | Total USBC Credit:       | \$21,366.58    |
| USBC Credit YTD:                | \$19,887.45 | Payments Issued YTD:     | \$19,931.41    |
| Average Monthly Credit Earned:  | \$1,657.29  | USBC Credit Balance:     | \$1,435.17     |
|                                 |             | Payment Pending:         | \$1,435.17     |

### Payment Requests Made

| Submitted By | Date | Amount |
|--------------|------|--------|
|              |      |        |

### Payments Issued

| Date       | Amount     |
|------------|------------|
| 04/10/2017 | \$6,303.13 |
| 07/07/2017 | \$4,799.35 |
| 10/09/2017 | \$5,709.05 |
| 12/06/2017 | \$3,119.88 |

### Account Detail

| Account | Premise | Meter      | Jan                           | Feb                | Mar                | Apr                | May                | Jun                | Jul                | Aug                | Sep                | Oct                | Nov                | Dec                 | YTD Total        |              |
|---------|---------|------------|-------------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|------------------|--------------|
| 100603  | 1607    | DA21480965 | KWH > 0<br>KW > 0             | 0<br>0             | 0<br>0             | 0<br>0             | 0<br>0             | 0<br>0             | 0<br>0             | 1,317,814<br>2,294 | 1,232,554<br>2,281 | 1,185,028<br>2,336 | 1,096,596<br>1,970 | 4,831,992<br>2,220  |                  |              |
|         |         |            | Elec Revenue >                | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$0.00             | \$19,494.98        | \$11,133.57        | \$110,292.67       | \$100,313.54       | \$443,234.76        |                  |              |
| 100603  | 1607    | DG23691808 | KWH > 1,259,845<br>KW > 2,082 | 1,223,737<br>2,019 | 1,084,167<br>2,077 | 1,142,281<br>2,103 | 1,185,583<br>2,245 | 1,302,006<br>2,385 | 1,332,012<br>2,401 | 1,496,413<br>2,631 | 0<br>0             | 0<br>0             | 0<br>0             | 10,026,044<br>2,243 |                  |              |
|         |         |            | Elec Revenue >                | \$115,997.07       | \$113,249.98       | \$99,892.90        | \$104,591.38       | \$110,179.04       | \$119,752.49       | \$121,416.64       | \$135,841.90       | \$0.00             | \$0.00             | \$0.00              | \$920,921.40     |              |
| 252463  | 79349   | DG52501009 | KWH > 100,000<br>KW > 109     | 99,680<br>267      | 94,240<br>291      | 116,480<br>305     | 112,640<br>297     | 139,680<br>363     | 157,440<br>324     | 157,120<br>344     | 163,040<br>342     | 98,560<br>281      | 99,200<br>272      | 1,428,480<br>286    |                  |              |
|         |         |            | Elec Revenue >                | \$10,200.74        | \$10,577.02        | \$10,222.06        | \$12,152.94        | \$11,809.30        | \$14,500.71        | \$15,435.14        | \$15,602.16        | \$16,059.69        | \$10,489.26        | \$10,449.68         | \$9,380.08       | \$146,878.78 |
| 252580  | 79411   | DG90038870 | KWH > 27,840<br>KW > 56       | 23,760<br>50       | 21,120<br>54       | 23,600<br>50       | 21,520<br>50       | 22,720<br>49       | 26,080<br>53       | 24,320<br>55       | 24,320<br>51       | 19,360<br>48       | 21,520<br>50       | 19,680<br>49        | 275,840<br>51    |              |
|         |         |            | Elec Revenue >                | \$2,813.41         | \$2,392.38         | \$2,187.85         | \$2,352.88         | \$2,197.50         | \$2,289.95         | \$2,560.95         | \$2,440.76         | \$2,403.08         | \$2,001.09         | \$2,186.53          | \$2,035.22       | \$27,841.60  |
| 252582  | 79412   | DG21353939 | KWH > 15,360<br>KW > 27       | 14,000<br>28       | 12,160<br>33       | 13,520<br>32       | 7,520<br>30        | 2,480<br>30        | 3,600<br>36        | 5,440<br>31        | 2,480<br>38        | 4,080<br>13        | 6,640<br>13        | 8,720<br>14         | 96,000<br>27     |              |
|         |         |            | Elec Revenue >                | \$1,527.02         | \$1,395.68         | \$1,285.60         | \$1,390.37         | \$900.67           | \$472.35           | \$646.07           | \$740.35           | \$583.72           | \$460.70           | \$660.23            | \$830.04         | \$10,892.80  |
| 667692  | 295892  | DA18484098 | KWH > 273,600<br>KW > 244     | 241,400<br>498     | 264,200<br>328     | 199,400<br>684     | 234,400<br>708     | 280,000<br>796     | 274,600<br>796     | 400,400<br>782     | 330,200<br>792     | 212,800<br>350     | 222,400<br>692     | 199,400<br>692      | 3,132,800<br>614 |              |
|         |         |            | Elec Revenue >                | \$26,809.78        | \$24,112.35        | \$23,756.44        | \$22,408.94        | \$25,454.58        | \$29,740.39        | \$29,212.62        | \$38,801.55        | \$33,503.94        | \$20,056.69        | \$24,240.96         | \$22,450.06      | \$320,548.30 |
| 693280  | 309227  | DD55409441 | KWH > 6,840<br>KW > 16        | 6,920<br>17        | 6,640<br>18        | 6,920<br>17        | 6,520<br>17        | 8,400<br>21        | 8,080<br>23        | 8,440<br>25        | 7,960<br>25        | 7,440<br>25        | 6,960<br>19        | 7,160<br>19         | 88,280<br>20     |              |
|         |         |            | Elec Revenue >                | \$718.18           | \$742.06           | \$702.52           | \$719.74           | \$695.70           | \$879.47           | \$868.62           | \$916.23           | \$879.32           | \$840.41           | \$746.00            | \$755.85         | \$9,464.10   |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan                          | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total   |
|---------|---------|------------|------------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|
| 712447  | 322799  | DA02824846 | KWH ><br>5,440               | 5,240      | 5,040      | 4,480      | 5,040      | 6,680      | 8,720      | 8,480      | 7,520      | 5,120      | 5,160      | 4,480      | 71,400      |
|         |         |            | KWH ><br>15                  | 14         | 20         | 18         | 18         | 20         | 26         | 25         | 22         | 16         | 14         | 14         | 19          |
|         |         |            | Elec Revenue ><br>\$606.45   | \$570.22   | \$601.95   | \$641.00   | \$582.29   | \$734.81   | \$646.01   | \$919.42   | \$817.87   | \$569.58   | \$553.02   | \$496.09   | \$7,938.71  |
| 712464  | 322814  | DD38419013 | KWH ><br>1,746               | 1,620      | 1,425      | 1,456      | 1,584      | 1,988      | 2,463      | 2,347      | 2,141      | 1,599      | 2,015      | 1,757      | 22,141      |
|         |         |            | KWH ><br>7                   | 6          | 6          | 8          | 8          | 9          | 10         | 9          | 9          | 8          | 9          | 9          | 8           |
|         |         |            | Elec Revenue ><br>\$227.20   | \$198.75   | \$183.39   | \$210.13   | \$216.42   | \$280.19   | \$306.24   | \$288.46   | \$266.12   | \$219.64   | \$262.24   | \$235.84   | \$2,874.62  |
| 775396  | 347607  | DG93142125 | KWH ><br>6,231               | 3,672      | 2,249      | 2,325      | 1,852      | 1,820      | 1,786      | 1,698      | 2,110      | 2,069      | 2,399      | 2,458      | 30,669      |
|         |         |            | KWH ><br>6                   | 12         | 5          | 5          | 5          | 5          | 5          | 5          | 5          | 5          | 5          | 5          | 6           |
|         |         |            | Elec Revenue ><br>\$633.33   | \$422.18   | \$240.21   | \$247.57   | \$210.96   | \$207.08   | \$203.73   | \$191.91   | \$223.99   | \$221.66   | \$247.49   | \$252.19   | \$3,302.30  |
| 874310  | 354140  | DA19955857 | KWH ><br>0                   | 0          | 0          | 0          | 0          | 0          | 1,540      | 1,428      | 2,089      | 1,775      | 1,997      | 1,991      | 12,537      |
|         |         |            | KWH ><br>0                   | 0          | 0          | 0          | 0          | 8          | 7          | 6          | 8          | 7          | 7          | 5          | 7           |
|         |         |            | Elec Revenue ><br>\$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$228.49   | \$198.82   | \$190.65   | \$253.19   | \$217.93   | \$234.62   | \$217.42   | \$1,531.12  |
| 874310  | 354140  | DD39910071 | KWH ><br>10,816              | 8,100      | 2,294      | 2,491      | 3,081      | -1,456     | 0          | 0          | 0          | 0          | 0          | 0          | 25,326      |
|         |         |            | KWH ><br>11                  | 23         | 8          | 9          | 15         | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 11          |
|         |         |            | Elec Revenue ><br>\$1,113.24 | \$886.92   | \$271.11   | \$297.16   | \$402.21   | (\$114.06) | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$2,856.58  |
| 922450  | 356361  | DA19166590 | KWH ><br>10,880              | 19,120     | 15,280     | 14,400     | 15,800     | 14,680     | 16,520     | 19,240     | 18,400     | 16,000     | 15,800     | 16,280     | 192,400     |
|         |         |            | KWH ><br>27                  | 35         | 35         | 34         | 35         | 38         | 45         | 43         | 43         | 40         | 35         | 34         | 37          |
|         |         |            | Elec Revenue ><br>\$1,139.47 | \$1,904.37 | \$1,548.89 | \$1,461.87 | \$1,534.69 | \$1,741.76 | \$1,931.57 | \$1,862.97 | \$1,647.77 | \$1,594.92 | \$1,620.89 | \$1,620.89 | \$19,589.88 |
| 1342725 | 379742  | DA04686576 | KWH ><br>5,840               | 4,699      | 5,773      | 3,848      | 4,345      | 4,483      | 4,176      | 4,951      | 3,356      | 3,473      | 2,969      | 4,012      | 51,925      |
|         |         |            | KWH ><br>18                  | 18         | 19         | 16         | 18         | 17         | 19         | 18         | 17         | 17         | 17         | 16         | 18          |
|         |         |            | Elec Revenue ><br>\$655.33   | \$567.60   | \$651.26   | \$474.61   | \$530.78   | \$532.92   | \$526.76   | \$573.00   | \$441.89   | \$451.64   | \$417.42   | \$486.28   | \$6,309.49  |
| 1363028 | 388931  | DA05050654 | KWH ><br>8,120               | 8,200      | 7,640      | 7,080      | 8,040      | 8,120      | 9,840      | 9,160      | 8,920      | 7,160      | 6,920      | 6,560      | 95,760      |
|         |         |            | KWH ><br>24                  | 29         | 23         | 24         | 28         | 27         | 30         | 28         | 33         | 23         | 23         | 22         | 26          |
|         |         |            | Elec Revenue ><br>\$907.08   | \$943.13   | \$831.03   | \$801.53   | \$904.81   | \$909.72   | \$1,068.63 | \$1,000.05 | \$1,034.56 | \$796.73   | \$781.71   | \$742.38   | \$10,721.36 |
| 1438241 | 333230  | DA07641119 | KWH ><br>2,377               | 1,942      | 1,881      | 1,863      | 1,092      | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 9,155       |
|         |         |            | KWH ><br>3                   | 7          | 6          | 7          | 7          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 6           |
|         |         |            | Elec Revenue ><br>\$272.16   | \$237.06   | \$219.34   | \$224.91   | \$131.46   | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$1,084.93  |
| 1438244 | 333231  | DA14169294 | KWH ><br>3,091               | 2,757      | 2,567      | 2,694      | 1,056      | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 12,165      |
|         |         |            | KWH ><br>5                   | 10         | 9          | 9          | 9          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 8           |
|         |         |            | Elec Revenue ><br>\$370.28   | \$328.11   | \$300.41   | \$316.59   | \$143.36   | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$1,458.75  |
| 1454739 | 67484   | DW68083374 | KWH ><br>2,076               | 1,906      | 1,913      | 1,652      | 1,648      | 2,079      | 1,906      | 2,322      | 2,151      | 1,562      | 1,429      | 1,544      | 22,198      |
|         |         |            | KWH ><br>8                   | 7          | 8          | 8          | 9          | 9          | 10         | 11         | 10         | 9          | 9          | 7          | 9           |
|         |         |            | Elec Revenue ><br>\$259.63   | \$240.46   | \$245.56   | \$218.42   | \$236.17   | \$262.94   | \$264.58   | \$299.31   | \$274.85   | \$225.27   | \$210.30   | \$205.88   | \$2,943.37  |
| 1454749 | 67471   | DA05050666 | KWH ><br>2,107               | 1,967      | 1,897      | 1,671      | 1,508      | 1,773      | 1,697      | 1,657      | 2,002      | 1,643      | 1,749      | 1,836      | 21,507      |
|         |         |            | KWH ><br>5                   | 7          | 6          | 6          | 5          | 5          | 5          | 5          | 5          | 5          | 5          | 5          | 5           |
|         |         |            | Elec Revenue ><br>\$239.76   | \$242.77   | \$218.01   | \$201.57   | \$175.84   | \$198.63   | \$193.18   | \$190.03   | \$216.80   | \$188.92   | \$198.01   | \$207.67   | \$2,471.19  |
| 1454755 | 67466   | DG36036981 | KWH ><br>1,140               | 1,089      | 1,055      | 895        | 819        | 1,429      | 1,809      | 2,389      | 2,439      | 1,240      | 859        | 862        | 16,035      |
|         |         |            | KWH ><br>3                   | 4          | 3          | 6          | 7          | 10         | 11         | 13         | 12         | 12         | 6          | 3          | 8           |
|         |         |            | Elec Revenue ><br>\$140.54   | \$136.44   | \$125.69   | \$143.80   | \$141.93   | \$228.85   | \$265.10   | \$330.58   | \$321.26   | \$223.72   | \$140.64   | \$105.56   | \$2,304.11  |
| 1490119 | 403086  | DG28375357 | KWH ><br>59,200              | 51,080     | 38,840     | 35,120     | 30,720     | 30,320     | 37,960     | 34,520     | 34,600     | 20,040     | 32,040     | 50,960     | 455,400     |
|         |         |            | KWH ><br>70                  | 120        | 94         | 74         | 83         | 83         | 96         | 81         | 68         | 54         | 92         | 103        | 85          |
|         |         |            | Elec Revenue ><br>\$6,149.39 | \$5,254.31 | \$3,956.89 | \$3,487.81 | \$3,250.45 | \$3,197.03 | \$3,912.14 | \$3,483.87 | \$3,371.27 | \$2,106.02 | \$3,421.55 | \$5,009.84 | \$46,610.57 |
| 1504283 | 402163  | DG28550506 | KWH ><br>10,380              | 12,320     | 10,080     | 9,400      | 9,560      | 11,040     | 12,960     | 16,320     | 14,280     | 12,000     | 11,000     | 10,080     | 139,400     |
|         |         |            | KWH ><br>32                  | 29         | 34         | 35         | 39         | 47         | 48         | 51         | 50         | 50         | 46         | 32         | 41          |
|         |         |            | Elec Revenue ><br>\$1,150.32 | \$1,304.07 | \$1,134.74 | \$1,086.98 | \$1,150.46 | \$1,346.67 | \$1,490.72 | \$1,785.81 | \$1,612.34 | \$1,437.76 | \$1,332.81 | \$1,114.94 | \$15,947.62 |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan                        | Feb          | Mar           | Apr           | May           | Jun           | Jul           | Aug           | Sep           | Oct           | Nov           | Dec           | YTD Total      |                |
|---------|---------|------------|----------------------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|----------------|
| 1517321 | 264299  | DA18997787 | KWH ><br>KW >              | 0<br>0       | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 2,600<br>12   | 2,340<br>10   | 0<br>0        | 0<br>0        | 4,940<br>11    |                |
|         |         |            | Elec Revenue >             | \$0.00       | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$334.75      | \$291.25      | \$0.00        | \$0.00        | \$626.00       |                |
| 1517321 | 264299  | DG75983234 | KWH ><br>KW >              | 0<br>0       | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 0<br>0        | 4,440<br>15   | 5,080<br>14   | 9,520<br>15    |                |
|         |         |            | Elec Revenue >             | \$0.00       | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$509.08      | \$546.72      | \$1,055.80     |                |
| 1517321 | 264299  | DG86190538 | KWH ><br>KW >              | 700<br>1     | 880<br>4      | 1,720<br>6    | 2,180<br>6    | 2,440<br>8    | 2,480<br>8    | 3,140<br>9    | 2,900<br>12   | 0<br>0        | 0<br>0        | 0<br>0        | 16,440<br>7    |                |
|         |         |            | Elec Revenue >             | \$97.85      | \$125.19      | \$202.66      | \$241.29      | \$280.62      | \$286.28      | \$346.30      | \$357.74      | \$0.00        | \$0.00        | \$0.00        | \$1,937.93     |                |
| 1570057 | 400440  | DA05495611 | KWH ><br>KW >              | 3,666<br>10  | 4,071<br>11   | 3,807<br>8    | 3,370<br>9    | 3,789<br>11   | 4,895<br>14   | 4,536<br>12   | 4,787<br>13   | 4,397<br>12   | 3,797<br>11   | 2,718<br>10   | 48,889<br>11   |                |
|         |         |            | Elec Revenue >             | \$398.51     | \$453.20      | \$388.48      | \$358.98      | \$415.06      | \$531.65      | \$479.51      | \$514.26      | \$475.36      | \$419.09      | \$328.57      | \$5,284.92     |                |
| 1863850 | 427923  | DG36289846 | KWH ><br>KW >              | 10,920<br>22 | 9,600<br>22   | 9,920<br>20   | 9,080<br>20   | 8,200<br>21   | 9,240<br>23   | 10,200<br>26  | 9,640<br>26   | 10,000<br>24  | 9,520<br>24   | 8,800<br>21   | 113,960<br>22  |                |
|         |         |            | Elec Revenue >             | \$1,106.63   | \$1,003.67    | \$980.35      | \$822.24      | \$666.78      | \$963.86      | \$1,060.56    | \$1,013.09    | \$1,025.46    | \$986.60      | \$908.91      | \$11,737.04    |                |
| 1890966 | 258385  | DG93700243 | KWH ><br>KW >              | 4,520<br>15  | 3,640<br>15   | 3,160<br>17   | 2,680<br>12   | 2,480<br>11   | 2,920<br>16   | 3,920<br>21   | 3,440<br>21   | 3,520<br>20   | 2,680<br>13   | 3,280<br>16   | 39,400<br>16   |                |
|         |         |            | Elec Revenue >             | \$526.11     | \$449.14      | \$428.13      | \$341.16      | \$317.52      | \$402.08      | \$526.89      | \$489.60      | \$484.19      | \$348.03      | \$413.23      | \$5,136.79     |                |
| 1914958 | 79345   | DG21141070 | KWH ><br>KW >              | 61,680<br>61 | 60,160<br>124 | 54,960<br>133 | 63,440<br>132 | 59,600<br>133 | 69,920<br>142 | 79,120<br>151 | 75,520<br>153 | 79,920<br>170 | 75,440<br>164 | 79,040<br>163 | 806,400<br>136 |                |
|         |         |            | Elec Revenue >             | \$6,170.75   | \$6,021.57    | \$5,601.95    | \$6,277.64    | \$6,013.14    | \$6,867.95    | \$7,640.11    | \$7,385.50    | \$7,901.62    | \$7,522.61    | \$7,791.87    | \$79,987.12    |                |
|         |         |            | <b>Total KWH</b>           | 1,894,395    | 1,811,560     | 1,654,028     | 1,672,326     | 1,730,837     | 1,929,414     | 2,004,105     | 2,292,942     | 2,046,259     | 1,742,252     | 1,724,243     | 22,097,013     |                |
|         |         |            | <b>Combined Average KW</b> | 2,877        | 3,376         | 3,261         | 3,629         | 3,815         | 4,122         | 4,164         | 4,388         | 4,062         | 3,466         | 3,875         | 5,971          |                |
|         |         |            | <b>USBC Charge</b>         | \$1,704.96   | \$1,630.41    | \$1,488.63    | \$1,505.08    | \$1,557.77    | \$1,736.50    | \$1,803.72    | \$2,063.68    | \$1,841.65    | \$1,568.05    | \$1,551.83    | \$19,887.45    |                |
|         |         |            | <b>Total Elec Revenue</b>  | 180,230.23   | 173,758.63    | 156,177.42    | 161,471.51    | 168,897.76    | 186,195.14    | 191,310.88    | 215,287.80    | 193,843.22    | 164,855.94    | 167,922.46    | 153,610.95     | \$2,113,471.94 |

January 19, 2018

Tony Jankovitch  
Facility Services  
St. Vincent Hospital  
P.O. Box 35200  
Billings, MT 59107

RE: "Self-Directed USBC Progress Report for 2017" for Department of Revenue Annual Report

Dear Tony:

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2017, and I am contacting you regarding your 2017 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end "Self-Directed USBC Progress Report for 2017" showing a summary of your USB activity during 2017 including payment requests you submitted (Form B's), payments issued and any reservations (Form A's) you may have submitted to carry over all or a portion of your 2017 USB credits into 2018. If your final progress report shows a "Payment Pending", it reflects your December 2017 USB credits that were carried over into 2018, and these credits will be distributed when we issue our first quarter USB checks in mid-April. Please review the numbers provided, and notify me immediately of any differences you identify.

Your "Self-Directed USBC Progress Report for 2017" will be helpful as you prepare your **required year-end USB report that you must file with the Montana Department of Revenue (DOR) by March 1, 2018.** The annual USB reporting requirements are highlighted in yellow in the attached copy of the Montana Code Annotated (MCA) and Montana Administrative Rule 4.29.103. Here are some tips to assist you in preparing your annual report for DOR.

- ✓ **A large customer claiming USB credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the Montana DOR and to the large customer's utility (NorthWestern Energy) by March 1<sup>st</sup> of the following year.**
- ✓ **In 2015, legislative changes to the MCA now impose penalties of not less than \$1,000 or more than \$5,000 if a large customer does not file an annual report on its USB credits with DOR by March 1.**
- ✓ **A report must be filed with the DOR even if a large customer is being reimbursed USB credits for a project submitted in previous years and the report should indicate if the USB credits were received for projects submitted in previous years.**
- ✓ **The annual report of a large customer must identify each qualifying project or expenditure for which it claimed a credit and the amount of the credit. So, if any new Form B's were submitted to the utility during 2017 to request credits, a copy of these forms should be submitted with your annual report to DOR. Large customers need to keep their own documentation on the project submitted as to the costs and energy savings claimed, etc. NorthWestern Energy does not qualify large customers' self-directed USB claims.**
- ✓ **The large customer's report must indicate the amount of USB funds earned and self-directed in 2017.**
- ✓ **We encourage large customers to make a copy of the "Self-Directed USBC Progress Report" and send it along with your other documentation to DOR.**
- ✓ **Also, as required by the MCA, please provide NorthWestern Energy with a copy of what you send to DOR, and send it to: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 or email: rick.edwards@northwestern.com.**

You may want to send your report via certified mail to DOR by **March 1, 2018** to the address below.

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

If you have any questions, please contact me at 406-655-2550.

Sincerely,

Deborah Singer  
Senior Key Account & Economic Development Specialist

February 27, 2018

Mr. Mark Schoenfeld  
Specialist Large Customer Team  
Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

Dear Mr. Schoenfeld:

Please find attached a summary of the projects related to expenditure for cost-effective energy savings and conservation for 2017. Total USB earned credits for 2017 are \$209,100.02 and a credit of \$205,017.55 was carried over from 2016.

The qualifying projects for 2017 are shown in the table below and the corresponding forms are attached.

| DESCRIPTION                                     | CREDIT              | REQUESTS            |
|---|---------------------|---------------------|
| 2016 Carryover Credit                           | \$205,017.55        |                     |
| 2017 USB Credits                                | \$209,100.02        |                     |
| Replace various lights at the Smelter with LED  |                     | \$9,359.30          |
| Replace various lights at the Nye Mill with LED |                     | \$7,526.46          |
| Replace various lights at the BMR with LED      |                     | \$43,472.93         |
| Donation to Energy Share of Montana             |                     | \$10,000.00         |
| Install 100KW solar array at the Columbus site  |                     | \$135,709.17        |
|   |                     |                     |
| <b>TOTALS</b>                                   | <b>\$414,117.57</b> | <b>\$206,067.86</b> |
|   |                     |                     |
| Carry over credit to 2018                       | \$208,049.71        |                     |

The self-directed USB is an excellent program and has provided significant positive benefits to Stillwater Mining Company in 2017.

If you require further information or more a detailed explanation of the projects and benefits, please feel free to contact me as follows:

Phil Ault  
Stillwater Mining Company  
PO Box 1209  
Columbus, MT 59019

(406) 322-8985 (Phone)  
(406) 322-6388 (Fax)  
[PAult@stillwatermining.com](mailto:PAult@stillwatermining.com) (e-mail)

Sincerely,



Phil Ault  
Electrical Engineer

Cc: Rick Edwards – Northwestern Energy  
Deborah Singer – Northwestern Energy



## Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

### STILLWATER MINING COMPANY

#### Account Summary

|                                 |              |                          |                |
|---------------------------------|--------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$207,500.00 | YTD Elec Revenue:        | \$1,526,320.71 |
| Reservations Made YTD:          | \$210,000.00 |                          |                |
| 2016 Carryover Payment Request: | \$0.00       | Total Payment Requests:  | \$206,067.86   |
| Payment Requests Made YTD:      | \$206,067.86 | Current Request Balance: | \$0.00         |
| 2016 Carryover USBC Credit:     | \$205,017.55 | Total USBC Credit:       | \$414,117.57   |
| USBC Credit YTD:                | \$209,100.02 | Payments Issued YTD:     | \$206,067.86   |
| Average Monthly Credit Earned:  | \$17,425.00  | USBC Credit Balance:     | \$208,049.71   |
|                                 |              | Payment Pending:         | \$0.00         |

#### Payment Requests Made

| Submitted By | Date       | Amount       |
|--------------|------------|--------------|
| Phil Ault    | 11/29/2017 | \$9,359.30   |
| Phil Ault    | 11/29/2017 | \$7,526.46   |
| Phil Ault    | 11/29/2017 | \$43,472.93  |
| Phil Ault    | 11/30/2017 | \$10,000.00  |
| Phil Ault    | 11/30/2017 | \$135,709.17 |

#### Payments Issued

| Date       | Amount       |
|------------|--------------|
| 12/06/2017 | \$60,358.69  |
| 12/06/2017 | \$135,709.17 |
| 12/06/2017 | \$10,000.00  |

#### Account Detail

| Account | Premise | Meter      |                | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |            |
|---------|---------|------------|----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|------------|
| 100723  | 1685    | DA06183397 | KWH >          | 12,407,425  | 12,395,890  | 11,136,632  | 12,459,090  | 11,690,957  | 11,886,919  | 11,013,732  | 10,564,014  | 10,821,762  | 10,212,214  | 11,577,051  | 11,131,415  | 137,297,101  |            |
|         |         |            | KW >           | 20,088      | 19,881      | 19,777      | 19,907      | 19,492      | 19,958      | 18,766      | 18,481      | 18,144      | 18,325      | 18,300      | 18,274      | 19,116       |            |
|         |         |            | Elec Revenue > | \$81,465.09 | \$83,165.65 | \$77,861.82 | \$83,465.77 | \$79,656.36 | \$81,216.32 | \$75,709.72 | \$72,861.46 | \$73,348.56 | \$71,190.70 | \$76,643.35 | \$74,807.20 | \$931,392.00 |            |
| 101562  | 2275    | DG63426880 | KWH >          | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 7,200       | 10,400      | 1,600       | 16,640      | 12,000      | 47,840       |            |
|         |         |            | KW >           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 35          | 32          | 14          | 41          | 49           | 34         |
|         |         |            | Elec Revenue > | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$916.49    | \$1,132.80  | \$275.77    | \$1,719.06  | \$1,437.43   | \$5,481.55 |
| 101562  | 2275    | DG97118090 | KWH >          | 10,720      | 7,360       | 4,640       | 2,240       | 1,760       | 2,080       | 3,040       | 0           | 0           | 0           | 0           | 0           | 31,840       |            |
|         |         |            | KW >           | 31          | 25          | 19          | 11          | 9           | 14          | 16          | 0           | 0           | 0           | 0           | 0           | 0            | 18         |
|         |         |            | Elec Revenue > | \$1,181.67  | \$848.46    | \$559.01    | \$293.97    | \$241.41    | \$313.33    | \$402.65    | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00       | \$3,840.50 |
| 659040  | 291432  | DG15154407 | KWH >          | 6,537       | 6,653       | 6,430       | 5,131       | 3,057       | 3,039       | 3,387       | 3,777       | 3,836       | 3,271       | 2,662       | 4,106       | 51,886       |            |
|         |         |            | KW >           | 15          | 16          | 16          | 14          | 13          | 12          | 16          | 16          | 15          | 14          | 13          | 11          | 14           |            |
|         |         |            | Elec Revenue > | \$690.62    | \$712.68    | \$669.46    | \$552.85    | \$385.18    | \$366.54    | \$433.50    | \$464.37    | \$462.69    | \$406.83    | \$350.81    | \$439.84    | \$5,935.37   |            |
| 659040  | 291432  | DS83181525 | KWH >          | 11,304      | 10,735      | 11,923      | 10,913      | 11,553      | 13,520      | 13,500      | 13,782      | 14,048      | 11,774      | 10,769      | 11,859      | 145,680      |            |
|         |         |            | KW >           | 19          | 19          | 21          | 22          | 23          | 25          | 26          | 26          | 26          | 24          | 21          | 21          | 23           |            |
|         |         |            | Elec Revenue > | \$1,100.29  | \$1,064.08  | \$1,149.83  | \$1,082.50  | \$1,145.34  | \$1,313.13  | \$1,317.79  | \$1,340.06  | \$1,363.44  | \$1,167.06  | \$1,062.71  | \$1,145.39  | \$14,251.62  |            |
| 772124  | 347321  | DG16689002 | KWH >          | 6,804,843   | 6,516,791   | 5,948,738   | 6,465,307   | 6,305,575   | 6,460,107   | 6,916,931   | 6,076,961   | 5,473,478   | 5,716,754   | 4,775,793   | 5,641,861   | 73,103,139   |            |
|         |         |            | KW >           | 11,534      | 10,757      | 11,275      | 11,210      | 10,951      | 10,951      | 11,599      | 10,951      | 10,174      | 9,785       | 11,146      | 10,044      | 10,865       |            |
|         |         |            | Elec Revenue > | \$40,726.79 | \$40,220.31 | \$38,531.11 | \$40,550.07 | \$39,593.89 | \$40,220.98 | \$42,845.33 | \$38,350.16 | \$35,008.66 | \$35,520.66 | \$33,369.57 | \$35,528.61 | \$460,466.14 |            |
| 779337  | 347946  | DA04604091 | KWH >          | 2,200       | 2,160       | 1,680       | 1,720       | 2,040       | 2,240       | 2,240       | 2,440       | 2,360       | 1,920       | 1,800       | 2,000       | 24,800       |            |
|         |         |            | KW >           | 16          | 11          | 6           | 19          | 24          | 18          | 18          | 18          | 18          | 19          | 18          | 18          | 20           | 17         |
|         |         |            | Elec Revenue > | \$352.04    | \$295.10    | \$205.57    | \$333.52    | \$415.48    | \$369.83    | \$364.76    | \$376.20    | \$386.22    | \$340.67    | \$327.61    | \$367.13    | \$4,134.13   |            |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account                    | Premise | Meter      |                | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total      |
|----------------------------|---------|------------|----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
| 803025                     | 349056  | DA03451116 | KWH >          | 9,400       | 9,400       | 8,680       | 7,660       | 7,960       | 8,940       | 8,980       | 10,140      | 9,660       | 8,300       | 7,940       | 7,980       | 105,040        |
|                            |         |            | KW >           | 39          | 39          | 39          | 37          | 39          | 42          | 41          | 41          | 43          | 38          | 37          | 34          | 39             |
|                            |         |            | Elec Revenue > | \$1,139.02  | \$1,156.78  | \$1,074.61  | \$976.00    | \$1,022.67  | \$1,125.15  | \$1,114.36  | \$1,207.83  | \$1,189.19  | \$1,037.58  | \$996.39    | \$975.95    | \$13,015.53    |
| 2075059                    | 436535  | DA05748542 | KWH >          | 1,330,713   | 1,255,745   | 1,174,403   | 1,307,093   | 1,216,852   | 1,751,891   | 2,067,674   | 2,237,018   | 2,358,824   | 2,233,359   | 2,321,426   | 2,271,031   | 21,526,029     |
|                            |         |            | KW >           | 3,681       | 3,690       | 3,618       | 3,303       | 3,033       | 3,456       | 3,429       | 4,500       | 4,878       | 4,635       | 4,716       | 4,779       | 3,977          |
|                            |         |            | Elec Revenue > | \$6,237.26  | \$6,501.76  | \$6,342.93  | \$6,087.77  | \$5,685.50  | \$6,670.04  | \$6,922.14  | \$8,348.11  | \$8,907.21  | \$8,505.33  | \$8,680.92  | \$8,710.49  | \$87,599.46    |
| <b>Total KWH</b>           |         |            |                | 20,583,142  | 20,204,734  | 18,293,126  | 20,259,154  | 19,239,754  | 20,128,736  | 20,029,484  | 18,915,332  | 18,694,368  | 18,189,192  | 18,714,081  | 19,082,252  | 232,333,355    |
| <b>Combined Average KW</b> |         |            |                | 35,423      | 34,438      | 34,771      | 34,523      | 33,584      | 34,476      | 33,911      | 34,068      | 33,331      | 32,853      | 34,292      | 33,232      | 34,103         |
| <b>USBC Charge</b>         |         |            |                | \$18,524.82 | \$18,184.25 | \$16,463.81 | \$18,233.24 | \$17,315.78 | \$18,115.88 | \$18,026.55 | \$17,023.80 | \$16,824.92 | \$16,370.27 | \$16,842.68 | \$17,174.02 | \$209,100.02   |
| <b>Total Elec Revenue</b>  |         |            |                | 132,892.78  | 133,964.82  | 126,394.34  | 133,342.45  | 128,145.83  | 131,595.32  | 129,110.25  | 123,864.68  | 121,798.77  | 118,444.60  | 123,150.42  | 123,412.04  | \$1,526,116.30 |

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                             |  |
|-----------------------------|--|
| <b>DATE:</b>                | 11/29/2017   |
| <b>NAME OF BUSINESS:</b>    | <b>Stillwater Mining Company</b>   |
| <b>CITY/TOWN LOCATION:</b>  | Columbus & Nye   |
| <b>CONTACT PERSON:</b>      | Phil Ault  |
| <b>MAILING ADDRESS:</b>     | PO BOX 1209  |
| <b>CITY, STATE AND ZIP:</b> | Columbus, MT 59019   |
| <b>PHONE NUMBER:</b>        | (406) 322-8985   |
| <b>FAX NUMBER:</b>          | xxxx   |
| <b>E-MAIL ADDRESS</b>       | <a href="mailto:pault@stillwatermining.com">pault@stillwatermining.com</a> |

|                                    |            |
|------------------------------------|------------|
| <b>AMOUNT OF CREDIT REQUESTED:</b> | \$9,359.30 |
|------------------------------------|------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|  |
|--|
| <b>DESCRIPTION OF PROJECT(S)</b> (if more space is needed, please attach):<br>Replaced (20) various fixtures with energy efficient LED fixtures. All these fixtures were located at the Smelter in Columbus. See the attached spreadsheet. |
|--|

Estimated Savings in kWh and/or KW for project needs to be provided

|                               |               |
|-------------------------------|---------------|
| <b>ESTIMATED kWh SAVINGS:</b> | 31,794 kWh/yr |
| <b>ESTIMATED KW SAVINGS:</b>  | 5.3 KW        |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

**LARGE CUSTOMER:** Signature: Phil Ault 11/29/2017

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

**Smelter 2017 light replacement (From 12-14-16 to 11-20-17) WO 34760876 1360.6472.1500**

| OLD Fixtures |                          |            |               |         |               | New Fixtures |                                  |            |               |         |              |              |               |           |                    |
|--------------|--------------------------|------------|---------------|---------|---------------|--------------|----------------------------------|------------|---------------|---------|--------------|--------------|---------------|-----------|--------------------|
| QTY          | Type                     | Wattage/EA | Total Wattage | Hrs/Day | Kwh/Year      | QTY          | Type                             | Wattage/EA | Total Wattage | Hrs/Day | Kwh/Year     | KW Reduction | Kwh/yr saving | Cost/Ea   | Total              |
| 1            | 175W HPS WM7M17 Wallpack | 210        | 210           | 24      | 1,840         | 1            | LTD3C4M2P LED 4-FT Linear        | 66         | 66            | 24      | 578          | 0.1          | 1,261         | \$ 407.00 | \$ 407.00          |
| 3            | 250W MH L4MD25M0A5       | 295        | 885           | 24      | 7,753         | 3            | LTD3C4M2P LED 4-FT Linear        | 66         | 198           | 24      | 1,734        | 0.7          | 6,018         | \$ 407.00 | \$ 1,221.00        |
| 1            | 250W MH L4MD25M0A5       | 295        | 295           | 12      | 1,292         | 1            | TWR1-LED-1-50K-MVOLT             | 79         | 79            | 12      | 346          | 0.2          | 946           | \$ 266.67 | \$ 266.67          |
| 1            | 250W MH L4MD25M0A5       | 295        | 295           | 24      | 2,584         | 1            | LTD3C4M2P LED 4-FT Linear        | 66         | 66            | 24      | 578          | 0.2          | 2,006         | \$ 407.00 | \$ 407.00          |
| 1            | 400W HPS WMTS40          | 465        | 465           | 12      | 2,037         | 1            | TWR2-LED-2-50K-MVOLT             | 79         | 79            | 12      | 346          | 0.4          | 1,691         | \$ 441.18 | \$ 441.18          |
| 1            | 150W HPS WM7M15S         | 188        | 188           | 12      | 823           | 1            | TWR1-LED-1-50K-MVOLT             | 41         | 41            | 12      | 180          | 0.1          | 644           | \$ 266.67 | \$ 266.67          |
| 4            | 400W MH Flood            | 455        | 1,820         | 12      | 7,972         | 4            | FDL-155WLED-UNIV-50-TMB flood    | 155        | 620           | 12      | 2,716        | 1.2          | 5,256         | \$ 401.25 | \$ 1,605.00        |
| 1            | 250W MH L4MD25M0A5       | 295        | 295           | 24      | 2,584         | 1            | LTD3C4M2P LED 4-FT Linear        | 66         | 66            | 24      | 578          | 0.2          | 2,006         | \$ 407.00 | \$ 407.00          |
| 1            | 400W HPS WMTS40          | 465        | 465           | 12      | 2,037         | 1            | WLD64LED wall pack               | 64         | 64            | 12      | 280          | 0.4          | 1,756         | \$ 441.18 | \$ 441.18          |
| 1            | 150W PMH WM7S15 Wallpack | 190        | 190           | 12      | 832           | 1            | WLM43LED wall pack               | 43         | 43            | 12      | 188          | 0.1          | 644           | \$ 179.95 | \$ 179.95          |
| 1            | 400W HPS WMTS40          | 465        | 465           | 12      | 2,037         | 1            | WLD64LED wall pack               | 64         | 64            | 12      | 280          | 0.4          | 1,756         | \$ 441.18 | \$ 441.18          |
| 1            | 400W HPS WMTS40          | 465        | 465           | 12      | 2,037         | 1            | WLD64LED wall pack               | 64         | 64            | 12      | 280          | 0.4          | 1,756         | \$ 441.18 | \$ 441.18          |
| 1            | 250W MH L4MD25M0A5       | 295        | 295           | 24      | 2,584         | 1            | LTD3C4D2P LED 2-FT Linear        | 33         | 33            | 24      | 289          | 0.3          | 2,295         | \$ 263.00 | \$ 263.00          |
| 1            | 250W MH L4MD25M0A5       | 295        | 295           | 24      | 2,584         | 1            | LTD3C4D2P LED 2-FT Linear        | 33         | 33            | 24      | 289          | 0.3          | 2,295         | \$ 263.00 | \$ 263.00          |
| 1            | 175W HPS WM7M17 Wallpack | 210        | 210           | 24      | 1,840         | 1            | WLM43LED wall pack               | 43         | 43            | 24      | 377          | 0.2          | 1,463         | \$ 179.95 | \$ 179.95          |
|              |                          |            | -             | -       | -             | 0            | Misc materials                   | -          | -             | -       | -            |              |               | \$ -      | \$ -               |
| -            | -                        | -          | -             | -       | -             | 3            | MOUNTING BRACKET for Linear fix. | -          | -             | -       | -            |              |               | \$ 44.01  | \$ 132.03          |
| -            | -                        | -          | -             | -       | -             |              | TOTAL LABOR                      | -          | -             | -       | -            |              |               | -         | \$ 1,996.31        |
|              |                          |            | <b>6,838</b>  |         | <b>40,835</b> |              |                                  |            | <b>1,559</b>  |         | <b>9,040</b> |              |               |           | <b>\$ 9,359.30</b> |

Energy Cost: 0.04 \$/kwh  
 Kw Reduction: 5.279 kw  
 Annual energy Saving: 31,794 kwh  
 Annual Savings: \$ 1,271.78 \$  
  
 Total Fixture & Labor Cost: \$ 9,359.30

**Notes:**  
 Total cost on WO was \$30,373.79 as of this report 11/20/2017

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                             |  |
|-----------------------------|--|
| <b>DATE:</b>                | 11/29/2017   |
| <b>NAME OF BUSINESS:</b>    | <b>Stillwater Mining Company</b>   |
| <b>CITY/TOWN LOCATION:</b>  | Columbus & Nye   |
| <b>CONTACT PERSON:</b>      | Phil Ault  |
| <b>MAILING ADDRESS:</b>     | PO BOX 1209  |
| <b>CITY, STATE AND ZIP:</b> | Columbus, MT 59019   |
| <b>PHONE NUMBER:</b>        | (406) 322-8985   |
| <b>FAX NUMBER:</b>          | xxxx   |
| <b>E-MAIL ADDRESS</b>       | <a href="mailto:pault@stillwatermining.com">pault@stillwatermining.com</a> |

|                                    |            |
|------------------------------------|------------|
| <b>AMOUNT OF CREDIT REQUESTED:</b> | \$7,526.46 |
|------------------------------------|------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| <b>DESCRIPTION OF PROJECT(S)</b> (if more space is needed, please attach):<br>Replaced (2) various HID fixtures and (224) T8 Fluorescent lamps with energy efficient LED equivalents. These were located at the Stillwater Concentrator near NYE, MT. See attached spreadsheet. |
|---|

Estimated Savings in kWh and/or KW for project needs to be provided

|                               |               |
|-------------------------------|---------------|
| <b>ESTIMATED kWh SAVINGS:</b> | 15,637 kWh/yr |
| <b>ESTIMATED KW SAVINGS:</b>  | 3.33 KW       |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

**LARGE CUSTOMER:** Signature: Phil Ault 11/29/2017

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

| Stillwater Mine Concentrator 2017 light replacement |                |            |               |         |               |              |                                |            |               |         |               |              |                |           |                    |
|---|----------------|------------|---------------|---------|---------------|--------------|--------------------------------|------------|---------------|---------|---------------|--------------|----------------|-----------|--------------------|
| OLD Fixtures  |                |            |               |         |               | New Fixtures |                                |            |               |         |               |              |                |           |                    |
| QTY   | Type           | Wattage/EA | Total Wattage | Hrs/Day | Kwh/Year      | QTY          | Type                           | Wattage/EA | Total Wattage | Hrs/Day | Kwh/Year      | KW Reduction | Kwh/yr savings | Cost/Ea   | Total              |
| 200   | 32W 4" T8 Tube | 32         | 6,400         | 12      | 28,032        | 200          | LED48T8CM-DLC-18W-XWW-101WC    | 18         | 3,600         | 12      | 15,768        | 2.8          | 12,264         | \$ 20.25  | \$ 4,050.00        |
| 24  | 32W 4" T8 Tube | 32         | 768           | 24      | 6,728         | 6            | LS8-80L-40K-10V 8' Strip Light | 88         | 528           | 24      | 4,625         | 0.2          | 2,102          | \$ 232.00 | \$ 1,392.00        |
| 2   | 150W HPS       | 188        | 376           | 12      | 1,647         | 2            | Crouse Hinds PVM5LWJR1/UNV1    | 43         | 86            | 12      | 377           | 0.3          | 1,270          | \$ 499.70 | \$ 999.40          |
|   |                |            | -             |         | -             |              |                                |            | -             |         | -             | -            | -              |           | \$ -               |
|   |                |            | -             |         | -             |              |                                |            | -             |         | -             | -            | -              |           | \$ -               |
|   |                |            | -             |         | -             |              |                                |            | -             |         | -             | -            | -              |           | \$ -               |
|   |                |            | -             |         | -             |              |                                |            | -             |         | -             | -            | -              |           | \$ -               |
|   |                |            | -             |         | -             |              |                                |            | -             |         | -             | -            | -              |           | \$ -               |
|   |                |            | -             |         | -             |              |                                |            | -             |         | -             | -            | -              |           | \$ -               |
|   |                |            | -             |         | -             |              |                                |            | -             |         | -             | -            | -              |           | \$ -               |
|   |                |            | -             |         | -             |              |                                |            | -             |         | -             | -            | -              |           | \$ -               |
| -   | -              | -          | -             | -       | -             |              |                                |            | -             |         | -             | -            | -              |           | \$ -               |
| -   | -              | -          | -             | -       | -             | 2            | Top Hat for PVM                | -          | -             | -       | -             |              |                | \$ 42.53  | \$ 85.06           |
| -   | -              | -          | -             | -       | -             |              | TOTAL LABOR                    | -          | -             | -       | -             |              |                | -         | \$ 1,000.00        |
|   |                |            | <b>7,544</b>  |         | <b>36,407</b> |              |                                |            | <b>4,214</b>  |         | <b>20,770</b> |              |                |           | <b>\$ 7,526.46</b> |

Energy Cost: 0.04 \$/kwh  
Kw Reduction: 3.33 kw  
Annual energy Saving: 15,637 kwh  
Annual Savings: \$ 625.46 \$  
  
Fixture Total Cost: \$ 7,526.46

Notes:  
-This is based on the REQ's that Jerek Depuydt emailed.  
-No labor costs were supplied so a low estimate was used.

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                             |  |
|-----------------------------|--|
| <b>DATE:</b>                | 11/29/2017   |
| <b>NAME OF BUSINESS:</b>    | <b>Stillwater Mining Company</b>   |
| <b>CITY/TOWN LOCATION:</b>  | Columbus & Nye   |
| <b>CONTACT PERSON:</b>      | Phil Ault  |
| <b>MAILING ADDRESS:</b>     | PO BOX 1209  |
| <b>CITY, STATE AND ZIP:</b> | Columbus, MT 59019   |
| <b>PHONE NUMBER:</b>        | (406) 322-8985   |
| <b>FAX NUMBER:</b>          | xxxx   |
| <b>E-MAIL ADDRESS</b>       | <a href="mailto:pault@stillwatermining.com">pault@stillwatermining.com</a> |

|                                    |             |
|------------------------------------|-------------|
| <b>AMOUNT OF CREDIT REQUESTED:</b> | \$43,472.93 |
|------------------------------------|-------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|  |
|--|
| <b>DESCRIPTION OF PROJECT(S)</b> (if more space is needed, please attach):<br>Replaced (54) various fixtures with energy efficient LED fixtures and (40) Fluorescent tubes with LED replacements. All these fixtures were located at the Base Metals Refinery in Columbus. See the attached spreadsheet. |
|--|

Estimated Savings in kWh and/or KW for project needs to be provided

|                               |                |
|-------------------------------|----------------|
| <b>ESTIMATED kWh SAVINGS:</b> | 141,497 kWh/yr |
| <b>ESTIMATED KW SAVINGS:</b>  | 16.862 KW      |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

**LARGE CUSTOMER:** Signature: Phil Ault 11/29/2017

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

**BMR 2017 light replacement. WO 35772158 & WO 35897559**

| OLD Fixtures |                   |            |               |         |                | New Fixtures |                                  |            |               |         |               |              |               |           |                     |
|--------------|-------------------|------------|---------------|---------|----------------|--------------|----------------------------------|------------|---------------|---------|---------------|--------------|---------------|-----------|---------------------|
| QTY          | Type              | Wattage/EA | Total Wattage | Hrs/Day | Kwh/Year       | QTY          | Type                             | Wattage/EA | Total Wattage | Hrs/Day | Kwh/Year      | KW Reduction | Kwh/yr saving | Cost/Ea   | Total               |
| 50           | 400W MH Probe     | 455        | 22,750        | 24      | 199,290        | 50           | HEGMC4KN-SGN 18K                 | 144        | 7,200         | 24      | 63,072        | 15.6         | 136,218       | \$ 720.00 | \$ 36,000.00        |
| 20           | 32W 4' T8 Tube    | 32         | 640           | 10      | 2,336          | 20           | T8U450-15 Forrest Lighting       | 15         | 300           | 10      | 1,095         | 0.3          | 1,241         | \$ 8.64   | \$ 172.80           |
| 20           | 32W 4' T8 Tube    | 32         | 640           | 10      | 2,336          | 20           | LED17T8/L48/FG/850/BF Sylvania   | 17         | 340           | 10      | 1,241         | 0.3          | 1,095         | \$ 8.50   | \$ 170.00           |
| 4            | 250W MH Wall Pack | 288        | 1,152         | 12      | 5,046          | 4            | G104885120W Beyond LED Tech Wall | 120        | 480           | 12      | 2,102         | 0.7          | 2,943         | \$ 233.00 | \$ 932.00           |
|              |                   |            | -             |         | -              |              |                                  |            | -             | 0       | -             | -            | -             | \$ -      | \$ -                |
|              |                   |            | -             |         | -              |              |                                  |            | -             |         | -             | -            | -             | \$ -      | \$ -                |
|              |                   |            | -             |         | -              |              |                                  |            | -             |         | -             | -            | -             | \$ -      | \$ -                |
|              |                   |            | -             |         | -              |              |                                  |            | -             |         | -             | -            | -             | \$ -      | \$ -                |
|              |                   |            | -             |         | -              |              |                                  |            | -             |         | -             | -            | -             | \$ -      | \$ -                |
|              |                   |            | -             |         | -              |              |                                  |            | -             |         | -             | -            | -             | \$ -      | \$ -                |
|              |                   |            | -             |         | -              | 4            | Wall Pack Visor                  |            | -             |         | -             |              |               | \$ 14.95  | \$ 59.80            |
|              |                   |            | -             |         | -              | 1            | Misc materials wo 35772158       |            | -             |         | -             |              |               | \$ 685.59 | \$ 685.59           |
| -            | -                 | -          | -             | -       | -              |              | TOTAL LABOR WO 35772158          |            | -             |         | -             |              |               |           | \$ 2,163.63         |
| -            | -                 | -          | -             | -       | -              |              | TOTAL LABOR WO 35897559          |            | -             |         | -             |              |               | -         | \$ 3,289.11         |
|              |                   |            | <b>25,182</b> |         | <b>209,008</b> |              |                                  |            | <b>8,320</b>  |         | <b>67,510</b> |              |               |           | <b>\$ 43,472.93</b> |

Energy Cost: 0.04 \$/kwh  
 Kw Reduction: 16.862 kw  
 Annual energy Saving: 141,497 kwh  
 Annual Savings: \$ 5,659.89 \$  
  
 Total Fixture & Labor Cost: \$ 43,472.93

**Notes:**  
 (1) WO 35772158 was for High bay lights for \$39,974.70  
 (2) WO 35897559 was for T8 Replacments for \$7,197.32 of which \$3,498.23 qualified.  
 (4) the G104885120W are actually Beyond LED tech #BLTWP120W57KWM SKU 104885

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

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 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |  |
|----------------------|--|
| DATE:                | 11/29/2017   |
| NAME OF BUSINESS:    | Stillwater Mining Company  |
| CITY/TOWN LOCATION:  | Columbus & Nye   |
| CONTACT PERSON:      | Phil Ault  |
| MAILING ADDRESS:     | PO BOX 1209  |
| CITY, STATE AND ZIP: | Columbus, MT 59019   |
| PHONE NUMBER:        | (406) 322-8985   |
| FAX NUMBER:          | xxxx   |
| E-MAIL ADDRESS       | <a href="mailto:pault@stillwatermining.com">pault@stillwatermining.com</a> |

|                             |          |
|-----------------------------|----------|
| AMOUNT OF CREDIT REQUESTED: | \$10,000 |
|-----------------------------|----------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):<br>Donation to Energy Share of Montana. |
|---|

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |     |
|------------------------|-----|
| ESTIMATED kWh SAVINGS: | N/A |
| ESTIMATED KW SAVINGS:  | N/A |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: Phil Ault 11/29/2017

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
Attn: Rick Edwards  
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11 E. Park Street  
Butte, MT 59701  
Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                             |  |
|-----------------------------|--|
| <b>DATE:</b>                | 11/29/2017   |
| <b>NAME OF BUSINESS:</b>    | <b>Stillwater Mining Company</b>   |
| <b>CITY/TOWN LOCATION:</b>  | Columbus & Nye   |
| <b>CONTACT PERSON:</b>      | Phil Ault  |
| <b>MAILING ADDRESS:</b>     | PO BOX 1209  |
| <b>CITY, STATE AND ZIP:</b> | Columbus, MT 59019   |
| <b>PHONE NUMBER:</b>        | (406) 322-8985   |
| <b>FAX NUMBER:</b>          | xxxx   |
| <b>E-MAIL ADDRESS</b>       | <a href="mailto:pault@stillwatermining.com">pault@stillwatermining.com</a> |

|                                    |              |
|------------------------------------|--------------|
| <b>AMOUNT OF CREDIT REQUESTED:</b> | \$135,709.17 |
|------------------------------------|--------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|  |
|--|
| <b>DESCRIPTION OF PROJECT(S)</b> (if more space is needed, please attach):<br>Installed a 100kw solar system at the Columbus Facility. The estimated savings is 143.4 Mwh/yr for at least 25 years. The total project cost is about \$244,000 but we can only refund the amount of energy saved over the life of the project based on our current average all-in energy rate. This info was from Mark Schoenfeld at the Montana DOR. |
|--|

Estimated Savings in kWh and/or KW for project needs to be provided

|                               |             |
|-------------------------------|-------------|
| <b>ESTIMATED kWh SAVINGS:</b> | 143,400 kwh |
| <b>ESTIMATED KW SAVINGS:</b>  | 100 kw      |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

**LARGE CUSTOMER:** Signature: Phil Ault 11/29/2017

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

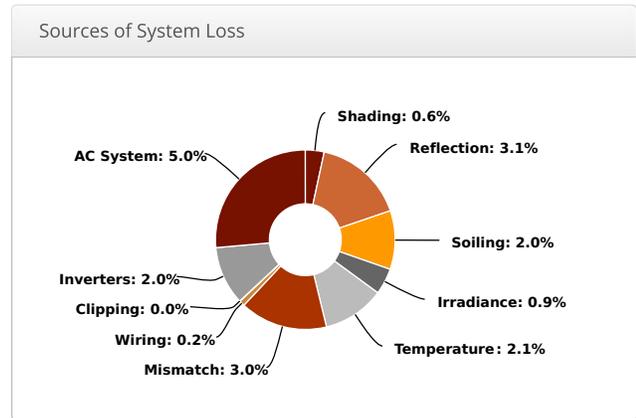
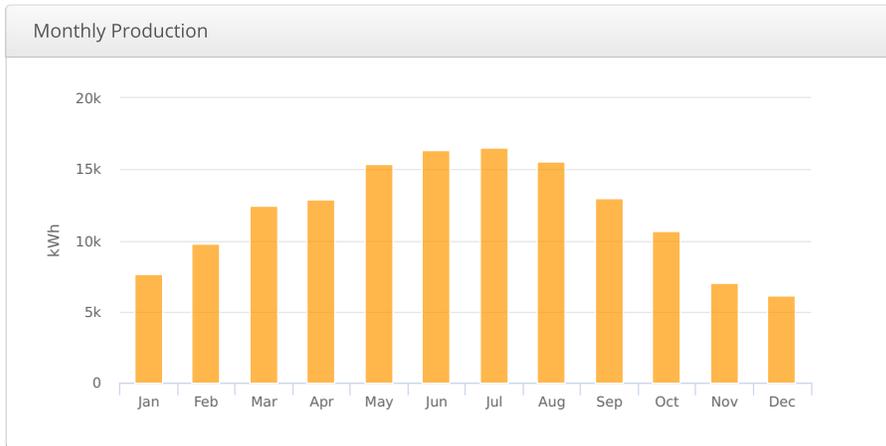
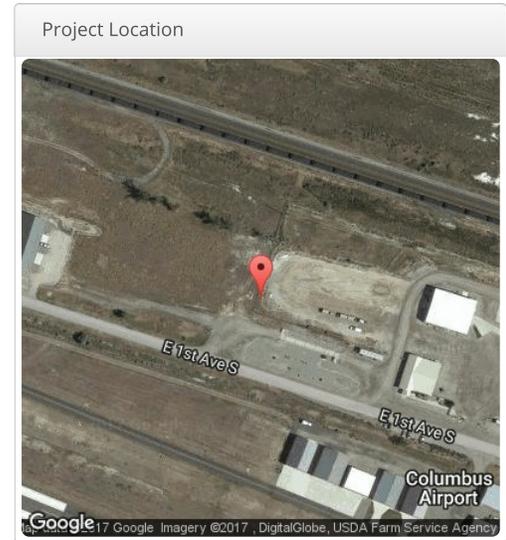
**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

## 100 kW Design--Canadian Solar 315's Sibanye Stillwater, 1800 1st Ave S. Columbus MT

| Report          |   |
|-----------------|---|
| Project Name    | Sibanye Stillwater                          |
| Project Address | 1800 1st Ave S. Columbus MT                 |
| Prepared By     | Orion Thornton<br>orion@onsiteenergyinc.com |



| System Metrics        |   |
|-----------------------|---|
| Design                | 100 kW Design--Canadian Solar 315's               |
| Module DC Nameplate   | 100.8 kW  |
| Inverter AC Nameplate | 100.0 kW<br>Load Ratio: 1.01                      |
| Annual Production     | 143.4 MWh   |
| Performance Ratio     | 82.5%   |
| kWh/kWp               | 1,422.4   |
| Weather Dataset       | TMY, 10km Grid (45.65,-109.25), NREL (prospector) |
| Simulator Version     | 4ca20c3b61-1eec45da6f-45704f1617-b67ae1bab9       |



| Annual Production                |                                     |                  |              |
|----------------------------------|-------------------------------------|------------------|--------------|
|                                  | Description                         | Output           | % Delta      |
| Irradiance (kWh/m <sup>2</sup> ) | Annual Global Horizontal Irradiance | 1,468.6          |              |
|                                  | POA Irradiance                      | 1,723.4          | 17.3%        |
|                                  | Shaded Irradiance                   | 1,712.3          | -0.6%        |
|                                  | Irradiance after Reflection         | 1,659.2          | -3.1%        |
|                                  | Irradiance after Soiling            | 1,626.0          | -2.0%        |
|                                  | <b>Total Collector Irradiance</b>   | <b>1,626.0</b>   | <b>0.0%</b>  |
| Energy (kWh)                     | Nameplate                           | 163,959.6        |              |
|                                  | Output at Irradiance Levels         | 162,492.9        | -0.9%        |
|                                  | Output at Cell Temperature Derate   | 159,061.2        | -2.1%        |
|                                  | Output After Mismatch               | 154,313.3        | -3.0%        |
|                                  | Optimal DC Output                   | 154,018.2        | -0.2%        |
|                                  | Constrained DC Output               | 154,006.9        | 0.0%         |
|                                  | Inverter Output                     | 150,926.7        | -2.0%        |
|                                  | <b>Energy to Grid</b>               | <b>143,380.4</b> | <b>-5.0%</b> |
| Temperature Metrics              |                                     |                  |              |
|                                  | Avg. Operating Ambient Temp         |                  | 11.2 °C      |
|                                  | Avg. Operating Cell Temp            |                  | 20.0 °C      |
| Simulation Metrics               |                                     |                  |              |
|                                  | Operating Hours                     | 4660             |              |
|                                  | Solved Hours                        | 4660             |              |

| Condition Set                |   |       |  |                   |   |   |   |   |   |   |   |   |
|------------------------------|---|-------|--|-------------------|---|---|---|---|---|---|---|---|
| Description                  | Condition Set 2                                   |       |  |                   |   |   |   |   |   |   |   |   |
| Weather Dataset              | TMY, 10km Grid (45.65,-109.25), NREL (prospector) |       |  |                   |   |   |   |   |   |   |   |   |
| Solar Angle Location         | Meteo Lat/Lng                                     |       |  |                   |   |   |   |   |   |   |   |   |
| Transposition Model          | Perez Model                                       |       |  |                   |   |   |   |   |   |   |   |   |
| Temperature Model            | Sandia Model                                      |       |  |                   |   |   |   |   |   |   |   |   |
| Temperature Model Parameters | Rack Type   | a     | b  | Temperature Delta |   |   |   |   |   |   |   |   |
|                              | Fixed Tilt  | -3.56 | -0.075   | 3°C               |   |   |   |   |   |   |   |   |
|                              | Flush Mount                                       | -2.81 | -0.0455  | 0°C               |   |   |   |   |   |   |   |   |
|                              | East-West   | -3.56 | -0.075   | 3°C               |   |   |   |   |   |   |   |   |
|                              | Carport   | -3.56 | -0.075   | 3°C               |   |   |   |   |   |   |   |   |
| Soiling (%)                  | J   | F     | M  | A                 | M | J | J | A | S | O | N | D |
|                              | 2   | 2     | 2  | 2                 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Irradiation Variance         | 5%  |       |  |                   |   |   |   |   |   |   |   |   |
| Cell Temperature Spread      | 4° C  |       |  |                   |   |   |   |   |   |   |   |   |
| Module Binning Range         | -2.5% to 2.5%                                     |       |  |                   |   |   |   |   |   |   |   |   |
| AC System Derate             | 5.00%   |       |  |                   |   |   |   |   |   |   |   |   |
| Module Characterizations     | Module  |       | Characterization                               |                   |   |   |   |   |   |   |   |   |
|                              | CS6X - 315P (Canadian Solar Inc.)                 |       | CS6X-315P-FG_MIX_CSI_EXT_V6.52_2016Q4.PAN, PAN |                   |   |   |   |   |   |   |   |   |
| Component Characterizations  | Device  |       |  | Characterization  |   |   |   |   |   |   |   |   |
|                              | Sunny Tripower Core1/US (SMA)                     |       |  | Spec Sheet        |   |   |   |   |   |   |   |   |

| Components |   |                 |
|------------|---|-----------------|
| Component  | Name                                    | Count           |
| Inverters  | Sunny Tripower Core1/US (SMA)           | 2 (100.0 kW)    |
| Strings    | 10 AWG (Copper)                         | 20 (2,368.7 ft) |
| Module     | Canadian Solar Inc., CS6X - 315P (315W) | 320 (100.8 kW)  |

| Wiring Zones |                |             |                    |
|--------------|----------------|-------------|--------------------|
| Description  | Combiner Poles | String Size | Stringing Strategy |
| Wiring Zone  | 12             | 15-18       | Along Racking      |

| Field Segments         |            |                     |      |          |                  |            |        |         |         |
|------------------------|------------|---------------------|------|----------|------------------|------------|--------|---------|---------|
| Description            | Racking    | Orientation         | Tilt | Azimuth  | Intrarow Spacing | Frame Size | Frames | Modules | Power   |
| Field Segment 1        | Fixed Tilt | Portrait (Vertical) | 25°  | 198.328° | 44.0 ft          | 2x40       | 2      | 160     | 50.4 kW |
| Field Segment 1 (copy) | Fixed Tilt | Portrait (Vertical) | 25°  | 198.328° | 44.0 ft          | 2x40       | 2      | 160     | 50.4 kW |

Detailed Layout



HelioScope



## FORM A - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
 FAX: (406) 497-4008

|                             |  |
|-----------------------------|--|
| <b>DATE:</b>                | 11/29/2017   |
| <b>NAME OF BUSINESS:</b>    | <b>Stillwater Mining Company</b>   |
| <b>CITY/TOWN LOCATION:</b>  | Columbus & Nye   |
| <b>CONTACT PERSON:</b>      | Phil Ault  |
| <b>MAILING ADDRESS:</b>     | PO Box 1209  |
| <b>CITY, STATE AND ZIP:</b> | Columbus, MT 59019   |
| <b>PHONE NUMBER:</b>        | 406-322-8985   |
| <b>FAX NUMBER:</b>          |  |
| <b>E-MAIL ADDRESS</b>       | <a href="mailto:pault@stillwatermining.com">pault@stillwatermining.com</a> |

1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

The 2017 USB credits will be used for these projects: Fan timer Project at the Mine Site and Multiple Lighting projects. Carryover the remaining credits to 2018, estimated to be about \$210,100.

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

**LARGE CUSTOMER:**

Signature: \_\_\_\_\_

*Phil Ault 11/29/2017*

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

March 1st, 2018

Mr. Mark Schoenfeld  
Specialist Large Customer Team  
Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

Dear Mr. Schoenfeld:

Please find below a summary of the projects related to expenditure for cost-effective energy savings and conservation for 2017. A total of 78,875,646 kWh was consumed at our East Boulder Mine that was purchased from the Park Electric Cooperative (PEC). Therefore, the Universal System Benefit (USB) charge (before credits) is \$70,988.08.

In the letter dated February 27, 2017, it was stated that the remaining 2016 USB credits of \$457,811.10 would be carried over into 2017.

In 2017, the following qualifying energy saving projects were completed at the East Boulder mine site.

| <b>PROJECT</b>   | <b>ANNUAL ENERGY SAVING</b> | <b>PROJECT COST</b> |
|--|-----------------------------|---------------------|
| Upgraded the underground ventilation system. Replaced 2600 HP of above ground fans with 1600 HP of underground fans and automated ramp up/dn times based on shift schedule. These fans run 24/7. This saves at least 600KW continuously. | 5,256,000 kwh               | \$1,600,000         |
| <b>Totals</b>  | 5,256,000 kwh               | \$1,600,000         |

Below is a summary of the 2017 USB funding:

| <b>DESCRIPTION</b>           | <b>CREDITS</b>  | <b>CHARGES</b> |
|------------------------------|-----------------|----------------|
| 2017 USB Charges             |                 | \$ 70,988.08   |
| Carry over from 2016         | \$ 457,811.10   |                |
| Qualifying Projects for 2017 | \$ 1,600,000.00 |                |
| Totals                       | \$ 2,057,811.10 | \$ 70,988.08   |
|                              |                 |                |
| Carry over credits to 2018   | \$ 1,986,823.02 |                |

The self-directed USB is an excellent program and has provided significant positive benefits to the Stillwater Mining Company in 2017. If you require further information or more a detailed explanation of the projects and benefits, please feel free to contact me as follows:

Phil Ault  
Stillwater Mining Company  
PO Box 1209  
Columbus, MT 59019  
(406) 322-8985 (Phone)  
(406) 322-6388 (Fax)  
[PAult@stillwatermining.com](mailto:PAult@stillwatermining.com) (e-mail)

Sincerely,



Phil Ault  
Electrical Engineer

Cc: Tim Stephens – Park Electric Cooperative



February 13, 2017

Mark Schoenfeld  
Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805

Dear Mark,

Attached are the forms we submitted to Northwestern Energy and the Progress Report for 2017. We had very few projects during the year so we are donating the 2016 USB Credits in the amount of \$3966.03 to Energy Share of Montana. Please let me know if you need any additional information.

Sincerely,

A handwritten signature in black ink, appearing to read "Anthony C. Colter", with a long horizontal line extending to the right.

Anthony C. Colter  
Vice President  
Sun Mountain Lumber  
PO Box 389  
Deer Lodge, MT 59722

CC: Rick Edwards, Northwestern Energy



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/24/2018

## SUN MOUNTAIN LUMBER

### Account Summary

2016 Carryover Reservation: \$5,000.00 YTD Elec Revenue: \$1,135,574.14  
 Reservations Made YTD: \$9,500.00

2016 Carryover Payment Request: \$0.00 Total Payment Requests: \$3,966.03  
 Payment Requests Made YTD: \$3,966.03 Current Request Balance: \$0.00

2016 Carryover USBC Credit: \$3,966.03 Total USBC Credit: \$13,227.19  
 USBC Credit YTD: \$9,261.16 Payments Issued YTD: \$3,966.03  
 Average Monthly Credit Earned: \$771.76 USBC Credit Balance: \$9,261.16  
 Payment Pending: \$0.00

### Payment Requests Made

| Submitted By | Date       | Amount     |
|--------------|------------|------------|
| Tony Colter  | 11/16/2017 | \$3,966.03 |

### Payments Issued

| Date       | Amount     |
|------------|------------|
| 12/06/2017 | \$3,966.03 |

### Account Detail

| Account | Premise | Meter      | Jan                                   | Feb        | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec        | YTD Total      |
|---------|---------|------------|---------------------------------------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|------------|----------------|
| 1233818 | 245475  | DA05571932 | KWH > 11,504                          | 10,634     | 9,474       | 7,809       | 6,077       | 6,827       | 6,190       | 5,204       | 5,003       | 4,462       | 6,640       | 8,999      | 88,823         |
|         |         |            | KW > 20                               | 20         | 19          | 18          | 14          | 15          | 14          | 13          | 15          | 15          | 16          | 18         | 16             |
|         |         |            | Elec Revenue > \$1,142.89             | \$1,043.17 | \$940.50    | \$807.76    | \$626.59    | \$696.52    | \$630.59    | \$548.56    | \$549.39    | \$510.10    | \$685.76    | \$892.41   | \$9,074.24     |
| 1233841 | 263122  | DA13299769 | KWH > 854,336                         | 943,499    | 811,190     | 861,586     | 813,329     | 905,794     | 841,407     | 753,922     | 842,943     | 746,913     | 892,868     | 933,567    | 10,201,354     |
|         |         |            | KW > 3,774                            | 3,637      | 3,670       | 3,549       | 3,354       | 3,583       | 3,186       | 3,126       | 3,115       | 3,251       | 3,290       | 3,545      | 3,423          |
|         |         |            | Elec Revenue > \$97,101.22            | 105,382.91 | \$92,550.93 | \$95,209.61 | \$90,879.29 | \$99,575.40 | \$90,726.15 | \$83,568.91 | \$90,258.35 | \$84,203.46 | \$95,992.83 | 101,050.84 | \$1,126,499.90 |
|         |         |            | <b>Total KWH</b> 865,840              | 954,133    | 820,664     | 869,395     | 819,406     | 912,621     | 847,597     | 759,126     | 847,946     | 751,375     | 899,508     | 942,566    | 10,290,177     |
|         |         |            | <b>Combined Average KW</b> 3,794      | 3,657      | 3,669       | 3,567       | 3,368       | 3,598       | 3,200       | 3,139       | 3,130       | 3,266       | 3,306       | 3,563      | 3,440          |
|         |         |            | <b>USBC Charge</b> \$779.25           | \$858.72   | \$738.60    | \$782.46    | \$737.47    | \$821.35    | \$762.84    | \$683.21    | \$763.15    | \$676.24    | \$809.56    | \$848.31   | \$9,261.16     |
|         |         |            | <b>Total Elec Revenue</b> \$98,244.11 | 106,426.08 | \$93,491.43 | \$96,017.37 | \$91,505.88 | 100,271.92  | \$91,356.74 | \$84,117.47 | \$90,807.74 | \$84,713.56 | \$96,678.59 | 101,943.25 | \$1,135,574.14 |

## FORM A - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
 FAX: (406) 497-4008

|                      |                      |
|----------------------|----------------------|
| DATE:                | 15 NOVEMBER 2017     |
| NAME OF BUSINESS:    | Sen Mountain Lumber  |
| CITY/TOWN LOCATION:  | Deer Lodge           |
| CONTACT PERSON:      | Tony COLTER          |
| MAILING ADDRESS:     | 181 Greenhouse Rd.   |
| CITY, STATE AND ZIP: | Deer Lodge, MT 59722 |
| PHONE NUMBER:        | 1-406-846-1600       |
| FAX NUMBER:          | 1-406-846-3714       |
| E-MAIL ADDRESS       |                      |

1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

*Reserve all remaining 2017 USB credits at year-end for use in 2018.  
 Various motor replacement + Kila project.*

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: \_\_\_\_\_ Signature: *Tony Colter* 11-17-17

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                             |
|----------------------|-----------------------------|
| DATE:                | November 15, 2017           |
| NAME OF BUSINESS:    | Sun Mountain Lumber Inc.    |
| CITY/TOWN LOCATION:  | Deer Lodge MT               |
| CONTACT PERSON:      | Tony Colter                 |
| MAILING ADDRESS:     | 181 Greenhouse Road         |
| CITY, STATE AND ZIP: | Deer Lodge MT 59722         |
| PHONE NUMBER:        | 406-846-1600                |
| FAX NUMBER:          | 406-843-3714                |
| E-MAIL ADDRESS:      | tony.colter@sunmtlumber.com |

|                             |  |
|-----------------------------|--|
| AMOUNT OF CREDIT REQUESTED: |  |
|-----------------------------|--|

The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach): |
| Please donate 2016 funds (\$3966.03) to Energy Share                |

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |  |
|------------------------|--|
| ESTIMATED kWh SAVINGS: |  |
| ESTIMATED KW SAVINGS:  |  |

NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.

LARGE CUSTOMER: Signature:  11-12-17

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.





580 Willow Ave, P.O. Box 38 • Colstrip, MT 59323 • [www.TalenEnergy.com](http://www.TalenEnergy.com)

February 14, 2018

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: [mschoenfeld@mt.gov](mailto:mschoenfeld@mt.gov)

RE: Self-Directed USBC Progress Report for 2017 – Talen Energy

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 USBC Report that we received from NorthWestern Energy showing our USB activities during 2017.

In 2017, we received \$55,198.61 in USB credit payments. These payments were composed of \$5,655.13 in 2016 USB credits that were carried over into 2017 and \$49,543.48 in 2017 credits.

These USB payments were self-directed to a low-income donation for Energy Share submitted in 2016 and again in 2017. A copy of the Form B submitted in 2017 to NorthWestern Energy is attached.

We also had a reservation to carry all remaining 2017 USB credits at year-end of \$4,880.92 into 2018 to donate to Energy Share in 2018.

Sincerely,

Shaunna Borge  
Senior Accountant  
Talen Energy

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                               |
|----------------------|-------------------------------|
| DATE:                | 11/20/2017                    |
| NAME OF BUSINESS:    | Talen Energy                  |
| CITY/TOWN LOCATION:  | Colstrip, MT                  |
| CONTACT PERSON:      | Shaunna Borge                 |
| MAILING ADDRESS:     | PO Box 38                     |
| CITY, STATE AND ZIP: | Colstrip, MT 59313            |
| PHONE NUMBER:        | (406) 748-5389                |
| FAX NUMBER:          |                               |
| E-MAIL ADDRESS       | Shaunna.Borge@talenenergy.com |

|                             |          |
|-----------------------------|----------|
| AMOUNT OF CREDIT REQUESTED: | \$53,450 |
|-----------------------------|----------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|  |
|--|
| <b>DESCRIPTION OF PROJECT(S)</b> (if more space is needed, please attach):<br>We are requesting our year-end 2017 USB credit balance for a donation to Energy Share. The year-end balance is estimated to be about \$53,450. |
|--|

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |  |
|------------------------|--|
| ESTIMATED kWh SAVINGS: |  |
| ESTIMATED KW SAVINGS:  |  |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: 

|   |
|---|
| FOR NORTHWESTERN ENERGY USE ONLY:<br>PROCESSED BY: _____<br>DISTRIBUTION: _____ |
|---|

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## TALEN MONTANA, LLC

### Account Summary

|                                 |             |                          |                |
|---------------------------------|-------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$2,072,497.51 |
| Reservations Made YTD:          | \$0.00      |                          |                |
| 2016 Carryover Payment Request: | \$5,655.13  | Total Payment Requests:  | \$60,078.63    |
| Payment Requests Made YTD:      | \$54,423.50 | Current Request Balance: | \$4,880.02     |
| 2016 Carryover USBC Credit:     | \$5,655.13  | Total USBC Credit:       | \$60,078.63    |
| USBC Credit YTD:                | \$54,423.50 | Payments Issued YTD:     | \$55,198.61    |
| Average Monthly Credit Earned:  | \$4,535.29  | USBC Credit Balance:     | \$4,880.02     |
|                                 |             | Payment Pending:         | \$4,880.02     |

### Payment Requests Made

| Submitted By  | Date       | Amount      |
|---------------|------------|-------------|
| Shaunna Borge | 11/20/2017 | \$54,423.50 |

### Payments Issued

| Date       | Amount      |
|------------|-------------|
| 04/10/2017 | \$5,655.13  |
| 12/06/2017 | \$49,543.48 |

### Account Detail

| Account | Premise | Meter      | Jan            | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total   |
|---------|---------|------------|----------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|
| 3212922 | 346777  | DG15024002 | KWH >          | 39,936     | 33,984     | 37,632     | 34,848     | 35,712     | 35,424     | 24,000     | 22,944     | 27,264     | 20,640     | 18,912     | 364,800     |
|         |         |            | KW >           | 77         | 80         | 81         | 87         | 86         | 92         | 57         | 92         | 93         | 94         | 84         | 84          |
|         |         |            | Elec Revenue > | \$3,957.92 | \$3,553.72 | \$3,742.13 | \$3,583.84 | \$3,661.54 | \$3,670.11 | \$2,439.77 | \$2,704.57 | \$3,063.18 | \$2,557.50 | \$2,322.35 | \$38,721.44 |
| 3212929 | 316344  | DG78206964 | KWH >          | 3,518      | 3,665      | 3,472      | 3,395      | 3,671      | 3,676      | 3,821      | 3,639      | 3,484      | 3,420      | 3,790      | 42,967      |
|         |         |            | KW >           | 4          | 12         | 5          | 5          | 5          | 5          | 5          | 5          | 5          | 5          | 5          | 6           |
|         |         |            | Elec Revenue > | \$343.50   | \$422.44   | \$328.61   | \$325.19   | \$345.87   | \$345.39   | \$356.63   | \$343.07   | \$331.04   | \$326.67   | \$354.24   | \$4,150.56  |
| 3212930 | 316343  | DG36207779 | KWH >          | 1,162      | 1,226      | 1,355      | 1,387      | 1,927      | 1,908      | 2,221      | 2,618      | 2,965      | 1,246      | 3,042      | 22,798      |
|         |         |            | KW >           | 4          | 2          | 3          | 2          | 3          | 2          | 10         | 5          | 5          | 3          | 4          | 4           |
|         |         |            | Elec Revenue > | \$156.25   | \$133.21   | \$146.89   | \$141.44   | \$187.69   | \$184.46   | \$283.02   | \$265.17   | \$296.64   | \$139.91   | \$287.60   | \$2,393.95  |
| 3212934 | 316023  | DA14206400 | KWH >          | 3,184      | 2,971      | 2,781      | 2,590      | 3,442      | 3,478      | 3,614      | 3,343      | 3,361      | 3,454      | 3,476      | 38,594      |
|         |         |            | KW >           | 3          | 4          | 4          | 4          | 4          | 5          | 5          | 5          | 5          | 5          | 5          | 4           |
|         |         |            | Elec Revenue > | \$307.74   | \$282.70   | \$264.59   | \$255.03   | \$323.86   | \$328.80   | \$338.61   | \$318.92   | \$320.24   | \$329.51   | \$330.90   | \$3,683.34  |
| 3212935 | 333897  | DA19955900 | KWH >          | 1,604      | 1,216      | 1,047      | 860        | 951        | 976        | 364        | 1,298      | 1,325      | 1,399      | 1,875      | 13,763      |
|         |         |            | KW >           | 1          | 2          | 1          | 2          | 1          | 1          | 1          | 2          | 2          | 2          | 2          | 2           |
|         |         |            | Elec Revenue > | \$166.95   | \$123.39   | \$105.73   | \$97.01    | \$94.81    | \$97.55    | \$52.32    | \$130.60   | \$135.45   | \$143.41   | \$179.14   | \$1,412.90  |
| 3212936 | 333800  | DD32261711 | KWH >          | 2,080      | 4,240      | 3,680      | 3,840      | 3,440      | 4,000      | 4,320      | 4,320      | 4,000      | 3,440      | 3,360      | 45,120      |
|         |         |            | KW >           | 6          | 8          | 8          | 8          | 8          | 8          | 8          | 8          | 8          | 8          | 8          | 8           |
|         |         |            | Elec Revenue > | \$238.68   | \$429.27   | \$380.35   | \$395.73   | \$362.38   | \$404.78   | \$429.55   | \$430.02   | \$406.59   | \$363.07   | \$356.98   | \$4,637.24  |
| 3213037 | 333801  | DG28727246 | KWH >          | 8,440      | 8,160      | 4,960      | 6,120      | 4,920      | 7,040      | 7,160      | 6,920      | 5,440      | 7,600      | 9,160      | 82,120      |
|         |         |            | KW >           | 14         | 22         | 11         | 14         | 10         | 12         | 11         | 13         | 10         | 17         | 14         | 13          |
|         |         |            | Elec Revenue > | \$830.51   | \$878.03   | \$503.48   | \$634.09   | \$497.25   | \$675.93   | \$677.22   | \$675.45   | \$530.63   | \$770.80   | \$868.55   | \$8,142.69  |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter      | Jan                             | Feb                           | Mar                           | Apr                           | May                            | Jun                            | Jul                            | Aug                           | Sep                           | Oct                           | Nov                           | Dec                               | YTD Total                              |
|---------|---------|------------|---------------------------------|-------------------------------|-------------------------------|-------------------------------|--------------------------------|--------------------------------|--------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-----------------------------------|--|
| 3213045 | 334214  | DA05310580 | KWH ><br>KW ><br>Elec Revenue > | 3,069<br>3,214<br>\$335.78    | 3,495<br>3,707<br>\$851.50    | 3,739<br>3,859<br>\$381.58    | 3,665<br>3,739<br>\$364.59     | 3,295<br>3,295<br>\$326.87     | 3,003<br>3,003<br>\$307.13     | 3,138<br>3,138<br>\$323.52    | 3,048<br>3,048<br>\$308.89    | 3,003<br>3,003<br>\$307.13    | 3,264<br>3,264<br>\$337.40    | 40,496<br>40,496<br>\$4,599.67    |  |
| 3213046 | 334250  | DG36343045 | KWH ><br>KW ><br>Elec Revenue > | 7,880<br>8,066<br>\$842.09    | 8,066<br>8,066<br>\$878.44    | 8,770<br>8,770<br>\$936.67    | 10,019<br>10,019<br>\$1,131.27 | 10,460<br>10,460<br>\$1,180.53 | 10,791<br>10,791<br>\$1,200.86 | 8,939<br>8,939<br>\$1,038.89  | 7,809<br>7,809<br>\$953.12    | 5,038<br>5,038<br>\$706.26    | 6,064<br>6,064<br>\$788.68    | 103,197<br>103,197<br>\$12,138.39 |  |
| 3213047 | 334355  | DG57404411 | KWH ><br>KW ><br>Elec Revenue > | 129,240<br>184<br>\$12,255.57 | 131,500<br>181<br>\$12,180.91 | 123,060<br>183<br>\$11,374.98 | 118,580<br>183<br>\$11,096.31  | 124,520<br>177<br>\$11,456.23  | 126,100<br>176<br>\$11,525.51  | 132,540<br>176<br>\$12,022.00 | 123,340<br>181<br>\$11,372.07 | 119,180<br>191<br>\$11,190.26 | 110,820<br>213<br>\$10,763.22 | 98,660<br>210<br>\$9,789.52       | 1,454,840<br>1,454,840<br>\$136,052.67 |
| 3213048 | 333689  | DA14169293 | KWH ><br>KW ><br>Elec Revenue > | 8,105<br>14<br>\$805.31       | 7,996<br>14<br>\$782.96       | 7,518<br>14<br>\$738.06       | 6,118<br>13<br>\$625.23        | 3,752<br>8<br>\$439.39         | 1,339<br>5<br>\$157.18         | 1,471<br>7<br>\$196.18        | 1,032<br>6<br>\$155.34        | 2,215<br>12<br>\$300.86       | 4,035<br>12<br>\$449.59       | 4,233<br>8<br>\$423.85            | 49,020<br>49,020<br>\$5,269.66         |
| 3213049 | 334439  | DG96834699 | KWH ><br>KW ><br>Elec Revenue > | 8,950<br>18<br>\$913.39       | 8,360<br>18<br>\$855.24       | 4,051<br>12<br>\$442.90       | 2,026<br>11<br>\$278.00        | 1,815<br>9<br>\$246.22         | 1,204<br>3<br>\$140.39         | 1,286<br>3<br>\$145.54        | 1,123<br>4<br>\$140.48        | 1,240<br>6<br>\$164.36        | 4,237<br>12<br>\$462.90       | 6,656<br>15<br>\$677.12           | 41,889<br>41,889<br>\$4,565.49         |
| 3213050 | 333370  | DA04660717 | KWH ><br>KW ><br>Elec Revenue > | 201,840<br>392<br>\$20,157.98 | 183,280<br>455<br>\$18,994.17 | 147,440<br>321<br>\$14,641.76 | 56,320<br>190<br>\$6,317.37    | 45,680<br>153<br>\$5,120.82    | 43,040<br>92<br>\$4,264.87     | 44,720<br>93<br>\$4,402.96    | 41,360<br>93<br>\$4,147.62    | 64,000<br>232<br>\$7,315.97   | 114,080<br>278<br>\$11,669.38 | 130,560<br>309<br>\$13,269.67     | 1,116,080<br>1,116,080<br>\$115,021.10 |
| 3213056 | 332006  | DA07642869 | KWH ><br>KW ><br>Elec Revenue > | 172,160<br>319<br>\$17,048.79 | 166,160<br>280<br>\$15,900.76 | 102,480<br>253<br>\$10,480.08 | 80,800<br>292<br>\$9,256.62    | 86,000<br>265<br>\$9,397.09    | 112,880<br>290<br>\$11,643.96  | 148,400<br>271<br>\$14,455.65 | 161,200<br>302<br>\$15,519.47 | 151,760<br>271<br>\$14,527.39 | 145,200<br>270<br>\$14,010.56 | 153,760<br>288<br>\$14,859.57     | 1,551,120<br>1,551,120<br>\$154,838.23 |
| 3213056 | 332006  | DG36046609 | KWH ><br>KW ><br>Elec Revenue > | 76,400<br>283<br>\$8,957.87   | 89,840<br>256<br>\$9,643.26   | 83,200<br>271<br>\$9,163.44   | 80,080<br>259<br>\$8,864.05    | 82,480<br>238<br>\$8,849.33    | 128,960<br>304<br>\$13,031.74  | 157,440<br>296<br>\$15,154.85 | 112,640<br>291<br>\$11,646.20 | 72,800<br>176<br>\$7,432.08   | 71,920<br>265<br>\$8,261.09   | 92,960<br>289<br>\$10,142.42      | 1,120,240<br>1,120,240<br>\$119,073.82 |
| 3213068 | 368680  | DG45760153 | KWH ><br>KW ><br>Elec Revenue > | 9,179<br>14<br>\$899.96       | 9,247<br>13<br>\$867.84       | 8,830<br>13<br>\$824.94       | 8,438<br>13<br>\$801.15        | 8,049<br>12<br>\$764.98        | 7,457<br>11<br>\$703.28        | 7,980<br>11<br>\$738.14       | 7,181<br>11<br>\$677.45       | 6,243<br>12<br>\$615.82       | 8,047<br>12<br>\$756.33       | 8,138<br>11<br>\$759.97           | 97,382<br>97,382<br>\$9,214.48         |
| 3213069 | 369050  | DG86439721 | KWH ><br>KW ><br>Elec Revenue > | 141<br>1<br>\$37.59           | 441<br>4<br>\$88.83           | 828<br>5<br>\$124.12          | 308<br>2<br>\$53.55            | 258<br>1<br>\$37.85            | 182<br>1<br>\$40.83            | 1,631<br>1<br>\$152.72        | 833<br>2<br>\$94.48           | 691<br>2<br>\$86.13           | 468<br>2<br>\$64.07           | 548<br>2<br>\$70.03               | 6,526<br>6,526<br>\$879.04             |
| 3213070 | 377960  | DA18929139 | KWH ><br>KW ><br>Elec Revenue > | 254,240<br>394<br>\$24,403.75 | 244,000<br>380<br>\$23,030.55 | 213,920<br>350<br>\$20,077.35 | 193,600<br>350<br>\$18,654.57  | 195,360<br>360<br>\$18,904.72  | 139,360<br>272<br>\$13,507.81  | 136,640<br>225<br>\$12,833.51 | 123,040<br>214<br>\$11,683.09 | 123,200<br>227<br>\$11,865.28 | 193,760<br>342<br>\$18,509.26 | 227,040<br>369<br>\$21,380.93     | 2,217,600<br>2,217,600<br>\$211,336.88 |
| 3213071 | 382029  | DG23734694 | KWH ><br>KW ><br>Elec Revenue > | 713<br>3<br>\$101.59          | 639<br>3<br>\$94.41           | 479<br>4<br>\$84.46           | 2,615<br>4<br>\$261.69         | 2,962<br>4<br>\$282.57         | 3,273<br>5<br>\$313.13         | 3,518<br>5<br>\$332.09        | 3,360<br>5<br>\$320.04        | 3,595<br>5<br>\$340.06        | 3,679<br>5<br>\$346.73        | 3,933<br>5<br>\$366.66            | 32,148<br>32,148<br>\$3,166.15         |
| 3213072 | 382027  | DG23734707 | KWH ><br>KW ><br>Elec Revenue > | 2,076<br>1<br>\$204.76        | 2,019<br>3<br>\$196.73        | 1,849<br>3<br>\$180.53        | 1,560<br>3<br>\$159.56         | 1,484<br>3<br>\$155.21         | 1,430<br>3<br>\$150.47         | 1,009<br>3<br>\$118.71        | 365<br>3<br>\$68.95           | 636<br>1<br>\$73.54           | 971<br>3<br>\$118.12          | 1,570<br>2<br>\$157.88            | 16,503<br>16,503<br>\$1,743.72         |
| 3213075 | 400631  | DA05495613 | KWH ><br>KW ><br>Elec Revenue > | 522<br>0<br>\$58.84           | 637<br>0<br>\$66.69           | 653<br>1<br>\$68.92           | 672<br>1<br>\$71.40            | 681<br>1<br>\$74.87            | 537<br>1<br>\$59.10            | 745<br>1<br>\$75.36           | 677<br>1<br>\$72.00           | 693<br>1<br>\$79.67           | 636<br>0<br>\$66.45           | 702<br>1<br>\$72.02               | 7,707<br>7,707<br>\$829.07             |
| 3213076 | 400630  | DA05267609 | KWH ><br>KW ><br>Elec Revenue > | 714<br>1<br>\$94.04           | 1,749<br>3<br>\$175.98        | 1,122<br>1<br>\$111.03        | 1,114<br>1<br>\$111.08         | 1,200<br>2<br>\$125.92         | 1,464<br>2<br>\$142.39         | 1,379<br>2<br>\$138.02        | 1,370<br>2<br>\$133.48        | 1,019<br>2<br>\$106.64        | 887<br>2<br>\$93.47           | 959<br>1<br>\$101.51              | 14,562<br>14,562<br>\$1,487.42         |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter          | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 3213077 | 400633  | DA07641108     | 0           | 0           | 398         | 630         | 406         | 412         | 807         | 433         | 397         | 394         | 651         | 856         | 5,384        |
|         |         | KWH >          | 0           | 0           | 1           | 1           | 1           | 0           | 1           | 1           | 1           | 1           | 1           | 1           | 1            |
|         |         | KW >           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0            |
|         |         | Elec Revenue > | \$0.00      | \$0.00      | \$51.47     | \$69.54     | \$52.45     | \$45.46     | \$83.68     | \$54.55     | \$51.84     | \$51.72     | \$71.42     | \$86.79     | \$618.92     |
| 3213078 | 401439  | DA11042381     | 720         | 800         | 640         | 52,320      | 94,320      | 192,320     | 188,560     | 159,120     | 135,520     | 1,520       | 880         | 960         | 827,680      |
|         |         | KWH >          | 720         | 800         | 640         | 52,320      | 94,320      | 192,320     | 188,560     | 159,120     | 135,520     | 1,520       | 880         | 960         | 827,680      |
|         |         | KW >           | 0           | 0           | 0           | 406         | 399         | 403         | 408         | 393         | 408         | 76          | 7           | 0           | 208          |
|         |         | Elec Revenue > | \$74.03     | \$78.35     | \$64.92     | \$8,166.26  | \$11,386.74 | \$18,976.97 | \$18,674.10 | \$16,253.57 | \$14,595.29 | \$886.22    | \$147.87    | \$90.09     | \$89,394.41  |
| 3213080 | 413689  | DG36058397     | 2,640       | 3,402       | 3,683       | 3,592       | 3,584       | 3,942       | 3,715       | 2,951       | 2,633       | 2,923       | 2,227       | 2,380       | 37,672       |
|         |         | KWH >          | 2,640       | 3,402       | 3,683       | 3,592       | 3,584       | 3,942       | 3,715       | 2,951       | 2,633       | 2,923       | 2,227       | 2,380       | 37,672       |
|         |         | KW >           | 4           | 5           | 5           | 5           | 5           | 5           | 5           | 4           | 4           | 4           | 4           | 3           | 4            |
|         |         | Elec Revenue > | \$272.13    | \$331.06    | \$345.26    | \$340.59    | \$340.28    | \$365.51    | \$347.13    | \$277.43    | \$254.51    | \$277.48    | \$223.34    | \$226.06    | \$3,600.78   |
| 3213083 | 422921  | DG28936303     | 258,600     | 237,900     | 224,100     | 217,200     | 196,500     | 180,600     | 235,800     | 255,900     | 228,000     | 222,900     | 230,400     | 253,500     | 2,741,400    |
|         |         | KWH >          | 258,600     | 237,900     | 224,100     | 217,200     | 196,500     | 180,600     | 235,800     | 255,900     | 228,000     | 222,900     | 230,400     | 253,500     | 2,741,400    |
|         |         | KW >           | 383         | 375         | 372         | 366         | 348         | 357         | 393         | 384         | 372         | 345         | 366         | 381         | 370          |
|         |         | Elec Revenue > | \$24,645.98 | \$22,492.22 | \$21,081.72 | \$20,656.32 | \$18,873.89 | \$17,604.50 | \$22,177.60 | \$23,642.87 | \$21,390.00 | \$20,800.18 | \$21,596.18 | \$23,554.87 | \$258,516.33 |
| 3213084 | 424773  | DG36058788     | 224,700     | 224,700     | 181,800     | 117,900     | 103,200     | 83,400      | 88,200      | 98,400      | 94,500      | 150,000     | 186,600     | 200,100     | 1,753,500    |
|         |         | KWH >          | 224,700     | 224,700     | 181,800     | 117,900     | 103,200     | 83,400      | 88,200      | 98,400      | 94,500      | 150,000     | 186,600     | 200,100     | 1,753,500    |
|         |         | KW >           | 383         | 378         | 348         | 321         | 291         | 144         | 153         | 153         | 246         | 300         | 318         | 333         | 281          |
|         |         | Elec Revenue > | \$21,909.36 | \$21,482.88 | \$17,566.35 | \$12,440.26 | \$10,997.62 | \$7,920.67  | \$8,360.09  | \$9,149.27  | \$9,788.80  | \$14,678.70 | \$17,708.00 | \$18,917.40 | \$170,919.40 |
| 3213085 | 426054  | DA16783069     | 1,960       | 1,609       | 993         | 1,301       | 1,700       | 1,346       | 1,462       | 2,325       | 2,301       | 1,982       | 2,445       | 2,126       | 21,550       |
|         |         | KWH >          | 1,960       | 1,609       | 993         | 1,301       | 1,700       | 1,346       | 1,462       | 2,325       | 2,301       | 1,982       | 2,445       | 2,126       | 21,550       |
|         |         | KW >           | 3           | 3           | 2           | 3           | 3           | 4           | 5           | 5           | 4           | 4           | 3           | 3           | 4            |
|         |         | Elec Revenue > | \$202.15    | \$170.66    | \$107.04    | \$139.82    | \$173.47    | \$161.62    | \$171.06    | \$237.82    | \$229.40    | \$203.67    | \$235.68    | \$205.71    | \$2,238.10   |
| 3213086 | 429795  | DA19955899     | 5,068       | 5,202       | 4,810       | 4,529       | 4,223       | 4,566       | 4,136       | 6,530       | 7,747       | 7,162       | 7,152       | 7,743       | 68,868       |
|         |         | KWH >          | 5,068       | 5,202       | 4,810       | 4,529       | 4,223       | 4,566       | 4,136       | 6,530       | 7,747       | 7,162       | 7,152       | 7,743       | 68,868       |
|         |         | KW >           | 6           | 6           | 6           | 6           | 6           | 6           | 7           | 10          | 11          | 12          | 12          | 11          | 8            |
|         |         | Elec Revenue > | \$485.18    | \$486.39    | \$449.44    | \$431.10    | \$405.41    | \$425.87    | \$398.70    | \$612.68    | \$719.49    | \$684.60    | \$683.89    | \$724.72    | \$6,507.47   |
| 3213087 | 431769  | DA12994657     | 102,480     | 104,000     | 101,600     | 92,560      | 102,480     | 101,520     | 100,720     | 105,840     | 102,080     | 91,520      | 111,520     | 114,000     | 1,230,320    |
|         |         | KWH >          | 102,480     | 104,000     | 101,600     | 92,560      | 102,480     | 101,520     | 100,720     | 105,840     | 102,080     | 91,520      | 111,520     | 114,000     | 1,230,320    |
|         |         | KW >           | 192         | 186         | 184         | 203         | 169         | 168         | 165         | 164         | 168         | 204         | 186         | 188         | 181          |
|         |         | Elec Revenue > | \$10,177.61 | \$10,061.63 | \$9,715.41  | \$9,279.60  | \$9,726.27  | \$9,567.05  | \$9,454.49  | \$9,834.81  | \$9,595.27  | \$9,168.61  | \$10,549.48 | \$10,771.54 | \$117,901.77 |
| 3213088 | 434671  | DA13873458     | 560         | 560         | 560         | 45,840      | 86,080      | 161,680     | 181,120     | 173,120     | 134,160     | 1,360       | 720         | 640         | 786,400      |
|         |         | KWH >          | 560         | 560         | 560         | 45,840      | 86,080      | 161,680     | 181,120     | 173,120     | 134,160     | 1,360       | 720         | 640         | 786,400      |
|         |         | KW >           | 0           | 0           | 0           | 356         | 365         | 388         | 399         | 410         | 410         | 92          | 20          | 0           | 203          |
|         |         | Elec Revenue > | \$61.13     | \$59.46     | \$58.72     | \$7,155.13  | \$10,405.38 | \$16,445.55 | \$18,010.61 | \$17,504.51 | \$14,505.94 | \$1,033.87  | \$263.52    | \$65.20     | \$85,569.02  |
| 3213089 | 434672  | DG52303331     | 200         | 160         | 200         | 160         | 16,080      | 200         | 240         | 200         | 4,160       | 240         | 200         | 240         | 22,280       |
|         |         | KWH >          | 200         | 160         | 200         | 160         | 16,080      | 200         | 240         | 200         | 4,160       | 240         | 200         | 240         | 22,280       |
|         |         | KW >           | 0           | 0           | 0           | 0           | 72          | 0           | 0           | 0           | 185         | 8           | 0           | 0           | 22           |
|         |         | Elec Revenue > | \$24.24     | \$19.95     | \$22.83     | \$19.86     | \$1,990.81  | \$22.88     | \$25.91     | \$22.82     | \$2,183.04  | \$110.09    | \$22.91     | \$26.03     | \$4,491.37   |
| 3213090 | 437607  | DA15527122     | 0           | 0           | 0           | 33,600      | 58,800      | 0           | 0           | 0           | 0           | 16,800      | 75,600      | 90,000      | 274,800      |
|         |         | KWH >          | 0           | 0           | 0           | 33,600      | 58,800      | 0           | 0           | 0           | 0           | 16,800      | 75,600      | 90,000      | 274,800      |
|         |         | KW >           | 0           | 0           | 0           | 144         | 168         | 0           | 0           | 0           | 0           | 108         | 132         | 300         | 170          |
|         |         | Elec Revenue > | \$21.78     | \$19.85     | \$19.85     | \$3,806.68  | \$5,947.93  | \$19.85     | \$19.85     | \$19.85     | \$19.85     | \$2,210.57  | \$6,905.46  | \$9,420.49  | \$28,432.01  |
| 3213092 | 603812  | DA12999945     | 331         | 338         | 320         | 295         | 305         | 320         | 386         | 176         | 188         | 186         | 179         | 198         | 3,222        |
|         |         | KWH >          | 331         | 338         | 320         | 295         | 305         | 320         | 386         | 176         | 188         | 186         | 179         | 198         | 3,222        |
|         |         | KW >           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 1           | 1           | 0           | 0           | 0           | 0            |
|         |         | Elec Revenue > | \$40.51     | \$39.78     | \$40.64     | \$36.23     | \$36.91     | \$39.10     | \$45.70     | \$31.47     | \$32.43     | \$25.33     | \$24.15     | \$25.66     | \$417.91     |
| 3213093 | 1052    | DA17677699     | 3,338,672   | 3,670,300   | 3,183,287   | 2,106,224   | 2,120,387   | 2,454,272   | 2,692,960   | 5,292,190   | 5,551,823   | 4,280,993   | 4,255,289   | 3,955,381   | 42,901,978   |
|         |         | KWH >          | 3,338,672   | 3,670,300   | 3,183,287   | 2,106,224   | 2,120,387   | 2,454,272   | 2,692,960   | 5,292,190   | 5,551,823   | 4,280,993   | 4,255,289   | 3,955,381   | 42,901,978   |
|         |         | KW >           | 6,017       | 6,056       | 6,056       | 2,937       | 5,888       | 5,983       | 5,875       | 8,406       | 8,285       | 8,350       | 6,393       | 6,086       | 6,361        |
|         |         | Elec Revenue > | \$23,006.88 | \$25,015.17 | \$23,029.62 | \$13,544.88 | \$18,421.17 | \$19,937.56 | \$20,734.32 | \$35,190.31 | \$36,037.90 | \$31,028.62 | \$27,729.25 | \$26,021.26 | \$299,696.94 |
| 3238432 | 614387  | DG71214283     | 0           | 0           | 0           | 0           | 0           | 0           | 360         | 1,200       | 840         | 720         | 2,000       | 2,840       | 7,960        |
|         |         | KWH >          | 0           | 0           | 0           | 0           | 0           | 0           | 360         | 1,200       | 840         | 720         | 2,000       | 2,840       | 7,960        |
|         |         | KW >           | 0           | 0           | 0           | 0           | 0           | 0           | 2           | 1           | 3           | 4           | 8           | 9           | 5            |
|         |         | Elec Revenue > | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$131.26    | \$112.18    | \$108.46    | \$103.38    | \$251.03    | \$324.53    | \$1,030.84   |
| 3296948 | 618372  | DG74371921     | 0           | 0           | 0           | 0           | 0           | 0           | 271,200     | 408,480     | 392,960     | 3,280       | 5,600       | 5,040       | 1,086,560    |
|         |         | KWH >          | 0           | 0           | 0           | 0           | 0           | 0           | 271,200     | 408,480     | 392,960     | 3,280       | 5,600       | 5,040       | 1,086,560    |
|         |         | KW >           | 0           | 0           | 0           | 0           | 0           | 0           | 1,042       | 1,047       | 1,049       | 256         | 157         | 14          | 594          |
|         |         | Elec Revenue > | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$40,963.22 | \$40,757.52 | \$39,674.78 | \$2,821.94  | \$2,002.16  | \$527.48    | \$126,747.10 |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account | Premise | Meter                      | Jan        | Feb        | Mar        | Apr        | May        | Jun        | Jul         | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total      |
|---------|---------|----------------------------|------------|------------|------------|------------|------------|------------|-------------|------------|------------|------------|------------|------------|----------------|
| 3420372 | 619310  | DA20957153                 | 0          | 0          | 0          | 0          | 0          | 0          | 50,640      | 92,480     | 65,920     | 3,200      | 5,360      | 3,600      | 221,200        |
|         |         | KWH >                      | 0          | 0          | 0          | 0          | 0          | 0          | 0           | 254        | 232        | 144        | 23         | 13         | 111            |
|         |         | KW >                       | 0          | 0          | 0          | 0          | 0          | 0          | 0           | 0          | 0          | 0          | 0          | 0          | 0              |
|         |         | Elec Revenue >             | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$13,051.29 | \$9,706.20 | \$7,443.04 | \$1,705.47 | \$656.55   | \$423.71   | \$32,986.26    |
|         |         | <b>Total KWH</b>           | 4,871,284  | 5,161,581  | 4,465,013  | 3,294,663  | 3,401,711  | 3,754,152  | 4,458,026   | 7,297,690  | 7,357,819  | 5,391,238  | 5,594,803  | 5,422,266  | 60,470,246     |
|         |         | <b>Combined Average KW</b> | 8.747      | 8.779      | 8.551      | 6.303      | 9.115      | 8.722      | 9.788       | 12,490     | 12,663     | 11,214     | 9,215      | 9,011      | 10,004         |
|         |         | <b>USBC Charge</b>         | \$4,384.16 | \$4,645.40 | \$4,018.51 | \$2,965.19 | \$3,061.52 | \$3,378.76 | \$4,012.23  | \$6,567.95 | \$6,622.05 | \$4,852.11 | \$5,035.31 | \$4,880.02 | \$54,423.21    |
|         |         | <b>Total Elec Revenue</b>  | 174,022.59 | 170,172.71 | 147,636.62 | 140,261.61 | 151,084.22 | 148,698.48 | 215,581.81  | 230,278.44 | 218,876.29 | 146,238.92 | 160,286.32 | 169,308.53 | \$2,072,446.54 |

2/27/2018

Mr. Mark Schoenfeld  
Department of Revenue (DOR)  
PO Box 5805  
Helena, MT 59604-5805

Dear Mark,

Thompson River Lumber (TRL) did not submit a request for Universal Systems Benefits refund for 2017. TRL did request that the 2017 USB credits (\$5640.16) be carried over to 2018 for an upcoming planer project. This project is expected to result in fairly significant energy savings. I have attached our Self Directed USBC Progress Report for 2017.

Thank you for your time.

Sincerely,

*Daniel R. Claridge*

Dan Claridge  
Vice President  
Thompson River Lumber Co.  
406-827-3322 Direct



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/27/2018

## THOMPSON RIVER LUMBER

### Account Summary

|                                 |            |                          |              |
|---------------------------------|------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00     | YTD Elec Revenue:        | \$683,246.42 |
| Reservations Made YTD:          | \$3,100.00 |                          |              |
| 2016 Carryover Payment Request: | \$3,041.21 | Total Payment Requests:  | \$3,041.21   |
| Payment Requests Made YTD:      | \$0.00     | Current Request Balance: | \$0.00       |
| 2016 Carryover USBC Credit:     | \$456.86   | Total USBC Credit:       | \$6,097.02   |
| USBC Credit YTD:                | \$5,640.16 | Payments Issued YTD:     | \$3,041.21   |
| Average Monthly Credit Earned:  | \$470.01   | USBC Credit Balance:     | \$3,055.81   |
|                                 |            | Payment Pending:         | \$0.00       |

### Payment Requests Made

| Submitted By | Date       | Amount     | Payments Issued |
|--------------|------------|------------|-----------------|
|              | 04/10/2017 | \$1,965.73 |                 |
|              | 07/07/2017 | \$1,075.48 |                 |

### Account Detail

| Account | Premise | Meter      | Jan                 | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|------------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 1967744 | 432058  | DA06613304 | 510,604             | 606,174     | 559,740     | 569,796     | 544,766     | 497,726     | 448,838     | 501,679     | 469,300     | 489,288     | 554,035     | 514,905     | 6,266,851    |
|         |         |            | 1,978               | 2,035       | 2,095       | 2,108       | 2,039       | 1,914       | 1,974       | 1,879       | 1,948       | 1,961       | 2,130       | 2,108       | 2,014        |
|         |         |            | \$56,269.20         | \$64,548.02 | \$60,157.94 | \$61,183.11 | \$59,063.46 | \$54,154.13 | \$50,710.44 | \$53,929.50 | \$52,075.36 | \$53,813.63 | \$60,277.63 | \$57,064.00 | \$683,246.42 |
|         |         |            |                     |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         |            | Total KWH           | 606,174     | 559,740     | 569,796     | 544,766     | 497,726     | 448,838     | 501,679     | 469,300     | 489,288     | 554,035     | 514,905     | 6,266,851    |
|         |         |            | Combined Average KW | 2,035       | 2,095       | 2,108       | 2,039       | 1,914       | 1,974       | 1,879       | 1,948       | 1,961       | 2,130       | 2,108       | 2,014        |
|         |         |            | USBC Charge         | \$545.56    | \$503.77    | \$512.82    | \$490.29    | \$447.95    | \$403.95    | \$451.51    | \$422.37    | \$440.36    | \$498.63    | \$463.41    | \$5,640.16   |
|         |         |            | Total Elec Revenue  | \$64,548.02 | \$60,157.94 | \$61,183.11 | \$59,063.46 | \$54,154.13 | \$50,710.44 | \$53,929.50 | \$52,075.36 | \$53,813.63 | \$60,277.63 | \$57,064.00 | \$683,246.42 |



**Tricon Timber, LLC**

P.O. Box 158  
St. Regis, MT 59866  
Office: (406) 649-2485  
Fax: (406) 649-2653

Rec'd MT DOR

NOV 03 2017

**Mark Schoenfeld**  
**Department of Revenue**  
**P.O. Box 5805**  
**Helena, MT 59604-5805**

**November 1st, 2017**

Dear Mr. Schoenfeld,

Tricon replaced 6 lights with LED flood lights cutting the energy consumption 55% per light which results in a savings of \$1,380.00 per year.

I have attached all the information along with a copy of our 2017 USBC Progress Report.

Sincerely,

**Taunya Voll**

**Tricon Timber, LLC**

[taunya@tricontimber.com](mailto:taunya@tricontimber.com)

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                                       |
|----------------------|---------------------------------------|
| DATE:                | 11/1/2017                             |
| NAME OF BUSINESS:    | Tricon Timber, LLC                    |
| CITY/TOWN LOCATION:  | 162 Old Mill Loop St. Regis, MT 59866 |
| CONTACT PERSON:      | Taunya Voll                           |
| MAILING ADDRESS:     | PO Box 158                            |
| CITY, STATE AND ZIP: | St. Regis, MT 59866                   |
| PHONE NUMBER:        | 406-649-2485 Ext. 213                 |
| FAX NUMBER:          | 406-649-2653                          |
| E-MAIL ADDRESS       | taunya@tricontimber.com               |

|                                |         |
|--------------------------------|---------|
| AMOUNT OF CREDIT REQUESTED: \$ | 2591.95 |
|--------------------------------|---------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|   |
|---|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach): |
| Replaced Lights w/ LED Lighting                                     |

|   |               |
|---|---------------|
| Estimated Savings in kWh and/or KW for project needs to be provided |               |
| ESTIMATED kWh SAVINGS:  | 288 per month |
| ESTIMATED KW SAVINGS:   | 36 per month  |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: Taunya Voll

|                                   |       |
|-----------------------------------|-------|
| FOR NORTHWESTERN ENERGY USE ONLY: |       |
| PROCESSED BY:                     | _____ |
| DISTRIBUTION:                     | _____ |

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 10/20/2017

## TRICON TIMBER

| Account Summary                 |            | Payment Requests Made |                          | Payments Issued |  |
|---------------------------------|------------|-----------------------|--------------------------|-----------------|--|
| Submitted By                    | Date       | Amount                | Date                     | Amount          |  |
| Taunya Erickson                 | 07/07/2017 | \$9,284.66            | 07/07/2017               | \$9,284.66      |  |
| 2016 Carryover Reservation:     |            | \$6,200.00            | YTD Elec Revenue:        | \$677,400.67    |  |
| Reservations Made YTD:          |            | \$0.00                |                          |                 |  |
| 2016 Carryover Payment Request: |            | \$0.00                | Total Payment Requests:  | \$9,284.66      |  |
| Payment Requests Made YTD:      |            | \$9,284.66            | Current Request Balance: | \$0.00          |  |
| 2016 Carryover USBC Credit:     |            | \$5,814.71            | Total USBC Credit:       | \$11,630.20     |  |
| USBC Credit YTD:                |            | \$5,815.49            | Payments Issued YTD:     | \$9,284.66      |  |
| Average Monthly Credit Earned:  |            | \$646.17              | USBC Credit Balance:     | \$2,345.54      |  |
|                                 |            |                       | Payment Pending:         | \$0.00          |  |

| Account Detail |      | Jan                 | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct    | Nov    | Dec    | YTD Total    |
|----------------|------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------|--------|--------|--------------|
| 100624         | 1628 | 763,959             | 863,651     | 832,935     | 790,887     | 604,052     | 637,241     | 666,584     | 738,677     | 563,647     | 0      | 0      | 0      | 6,461,633    |
|                |      | 2,500               | 2,497       | 2,519       | 2,506       | 2,328       | 2,341       | 2,385       | 2,303       | 2,251       | 0      | 0      | 0      | 2,403        |
|                |      | \$88,543.87         | \$88,547.15 | \$84,482.69 | \$81,388.31 | \$66,047.57 | \$68,385.54 | \$70,710.49 | \$75,502.52 | \$61,792.53 | \$0.00 | \$0.00 | \$0.00 | \$677,400.67 |
|                |      | Total KWH           | 863,651     | 832,935     | 790,887     | 604,052     | 637,241     | 666,584     | 738,677     | 563,647     | 0      | 0      | 0      | 6,461,633    |
|                |      | Combined Average KW | 2,500       | 2,497       | 2,519       | 2,328       | 2,341       | 2,385       | 2,303       | 2,251       | 0      | 0      | 0      | 2,403        |
|                |      | USBC Charge         | \$687.57    | \$777.29    | \$749.64    | \$711.80    | \$573.52    | \$599.93    | \$664.81    | \$507.26    | \$0.00 | \$0.00 | \$0.00 | \$5,815.49   |
|                |      | Total Elec Revenue  | \$80,543.87 | \$88,547.15 | \$84,482.69 | \$81,388.31 | \$66,047.57 | \$70,710.49 | \$75,502.52 | \$61,792.53 | \$0.00 | \$0.00 | \$0.00 | \$677,400.67 |

# Tricon Timber, LLC

# Purchase Order

162 Old Mill Loop  
 PO Box 158  
 Saint Regis, MT 59866

**PAID**  
**03/15/2017**

|            |          |
|------------|----------|
| Date       | P.O. No. |
| 03/15/2017 | 30807    |

|                             |  |
|-----------------------------|--|
| <b>Vendor</b><br>E-conolite | <b>Ship To</b><br>Tricon Timber, LLC<br>162 Old Mill Loop<br>PO Box 158<br>Saint Regis, MT 59866 |
|-----------------------------|--|

|       |          |            |          |            |          |                 |
|-------|----------|------------|----------|------------|----------|-----------------|
| Terms | Due Date | 03/15/2017 | Expected | 03/17/2017 | Ship Via | Federal Expr... |
|-------|----------|------------|----------|------------|----------|-----------------|

| Item        | Qty | Description   | Price     | Department | Amount    |
|-------------|-----|---|-----------|------------|-----------|
| Parts       | 6   | E-HL9F30CSZ LED Floodlight                              | 479.99    | 9999       | 2,879.94  |
| Discount    | 1   |   | -287.99   |            | -287.99   |
| Credit Card |     | Used MasterCard ending with #0841<br><br>invoice#718612 | -2,591.95 |            | -2,591.95 |

Purchase Order must be on the Packing List and the Invoice.  
 Order must ship complete.  
 Please call if a partial is shipped.

|              |        |
|--------------|--------|
| <b>Total</b> | \$0.00 |
|--------------|--------|

Phone # 406-649-2485 Fax # 406-649-2803 E-mail p.horn@tricontimber.com Web Site www.tricontimber.com



Remit To: 1501 96th Street  
Sturtevant WI 53177  
United States

|                  |          |
|------------------|----------|
| INVOICE NO.      | 718612   |
| INVOICE DATE     | 03/15/17 |
| S.O.NUMBER       | 7206935  |
| CUSTOMER NO.     | 134744   |
| DATE SHIPPED     | 03/15/17 |
| INVOICE DUE DATE | 03/15/17 |

1501 96th Street Sturtevant, WI 53177  
888.243.9445 [www.e-conolight.com](http://www.e-conolight.com)

**Sold To:**  
Attn: Accounts Payable  
Tricon Timber  
PO Box 158  
SAINT REGIS MT 59866  
United States

**Ship To:**  
Tricon Timber  
162 Old Mill Loop  
SAINT REGIS MT 59866

**Job Name:** - **P.O. Number:** 30807  
**Agency:** - **Carrier:** FEDEX  
**Pro/Tracking #:** 725703588415

| QTY ORDERED | QTY SHIPPED | BACK ORD. | ITEM NUMBER | DESCRIPTION              | UNIT PRICE | EXTENDED PRICE |
|-------------|-------------|-----------|-------------|--------------------------|------------|----------------|
| 6           | 6           | 0         | E-HL9F30CSZ | Deduction.18850048       | -48.00     | -287.99        |
| 6           | 6           | 0         | E-HL9F30CSZ | FLD LED 2 ADJ 300W CW BZ | 479.99     | 2,879.94       |

| PAYMENT TERMS | CARTONS | POLES | SKIDS        | EST. TOTAL WEIGHT | EST. TOTAL CUBIC FEET | SUB TOTAL   |          |
|---------------|---------|-------|--------------|-------------------|-----------------------|-------------|----------|
| PREPAY        | 6       |       |              | 190.2             | 12.9564               | FREIGHT     | 2,591.95 |
| FAX NUMBER    |         |       | PAYMENT TYPE |                   |                       | SALES TAX   | 0.00     |
|               |         |       |              |                   |                       | TOTAL       | 2,591.95 |
|               |         |       |              |                   |                       | BALANCE DUE | 0.00     |

Seller : E-conolight. Shipping Term :  
All sales are subject to Seller's Sales Term and conditions at [www.e-conolight.com/terms](http://www.e-conolight.com/terms).  
Check out [www.e-conolight.com](http://www.e-conolight.com) for web specials.



February 23, 2018

Mark Schoenfeld  
Montana Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

**Rec'd MT DOR**  
**FEB 26 2018**

Re: Universal System Benefits Programs (USBP)  
Large Customers Annual Report for 2017

Mark,

This is to comply with Montana Code Annotated 69-8-402 Universal system benefits programs Section (10) (a).

The University of Montana ("UM") did not submit any new USBP payment requests in 2017. Several projects from last year would have qualified and UM may yet process the USBP paperwork on these projects.

UM has a USBP balance of over \$2.6 million and receives an average monthly credit of \$3,646. At this recovery rate, it will require 60.5 years to payout UM's request balance.

Sincerely,

A handwritten signature in black ink that reads "Brian P. Kerns".

Brian P. Kerns  
Engineer, University of Montana

Cc: Dale Mahugh, NorthWestern Energy  
Attachments

# University Of Montana 2017 USBP Large Customer Annual Report

| Building                            | Energy Conservation Modification Description | Total Costs      | Energy Savings, kWh/yr |
|-------------------------------------|--|------------------|------------------------|
| <b>Totals</b>                       |  | <b>\$ 71,995</b> | <b>\$ 79,088</b>       |
| Parking Structure Lighting Retrofit | Upgrade lot lights to programmable LED       | \$ 51,323        | 46,905                 |
| West Campus Missoula College        | Install 3.6kW solar PV                       | \$ 16,501        | 3,677                  |
| Various Buildings                   | LED T8 lamp upgrade                          | \$ 4,171         | 28,507                 |

Data updated by:  
 Brian P. Kerns, Utility Engineer, 2/22/2018  
 File: "\\MELKOR\Utilities\utilities\Energy conservation\UMEnergyProjectsforRoyce3 - DOR Report 2018 worksheet"



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/23/2018

## UNIVERSITY OF MONTANA

### Account Summary

|                                 |                |                          |                |
|---------------------------------|----------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00         | YTD Elec Revenue:        | \$4,649,616.48 |
| Reservations Made YTD:          | \$0.00         |                          |                |
| 2016 Carryover Payment Request: | \$2,688,588.78 | Total Payment Requests:  | \$2,688,588.78 |
| Payment Requests Made YTD:      | \$0.00         | Current Request Balance: | \$2,644,891.53 |
| 2016 Carryover USBC Credit:     | \$3,734.27     | Total USBC Credit:       | \$47,486.92    |
| USBC Credit YTD:                | \$43,752.65    | Payments Issued YTD:     | \$43,697.25    |
| Average Monthly Credit Earned:  | \$3,646.05     | USBC Credit Balance:     | \$3,789.67     |
|                                 |                | Payment Pending:         | \$3,789.67     |

|              |            | Payment Requests Made |            | Payments Issued |  |
|--------------|------------|-----------------------|------------|-----------------|--|
| Submitted By | Date       | Amount                | Date       | Amount          |  |
|              | 04/10/2017 |                       | 04/10/2017 | \$14,420.29     |  |
|              | 07/07/2017 |                       | 07/07/2017 | \$10,432.04     |  |
|              | 10/09/2017 |                       | 10/09/2017 | \$11,051.18     |  |
|              | 12/06/2017 |                       | 12/06/2017 | \$7,793.74      |  |

### Account Detail

| Account | Premise | Meter      | Jan                         | Feb          | Mar          | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total      |
|---------|---------|------------|-----------------------------|--------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
| 100610  | 1614    | DA06183515 | KWH > 588,632               | 640,913      | 562,504      | 573,736     | 556,711     | 526,614     | 574,032     | 672,883     | 586,477     | 605,004     | 660,439     | 566,632     | 7,114,577      |
|         |         |            | KW > 1,172                  | 1,205        | 1,209        | 1,218       | 1,163       | 1,170       | 1,244       | 1,231       | 1,403       | 1,234       | 1,296       | 1,199       | 1,229          |
|         |         |            | Elec Revenue > \$56,194.65  | \$59,669.57  | \$52,888.24  | \$54,235.66 | \$52,559.45 | \$50,009.02 | \$54,092.25 | \$61,502.50 | \$56,438.50 | \$56,604.70 | \$61,366.78 | \$53,421.06 | \$668,982.38   |
| 100625  | 1629    | DA19066015 | KWH > 0                     | 0            | 0            | 2,524,550   | 2,842,852   | 2,832,417   | 2,709,023   | 3,024,486   | 3,024,445   | 3,010,256   | 3,163,955   | 3,060,800   | 26,192,794     |
|         |         |            | KW > 0                      | 0            | 0            | 5,417       | 5,616       | 5,737       | 5,383       | 5,694       | 6,117       | 6,160       | 6,074       | 5,927       | 5,792          |
|         |         |            | Elec Revenue > \$0.00       | \$0.00       | \$0.00       | \$27,280.72 | \$26,231.98 | \$25,115.31 | \$27,689.23 | \$28,322.34 | \$28,108.68 | \$28,108.68 | \$29,159.76 | \$28,466.10 | \$2,436,619.39 |
| 100625  | 1629    | DG21485371 | KWH > 2,658,114             | 2,354,538    | 2,412,120    | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 7,424,772      |
|         |         |            | KW > 5,287                  | 5,098        | 5,003        | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 5,129          |
|         |         |            | Elec Revenue > \$251,451.84 | \$229,280.63 | \$225,510.91 | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$706,243.38   |
| 533793  | 222611  | DG15155368 | KWH > 5,240                 | 4,800        | 4,320        | 3,800       | 6,760       | 9,040       | 10,880      | 9,600       | 7,720       | 6,800       | 6,800       | 7,400       | 83,160         |
|         |         |            | KW > 12                     | 12           | 13           | 15          | 26          | 27          | 29          | 26          | 26          | 23          | 20          | 21          | 21             |
|         |         |            | Elec Revenue > \$561,14     | \$511.75     | \$473.89     | \$457.43    | \$796.28    | \$984.57    | \$1,145.03  | \$1,018.08  | \$873.61    | \$768.80    | \$740.29    | \$795.88    | \$9,126.75     |
| 534357  | 222713  | DG62108610 | KWH > 3,580                 | 3,460        | 3,460        | 2,700       | 2,480       | 2,440       | 2,640       | 2,560       | 2,440       | 2,940       | 2,900       | 3,240       | 34,860         |
|         |         |            | KW > 13                     | 14           | 13           | 12          | 11          | 12          | 11          | 11          | 11          | 12          | 13          | 13          | 12             |
|         |         |            | Elec Revenue > \$438.88     | \$420.71     | \$409.30     | \$347.15    | \$319.39    | \$322.66    | \$325.62    | \$318.99    | \$310.47    | \$364.29    | \$362.96    | \$391.80    | \$4,332.22     |
| 535331  | 222891  | DD33105146 | KWH > 25,720                | 20,560       | 20,800       | 17,520      | 16,760      | 15,920      | 20,200      | 20,480      | 22,160      | 21,840      | 20,000      | 22,320      | 244,280        |
|         |         |            | KW > 62                     | 60           | 53           | 53          | 49          | 42          | 48          | 57          | 64          | 65          | 55          | 60          | 56             |
|         |         |            | Elec Revenue > \$2,699.84   | \$2,223.63   | \$2,154.00   | \$1,917.57  | \$1,814.59  | \$1,662.20  | \$2,053.95  | \$2,167.90  | \$2,368.56  | \$2,363.79  | \$2,115.03  | \$2,354.25  | \$25,895.31    |
| 535332  | 222892  | DG93700122 | KWH > 27,080                | 23,160       | 24,120       | 19,640      | 17,800      | 17,400      | 24,280      | 24,440      | 23,400      | 22,040      | 22,760      | 24,400      | 270,520        |
|         |         |            | KW > 61                     | 62           | 62           | 58          | 49          | 44          | 54          | 50          | 54          | 52          | 57          | 58          | 55             |
|         |         |            | Elec Revenue > \$2,805.77   | \$2,451.45   | \$2,503.10   | \$2,131.83  | \$1,891.93  | \$1,800.97  | \$2,429.54  | \$2,398.12  | \$2,364.55  | \$2,251.24  | \$2,349.68  | \$2,496.24  | \$27,874.42    |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/23/2018

| Account | Premise | Meter      | Jan                        | Feb         | Mar         | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total   |
|---------|---------|------------|----------------------------|-------------|-------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|
| 578371  | 244994  | DS61323869 | KWH > 57,408               | 70,080      | 59,136      | 61,248     | 61,056     | 42,048     | 41,280     | 45,696     | 50,112     | 62,976     | 63,744     | 61,824     | 676,608     |
|         |         |            | KW > 191                   | 190         | 190         | 193        | 190        | 149        | 92         | 97         | 209        | 190        | 209        | 190        | 174         |
|         |         |            | Elec Revenue > \$6,452.22  | \$7,537.97  | \$6,495.06  | \$6,697.43 | \$6,704.48 | \$4,790.54 | \$4,123.15 | \$4,521.10 | \$5,978.35 | \$6,792.48 | \$7,069.78 | \$6,713.65 | \$73,876.21 |
| 650489  | 286796  | DD38810358 | KWH > 2,000                | 1,720       | 1,940       | 1,660      | 1,780      | 1,780      | 2,060      | 2,040      | 1,760      | 1,960      | 1,720      | 1,700      | 22,120      |
|         |         |            | KW > 4                     | 5           | 6           | 6          | 8          | 5          | 6          | 5          | 5          | 5          | 7          | 5          | 6           |
|         |         |            | Elec Revenue > \$216.72    | \$194.22    | \$219.58    | \$205.56   | \$232.63   | \$197.42   | \$228.71   | \$223.18   | \$199.74   | \$211.95   | \$211.14   | \$195.80   | \$2,536.65  |
| 692547  | 308805  | DD49232639 | KWH > 1,056                | 1,344       | 1,152       | 1,152      | 864        | 960        | 864        | 864        | 672        | 864        | 1,056      | 1,056      | 11,904      |
|         |         |            | KW > 6                     | 2           | 3           | 3          | 2          | 3          | 5          | 3          | 2          | 4          | 7          | 4          | 4           |
|         |         |            | Elec Revenue > \$157.47    | \$144.89    | \$135.84    | \$134.96   | \$103.92   | \$120.86   | \$132.01   | \$112.59   | \$88.15    | \$122.32   | \$166.44   | \$137.50   | \$1,556.95  |
| 701825  | 314718  | DD39917823 | KWH > 16,320               | 21,120      | 22,560      | 22,120     | 20,120     | 17,360     | 16,160     | 17,120     | 18,000     | 25,360     | 26,440     | 23,440     | 246,120     |
|         |         |            | KW > 47                    | 49          | 55          | 48         | 45         | 48         | 36         | 36         | 51         | 59         | 57         | 55         | 49          |
|         |         |            | Elec Revenue > \$1,764.41  | \$2,211.84  | \$2,323.15  | \$2,203.91 | \$2,041.35 | \$1,849.51 | \$1,620.75 | \$1,691.66 | \$1,916.02 | \$2,564.50 | \$2,642.66 | \$2,382.54 | \$25,212.30 |
| 710201  | 321192  | DG28611521 | KWH > 21,120               | 36,400      | 33,520      | 27,040     | 29,680     | 16,720     | 19,520     | 21,280     | 33,120     | 34,800     | 35,520     | 37,280     | 346,000     |
|         |         |            | KW > 150                   | 181         | 189         | 182        | 184        | 57         | 71         | 90         | 186        | 178        | 171        | 189        | 152         |
|         |         |            | Elec Revenue > \$3,186.45  | \$4,690.89  | \$4,500.23  | \$3,947.46 | \$4,172.01 | \$1,881.22 | \$2,229.63 | \$2,557.97 | \$4,438.20 | \$4,500.33 | \$4,484.30 | \$4,807.28 | \$45,395.97 |
| 710201  | 321192  | DG28727355 | KWH > 9,440                | 10,720      | 10,000      | 8,480      | 8,320      | 4,160      | 3,760      | 3,680      | 5,840      | 6,880      | 6,880      | 7,520      | 85,680      |
|         |         |            | KW > 60                    | 49          | 63          | 57         | 46         | 32         | 16         | 31         | 35         | 43         | 35         | 53         | 43          |
|         |         |            | Elec Revenue > \$1,365.78  | \$1,347.82  | \$1,414.12  | \$1,247.00 | \$1,122.96 | \$658.39   | \$466.27   | \$604.23   | \$811.99   | \$975.02   | \$894.88   | \$1,129.25 | \$12,037.71 |
| 710214  | 321203  | DG28727338 | KWH > 62,160               | 65,640      | 70,520      | 63,480     | 62,520     | 65,520     | 78,200     | 85,800     | 77,200     | 80,760     | 62,160     | 60,400     | 834,360     |
|         |         |            | KW > 177                   | 172         | 174         | 173        | 177        | 217        | 215        | 220        | 215        | 255        | 196        | 177        | 197         |
|         |         |            | Elec Revenue > \$6,669.73  | \$7,027.63  | \$7,258.54  | \$6,653.10 | \$6,683.07 | \$7,309.61 | \$8,227.77 | \$8,844.41 | \$8,136.37 | \$8,822.07 | \$6,813.22 | \$6,481.60 | \$88,927.12 |
| 716833  | 326576  | DD55413464 | KWH > 25,200               | 27,680      | 25,840      | 24,720     | 23,760     | 9,280      | 8,000      | 11,280     | 15,680     | 23,680     | 22,240     | 26,160     | 243,520     |
|         |         |            | KW > 77                    | 108         | 96          | 84         | 74         | 44         | 53         | 53         | 98         | 96         | 95         | 92         | 81          |
|         |         |            | Elec Revenue > \$2,789.19  | \$3,289.72  | \$2,978.23  | \$2,774.08 | \$2,614.03 | \$1,177.61 | \$1,162.57 | \$1,416.16 | \$2,206.07 | \$2,815.74 | \$2,691.74 | \$2,971.26 | \$28,886.40 |
| 716834  | 326577  | DG2754925  | KWH > 0                    | 0           | 0           | 0          | 0          | 0          | 0          | 0          | 9,280      | 13,920     | 12,160     | 14,080     | 49,440      |
|         |         |            | KW > 0                     | 0           | 0           | 0          | 0          | 0          | 0          | 0          | 62         | 71         | 68         | 72         | 68          |
|         |         |            | Elec Revenue > \$0.00      | \$0.00      | \$0.00      | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$1,350.30 | \$1,801.33 | \$1,634.67 | \$1,823.29 | \$6,609.59  |
| 716834  | 326577  | DG90038300 | KWH > 12,680               | 17,120      | 16,360      | 17,640     | 14,920     | 4,840      | 3,720      | 7,840      | 0          | 0          | 0          | 0          | 95,120      |
|         |         |            | KW > 51                    | 78          | 77          | 76         | 66         | 38         | 40         | 47         | 0          | 0          | 0          | 0          | 59          |
|         |         |            | Elec Revenue > \$1,536.73  | \$2,153.60  | \$2,051.56  | \$2,150.38 | \$1,837.18 | \$768.18   | \$699.42   | \$1,086.08 | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$12,283.13 |
| 717031  | 326717  | DA03609659 | KWH > 68,544               | 74,496      | 75,840      | 66,240     | 54,144     | 18,048     | 8,832      | 4,416      | 0          | 0          | 0          | 0          | 370,560     |
|         |         |            | KW > 176                   | 203         | 199         | 193        | 180        | 119        | 53         | 15         | 0          | 0          | 0          | 0          | 142         |
|         |         |            | Elec Revenue > \$7,267.24  | \$7,927.38  | \$7,879.43  | \$7,125.65 | \$6,053.27 | \$2,600.64 | \$1,228.48 | \$427.40   | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$40,509.49 |
| 717365  | 326930  | DG21485372 | KWH > 170,358              | 145,343     | 357,055     | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 672,756     |
|         |         |            | KW > 566                   | 371         | 1,964       | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 967         |
|         |         |            | Elec Revenue > \$17,950.87 | \$14,644.80 | \$40,610.17 | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$73,205.84 |
| 717367  | 326932  | DG90025395 | KWH > 1,302                | 1,107       | 1,247       | 968        | 1,803      | 2,990      | 6,465      | 7,941      | 5,907      | 3,920      | 1,159      | 1,035      | 35,844      |
|         |         |            | KW > 1                     | 1           | 2           | 21         | 23         | 24         | 24         | 24         | 24         | 7          | 2          | 1          | 13          |
|         |         |            | Elec Revenue > \$132.78    | \$113.15    | \$124.89    | \$302.43   | \$387.55   | \$484.40   | \$751.53   | \$865.77   | \$709.15   | \$391.52   | \$122.49   | \$104.98   | \$4,490.64  |
| 717372  | 326937  | DG90038780 | KWH > 320                  | 0           | 640         | 320        | 4,160      | 12,800     | 21,760     | 20,640     | 11,840     | 480        | 320        | 160        | 73,440      |
|         |         |            | KW > 0                     | 0           | 0           | 0          | 105        | 100        | 105        | 105        | 105        | 0          | 0          | 0          | 47          |
|         |         |            | Elec Revenue > \$33.77     | \$7.35      | \$56.90     | \$32.45    | \$2,429.65 | \$1,973.08 | \$2,692.45 | \$2,608.60 | \$1,948.33 | \$36.30    | \$24.19    | \$19.81    | \$11,662.88 |
| 717373  | 326938  | DA02798274 | KWH > 1,560                | 1,040       | 1,840       | 1,840      | 1,440      | 1,520      | 1,160      | 1,560      | 2,000      | 1,600      | 1,480      | 1,080      | 18,120      |
|         |         |            | KW > 5                     | 5           | 7           | 10         | 14         | 8          | 8          | 8          | 13         | 14         | 12         | 3          | 9           |
|         |         |            | Elec Revenue > \$192.97    | \$140.92    | \$225.86    | \$255.72   | \$264.09   | \$209.29   | \$181.13   | \$212.08   | \$298.41   | \$272.05   | \$250.53   | \$127.50   | \$2,630.55  |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/23/2018

| Account | Premise | Meter               | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total      |
|---------|---------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
| 718301  | 327614  | DA19688369          | 0           | 0           | 0           | 0           | 0           | 184,713     | 229,734     | 244,425     | 264,171     | 264,133     | 271,404     | 249,981     | 1,708,561      |
|         |         | KWH >               | 0           | 0           | 0           | 0           | 0           | 488         | 527         | 514         | 631         | 626         | 562         | 575         | 560            |
|         |         | KW >                | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0              |
|         |         | Elec Revenue >      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$22,315.11 | \$21,905.85 | \$22,911.68 | \$25,400.25 | \$25,391.55 | \$25,513.26 | \$23,929.51 | \$167,367.21   |
| 718301  | 327614  | DG21404588          | 271,200     | 249,600     | 247,200     | 230,400     | 254,400     | 33,600      | 0           | 0           | 0           | 0           | 0           | 0           | 1,286,400      |
|         |         | KWH >               | 551         | 528         | 528         | 528         | 528         | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 444            |
|         |         | KW >                | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0              |
|         |         | Elec Revenue >      | \$25,775.22 | \$24,218.95 | \$23,255.57 | \$21,938.36 | \$24,059.61 | \$3,116.82  | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$122,364.53   |
| 719003  | 328127  | DG16563216          | 15,459      | 13,289      | 13,466      | 12,448      | 11,843      | 14,653      | 12,160      | 14,975      | 8,808       | 10,412      | 13,748      | 12,974      | 154,235        |
|         |         | KWH >               | 18          | 18          | 18          | 18          | 18          | 19          | 19          | 19          | 15          | 15          | 18          | 18          | 18             |
|         |         | KW >                | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0              |
|         |         | Elec Revenue >      | \$1,436.40  | \$1,257.86  | \$1,240.63  | \$1,163.23  | \$1,116.73  | \$1,342.99  | \$1,142.44  | \$1,359.92  | \$848.14    | \$874.90    | \$1,263.79  | \$1,204.14  | \$14,351.17    |
| 763520  | 315583  | DA03986633          | 22,656      | 26,880      | 29,568      | 29,376      | 27,456      | 23,616      | 22,080      | 24,576      | 22,656      | 33,024      | 29,184      | 27,264      | 318,336        |
|         |         | KWH >               | 65          | 66          | 67          | 61          | 63          | 61          | 46          | 55          | 65          | 71          | 71          | 72          | 64             |
|         |         | KW >                | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0              |
|         |         | Elec Revenue >      | \$2,443.49  | \$2,848.38  | \$2,991.01  | \$2,896.05  | \$2,794.33  | \$2,469.30  | \$2,180.71  | \$2,465.25  | \$2,413.06  | \$3,276.77  | \$2,990.84  | \$2,857.63  | \$32,626.82    |
|         |         | Total KWH           | 4,067,149   | 3,811,010   | 3,995,208   | 3,711,088   | 4,021,629   | 3,858,439   | 3,816,810   | 4,268,602   | 4,193,688   | 4,233,649   | 4,426,069   | 4,210,746   | 48,614,087     |
|         |         | Combined Average KW | 8,752       | 8,477       | 9,991       | 8,426       | 8,637       | 8,444       | 8,085       | 8,391       | 9,391       | 9,180       | 9,025       | 8,784       | 15,391         |
|         |         | USBC Charge         | \$3,660.42  | \$3,429.90  | \$3,595.70  | \$3,339.99  | \$3,619.46  | \$3,472.59  | \$3,435.11  | \$3,841.75  | \$3,774.32  | \$3,810.28  | \$3,983.46  | \$3,789.67  | \$43,752.65    |
|         |         | Total Elec Revenue  | 393,523.56  | 374,315.11  | 387,700.21  | 356,098.13  | 386,230.48  | 373,329.66  | 360,134.57  | 397,002.90  | 400,420.56  | 402,370.33  | 416,868.43  | 397,811.07  | \$4,645,805.01 |

2100 9<sup>th</sup> Avenue North



February 7, 2018

Montana Department of Revenue  
Attention: Mark Schoenfeld  
P.O. Box 5805  
Helena, MT 59604-5805

Re: Universal System Benefits Programs (USBP)  
Large Customer Annual Report

Dear Mr. Schoenfeld:

During the calendar year 2017, United Materials requested \$3,679.11 of USB credit from Northwestern Energy. The qualifying project was upgrading lighting in our warehouse.

If you need any additional information, you can contact me at (406) 453-7692.

Respectfully,

A handwritten signature in black ink, appearing to read 'Rob Skawinski', with a long horizontal flourish extending to the right.

Rob Skawinski  
United Materials of Great Falls, Inc.

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |  |
|----------------------|--|
| DATE:                | 11/13/2017   |
| NAME OF BUSINESS:    | United Materials of Great Falls, Inc.  |
| CITY/TOWN LOCATION:  | Great Falls, MT  |
| CONTACT PERSON:      | Rob Skawinski  |
| MAILING ADDRESS:     | PO Box 1690  |
| CITY, STATE AND ZIP: | Great Falls, MT 59403  |
| PHONE NUMBER:        | (406) 453-7692   |
| FAX NUMBER:          | (406) 727-9040   |
| E-MAIL ADDRESS       | <a href="mailto:rob@unitedmaterialsgrtf.com">rob@unitedmaterialsgrtf.com</a> |

|                             |            |
|-----------------------------|------------|
| AMOUNT OF CREDIT REQUESTED: | \$3,679.11 |
|-----------------------------|------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|  |
|--|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):<br>Warehouse remodel lighting upgrades. Replace 400 W MH with 6L 54W T5 HO lights. |
|--|

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |        |
|------------------------|--------|
| ESTIMATED kWh SAVINGS: | 10,900 |
| ESTIMATED KW SAVINGS:  |        |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: 

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

**FORM A - UNIVERSAL SYSTEMS BENEFITS (USB)  
LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION**

Complete and mail to: NorthWestern Energy  
Attn: Rick Edwards  
Customer Services Department  
11 E. Park Street  
Butte, MT 59701  
Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
FAX: (406) 497-4008

|                      |                                       |
|----------------------|---------------------------------------|
| DATE:                | 11/13/2017                            |
| NAME OF BUSINESS:    | United Materials of Great Falls, Inc. |
| CITY/TOWN LOCATION:  | Great Falls, MT                       |
| CONTACT PERSON:      | Rob Skawinski                         |
| MAILING ADDRESS:     | PO Box 1690                           |
| CITY, STATE AND ZIP: | Great Falls, MT 59403                 |
| PHONE NUMBER:        | (406) 453-7692                        |
| FAX NUMBER:          | (406) 727-9040                        |
| E-MAIL ADDRESS       | rob@unitedmaterialsgtf.com            |

1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

We will be identifying other future energy efficiency projects.

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER:

Signature:



FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

*Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.*



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 10/20/2017

## UNITED MATERIALS INCORPORATED

### Account Summary

|                                 |            |                          |              |
|---------------------------------|------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$3,000.00 | YTD Elec Revenue:        | \$230,811.45 |
| Reservations Made YTD:          | \$0.00     |                          |              |
| 2016 Carryover Payment Request: | \$0.00     | Total Payment Requests:  | \$0.00       |
| Payment Requests Made YTD:      | \$0.00     | Current Request Balance: | \$0.00       |
| 2016 Carryover USBC Credit:     | \$2,856.38 | Total USBC Credit:       | \$4,848.83   |
| USBC Credit YTD:                | \$1,992.45 | Payments Issued YTD:     | \$0.00       |
| Average Monthly Credit Earned:  | \$221.38   | USBC Credit Balance:     | \$4,848.83   |
|                                 |            | Payment Pending:         | \$0.00       |

| Payment Requests Made |      | Payments Issued |      |
|-----------------------|------|-----------------|------|
| Submitted By          | Date | Amount          | Date |

### Account Detail

| Account | Premise | Meter      | Jan            | Feb        | Mar        | Apr        | May         | Jun         | Jul         | Aug         | Sep         | Oct    | Nov    | Dec    | YTD Total    |
|---------|---------|------------|----------------|------------|------------|------------|-------------|-------------|-------------|-------------|-------------|--------|--------|--------|--------------|
| 357185  | 136156  | DG89601511 | KWH >          | 6,240      | -1,760     | 2,600      | 6,160       | 4,640       | 3,840       | 9,560       | 2,080       | 0      | 0      | 0      | 39,600       |
|         |         |            | KW >           | 38         | 12         | 13         | 35          | 28          | 26          | 33          | 11          | 0      | 0      | 0      | 26           |
|         |         |            | Elec Revenue > | \$868.37   | (\$0.76)   | \$345.15   | \$940.27    | \$650.14    | \$564.64    | \$1,082.90  | \$284.33    | \$0.00 | \$0.00 | \$0.00 | \$5,488.91   |
| 366981  | 140606  | DG83128377 | KWH >          | 2,857      | 4,514      | 3,424      | 3,169       | 23          | 5,977       | 4,411       | 3,598       | 0      | 0      | 0      | 31,396       |
|         |         |            | KW >           | 16         | 18         | 11         | 16          | 13          | 16          | 17          | 16          | 0      | 0      | 0      | 15           |
|         |         |            | Elec Revenue > | \$407.68   | \$550.90   | \$387.77   | \$423.79    | \$142.74    | \$639.65    | \$519.85    | \$450.01    | \$0.00 | \$0.00 | \$0.00 | \$3,958.90   |
| 366982  | 140607  | DD38292760 | KWH >          | 5,360      | 6,160      | 5,360      | 5,400       | 6,080       | 5,000       | 5,640       | 5,880       | 0      | 0      | 0      | 50,840       |
|         |         |            | KW >           | 19         | 19         | 19         | 19          | 19          | 19          | 19          | 19          | 0      | 0      | 0      | 19           |
|         |         |            | Elec Revenue > | \$632.37   | \$689.18   | \$618.54   | \$625.60    | \$675.79    | \$590.22    | \$639.74    | \$658.87    | \$0.00 | \$0.00 | \$0.00 | \$5,800.51   |
| 366982  | 140607  | DG99701036 | KWH >          | 10,320     | 11,400     | 11,400     | 10,800      | 11,880      | 6,480       | 10,440      | 8,640       | 0      | 0      | 0      | 89,280       |
|         |         |            | KW >           | 84         | 94         | 124        | 122         | 121         | 111         | 104         | 110         | 0      | 0      | 0      | 110          |
|         |         |            | Elec Revenue > | \$1,674.07 | \$1,854.93 | \$2,139.11 | \$2,076.49  | \$2,143.14  | \$1,625.43  | \$1,859.65  | \$1,781.34  | \$0.00 | \$0.00 | \$0.00 | \$16,982.64  |
| 1362170 | 392751  | DD80649094 | KWH >          | 42,818     | 40,595     | 50,695     | 199,075     | 262,488     | 343,625     | 303,640     | 352,623     | 0      | 0      | 0      | 1,887,164    |
|         |         |            | KW >           | 79         | 70         | 920        | 1,520       | 1,600       | 1,770       | 1,640       | 1,820       | 0      | 0      | 0      | 1,214        |
|         |         |            | Elec Revenue > | \$4,565.94 | \$4,144.56 | \$7,715.44 | \$20,075.82 | \$26,695.31 | \$30,871.85 | \$27,653.64 | \$31,673.75 | \$0.00 | \$0.00 | \$0.00 | \$178,245.96 |
| 1476672 | 402021  | DD93229373 | KWH >          | 16,538     | 16,760     | 14,570     | 9,315       | 12,223      | 9,083       | 14,685      | 0           | 0      | 0      | 0      | 102,319      |
|         |         |            | KW >           | 110        | 110        | 110        | 90          | 90          | 90          | 90          | 0           | 0      | 0      | 0      | 99           |
|         |         |            | Elec Revenue > | \$2,803.31 | \$2,582.11 | \$2,376.83 | \$1,941.59  | \$2,150.90  | \$1,925.49  | \$2,311.01  | \$0.00      | \$0.00 | \$0.00 | \$0.00 | \$18,066.74  |
| 1699245 | 419608  | DD37415238 | KWH >          | 2,727      | 2,490      | 2,457      | 1,180       | 637         | 1,210       | 584         | 853         | 0      | 0      | 0      | 13,226       |
|         |         |            | KW >           | 13         | 15         | 14         | 13          | 10          | 12          | 10          | 12          | 0      | 0      | 0      | 12           |
|         |         |            | Elec Revenue > | \$365.03   | \$360.29   | \$345.01   | \$236.39    | \$166.11    | \$221.82    | \$161.20    | \$201.11    | \$0.00 | \$0.00 | \$0.00 | \$2,267.79   |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 10/20/2017

| Account             | Premise | Meter | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct    | Nov    | Dec    | YTD Total    |
|---------------------|---------|-------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------|--------|--------|--------------|
| Total KWH           |         |       | 86,860      | 80,159      | 90,506      | 235,099     | 325,381     | 297,971     | 375,215     | 348,960     | 373,674     | 0      | 0      | 0      | 2,213,825    |
| Combined Average KW |         |       | 359         | 338         | 1,211       | 1,815       | 1,811       | 1,881       | 2,044       | 1,913       | 1,988       | 0      | 0      | 0      | 1,495        |
| USBC Charge         |         |       | \$78.19     | \$72.14     | \$81.45     | \$211.58    | \$292.84    | \$268.17    | \$337.69    | \$314.08    | \$336.31    | \$0.00 | \$0.00 | \$0.00 | \$1,992.45   |
| Total Elec Revenue  |         |       | \$11,316.77 | \$10,181.21 | \$13,927.85 | \$26,219.95 | \$32,670.70 | \$30,778.47 | \$36,439.10 | \$34,227.99 | \$35,049.41 | \$0.00 | \$0.00 | \$0.00 | \$230,811.45 |



UNITED PROPERTIES  
— I N C —

Rec'd MT DOR

FEB 02 2018

January 30, 2018

Mark Schoenfeld  
Department of Revenue  
P.O. Box 5805  
Helena, MT 59604-5805

Ref: Universal Systems Benefit Program (USBP)  
Large Customers Annual Reports for 2018

Dear Mark,

In 2017 we did receive four checks for a total of \$ 7,220.37 from NorthWestern Energy. See copy of Self-Directed USBC Progress Report for 2017 enclosed. These payments were for carryover projects that were submitted in earlier years.

A portion of the first payment we expect to receive in 2018 will be carryover from projects that we submitted from an earlier year.

For 2017 we did not have any new projects.

Sincerely,

Jerome L. Ries  
United Properties, Inc.  
Billings, Montana  
Enc.



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## UNITED PROPERTIES, INC.

### Account Summary

|                                 |             |                          |              |
|---------------------------------|-------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$853,485.62 |
| Reservations Made YTD:          | \$0.00      |                          |              |
| 2016 Carryover Payment Request: | \$13,476.65 | Total Payment Requests:  | \$13,476.65  |
| Payment Requests Made YTD:      | \$0.00      | Current Request Balance: | \$6,256.28   |
| 2016 Carryover USBC Credit:     | \$569.82    | Total USBC Credit:       | \$7,746.60   |
| USBC Credit YTD:                | \$7,176.78  | Payments Issued YTD:     | \$7,220.37   |
| Average Monthly Credit Earned:  | \$598.07    | USBC Credit Balance:     | \$526.23     |
|                                 |             | Payment Pending:         | \$526.23     |

### Payment Requests Made

| Submitted By | Date | Amount |
|--------------|------|--------|
|              |      |        |
|              |      |        |
|              |      |        |
|              |      |        |

### Payments Issued

| Date       | Amount     |
|------------|------------|
| 04/10/2017 | \$2,826.21 |
| 07/07/2017 | \$1,614.23 |
| 10/09/2017 | \$1,733.33 |
| 12/06/2017 | \$1,046.60 |

### Account Detail

| Account | Premise | Meter      | Jan            | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|------------|----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 100601  | 1605    | DA06183511 | 529,590        | 503,759     | 321,529     | 322,539     | 307,598     | 314,236     | 340,267     | 365,284     | 0           | 0           | 0           | 0           | 3,004,802    |
|         |         |            | KWH >          |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         |            | KW >           | 973         | 947         | 933         | 953         | 895         | 931         | 965         | 0           | 0           | 0           | 0           | 931          |
|         |         |            | Elec Revenue > | \$51,867.19 | \$49,943.05 | \$34,276.09 | \$34,566.61 | \$32,671.74 | \$35,647.00 | \$37,914.28 | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$310,364.78 |
| 100601  | 1605    | DA19428659 | 0              | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 321,954     | 319,461     | 324,758     | 332,002     | 1,298,175    |
|         |         |            | KWH >          |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         |            | KW >           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 914         | 927         | 883         | 1,008       | 933          |
|         |         |            | Elec Revenue > | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$34,068.40 | \$34,072.91 | \$34,142.29 | \$35,909.78 | \$138,193.38 |
| 712486  | 322827  | DG28214383 | 157,280        | 127,360     | 106,560     | 108,640     | 97,920      | 111,660     | 113,280     | 109,120     | 108,000     | 92,480      | 99,040      | 95,520      | 1,326,880    |
|         |         |            | KWH >          |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         |            | KW >           | 303         | 296         | 278         | 268         | 296         | 304         | 296         | 292         | 265         | 289         | 280         | 287          |
|         |         |            | Elec Revenue > | \$15,647.33 | \$13,050.41 | \$11,048.34 | \$11,173.01 | \$10,464.08 | \$11,651.51 | \$11,409.34 | \$11,301.06 | \$9,856.38  | \$10,613.36 | \$10,242.87 | \$138,269.11 |
| 712487  | 322828  | DA05500116 | 158,560        | 109,440     | 78,160      | 84,560      | 82,880      | 90,240      | 99,120      | 95,120      | 92,400      | 72,240      | 84,400      | 74,240      | 1,121,360    |
|         |         |            | KWH >          |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         |            | KW >           | 347         | 462         | 477         | 428         | 271         | 266         | 289         | 324         | 391         | 479         | 460         | 375          |
|         |         |            | Elec Revenue > | \$16,178.18 | \$13,297.36 | \$10,841.89 | \$10,895.70 | \$9,736.61  | \$10,844.18 | \$10,262.46 | \$10,405.28 | \$9,539.60  | \$11,371.55 | \$10,388.34 | \$132,791.06 |
| 712488  | 322829  | DA05500110 | 160,040        | 116,800     | 87,080      | 84,560      | 74,360      | 80,200      | 86,200      | 83,360      | 81,920      | 68,880      | 84,080      | 71,760      | 1,079,240    |
|         |         |            | KWH >          |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         |            | KW >           | 291         | 301         | 296         | 297         | 262         | 260         | 250         | 256         | 250         | 266         | 267         | 271          |
|         |         |            | Elec Revenue > | \$15,749.41 | \$12,270.62 | \$9,715.46  | \$9,578.65  | \$8,458.38  | \$9,290.57  | \$8,960.63  | \$8,917.18  | \$7,869.23  | \$9,216.93  | \$8,265.79  | \$117,042.80 |
| 712888  | 323197  | DG93142113 | 1,980          | 1,751       | 1,585       | 1,415       | 1,860       | 2,304       | 2,701       | 1,149       | 1,701       | 1,328       | 1,743       | 182         | 16,213       |
|         |         |            | KWH >          |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         |            | KW >           | 5           | 7           | 7           | 6           | 13          | 13          | 7           | 13          | 12          | 10          | 4           | 9            |
|         |         |            | Elec Revenue > | \$269.81    | \$220.50    | \$200.40    | \$193.87    | \$291.42    | \$321.65    | \$347.27    | \$173.47    | \$276.06    | \$238.85    | (\$24.82)   | \$70.15      |
| 2087487 | 1517    | DG54443191 | 18,340         | 15,480      | 11,820      | 10,940      | 8,840       | 8,820       | 8,320       | 7,800       | 8,220       | 8,040       | 9,920       | 11,000      | 127,540      |
|         |         |            | KWH >          |             |             |             |             |             |             |             |             |             |             |             |              |
|         |         |            | KW >           | 23          | 44          | 40          | 38          | 29          | 28          | 24          | 26          | 33          | 37          | 37          | 33           |
|         |         |            | Elec Revenue > | \$1,937.85  | \$1,679.85  | \$1,329.32  | \$1,243.15  | \$1,032.15  | \$935.09    | \$856.83    | \$904.11    | \$964.78    | \$1,151.67  | \$1,237.71  | \$14,255.86  |

# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

| Account             | Premise | Meter | Jan        | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------------------|---------|-------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| Total KWH           |         |       | 1,025,790  | 874,590     | 606,734     | 612,654     | 573,458     | 607,480     | 649,888     | 661,833     | 614,195     | 562,429     | 600,455     | 584,704     | 7,974,210    |
| Combined Average KW |         |       | 1,942      | 2,057       | 2,031       | 1,990       | 1,709       | 1,755       | 1,832       | 1,831       | 1,825       | 1,878       | 1,964       | 2,056       | 2,838        |
| USBC Charge         |         |       | \$923.20   | \$787.13    | \$546.06    | \$551.39    | \$516.11    | \$546.73    | \$584.90    | \$595.65    | \$552.78    | \$506.19    | \$540.41    | \$526.23    | \$7,176.78   |
| Total Elec Revenue  |         |       | 101,649.77 | \$90,461.79 | \$67,411.50 | \$67,640.99 | \$62,147.66 | \$64,931.89 | \$68,665.53 | \$69,577.03 | \$65,872.09 | \$62,541.75 | \$66,470.98 | \$66,114.64 | \$853,485.62 |



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

## US AIR FORCE

### Account Summary

|                                 |              |                          |                |
|---------------------------------|--------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00       | YTD Elec Revenue:        | \$4,669,311.47 |
| Reservations Made YTD:          | \$0.00       |                          |                |
| 2016 Carryover Payment Request: | \$335,247.99 | Total Payment Requests:  | \$335,247.99   |
| Payment Requests Made YTD:      | \$0.00       | Current Request Balance: | \$283,464.63   |
| 2016 Carryover USBC Credit:     | \$4,422.08   | Total USBC Credit:       | \$56,069.75    |
| USBC Credit YTD:                | \$51,647.67  | Payments Issued YTD:     | \$51,783.36    |
| Average Monthly Credit Earned:  | \$4,303.97   | USBC Credit Balance:     | \$4,286.39     |
|                                 |              | Payment Pending:         | \$4,286.39     |

### Payment Requests Made

| Submitted By | Date | Amount |
|--------------|------|--------|
|              |      |        |
|              |      |        |
|              |      |        |
|              |      |        |

### Payments Issued

| Date       | Amount      |
|------------|-------------|
| 04/10/2017 | \$18,117.59 |
| 07/07/2017 | \$11,970.01 |
| 10/09/2017 | \$13,559.49 |
| 12/06/2017 | \$8,136.27  |

### Account Detail

| Account | Premise | Meter          | Jan        | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total      |
|---------|---------|----------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|----------------|
| 100634  | 1638    | DA06183532     | 4,484,588  | 3,574,833  | 3,686,208  | 3,363,758  | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 15,109,387     |
|         |         | KW >           | 6,822      | 6,531      | 6,441      | 5,812      | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 6,402          |
|         |         | Elec Revenue > | 348,590.40 | 274,259.48 | 277,816.15 | 255,864.37 | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$0.00     | \$1,156,530.40 |
| 100634  | 1638    | DA19688368     | 0          | 0          | 0          | 0          | 3,391,457  | 3,492,779  | 4,030,262  | 4,113,766  | 3,846,405  | 3,412,837  | 3,698,175  | 3,680,515  | 29,666,196     |
|         |         | KW >           | 0          | 0          | 0          | 0          | 6,667      | 7,698      | 8,510      | 8,078      | 7,966      | 6,082      | 5,961      | 6,195      | 7,145          |
|         |         | Elec Revenue > | \$0.00     | \$0.00     | \$0.00     | \$0.00     | 261,055.32 | 269,612.49 | 308,465.95 | 312,705.67 | 294,275.50 | 258,858.71 | 278,256.89 | 278,079.29 | \$2,261,309.82 |
| 714056  | 324164  | DG15071063     | 41,320     | 41,520     | 34,680     | 33,200     | 35,680     | 30,640     | 32,120     | 36,680     | 32,760     | 31,880     | 33,800     | 38,880     | 423,160        |
|         |         | KW >           | 76         | 83         | 76         | 68         | 65         | 67         | 67         | 71         | 65         | 67         | 69         | 71         | 70             |
|         |         | Elec Revenue > | \$4,088.87 | \$4,174.24 | \$3,464.58 | \$3,273.06 | \$3,463.59 | \$3,073.12 | \$3,168.61 | \$3,556.57 | \$3,198.94 | \$3,153.18 | \$3,337.58 | \$3,742.57 | \$41,674.91    |
| 714057  | 324165  | DD49249861     | 12,483     | 12,031     | 10,874     | 8,530      | 7,624      | 15,637     | 10,215     | 10,565     | 9,781      | 9,833      | 10,128     | 10,617     | 128,328        |
|         |         | KW >           | 20         | 20         | 41         | 16         | 18         | 36         | 21         | 19         | 31         | 34         | 19         | 19         | 25             |
|         |         | Elec Revenue > | \$1,215.74 | \$1,161.02 | \$1,265.83 | \$836.27   | \$784.57   | \$1,588.80 | \$1,013.74 | \$1,016.45 | \$1,083.07 | \$1,120.46 | \$987.10   | \$1,025.66 | \$13,098.71    |
| 714058  | 324166  | DD56554467     | 12,433     | 12,192     | 11,298     | 10,977     | 10,634     | 10,738     | 9,720      | 10,913     | 9,168      | 9,977      | 9,350      | 10,065     | 127,455        |
|         |         | KW >           | 19         | 25         | 18         | 20         | 19         | 19         | 20         | 19         | 20         | 32         | 32         | 18         | 22             |
|         |         | Elec Revenue > | \$1,189.30 | \$1,261.21 | \$1,067.84 | \$1,059.37 | \$1,037.65 | \$1,044.34 | \$959.75   | \$1,046.41 | \$916.68   | \$1,108.29 | \$1,061.10 | \$969.11   | \$12,721.05    |
| 714059  | 324167  | DG28771683     | 11,894     | 12,870     | 8,636      | 9,610      | 10,212     | 11,407     | 10,389     | 10,403     | 10,503     | 10,108     | 10,322     | 11,435     | 127,789        |
|         |         | KW >           | 17         | 18         | 22         | 16         | 18         | 21         | 18         | 22         | 22         | 28         | 24         | 17         | 20             |
|         |         | Elec Revenue > | \$1,133.84 | \$1,232.99 | \$906.04   | \$916.12   | \$982.59   | \$1,116.37 | \$995.91   | \$1,034.00 | \$1,041.95 | \$1,080.70 | \$1,061.37 | \$1,075.58 | \$12,587.46    |
| 714060  | 324168  | DG99700454     | 13,860     | 12,528     | 11,157     | 10,224     | 10,942     | 11,129     | 10,401     | 10,858     | 9,684      | 9,927      | 13,663     | 14,323     | 138,696        |
|         |         | KW >           | 31         | 21         | 19         | 19         | 19         | 19         | 19         | 20         | 18         | 22         | 41         | 41         | 24             |
|         |         | Elec Revenue > | \$1,444.57 | \$1,204.56 | \$1,064.55 | \$999.68   | \$1,056.94 | \$1,063.72 | \$1,007.72 | \$1,048.52 | \$940.87   | \$1,006.28 | \$1,486.40 | \$1,538.43 | \$13,862.24    |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

| Account | Premise | Meter      | Jan                          | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total   |
|---------|---------|------------|------------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|
| 714061  | 324169  | DG99700325 | KWH ><br>11,782              | 10,819     | 11,544     | 11,407     | 12,481     | 11,023     | 11,247     | 11,327     | 10,578     | 10,330     | 10,782     | 12,448     | 135,768     |
|         |         |            | KW ><br>18                   | 21         | 22         | 18         | 23         | 19         | 19         | 23         | 32         | 18         | 19         | 35         | 22          |
|         |         |            | Elec Revenue ><br>\$1,140.22 | \$1,088.39 | \$1,124.09 | \$1,075.48 | \$1,219.58 | \$1,059.15 | \$1,069.83 | \$1,120.71 | \$1,147.36 | \$985.43   | \$1,046.21 | \$1,332.28 | \$13,418.73 |
| 714062  | 324170  | DG99700322 | KWH ><br>12,483              | 12,808     | 11,289     | 11,021     | 11,660     | 10,653     | 10,958     | 11,412     | 10,449     | 10,286     | 9,693      | 12,377     | 135,689     |
|         |         |            | KW ><br>19                   | 20         | 19         | 23         | 23         | 40         | 19         | 21         | 19         | 19         | 19         | 33         | 23          |
|         |         |            | Elec Revenue ><br>\$1,209.00 | \$1,242.11 | \$1,073.41 | \$1,099.84 | \$1,155.44 | \$1,240.46 | \$1,046.27 | \$1,105.18 | \$1,008.97 | \$986.22   | \$961.78   | \$1,309.03 | \$13,445.71 |
| 714063  | 324171  | DA02747874 | KWH ><br>43,920              | 37,520     | 32,320     | 33,920     | 30,000     | 35,080     | 34,400     | 35,840     | 31,160     | 32,640     | 19,240     | 20,160     | 386,200     |
|         |         |            | KW ><br>74                   | 68         | 68         | 64         | 70         | 63         | 67         | 62         | 60         | 68         | 60         | 60         | 65          |
|         |         |            | Elec Revenue ><br>\$4,282.48 | \$3,642.16 | \$3,190.32 | \$3,309.00 | \$3,060.27 | \$3,363.95 | \$3,344.44 | \$3,403.88 | \$3,029.31 | \$3,235.07 | \$2,112.79 | \$2,185.32 | \$38,158.99 |
| 714064  | 324172  | DG99700452 | KWH ><br>10,654              | 11,758     | 12,142     | 10,288     | 8,913      | 10,129     | 9,600      | 10,464     | 9,646      | 8,724      | 9,590      | 10,053     | 121,961     |
|         |         |            | KW ><br>22                   | 22         | 20         | 18         | 21         | 14         | 20         | 19         | 15         | 13         | 19         | 19         |             |
|         |         |            | Elec Revenue ><br>\$1,092.02 | \$1,163.04 | \$1,151.75 | \$984.50   | \$922.22   | \$934.54   | \$950.07   | \$1,009.14 | \$912.71   | \$825.20   | \$951.94   | \$988.45   | \$11,895.58 |
| 714065  | 324173  | DA12994709 | KWH ><br>13,828              | 11,467     | 13,808     | 11,298     | 11,119     | 11,456     | 10,735     | 10,168     | 10,165     | 8,797      | 9,898      | 10,976     | 133,713     |
|         |         |            | KW ><br>18                   | 25         | 22         | 18         | 18         | 39         | 29         | 23         | 43         | 20         | 21         | 25         |             |
|         |         |            | Elec Revenue ><br>\$1,302.83 | \$1,180.07 | \$1,306.36 | \$1,070.24 | \$1,062.92 | \$1,298.06 | \$1,135.96 | \$1,023.99 | \$1,230.72 | \$893.75   | \$994.95   | \$1,114.36 | \$13,614.21 |
| 714066  | 324174  | DG99700323 | KWH ><br>13,074              | 12,387     | 10,796     | 10,967     | 10,060     | 10,922     | 10,376     | 10,874     | 10,113     | 10,242     | 10,565     | 11,075     | 131,451     |
|         |         |            | KW ><br>18                   | 20         | 20         | 17         | 17         | 17         | 23         | 23         | 19         | 18         | 17         | 17         |             |
|         |         |            | Elec Revenue ><br>\$1,251.92 | \$1,185.85 | \$1,051.03 | \$1,043.30 | \$973.68   | \$1,034.34 | \$1,042.25 | \$1,082.27 | \$983.49   | \$990.25   | \$1,008.00 | \$1,048.21 | \$12,694.59 |
| 714067  | 324175  | DG99700324 | KWH ><br>12,459              | 12,557     | 11,026     | 11,085     | 10,132     | 11,025     | 9,950      | 11,084     | 10,567     | 10,558     | 10,849     | 11,373     | 132,665     |
|         |         |            | KW ><br>17                   | 18         | 17         | 19         | 17         | 19         | 26         | 21         | 20         | 18         | 19         | 19         |             |
|         |         |            | Elec Revenue ><br>\$1,188.92 | \$1,181.90 | \$1,037.09 | \$1,064.57 | \$976.20   | \$1,059.64 | \$1,041.92 | \$1,078.90 | \$1,029.97 | \$1,015.14 | \$1,044.18 | \$1,085.52 | \$12,803.95 |
| 714068  | 324176  | DG99700609 | KWH ><br>13,262              | 12,315     | 11,024     | 10,783     | 9,970      | 11,030     | 10,842     | 10,033     | 10,159     | 10,414     | 10,602     | 11,114     | 131,548     |
|         |         |            | KW ><br>17                   | 18         | 18         | 18         | 19         | 22         | 20         | 18         | 29         | 19         | 18         | 18         |             |
|         |         |            | Elec Revenue ><br>\$1,259.42 | \$1,160.43 | \$1,041.74 | \$1,034.61 | \$978.02   | \$1,090.45 | \$1,055.76 | \$988.49   | \$1,087.75 | \$1,017.54 | \$1,021.28 | \$1,061.64 | \$12,777.13 |
| 714069  | 324177  | DG99700510 | KWH ><br>9,512               | 9,247      | 8,166      | 8,425      | 7,929      | 9,092      | 8,632      | 9,036      | 8,415      | 8,111      | 8,490      | 8,900      | 103,955     |
|         |         |            | KW ><br>25                   | 30         | 17         | 20         | 14         | 15         | 17         | 17         | 16         | 23         | 25         | 25         |             |
|         |         |            | Elec Revenue ><br>\$1,028.13 | \$1,043.58 | \$816.67   | \$867.29   | \$777.94   | \$870.52   | \$852.70   | \$880.98   | \$825.96   | \$874.02   | \$925.72   | \$958.04   | \$10,721.55 |
| 714070  | 324178  | DD5654426  | KWH ><br>10,982              | 12,429     | 10,031     | 10,934     | 9,960      | 10,283     | 9,284      | 11,148     | 9,735      | 9,555      | 8,927      | 10,985     | 124,233     |
|         |         |            | KW ><br>36                   | 17         | 18         | 27         | 24         | 17         | 28         | 23         | 19         | 19         | 17         | 17         |             |
|         |         |            | Elec Revenue ><br>\$1,232.74 | \$1,192.09 | \$965.74   | \$1,131.13 | \$1,029.77 | \$988.74   | \$1,011.07 | \$1,102.13 | \$950.52   | \$942.97   | \$880.51   | \$1,037.35 | \$12,464.76 |
| 714071  | 324179  | DA07246466 | KWH ><br>12,016              | 12,498     | 11,302     | 11,107     | 10,642     | 10,388     | 8,776      | 11,566     | 10,005     | 10,051     | 9,645      | 10,232     | 128,228     |
|         |         |            | KW ><br>17                   | 17         | 20         | 41         | 18         | 19         | 29         | 23         | 18         | 29         | 36         | 32         |             |
|         |         |            | Elec Revenue ><br>\$1,137.90 | \$1,201.67 | \$1,086.07 | \$1,286.91 | \$1,026.78 | \$1,011.70 | \$983.69   | \$1,134.77 | \$967.10   | \$1,084.11 | \$1,122.83 | \$1,129.09 | \$13,172.62 |
| 714072  | 324180  | DG93799079 | KWH ><br>40,280              | 32,600     | 32,720     | 29,040     | 30,880     | 27,560     | 33,600     | 32,520     | 32,840     | 29,480     | 30,080     | 31,440     | 383,040     |
|         |         |            | KW ><br>60                   | 57         | 62         | 57         | 61         | 59         | 55         | 62         | 59         | 56         | 58         | 58         |             |
|         |         |            | Elec Revenue ><br>\$3,844.82 | \$3,162.51 | \$3,162.02 | \$2,848.48 | \$3,038.15 | \$2,741.86 | \$3,162.59 | \$3,151.04 | \$3,142.91 | \$2,864.25 | \$2,936.64 | \$3,038.61 | \$37,093.88 |
| 714073  | 324181  | DG99700328 | KWH ><br>11,328              | 11,583     | 11,146     | 9,136      | 10,456     | 9,182      | 10,662     | 9,791      | 10,757     | 8,959      | 10,066     | 10,732     | 123,808     |
|         |         |            | KW ><br>16                   | 18         | 17         | 18         | 41         | 22         | 24         | 18         | 24         | 18         | 18         | 19         |             |
|         |         |            | Elec Revenue ><br>\$1,091.98 | \$1,108.29 | \$1,048.20 | \$907.82   | \$1,237.62 | \$947.58   | \$1,073.11 | \$949.55   | \$1,083.98 | \$891.07   | \$975.41   | \$1,032.96 | \$12,347.57 |
| 714074  | 324182  | DG23524418 | KWH ><br>12,229              | 13,423     | 13,097     | 10,760     | 11,947     | 9,894      | 11,397     | 10,522     | 11,497     | 9,462      | 10,612     | 11,330     | 136,170     |
|         |         |            | KW ><br>20                   | 19         | 38         | 25         | 21         | 20         | 34         | 20         | 28         | 18         | 18         | 18         |             |
|         |         |            | Elec Revenue ><br>\$1,193.21 | \$1,262.63 | \$1,410.47 | \$1,106.33 | \$1,154.94 | \$985.30   | \$1,230.63 | \$1,022.70 | \$1,181.20 | \$923.62   | \$1,022.39 | \$1,070.38 | \$13,563.80 |
| 714075  | 324183  | DG99700428 | KWH ><br>5,846               | 6,511      | 5,315      | 4,342      | 4,597      | 3,892      | 4,435      | 3,830      | 4,288      | 4,006      | 4,732      | 4,891      | 56,685      |
|         |         |            | KW ><br>9                    | 10         | 9          | 13         | 7          | 9          | 12         | 7          | 10         | 8          | 10         | 9          |             |
|         |         |            | Elec Revenue ><br>\$584.24   | \$631.77   | \$515.89   | \$478.67   | \$443.92   | \$405.81   | \$471.16   | \$381.62   | \$442.02   | \$407.65   | \$482.62   | \$480.04   | \$5,725.41  |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

| Account | Premise | Meter          | Jan           | Feb          | Mar          | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct          | Nov          | Dec          | YTD Total     |
|---------|---------|----------------|---------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| 714076  | 324184  | DG35598088     | KWH ><br>KW > | 11,965<br>18 | 9,290<br>20  | 10,118<br>15 | 8,883<br>15  | 9,778<br>27  | 8,787<br>22  | 10,862<br>33 | 11,883<br>24 | 9,670<br>19  | 10,681<br>20 | 11,345<br>20 | 125,334<br>21 |
|         |         | Elec Revenue > | \$1,165.09    | \$944.64     | \$947.37     | \$857.82     | \$1,047.01   | \$918.28     | \$1,275.23   | \$1,055.01   | \$1,176.76   | \$955.99     | \$1,045.89   | \$1,095.18   | \$12,484.27   |
| 714077  | 324185  | DA03705240     | KWH ><br>KW > | 44,840<br>74 | 36,240<br>66 | 34,240<br>63 | 30,920<br>61 | 32,000<br>70 | 28,080<br>61 | 33,320<br>61 | 36,880<br>70 | 32,000<br>66 | 32,160<br>66 | 32,360<br>65 | 407,720<br>65 |
|         |         | Elec Revenue > | \$4,356.63    | \$3,534.49   | \$3,291.76   | \$3,039.37   | \$3,213.94   | \$2,806.30   | \$3,306.18   | \$3,196.91   | \$3,563.86   | \$3,156.30   | \$3,178.57   | \$3,178.24   | \$39,822.55   |
| 714078  | 324186  | DG36058689     | KWH ><br>KW > | 14,049<br>19 | 12,779<br>20 | 12,535<br>18 | 11,433<br>18 | 11,397<br>19 | 9,913<br>21  | 10,382<br>20 | 10,995<br>18 | 10,374<br>25 | 10,561<br>18 | 11,003<br>19 | 136,694<br>19 |
|         |         | Elec Revenue > | \$1,337.22    | \$1,220.43   | \$1,166.14   | \$1,088.46   | \$1,090.93   | \$992.57     | \$1,063.12   | \$1,011.49   | \$1,046.14   | \$1,064.97   | \$1,010.74   | \$1,056.40   | \$13,148.61   |
| 714079  | 324187  | DD56554463     | KWH ><br>KW > | 12,690<br>17 | 11,856<br>22 | 11,417<br>20 | 10,330<br>18 | 10,660<br>18 | 9,632<br>19  | 9,908<br>18  | 10,720<br>18 | 10,237<br>25 | 10,445<br>18 | 10,057<br>18 | 129,151<br>30 |
|         |         | Elec Revenue > | \$1,208.73    | \$1,172.16   | \$1,094.87   | \$995.00     | \$1,027.71   | \$951.43     | \$1,056.70   | \$959.39     | \$1,020.03   | \$1,056.33   | \$1,004.93   | \$1,097.06   | \$12,644.34   |
| 714080  | 324188  | DD39780673     | KWH ><br>KW > | 39,800<br>69 | 34,360<br>70 | 37,000<br>71 | 33,560<br>70 | 33,160<br>68 | 34,360<br>45 | 31,240<br>61 | 36,440<br>64 | 33,280<br>46 | 33,400<br>72 | 35,520<br>69 | 417,200<br>64 |
|         |         | Elec Revenue > | \$3,890.75    | \$3,454.63   | \$3,587.33   | \$3,323.97   | \$3,292.47   | \$3,136.53   | \$3,036.34   | \$3,392.86   | \$3,476.45   | \$3,056.47   | \$3,328.96   | \$3,462.29   | \$40,439.05   |
| 714081  | 324189  | DG99700459     | KWH ><br>KW > | 13,965<br>19 | 13,063<br>21 | 13,339<br>21 | 11,711<br>18 | 11,126<br>18 | 12,142<br>23 | 10,613<br>20 | 11,808<br>20 | 10,830<br>25 | 10,532<br>19 | 11,701<br>20 | 142,506<br>20 |
|         |         | Elec Revenue > | \$1,326.91    | \$1,266.34   | \$1,252.65   | \$1,101.99   | \$1,063.06   | \$1,187.28   | \$1,114.60   | \$1,028.89   | \$1,122.37   | \$1,101.99   | \$1,020.30   | \$1,119.99   | \$13,706.37   |
| 714082  | 324190  | DG99700327     | KWH ><br>KW > | 12,291<br>19 | 12,755<br>20 | 11,323<br>18 | 10,531<br>19 | 12,133<br>19 | 10,352<br>19 | 10,499<br>23 | 10,161<br>18 | 9,983<br>18  | 10,502<br>26 | 12,062<br>22 | 133,545<br>20 |
|         |         | Elec Revenue > | \$1,189.46    | \$1,235.57   | \$1,067.43   | \$1,015.67   | \$1,156.85   | \$1,006.62   | \$1,051.11   | \$1,044.36   | \$977.88     | \$967.46     | \$1,092.07   | \$1,166.96   | \$12,971.44   |
| 714083  | 324191  | DA05507200     | KWH ><br>KW > | 13,760<br>18 | 12,440<br>21 | 13,049<br>20 | 12,327<br>19 | 12,437<br>21 | 11,689<br>22 | 11,682<br>19 | 11,946<br>19 | 11,087<br>18 | 10,751<br>18 | 11,925<br>18 | 143,524<br>19 |
|         |         | Elec Revenue > | \$1,297.91    | \$1,210.71   | \$1,219.26   | \$1,162.54   | \$1,194.40   | \$1,138.37   | \$1,102.63   | \$995.31     | \$1,122.96   | \$1,054.38   | \$1,026.43   | \$1,123.40   | \$13,648.30   |
| 714084  | 324192  | DA05102830     | KWH ><br>KW > | 13,662<br>43 | 10,874<br>18 | 17,322<br>39 | 7,043<br>16  | 10,683<br>20 | 9,596<br>20  | 11,144<br>31 | 10,661<br>30 | 9,954<br>34  | 10,025<br>19 | 10,471<br>24 | 131,284<br>26 |
|         |         | Elec Revenue > | \$1,543.96    | \$1,055.03   | \$1,745.27   | \$723.30     | \$1,051.73   | \$956.25     | \$1,187.13   | \$1,003.49   | \$1,136.96   | \$1,126.48   | \$983.15     | \$1,067.94   | \$13,580.69   |
| 714085  | 324193  | DG99700426     | KWH ><br>KW > | 9,783<br>25  | 11,618<br>20 | 10,782<br>20 | 11,105<br>18 | 10,540<br>25 | 9,809<br>23  | 10,840<br>28 | 8,611<br>21  | 11,796<br>18 | 10,122<br>18 | 10,790<br>20 | 125,838<br>21 |
|         |         | Elec Revenue > | \$1,057.50    | \$1,134.58   | \$1,049.77   | \$1,056.77   | \$1,084.45   | \$1,001.05   | \$1,128.21   | \$915.52     | \$893.47     | \$1,104.94   | \$979.58     | \$1,055.10   | \$12,460.94   |
| 714086  | 324194  | DG23689627     | KWH ><br>KW > | 12,101<br>21 | 11,617<br>16 | 11,529<br>16 | 10,786<br>20 | 10,933<br>20 | 9,580<br>19  | 11,450<br>16 | 9,407<br>16  | 10,008<br>22 | 10,131<br>21 | 10,568<br>15 | 128,204<br>18 |
|         |         | Elec Revenue > | \$1,194.79    | \$1,087.59   | \$1,063.51   | \$1,054.84   | \$1,064.10   | \$960.89     | \$1,062.60   | \$957.27     | \$905.36     | \$1,006.37   | \$1,006.11   | \$989.33     | \$12,342.76   |
| 714087  | 324195  | DG99700458     | KWH ><br>KW > | 13,609<br>27 | 12,220<br>18 | 12,301<br>18 | 11,094<br>19 | 10,849<br>19 | 10,717<br>22 | 11,270<br>27 | 11,119<br>18 | 10,225<br>21 | 10,227<br>18 | 11,302<br>17 | 134,845<br>20 |
|         |         | Elec Revenue > | \$1,364.38    | \$1,170.73   | \$1,141.89   | \$1,062.26   | \$1,050.94   | \$1,067.55   | \$1,149.73   | \$970.96     | \$1,053.95   | \$1,017.27   | \$990.64     | \$1,065.35   | \$13,105.65   |
| 714088  | 324196  | DG99700456     | KWH ><br>KW > | 12,394<br>24 | 11,229<br>18 | 11,555<br>21 | 10,442<br>17 | 10,179<br>17 | 9,813<br>21  | 10,645<br>17 | 11,110<br>19 | 10,183<br>23 | 9,743<br>17  | 10,777<br>19 | 126,950<br>19 |
|         |         | Elec Revenue > | \$1,244.89    | \$1,087.10   | \$1,122.00   | \$995.31     | \$981.07     | \$986.11     | \$1,010.41   | \$876.15     | \$1,063.77   | \$1,032.92   | \$942.64     | \$1,036.24   | \$12,378.61   |
| 715572  | 325488  | DA03573682     | KWH ><br>KW > | 41,240<br>88 | 39,040<br>90 | 36,280<br>84 | 31,160<br>80 | 33,680<br>74 | 27,880<br>62 | 30,280<br>62 | 30,800<br>62 | 30,640<br>72 | 33,680<br>79 | 37,040<br>75 | 405,120<br>74 |
|         |         | Elec Revenue > | \$4,186.19    | \$4,017.08   | \$3,667.03   | \$3,243.81   | \$3,395.49   | \$2,800.64   | \$2,978.00   | \$3,227.00   | \$3,020.33   | \$3,112.28   | \$3,422.34   | \$3,645.56   | \$40,715.75   |
| 715573  | 325489  | DA18997911     | KWH ><br>KW > | 10,678<br>38 | 12,802<br>24 | 11,230<br>18 | 10,517<br>19 | 11,733<br>36 | 10,174<br>24 | 10,266<br>18 | 10,210<br>17 | 9,888<br>17  | 10,524<br>19 | 11,887<br>17 | 130,736<br>23 |
|         |         | Elec Revenue > | \$1,250.93    | \$1,273.55   | \$1,064.22   | \$1,025.64   | \$1,288.07   | \$1,040.58   | \$986.37     | \$1,154.25   | \$976.03     | \$952.66     | \$1,020.02   | \$1,111.17   | \$13,143.49   |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

| Account | Premise | Meter      | Jan            | Feb          | Mar          | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct           | Nov          | Dec          | YTD Total     |             |
|---------|---------|------------|----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|--------------|--------------|---------------|-------------|
| 715574  | 325490  | DG28273066 | KWH ><br>KW >  | 11,634<br>18 | 9,897<br>24  | 11,350<br>19 | 11,794<br>33 | 10,813<br>32 | 10,263<br>17 | 10,322<br>28 | 10,461<br>28 | 10,271<br>17  | 10,613<br>21 | 11,365<br>18 | 130,329<br>23 |             |
|         |         |            | Elec Revenue > | \$1,127.55   | \$1,039.22   | \$1,086.45   | \$1,262.25   | \$1,178.01   | \$982.44     | \$1,093.15   | \$1,104.59   | \$983.11      | \$1,051.34   | \$1,073.24   | \$13,115.31   |             |
| 715575  | 325491  | DG28273067 | KWH ><br>KW >  | 13,248<br>21 | 12,126<br>18 | 13,233<br>18 | 10,553<br>41 | 10,785<br>29 | 10,964<br>21 | 10,693<br>23 | 10,605<br>23 | 11,025<br>31  | 10,811<br>33 | 11,558<br>16 | 137,771<br>24 |             |
|         |         |            | Elec Revenue > | \$1,279.62   | \$1,163.37   | \$1,217.55   | \$1,242.45   | \$1,150.42   | \$1,079.17   | \$1,069.21   | \$1,061.91   | \$1,177.96    | \$1,181.76   | \$1,075.76   | \$13,825.94   |             |
| 715576  | 325492  | DG28273068 | KWH ><br>KW >  | 6,522<br>27  | 12,505<br>21 | 26,133<br>42 | 9,867<br>39  | 12,101<br>32 | 10,567<br>22 | 10,619<br>28 | 10,761<br>28 | 10,761<br>19  | 8,308<br>19  | 14,145<br>19 | 144,024<br>26 |             |
|         |         |            | Elec Revenue > | \$800.01     | \$1,219.96   | \$2,455.79   | \$1,167.85   | \$1,279.83   | \$1,059.14   | \$1,115.62   | \$1,127.53   | \$1,034.26    | \$854.14     | \$1,301.15   | \$14,530.13   |             |
| 715577  | 325493  | DG28273069 | KWH ><br>KW >  | 12,209<br>16 | 13,942<br>31 | 12,560<br>38 | 10,784<br>17 | 10,754<br>18 | 10,372<br>18 | 10,228<br>20 | 10,223<br>23 | 10,661<br>29  | 10,984<br>19 | 11,371<br>19 | 135,686<br>23 |             |
|         |         |            | Elec Revenue > | \$1,156.64   | \$1,437.37   | \$1,367.55   | \$1,023.25   | \$1,033.18   | \$997.52     | \$1,003.41   | \$1,031.93   | \$1,125.57    | \$1,057.03   | \$1,084.12   | \$13,471.56   |             |
| 715578  | 325494  | DG28273062 | KWH ><br>KW >  | 10,434<br>25 | 11,846<br>27 | 12,059<br>18 | 10,698<br>18 | 10,209<br>28 | 10,304<br>20 | 10,316<br>26 | 10,454<br>26 | 10,207<br>23  | 10,529<br>17 | 11,180<br>19 | 129,672<br>22 |             |
|         |         |            | Elec Revenue > | \$1,101.05   | \$1,229.15   | \$1,123.35   | \$1,025.45   | \$1,092.92   | \$1,016.53   | \$1,069.16   | \$1,080.55   | \$1,039.38    | \$1,002.47   | \$1,067.47   | \$12,945.97   |             |
| 715579  | 325495  | DG28273063 | KWH ><br>KW >  | 12,811<br>26 | 11,837<br>19 | 13,186<br>19 | 10,064<br>32 | 11,336<br>18 | 11,239<br>18 | 10,542<br>29 | 11,347<br>18 | 10,365<br>17  | 10,615<br>17 | 12,192<br>19 | 136,616<br>22 |             |
|         |         |            | Elec Revenue > | \$1,306.94   | \$1,147.32   | \$1,220.69   | \$1,113.41   | \$1,081.34   | \$1,064.42   | \$1,114.59   | \$1,067.67   | \$991.96      | \$1,008.77   | \$1,147.32   | \$13,506.18   |             |
| 715580  | 325496  | DG28273185 | KWH ><br>KW >  | 11,792<br>27 | 12,579<br>29 | 11,878<br>20 | 11,264<br>18 | 12,182<br>18 | 10,686<br>23 | 11,157<br>23 | 10,396<br>31 | 10,448<br>21  | 11,163<br>18 | 12,770<br>18 | 137,033<br>22 |             |
|         |         |            | Elec Revenue > | \$1,225.91   | \$1,304.76   | \$1,130.94   | \$1,068.42   | \$1,143.60   | \$1,070.70   | \$1,103.72   | \$1,131.04   | \$1,037.89    | \$1,064.07   | \$1,187.06   | \$13,492.14   |             |
| 715581  | 325497  | DG21490214 | KWH ><br>KW >  | 9,713<br>15  | 12,951<br>20 | 12,421<br>33 | 11,271<br>19 | 12,198<br>25 | 10,924<br>28 | 11,625<br>28 | 10,630<br>19 | 10,410<br>17  | 10,911<br>30 | 12,393<br>18 | 136,498<br>23 |             |
|         |         |            | Elec Revenue > | \$951.72     | \$1,243.14   | \$1,306.10   | \$1,079.59   | \$1,222.61   | \$1,144.56   | \$1,196.36   | \$1,023.56   | \$993.82      | \$1,167.03   | \$1,161.03   | \$13,541.50   |             |
| 715582  | 325498  | DG15003070 | KWH ><br>KW >  | 34,707<br>18 | -7,716<br>26 | 8,758<br>43  | 11,029<br>26 | 10,835<br>22 | 10,848<br>20 | 29,646<br>29 | 28,165<br>29 | -25,880<br>20 | 11,144<br>20 | 11,207<br>18 | 134,317<br>24 |             |
|         |         |            | Elec Revenue > | \$2,983.73   | (\$360.76)   | \$1,124.07   | \$1,134.84   | \$1,079.83   | \$1,056.30   | \$2,600.12   | \$2,487.17   | (\$1,790.90)  | \$1,083.87   | \$1,061.38   | \$13,570.46   |             |
| 715583  | 325499  | DG59962908 | KWH ><br>KW >  | 41,560<br>79 | 37,600<br>70 | 37,360<br>73 | 32,560<br>66 | 32,200<br>64 | 32,760<br>64 | 32,960<br>63 | 35,640<br>63 | 30,600<br>68  | 32,200<br>66 | 38,240<br>75 | 412,840<br>68 |             |
|         |         |            | Elec Revenue > | \$4,112.55   | \$3,731.66   | \$3,636.60   | \$3,198.02   | \$3,180.08   | \$3,203.66   | \$2,903.62   | \$3,188.72   | \$3,397.52    | \$3,065.41   | \$3,181.16   | \$3,736.54    | \$40,535.54 |
| 715584  | 325500  | DD80878884 | KWH ><br>KW >  | 10,710<br>19 | 12,253<br>24 | 12,435<br>25 | 10,568<br>17 | 10,480<br>21 | 11,121<br>17 | 10,128<br>23 | 10,950<br>23 | 9,927<br>26   | 10,010<br>18 | 11,642<br>39 | 130,129<br>22 |             |
|         |         |            | Elec Revenue > | \$1,055.36   | \$1,235.59   | \$1,222.87   | \$998.40     | \$1,040.95   | \$1,052.22   | \$950.84     | \$1,025.06   | \$1,089.09    | \$1,042.35   | \$966.35     | \$1,302.84    | \$12,983.92 |
| 715585  | 325501  | DG28273184 | KWH ><br>KW >  | 11,342<br>17 | 10,015<br>19 | 12,604<br>34 | 10,462<br>18 | 10,057<br>21 | 11,070<br>25 | 9,468<br>19  | 10,601<br>19 | 10,111<br>28  | 10,212<br>21 | 11,662<br>17 | 128,107<br>22 |             |
|         |         |            | Elec Revenue > | \$1,093.47   | \$1,002.92   | \$1,332.37   | \$999.38     | \$1,016.36   | \$1,130.71   | \$1,040.02   | \$930.67     | \$1,018.76    | \$1,072.56   | \$1,014.11   | \$1,085.83    | \$12,737.16 |
| 715586  | 325502  | DG28273182 | KWH ><br>KW >  | 12,746<br>25 | 8,988<br>19  | 17,189<br>41 | 9,783<br>30  | 8,141<br>17  | 8,994<br>15  | 10,367<br>19 | 11,607<br>19 | 10,569<br>23  | 10,612<br>18 | 12,097<br>21 | 131,851<br>23 |             |
|         |         |            | Elec Revenue > | \$1,275.49   | \$921.57     | \$1,756.91   | \$1,066.58   | \$825.90     | \$861.15     | \$1,121.60   | \$1,102.51   | \$1,059.72    | \$1,021.26   | \$1,158.38   | \$13,177.17   |             |
| 715587  | 325503  | DG28273183 | KWH ><br>KW >  | 11,721<br>19 | 10,228<br>22 | 12,850<br>37 | 10,237<br>22 | 9,885<br>42  | 10,844<br>19 | 9,858<br>18  | 11,037<br>19 | 9,839<br>27   | 9,633<br>17  | 12,335<br>20 | 129,233<br>23 |             |
|         |         |            | Elec Revenue > | \$1,134.87   | \$1,051.16   | \$1,379.26   | \$1,023.85   | \$1,207.74   | \$1,051.01   | \$962.44     | \$1,054.09   | \$1,048.05    | \$935.08     | \$1,169.06   | \$13,044.84   |             |
| 715588  | 325504  | DG21003269 | KWH ><br>KW >  | 12,472<br>20 | 12,620<br>28 | 13,469<br>28 | 11,476<br>19 | 11,272<br>24 | 12,111<br>19 | 7,867<br>31  | 8,808<br>19  | 13,544<br>19  | 11,017<br>18 | 12,749<br>19 | 138,795<br>22 |             |
|         |         |            | Elec Revenue > | \$1,204.98   | \$1,307.22   | \$1,338.79   | \$1,088.57   | \$1,135.98   | \$1,143.36   | \$1,200.29   | \$812.89     | \$886.04      | \$1,257.98   | \$1,055.54   | \$1,190.33    | \$13,621.97 |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

| Account | Premise | Meter      | Jan                       | Feb          | Mar          | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct          | Nov          | Dec          | YTD Total     |
|---------|---------|------------|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| 715589  | 325505  | DA16314196 | KWH > 11,286<br>KW > 23   | 12,564<br>23 | 15,940<br>28 | 11,611<br>19 | 11,495<br>23 | 12,124<br>19 | 10,798<br>19 | 10,929<br>30 | 11,815<br>30 | 10,834<br>34 | 10,624<br>18 | 13,417<br>19 | 143,437<br>24 |
|         |         |            | Elec Revenue > \$1,149.70 | \$1,250.09   | \$1,524.47   | \$1,105.43   | \$1,145.69   | \$1,151.69   | \$1,041.12   | \$1,154.37   | \$1,223.38   | \$1,186.28   | \$1,025.29   | \$1,244.89   | \$14,204.40   |
| 715590  | 325506  | DG21003319 | KWH > 10,309<br>KW > 27   | 11,299<br>23 | 6,395<br>34  | 7,593<br>12  | 8,061<br>16  | 8,937<br>13  | 7,960<br>13  | 8,829<br>29  | 9,544<br>29  | 8,075<br>20  | 8,734<br>28  | 8,887<br>18  | 104,713<br>22 |
|         |         |            | Elec Revenue > \$1,104.42 | \$1,147.19   | \$846.77     | \$723.98     | \$809.70     | \$841.99     | \$760.55     | \$982.05     | \$1,037.75   | \$838.16     | \$971.18     | \$886.09     | \$10,949.83   |
| 715591  | 325507  | DG21003318 | KWH > 10,482<br>KW > 19   | 11,749<br>23 | 12,137<br>26 | 10,117<br>19 | 11,179<br>25 | 11,385<br>24 | 10,140<br>24 | 10,369<br>25 | 11,209<br>25 | 10,253<br>23 | 10,374<br>20 | 11,973<br>18 | 131,367<br>23 |
|         |         |            | Elec Revenue > \$1,043.98 | \$1,184.31   | \$1,210.80   | \$982.52     | \$1,140.69   | \$1,140.56   | \$1,036.76   | \$1,068.13   | \$1,133.56   | \$1,038.53   | \$1,017.95   | \$1,125.11   | \$13,122.90   |
| 715592  | 325508  | DG57846955 | KWH > 35,600<br>KW > 66   | 38,400<br>67 | 32,880<br>69 | 34,560<br>65 | 31,200<br>64 | 30,000<br>61 | 33,240<br>62 | 34,640<br>66 | 33,400<br>69 | 33,800<br>66 | 31,400<br>69 | 34,280<br>69 | 403,400<br>66 |
|         |         |            | Elec Revenue > \$3,519.94 | \$3,756.49   | \$3,248.75   | \$3,350.99   | \$3,103.21   | \$2,958.37   | \$3,207.10   | \$3,346.84   | \$3,284.83   | \$3,295.89   | \$3,145.54   | \$3,365.58   | \$39,583.53   |
| 715593  | 325509  | DG17829588 | KWH > 11,053<br>KW > 18   | 9,409<br>21  | 14,492<br>42 | 10,225<br>19 | 9,997<br>20  | 10,483<br>25 | 10,513<br>34 | 10,230<br>18 | 9,713<br>17  | 10,207<br>24 | 9,895<br>18  | 11,132<br>28 | 127,349<br>24 |
|         |         |            | Elec Revenue > \$1,067.98 | \$979.61     | \$1,565.01   | \$991.68     | \$996.78     | \$1,083.84   | \$1,162.86   | \$987.33     | \$938.56     | \$1,044.75   | \$966.53     | \$1,153.26   | \$12,938.19   |
| 715594  | 325510  | DG28273065 | KWH > 11,642<br>KW > 17   | 21,734<br>40 | 11,264<br>18 | 10,350<br>19 | 11,284<br>27 | 11,199<br>20 | 10,780<br>20 | 10,734<br>19 | 10,943<br>19 | 10,161<br>18 | 10,476<br>19 | 10,983<br>19 | 141,560<br>21 |
|         |         |            | Elec Revenue > \$1,123.39 | \$2,140.64   | \$1,063.29   | \$1,013.02   | \$1,167.39   | \$1,086.16   | \$1,044.24   | \$1,028.56   | \$1,050.61   | \$982.77     | \$1,021.89   | \$1,060.65   | \$13,782.61   |
| 715595  | 325511  | DA15269509 | KWH > 11,452<br>KW > 17   | 10,495<br>27 | 23,979<br>34 | 10,336<br>45 | 14,909<br>45 | 10,117<br>19 | 9,944<br>19  | 11,130<br>28 | 9,817<br>17  | 8,927<br>17  | 10,717<br>18 | 10,740<br>20 | 142,563<br>26 |
|         |         |            | Elec Revenue > \$1,105.00 | \$1,120.85   | \$2,216.28   | \$1,265.88   | \$1,633.68   | \$995.25     | \$975.83     | \$1,156.52   | \$946.61     | \$880.09     | \$1,023.32   | \$1,043.09   | \$14,362.40   |
| 715596  | 325512  | DG16690580 | KWH > 11,718<br>KW > 25   | 12,725<br>19 | 11,585<br>22 | 12,228<br>25 | 10,867<br>25 | 10,439<br>23 | 10,970<br>18 | 10,532<br>18 | 11,014<br>32 | 9,984<br>26  | 11,291<br>18 | 9,569<br>17  | 132,922<br>22 |
|         |         |            | Elec Revenue > \$1,200.49 | \$1,220.28   | \$1,133.22   | \$1,218.06   | \$1,119.58   | \$1,056.97   | \$1,041.87   | \$1,010.92   | \$1,188.82   | \$1,051.66   | \$1,070.19   | \$929.78     | \$13,243.84   |
| 715597  | 325513  | DA02748464 | KWH > 44,160<br>KW > 84   | 45,880<br>79 | 41,520<br>80 | 37,520<br>82 | 37,920<br>79 | 34,040<br>80 | 31,280<br>80 | 35,200<br>77 | 32,160<br>71 | 35,440<br>82 | 39,240<br>73 | 42,840<br>82 | 457,200<br>79 |
|         |         |            | Elec Revenue > \$4,347.68 | \$4,519.32   | \$4,036.71   | \$3,731.20   | \$3,779.09   | \$3,475.77   | \$3,235.94   | \$3,502.02   | \$3,207.56   | \$3,582.64   | \$3,797.38   | \$4,165.19   | \$45,380.50   |
| 715598  | 325514  | DG28273160 | KWH > 10,879<br>KW > 20   | 12,549<br>36 | 12,881<br>25 | 10,529<br>20 | 11,030<br>34 | 11,152<br>29 | 10,372<br>18 | 9,390<br>20  | 10,641<br>18 | 10,087<br>20 | 10,386<br>19 | 11,884<br>18 | 131,780<br>23 |
|         |         |            | Elec Revenue > \$1,089.68 | \$1,378.04   | \$1,255.89   | \$1,030.44   | \$1,215.88   | \$1,173.05   | \$985.08     | \$938.43     | \$1,013.93   | \$997.70     | \$1,007.05   | \$1,119.05   | \$13,214.22   |
| 715599  | 325515  | DA15826840 | KWH > 9,909<br>KW > 21    | 13,639<br>29 | 11,186<br>31 | 10,624<br>23 | 10,789<br>23 | 8,852<br>29  | 8,130<br>29  | 11,059<br>29 | 13,027<br>17 | 5,296<br>16  | 9,856<br>21  | 9,513<br>21  | 121,880<br>24 |
|         |         |            | Elec Revenue > \$1,003.58 | \$1,417.79   | \$1,193.31   | \$1,062.29   | \$1,087.85   | \$993.76     | \$931.05     | \$1,157.29   | \$1,188.26   | \$581.12     | \$991.15     | \$962.49     | \$12,569.94   |
| 715600  | 325516  | DG28273161 | KWH > 9,160<br>KW > 20    | 10,521<br>18 | 16,465<br>37 | 11,390<br>23 | 10,306<br>22 | 10,344<br>33 | 9,794<br>17  | 11,177<br>19 | 9,641<br>27  | 8,949<br>21  | 11,626<br>21 | 10,989<br>18 | 130,362<br>23 |
|         |         |            | Elec Revenue > \$950.63   | \$1,040.64   | \$1,658.73   | \$1,123.58   | \$1,045.64   | \$1,146.90   | \$945.09     | \$1,068.52   | \$1,024.53   | \$917.95     | \$1,125.20   | \$1,046.10   | \$13,093.51   |
| 715601  | 325517  | DA08581524 | KWH > 11,115<br>KW > 20   | 9,915<br>22  | 10,288<br>19 | 17,915<br>36 | 10,160<br>19 | 15,639<br>20 | 4,348<br>31  | 10,893<br>31 | 9,866<br>31  | 10,342<br>31 | 10,958<br>31 | 11,177<br>31 | 132,616<br>27 |
|         |         |            | Elec Revenue > \$1,105.25 | \$1,031.51   | \$1,003.88   | \$1,763.84   | \$998.14     | \$1,432.41   | \$656.78     | \$1,162.76   | \$1,083.56   | \$1,122.25   | \$1,174.51   | \$1,188.89   | \$13,723.78   |
| 715602  | 325518  | DG28273174 | KWH > 11,824<br>KW > 13   | 11,922<br>33 | 11,425<br>43 | 10,916<br>18 | 11,080<br>31 | 10,657<br>31 | 9,788<br>31  | 11,233<br>19 | 9,573<br>18  | 10,192<br>18 | 10,612<br>17 | 10,631<br>18 | 129,853<br>24 |
|         |         |            | Elec Revenue > \$1,087.00 | \$1,302.83   | \$1,324.96   | \$1,037.81   | \$1,196.61   | \$1,153.52   | \$1,078.33   | \$1,071.48   | \$929.00     | \$979.91     | \$1,012.12   | \$1,018.48   | \$13,192.05   |
| 715603  | 325519  | DG28273175 | KWH > 10,282<br>KW > 32   | 14,056<br>32 | 8,700<br>28  | 15,041<br>26 | 12,479<br>31 | 11,847<br>32 | 10,881<br>32 | 12,753<br>23 | 11,226<br>20 | 10,894<br>21 | 12,352<br>19 | 12,298<br>27 | 142,789<br>27 |
|         |         |            | Elec Revenue > \$1,141.22 | \$1,469.53   | \$964.64     | \$1,435.29   | \$1,299.20   | \$1,262.11   | \$1,178.21   | \$1,223.74   | \$1,077.56   | \$1,068.61   | \$1,164.93   | \$1,235.28   | \$14,520.32   |

# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

| Account | Premise | Meter      | Jan                       | Feb          | Mar          | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct          | Nov          | Dec          | YTD Total      |        |
|---------|---------|------------|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|----------------|--------|
| 715604  | 325520  | DG28273177 | KWH > 11,516<br>KW > 25   | 11,629<br>19 | 11,086<br>19 | 10,884<br>19 | 0<br>0       | 21,061<br>27 | 9,779<br>27  | 10,829<br>22 | 9,272<br>17  | 9,832<br>18  | 10,447<br>29 | 9,080<br>17  | 125,415<br>22  |        |
|         |         |            | Elec Revenue > \$1,174.68 | \$1,141.94   | \$1,061.19   | \$1,044.75   | \$7.35       | \$1,930.88   | \$1,037.91   | \$1,067.37   | \$903.99     | \$950.42     | \$1,118.97   | \$892.25     | \$12,331.70    |        |
| 715605  | 325521  | DA14726090 | KWH > 8,847<br>KW > 22    | 10,996<br>34 | 5,907<br>23  | 8,084<br>19  | 8,143<br>17  | 8,833<br>34  | 8,652<br>21  | 9,375<br>30  | 9,299<br>14  | 8,787<br>15  | 8,788<br>15  | 9,685<br>15  | 105,396<br>22  |        |
|         |         |            | Elec Revenue > \$943.64   | \$1,225.21   | \$704.69     | \$827.76     | \$823.37     | \$1,044.34   | \$895.97     | \$1,042.46   | \$870.58     | \$840.11     | \$841.70     | \$910.93     | \$10,970.76    |        |
| 715606  | 325522  | DG28273176 | KWH > 9,979<br>KW > 16    | 15,106<br>29 | 12,116<br>20 | 11,261<br>20 | 11,776<br>19 | 11,104<br>25 | 10,550<br>20 | 11,405<br>30 | 10,496<br>18 | 10,280<br>25 | 11,598<br>17 | 11,445<br>19 | 137,116<br>22  |        |
|         |         |            | Elec Revenue > \$964.78   | \$1,530.02   | \$1,150.44   | \$1,081.95   | \$1,127.75   | \$1,131.69   | \$1,026.11   | \$1,198.04   | \$1,008.50   | \$1,064.07   | \$1,090.76   | \$1,089.42   | \$13,463.53    |        |
| 715607  | 325523  | DG21003317 | KWH > 14,246<br>KW > 23   | 7,856<br>23  | 13,126<br>25 | 10,393<br>19 | 7,804<br>18  | 12,727<br>21 | 10,264<br>21 | 10,838<br>18 | 9,942<br>18  | 10,493<br>18 | 10,370<br>41 | 11,932<br>30 | 129,991<br>23  |        |
|         |         |            | Elec Revenue > \$1,377.49 | \$883.85     | \$1,289.80   | \$1,003.07   | \$801.84     | \$1,219.15   | \$1,020.48   | \$1,031.23   | \$962.20     | \$1,005.35   | \$1,226.90   | \$1,238.97   | \$13,060.33    |        |
| 715608  | 325524  | DD56554544 | KWH > 9,180<br>KW > 20    | 13,552<br>17 | 11,252<br>17 | 11,687<br>17 | 10,237<br>20 | 8,082<br>17  | 10,411<br>22 | 13,363<br>22 | 9,954<br>29  | 10,225<br>31 | 10,832<br>29 | 15,927<br>33 | 134,702<br>23  |        |
|         |         |            | Elec Revenue > \$941.94   | \$1,284.79   | \$1,060.97   | \$1,091.29   | \$1,017.99   | \$817.97     | \$1,034.56   | \$1,269.37   | \$1,072.62   | \$1,114.50   | \$1,149.57   | \$1,583.11   | \$13,438.68    |        |
| 715609  | 325525  | DD81623852 | KWH > 11,889<br>KW > 17   | 10,307<br>18 | 10,548<br>17 | 9,669<br>21  | 10,403<br>23 | 9,652<br>18  | 9,608<br>17  | 10,108<br>18 | 9,393<br>17  | 9,146<br>22  | 10,269<br>30 | 9,813<br>42  | 120,805<br>22  |        |
|         |         |            | Elec Revenue > \$1,145.14 | \$1,007.47   | \$1,003.79   | \$972.87     | \$1,061.07   | \$947.01     | \$929.55     | \$972.25     | \$911.63     | \$946.20     | \$1,108.34   | \$1,196.58   | \$12,201.90    |        |
| 715610  | 325526  | DG15003053 | KWH > 13,023<br>KW > 21   | 11,225<br>21 | 11,147<br>19 | 11,190<br>19 | 10,135<br>22 | 9,346<br>19  | 10,258<br>16 | 9,578<br>16  | 9,831<br>16  | 9,496<br>17  | 8,795<br>16  | 8,769<br>15  | 122,793<br>18  |        |
|         |         |            | Elec Revenue > \$1,270.81 | \$1,109.91   | \$1,061.33   | \$1,076.01   | \$1,026.44   | \$933.97     | \$967.18     | \$915.16     | \$935.11     | \$923.37     | \$861.31     | \$842.11     | \$11,932.71    |        |
| 715611  | 325527  | DD81623853 | KWH > 12,006<br>KW > 9    | 12,216<br>18 | 11,588<br>42 | 10,716<br>25 | 11,244<br>24 | 10,319<br>19 | 10,289<br>21 | 10,686<br>19 | 9,983<br>18  | 9,809<br>18  | 11,268<br>17 | 10,556<br>23 | 130,660<br>21  |        |
|         |         |            | Elec Revenue > \$1,157.97 | \$1,166.18   | \$1,329.82   | \$1,093.13   | \$1,132.66   | \$1,009.19   | \$1,022.55   | \$1,029.26   | \$960.81     | \$952.19     | \$1,059.89   | \$1,059.75   | \$12,973.40    |        |
| 715612  | 325528  | DG62786214 | KWH > 8,755<br>KW > 6     | 7,787<br>13  | 8,085<br>12  | 8,576<br>13  | 7,764<br>25  | 11,252<br>33 | 11,779<br>21 | 9,437<br>18  | 10,159<br>19 | 10,002<br>17 | 9,199<br>23  | 9,577<br>17  | 112,372<br>18  |        |
|         |         |            | Elec Revenue > \$841.16   | \$755.24     | \$763.68     | \$808.78     | \$871.14     | \$1,218.66   | \$1,135.08   | \$926.47     | \$985.23     | \$961.41     | \$959.81     | \$929.22     | \$11,155.88    |        |
| 715613  | 325529  | DG28273159 | KWH > 12,881<br>KW > 33   | 10,931<br>18 | 11,501<br>19 | 10,607<br>19 | 11,084<br>22 | 10,328<br>25 | 10,182<br>18 | 10,488<br>19 | 9,812<br>25  | 9,769<br>19  | 11,382<br>21 | 10,932<br>29 | 129,897<br>22  |        |
|         |         |            | Elec Revenue > \$1,381.13 | \$1,054.62   | \$1,089.10   | \$1,024.70   | \$1,099.81   | \$1,064.54   | \$981.34     | \$1,011.75   | \$1,025.72   | \$962.58     | \$1,109.18   | \$1,149.65   | \$12,954.12    |        |
| 715614  | 325530  | DG28273158 | KWH > 11,404<br>KW > 19   | 13,331<br>19 | 11,208<br>24 | 10,141<br>18 | 11,227<br>23 | 11,270<br>24 | 10,121<br>22 | 10,837<br>18 | 10,025<br>18 | 9,840<br>22  | 8,915<br>40  | 10,204<br>32 | 128,523<br>23  |        |
|         |         |            | Elec Revenue > \$1,114.75 | \$1,264.77   | \$1,124.51   | \$982.13     | \$1,124.86   | \$1,126.69   | \$1,010.98   | \$1,033.02   | \$964.63     | \$994.27     | \$1,108.79   | \$1,122.44   | \$12,971.84    |        |
| 715615  | 325531  | DG21003271 | KWH > 11,364<br>KW > 18   | 11,667<br>18 | 12,296<br>31 | 10,830<br>17 | 10,459<br>21 | 10,315<br>23 | 11,127<br>33 | 10,333<br>18 | 9,783<br>18  | 10,744<br>18 | 10,378<br>17 | 11,966<br>19 | 131,262<br>21  |        |
|         |         |            | Elec Revenue > \$1,094.35 | \$1,136.02   | \$1,280.42   | \$1,021.76   | \$1,042.76   | \$1,051.05   | \$1,204.75   | \$993.60     | \$950.71     | \$1,022.66   | \$994.03     | \$1,136.73   | \$12,928.84    |        |
| 715616  | 325532  | DG21003316 | KWH > 8,458<br>KW > 13    | 8,403<br>12  | 9,446<br>27  | 7,875<br>13  | 7,792<br>13  | 8,447<br>18  | 9,671<br>27  | 8,471<br>23  | 8,431<br>13  | 8,776<br>13  | 8,213<br>13  | 12,739<br>33 | 106,722<br>18  |        |
|         |         |            | Elec Revenue > \$816.64   | \$824.51     | \$1,016.44   | \$752.89     | \$756.92     | \$856.34     | \$1,035.77   | \$894.14     | \$790.27     | \$819.59     | \$781.41     | \$1,335.16   | \$10,680.08    |        |
|         |         |            | Total KWH                 | 5,675,080    | 4,711,613    | 4,830,485    | 4,387,922    | 4,402,655    | 5,035,238    | 5,157,815    | 4,873,090    | 4,349,840    | 4,690,450    | 4,762,643    | 57,386,312     |        |
|         |         |            | Combined Average KW       | 8,926        | 8,690        | 8,785        | 7,879        | 8,813        | 9,784        | 10,638       | 10,152       | 10,034       | 8,153        | 8,037        | 8,317          | 15,668 |
|         |         |            | USBC Charge               | \$5,107.55   | \$4,240.49   | \$4,347.47   | \$3,949.14   | \$3,962.35   | \$4,531.71   | \$4,642.03   | \$4,385.75   | \$3,914.86   | \$4,221.41   | \$4,286.39   | \$51,647.67    |        |
|         |         |            | Total Elec Revenue        | 466,172.20   | 387,621.92   | 390,928.52   | 357,123.20   | 362,752.17   | 408,486.55   | 415,146.33   | 395,369.78   | 353,314.87   | 377,301.93   | 384,403.89   | \$4,669,311.47 |        |

## Hensley, Nicole

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**From:** Schoenfeld, Mark  
**Sent:** Thursday, March 01, 2018 7:59 AM  
**To:** Hensley, Nicole  
**Subject:** FW: Self Directed USBC annual report for 2017  
**Attachments:** 20180228121228148.pdf

**From:** Delzer, Wayne [mailto:Wayne.Delzer@va.gov]  
**Sent:** Wednesday, February 28, 2018 1:19 PM  
**To:** Schoenfeld, Mark <mschoenfeld@mt.gov>  
**Cc:** Mahugh, Dale E <Dale.Mahugh@northwestern.com>; Collette, Kailen J. <Kailen.Collette2@va.gov>  
**Subject:** Self Directed USBC annual report for 2017

Mark:

This is the US Veterans Affairs Self Directed USBC annual report for 2017:

2017 funds in the amount of \$5,148.79 were used for energy conservation projects identified as lighting.

2018 funds are reserved for energy conservation projects that are being planned or in process and are identified as energy saving controls and patient friendly energy saving lighting .

Please find attached below, a copy of the 2017 Self Directed USBC Progress Report.

Thank you

Wayne Delzer, P.E.

Energy Engineer

VA Montana Healthcare System  
3687 VETERANS DRIVE  
FACILITIES MGMT (139)  
FT. HARRISON, MT 59636

Phone: (406)447-7290

Email Address: [wayne.delzer@va.gov](mailto:wayne.delzer@va.gov)

Wayne Delzer, P.E.

Energy Engineer

VA Montana Healthcare System  
3687 VETERANS DRIVE  
FACILITIES MGMT (139)

FT. HARRISON, MT 59636

Phone: (406)447-7290

Email Address: [wayne.delzer@va.gov](mailto:wayne.delzer@va.gov)



# Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 1/23/2018

## US DEPT VETERANS AFFAIRS

### Account Summary

|                                 |             |                          |              |
|---------------------------------|-------------|--------------------------|--------------|
| 2016 Carryover Reservation:     | \$6,300.00  | YTD Elec Revenue:        | \$645,927.99 |
| Reservations Made YTD:          | \$0.00      |                          |              |
| 2016 Carryover Payment Request: | \$0.00      | Total Payment Requests:  | \$12,113.00  |
| Payment Requests Made YTD:      | \$12,113.00 | Current Request Balance: | \$598.21     |
| 2016 Carryover USBC Credit:     | \$5,722.99  | Total USBC Credit:       | \$11,938.66  |
| USBC Credit YTD:                | \$6,215.67  | Payments Issued YTD:     | \$11,514.79  |
| Average Monthly Credit Earned:  | \$517.97    | USBC Credit Balance:     | \$423.87     |
|                                 |             | Payment Pending:         | \$423.87     |

| Payment Requests Made |            | Payments Issued |            |
|-----------------------|------------|-----------------|------------|
| Submitted By          | Date       | Amount          | Date       |
| Kailen Collette       | 06/21/2017 | \$6,366.00      | 07/07/2017 |
| Wayne Delzer          | 10/24/2017 | \$5,747.00      | 12/06/2017 |
|                       |            |                 |            |

### Account Detail

| Account | Premise | Meter               | Jan         | Feb         | Mar         | Apr         | May         | Jun         | Jul         | Aug         | Sep         | Oct         | Nov         | Dec         | YTD Total    |
|---------|---------|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| 710151  | 321147  | DS55258634          | 0           | 0           | 0           | 291         | 2,131       | 4,116       | 5,488       | 5,650       | 3,936       | 0           | 0           | 0           | 21,612       |
|         |         | KWH >               | 0           | 0           | 0           | 38          | 38          | 38          | 37          | 38          | 37          | 0           | 0           | 0           | 38           |
|         |         | KW >                | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0            |
|         |         | Elec Revenue >      | \$8.08      | \$7.35      | \$7.35      | \$410.40    | \$554.48    | \$707.27    | \$802.09    | \$824.65    | \$682.51    | \$7.35      | \$7.35      | \$7.35      | \$4,026.23   |
| 710210  | 321199  | DA16344228          | 524,246     | 571,852     | 486,613     | 527,564     | 528,899     | 637,685     | 595,776     | 711,445     | 719,733     | 521,429     | 588,467     | 0           | 6,413,711    |
|         |         | KWH >               | 524,246     | 571,852     | 486,613     | 527,564     | 528,899     | 637,685     | 595,776     | 711,445     | 719,733     | 521,429     | 588,467     | 0           | 6,413,711    |
|         |         | KW >                | 1,003       | 996         | 957         | 957         | 1,179       | 1,248       | 1,335       | 1,315       | 1,302       | 1,266       | 1,108       | 0           | 11,151       |
|         |         | Elec Revenue >      | \$49,504.20 | \$53,135.31 | \$45,041.69 | \$48,294.52 | \$50,619.14 | \$59,243.99 | \$56,510.21 | \$65,134.37 | \$65,698.71 | \$50,430.15 | \$54,319.04 | \$0.00      | \$597,931.33 |
| 710210  | 321199  | DA21629765          | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 470,971      |
|         |         | KWH >               | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 470,971      |
|         |         | KW >                | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 948          |
|         |         | Elec Revenue >      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$0.00      | \$43,970.43 | \$43,970.43  |
|         |         | Total KWH           | 524,246     | 571,852     | 486,613     | 527,855     | 531,030     | 641,801     | 601,266     | 717,095     | 723,669     | 521,429     | 588,467     | 470,971     | 6,906,294    |
|         |         | Combined Average KW | 1,003       | 996         | 957         | 957         | 1,217       | 1,286       | 1,372       | 1,353       | 1,339       | 1,266       | 1,108       | 948         | 2,137        |
|         |         | USBC Charge         | \$471.82    | \$514.67    | \$437.95    | \$475.07    | \$477.93    | \$577.62    | \$541.14    | \$645.39    | \$651.30    | \$469.29    | \$529.62    | \$423.87    | \$6,215.67   |
|         |         | Total Elec Revenue  | \$49,512.28 | \$53,142.66 | \$45,049.04 | \$48,704.92 | \$51,173.62 | \$59,951.26 | \$57,312.30 | \$65,959.02 | \$66,381.22 | \$50,437.50 | \$54,326.39 | \$43,977.78 | \$645,927.99 |



**WESTERN ENERGY COMPANY - *Rosebud Mine***  
A Subsidiary of WESTMORELAND COAL COMPANY

P.O. BOX 99 • 138 ROSEBUD LANE • COLSTRIP, MT 59323  
(406) 748-5100

February 23, 2018

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

RE: Self-Directed USBC Progress Report for 2017 – Western Energy

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2017.

- All the USB payments we received in 2017 were self-directed for an energy efficiency LED lighting project we submitted in previous years.
- During 2017, we received USB payments totaling \$9,826 that was composed of \$4,541.53 in 2017 USB credits and \$5,284.47 in 2016 credits that had been carried over into 2017.

At year-end 2017, we also had a Reservation to carry over all remaining 2017 USB credits of \$47,687.06 into 2018 for a potential project this year.

Please send Confirmation of receipt of this E-mail back to me.

Sincerely,

Gary Parry  
Senior Contract Analyst  
Western Energy

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email: rick.edwards@northwestern.com



# Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

## WESTERN ENERGY

### Account Summary

2016 Carryover Reservation: \$0.00 YTD Elec Revenue: \$5,018,838.26  
 Reservations Made YTD: \$47,700.00

2016 Carryover Payment Request: \$9,826.00 Total Payment Requests: \$9,826.00  
 Payment Requests Made YTD: \$0.00 Current Request Balance: \$0.00

2016 Carryover USBC Credit: \$5,284.47 Total USBC Credit: \$57,513.06  
 USBC Credit YTD: \$52,228.59 Payments Issued YTD: \$9,826.00  
 Average Monthly Credit Earned: \$4,352.38 USBC Credit Balance: \$47,687.06

Payment Pending: \$0.00

| Payment Requests Made Submitted By |        | Payments Issued |            |
|------------------------------------|--------|-----------------|------------|
| Date                               | Amount | Date            | Amount     |
| 04/10/2017                         |        | 04/10/2017      | \$9,826.00 |

### Account Detail

| Account                    | Premise | Meter      | Jan   | Feb   | Mar   | Apr   | May   | Jun   | Jul   | Aug   | Sep   | Oct   | Nov   | Dec   | YTD Total  |
|----------------------------|---------|------------|---|---|---|---|---|---|---|---|---|---|---|---|--|
| 100592                     | 1596    | DA17677687 | 2,852,836<br>KWH ><br>6,543<br>KW >                         | 2,824,243<br>6,920<br>KWH ><br>241,063.64<br>Elec Revenue > | 2,553,253<br>6,441<br>KWH ><br>214,471.48<br>Elec Revenue > | 2,979,012<br>6,622<br>KWH ><br>246,463.70<br>Elec Revenue > | 2,329,524<br>6,052<br>KWH ><br>199,615.82<br>Elec Revenue > | 2,326,634<br>6,480<br>KWH ><br>117,587.06<br>Elec Revenue > | 1,213,412<br>5,793<br>KWH ><br>117,587.06<br>Elec Revenue > | 1,782,642<br>6,078<br>KWH ><br>158,662.26<br>Elec Revenue > | 1,483,198<br>6,039<br>KWH ><br>137,812.72<br>Elec Revenue > | 1,803,161<br>5,598<br>KWH ><br>157,991.20<br>Elec Revenue > | 2,476,993<br>6,467<br>KWH ><br>210,173.49<br>Elec Revenue > | 2,786,905<br>6,246<br>KWH ><br>230,525.58<br>Elec Revenue > | 27,411,813<br>6,273<br>KWH ><br>\$2,357,154.09<br>Elec Revenue > |
| 100726                     | 1687    | DA17677690 | 3,040,847<br>6,479<br>KWH ><br>257,407.21<br>Elec Revenue > | 3,157,555<br>6,285<br>KWH ><br>261,139.19<br>Elec Revenue > | 2,319,944<br>5,948<br>KWH ><br>195,441.25<br>Elec Revenue > | 2,009,766<br>5,689<br>KWH ><br>173,357.20<br>Elec Revenue > | 1,926,890<br>5,806<br>KWH ><br>168,979.22<br>Elec Revenue > | 1,531,600<br>5,443<br>KWH ><br>123,229<br>Elec Revenue >    | 1,820,070<br>5,222<br>KWH ><br>117,338<br>Elec Revenue >    | 2,699,276<br>8,372<br>KWH ><br>117,338<br>Elec Revenue >    | 3,082,714<br>8,203<br>KWH ><br>117,338<br>Elec Revenue >    | 2,072,884<br>5,417<br>KWH ><br>117,338<br>Elec Revenue >    | 2,641,037<br>6,143<br>KWH ><br>117,338<br>Elec Revenue >    | 2,725,903<br>6,181<br>KWH ><br>117,338<br>Elec Revenue >    | 29,028,486<br>6,266<br>KWH ><br>\$2,468,901.47<br>Elec Revenue > |
| 298159                     | 101781  | DA17459013 | 171,119<br>751<br>KWH ><br>\$19,664.05<br>Elec Revenue >    | 169,594<br>713<br>KWH ><br>\$19,191.69<br>Elec Revenue >    | 131,561<br>690<br>KWH ><br>\$15,809.99<br>Elec Revenue >    | 95,407<br>711<br>KWH ><br>\$13,286.65<br>Elec Revenue >     | 83,611<br>674<br>KWH ><br>\$12,109.03<br>Elec Revenue >     | 123,229<br>699<br>KWH ><br>\$15,299.90<br>Elec Revenue >    | 117,338<br>655<br>KWH ><br>\$14,438.60<br>Elec Revenue >    | 139,686<br>666<br>KWH ><br>\$16,230.31<br>Elec Revenue >    | 154,325<br>669<br>KWH ><br>\$17,379.91<br>Elec Revenue >    | 102,729<br>729<br>KWH ><br>\$13,985.75<br>Elec Revenue >    | 135,053<br>717<br>KWH ><br>\$16,365.06<br>Elec Revenue >    | 167,832<br>735<br>KWH ><br>\$19,021.76<br>Elec Revenue >    | 1,591,484<br>701<br>KWH ><br>\$192,782.70<br>Elec Revenue >      |
| <b>Total KWH</b>           |         |            | 6,064,802   | 6,151,392   | 5,004,758   | 5,084,185   | 4,340,025   | 3,981,463   | 3,150,820   | 4,621,604   | 4,720,237   | 3,978,774   | 5,253,083   | 5,680,640   | 58,031,783   |
| <b>Combined Average KW</b> |         |            | 13,773  | 13,918  | 13,079  | 13,022  | 12,532  | 12,622  | 11,670  | 15,116  | 14,911  | 11,744  | 13,327  | 13,162  | 13,240   |
| <b>USBC Charge</b>         |         |            | \$5,458.32  | \$5,536.25  | \$4,504.28  | \$4,575.77  | \$3,906.02  | \$3,583.32  | \$2,835.73  | \$4,159.45  | \$4,248.21  | \$3,580.90  | \$4,727.77  | \$5,112.57  | \$52,228.59  |
| <b>Total Elec Revenue</b>  |         |            | 521,169.11  | 521,394.52  | 425,722.72  | 433,107.55  | 379,777.54  | 353,152.50  | 288,370.28  | 410,271.34  | 416,424.26  | 347,713.03  | 446,290.90  | 475,444.51  | \$5,018,838.26   |

From: Western Sugar Cooperative

320 State Ave

Billings Mt. 59101

February 23, 2018

CERTIFIED MAIL RRR

To: Mark Schoenfeld

Department of Revenue (DOR)

P.O. Box 5805

Helena, MT 59604-5805

Phone: 406-444-0756 FAX: 406-444-7997 Email: mschoenfeld@mt.gov

RE: Self-Directed USBC Progress Report for 2017 – Western Sugar Cooperative

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2017. All the USB payments we received in 2017 were self-directed for an energy efficiency LED lighting project we submitted in previous years. During 2017, we received USB payments totaling \$17,878.02; composed of \$15,310.52 in 2017 USB credits and \$2,567.50 in 2016 credits that had been carried over into 2017.

At year-end 2017, we also had request balance to carry over all remaining 2017 USB credits of \$2,446.38 into 2018.

Sincerely,

Ray Bode

Western Sugar Cooperative

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email: rick.edwards@northwestern.com





**WESTMORELAND RESOURCES, INC. - *Absaloka Mine***  
A Subsidiary of WESTMORELAND COAL COMPANY

February 20, 2018

CERTIFIED MAIL 7014 0510 0002 0777 0205

Mark Schoenfeld  
Department of Revenue (DOR)  
P.O. Box 5805  
Helena, MT 59604-5805  
Phone: 406-444-0756 FAX: 406-444-7997 Email: [mschoenfeld@mt.gov](mailto:mschoenfeld@mt.gov)

RE: 2017 Self-Directed USBC Progress Report – Westmoreland Resources, Inc.

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2017 Self-Directed USBC Report that we receive from NorthWestern Energy that shows our Large Customer USB activities during 2017.

The USB payments we received for 2017 were for energy efficiency projects submitted in previous years. We received USB payments for 2017 totaling \$20,470.85, which was composed of \$18,690.57 in 2017 USB credits and \$1,780.28 in 2016 credits that had been carried over into 2017.

We also have a request balance to carry over all remaining 2017 USB credits at year-end of \$2,219.62 into 2018.

Sincerely,

Connie McNaney  
Westmoreland Resources, Inc.  
Absaloka Mine

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)



## Self-Directed USBC Progress Report for 2017

Prepared by Deborah Singer on 1/19/2018

### WESTMORELAND RESOURCES INC.

#### Account Summary

|                                 |             |                          |                |
|---------------------------------|-------------|--------------------------|----------------|
| 2016 Carryover Reservation:     | \$0.00      | YTD Elec Revenue:        | \$1,891,417.37 |
| Reservations Made YTD:          | \$0.00      |                          |                |
| 2016 Carryover Payment Request: | \$42,025.27 | Total Payment Requests:  | \$42,025.27    |
| Payment Requests Made YTD:      | \$0.00      | Current Request Balance: | \$21,554.42    |
| 2016 Carryover USBC Credit:     | \$1,780.28  | Total USBC Credit:       | \$22,690.47    |
| USBC Credit YTD:                | \$20,910.19 | Payments Issued YTD:     | \$20,470.85    |
| Average Monthly Credit Earned:  | \$1,742.52  | USBC Credit Balance:     | \$2,219.62     |
|                                 |             | Payment Pending:         | \$2,219.62     |

#### Payment Requests Made

| Submitted By | Date | Amount |
|--------------|------|--------|
|              |      |        |

#### Payments Issued

| Date       | Amount     |
|------------|------------|
| 04/10/2017 | \$7,192.09 |
| 07/07/2017 | \$3,694.50 |
| 10/09/2017 | \$5,481.84 |
| 12/06/2017 | \$4,102.42 |

#### Account Detail

| Account | Premise | Meter      |                            | Jan        | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep        | Oct        | Nov        | Dec        | YTD Total      |
|---------|---------|------------|----------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|----------------|
| 1577826 | 1599    | DA18484086 | KWH >                      | 2,339,871  | 1,686,709  | 1,986,548  | 1,724,707  | 1,174,024  | 1,206,264  | 2,259,911  | 2,050,650  | 1,780,371  | 2,309,268  | 2,248,980  | 2,466,239  | 23,233,542     |
|         |         |            | KW >                       | 6,350      | 6,124      | 6,426      | 6,502      | 5,519      | 5,292      | 6,678      | 6,476      | 5,821      | 6,426      | 6,577      | 6,401      | 6,216          |
|         |         |            | Elec Revenue >             | 190,664.86 | 144,480.53 | 160,834.85 | 142,664.34 | 102,615.82 | 103,568.61 | 180,137.12 | 164,944.24 | 144,068.41 | 182,969.45 | 180,282.06 | 194,187.08 | \$1,891,417.37 |
|         |         |            | <b>Total KWH</b>           | 2,339,871  | 1,686,709  | 1,986,548  | 1,724,707  | 1,174,024  | 1,206,264  | 2,259,911  | 2,050,650  | 1,780,371  | 2,309,268  | 2,248,980  | 2,466,239  | 23,233,542     |
|         |         |            | <b>Combined Average KW</b> | 6,350      | 6,124      | 6,426      | 6,502      | 5,519      | 5,292      | 6,678      | 6,476      | 5,821      | 6,426      | 6,577      | 6,401      | 6,216          |
|         |         |            | <b>USBC Charge</b>         | \$2,105.88 | \$1,518.04 | \$1,787.89 | \$1,552.24 | \$1,056.62 | \$1,085.64 | \$2,033.92 | \$1,845.59 | \$1,602.33 | \$2,078.34 | \$2,024.08 | \$2,219.62 | \$20,910.19    |
|         |         |            | <b>Total Elec Revenue</b>  | 190,664.86 | 144,480.53 | 160,834.85 | 142,664.34 | 102,615.82 | 103,568.61 | 180,137.12 | 164,944.24 | 144,068.41 | 182,969.45 | 180,282.06 | 194,187.08 | \$1,891,417.37 |

03/13/2018

Weyerhaeuser NR Company  
MDF  
105 Mills Drive  
Columbia Falls, MT 59912

Large Customer Team  
Department of Revenue  
P. O. Box 5805  
Helena, MT 59604-5808

Rec'd MT DOR

MAR 19 2018

RE: USBP Progress Report for 2017

Weyerhaeuser NR Co. in Montana has recently completed the 2017 USBP program year. This letter will complete the requirement of reporting the USBP (year-end) figures on 2017 USBP credits. We have received the figures from Flathead Electric and you will find that attached. The letter written to FEC was closed by: Jim McKeon, Unit Manager, Miscellaneous Tax Unit.

Sincerely,

Leanne Buzzell  
Accounting Clerk  
Weyerhaeuser NR Co. MDF  
P: 406-892-6147  
e-mail: Leanne.buzzell@weyerhaeuser.com

**Flathead Electric Cooperative, Inc.  
Large Customer USB Information  
January 1, 2017 - December 31, 2017**

|   | 2017 kWh Purchases through Dec 31, 2017 | Conservation investments made through power purchases pursuant to 69-8-402(2)(b) | Low-income energy assistance investments made through power purchases pursuant to 69-8-402(2)(b) | Renewable energy investments made through power purchases pursuant to 69-8-402(2)(b) | Large customer conservation investments made pursuant to 69-8-101 et.seq | Power Supplier Reimbursements/Rebates for Energy Efficiency |
|---|---|--|--|--|--|---|
| <b>FEC Customer</b><br>Weyerhaeuser Company | 214,436,600                             | \$490,017  | \$19,450   | \$145,758  | \$41,864   | (\$41,864)  |



**YELLOWSTONE CLUB**

**Rec'd MT DOR**

**MAR 01 2018**

February 26, 2018

Mr. Mark Schoenfeld  
Department of Revenue (DOR)  
PO Box 5805  
Helena, MT 59604-5805

Re: Self Directed USBC Progress Report 2017

Mr. Schoenfeld:

Attached is the Northwestern Energy 2017 report for the Self Directed USBC program for large customers.

We have been utilizing the program to pay for an engineering analysis to specify filtration equipment for our large electric motors. Ultimately this filtration will be installed and create electrical efficiencies (savings) in our operations through harmonics corrections.

This project has approached its 100% payback and we anticipate providing Northwestern Energy with another like project in the future.

If you have any questions related to this report please feel free to contact us at any time.

Sincerely,

Mike DuCuennois  
Vice President  
Yellowstone Development LLC



# Self-Directed USBC Progress Report for 2017

Prepared by Rick Edwards on 2/6/2018

## YELLOWSTONE DEVELOPMENT

| Account Summary                     |             |
|-------------------------------------|-------------|
| 2016 Carryover Reservation:         | \$3,700.00  |
| Reservations Made YTD:              | \$6,520.00  |
| YTD Elec Revenue: \$1,919,371.57    |             |
| 2016 Carryover Payment Request:     | \$0.00      |
| Payment Requests Made YTD:          | \$16,488.30 |
| Total Payment Requests: \$16,488.30 |             |
| Current Request Balance: \$0.00     |             |
| 2016 Carryover USBC Credit:         | \$3,569.46  |
| USBC Credit YTD:                    | \$19,430.80 |
| Total USBC Credit: \$23,000.26      |             |
| Average Monthly Credit Earned:      | \$1,619.23  |
| Payments Issued YTD: \$16,488.30    |             |
| USBC Credit Balance: \$6,511.96     |             |
| Payment Pending: \$0.00             |             |

| Payment Requests Made |            | Payments Issued |             |
|-----------------------|------------|-----------------|-------------|
| Submitted By          | Date       | Date            | Amount      |
| Mike Ducuennis        | 11/28/2017 | 12/06/2017      | \$16,488.30 |

## Account Detail

| Account | Premise | Meter      | Jan                 | Feb        | Mar        | Apr        | May        | Jun        | Jul        | Aug        | Sep         | Oct        | Nov        | Dec        | YTD Total      |
|---------|---------|------------|---------------------|------------|------------|------------|------------|------------|------------|------------|-------------|------------|------------|------------|----------------|
| 1746115 | 309876  | DA19066008 | 2,953,700           | 2,429,773  | 2,117,858  | 2,006,494  | 1,607,313  | 1,121,345  | 1,212,937  | 1,299,941  | 906,951     | 1,271,126  | 2,068,658  | 2,593,689  | 21,589,785     |
|         |         |            | 8,432               | 7,007      | 7,093      | 6,886      | 5,546      | 3,888      | 3,767      | 3,888      | 3,931       | 5,097      | 6,160      | 7,957      | 5,804          |
|         |         |            | 260,919.52          | 216,014.47 | 188,152.23 | 179,267.09 | 145,257.93 | 100,961.76 | 105,906.54 | 112,601.64 | \$85,660.22 | 117,866.83 | 180,077.35 | 226,685.99 | \$1,919,371.57 |
|         |         |            | Total KWH           | 2,953,700  | 2,429,773  | 2,117,858  | 2,006,494  | 1,607,313  | 1,212,937  | 1,299,941  | 906,951     | 1,271,126  | 2,068,658  | 2,593,689  | 21,589,785     |
|         |         |            | Combined Average KW | 8,432      | 7,007      | 7,093      | 6,886      | 5,546      | 3,888      | 3,767      | 3,931       | 5,097      | 6,160      | 7,957      | 5,804          |
|         |         |            | USBC Charge         | \$2,658.33 | \$2,186.80 | \$1,906.07 | \$1,805.84 | \$1,446.58 | \$1,009.21 | \$1,169.95 | \$816.26    | \$1,144.01 | \$1,861.79 | \$2,334.32 | \$19,430.80    |
|         |         |            | Total Elec Revenue  | 260,919.52 | 216,014.47 | 188,152.23 | 179,267.09 | 145,257.93 | 100,961.76 | 112,601.64 | \$85,660.22 | 117,866.83 | 180,077.35 | 226,685.99 | \$1,919,371.57 |

## FORM B - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER CREDIT REQUEST FORM

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com) FAX: (406) 497-4008

|                      |                                     |
|----------------------|-------------------------------------|
| DATE:                | 11/28/17                            |
| NAME OF BUSINESS:    | Yellowstone Mountain Club           |
| CITY/TOWN LOCATION:  | Big Sky, MT                         |
| CONTACT PERSON:      | Mike DuCuennois                     |
| MAILING ADDRESS:     | PO Box 161097                       |
| CITY, STATE AND ZIP: | Big Sky, MT 59716                   |
| PHONE NUMBER:        | 406-995-7385                        |
| FAX NUMBER:          |                                     |
| E-MAIL ADDRESS       | mike.ducuennois@yellowstoneclub.com |

|                             |             |
|-----------------------------|-------------|
| AMOUNT OF CREDIT REQUESTED: | \$16,488.30 |
|-----------------------------|-------------|

*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

|  |
|--|
| DESCRIPTION OF PROJECT(S) (if more space is needed, please attach):  |
| Harmonics analysis for large motors on property that resulted in sourcing harmonic filtering. We are in the process of finalizing those filters. To date we have installed 3 filters on large motors and the resultant savings is yet to be calculated as these filters are on ski lifts that are not yet running. We are anticipating a significant power factor benefit. |

Estimated Savings in kWh and/or KW for project needs to be provided

|                        |                       |
|------------------------|-----------------------|
| ESTIMATED kWh SAVINGS: | 5% of 9MW 450,000 kWh |
| ESTIMATED KW SAVINGS:  |                       |

*NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.*

LARGE CUSTOMER: Signature: 

|                                   |
|-----------------------------------|
| FOR NORTHWESTERN ENERGY USE ONLY: |
| PROCESSED BY: _____               |
| DISTRIBUTION: _____               |

**Montana Code Annotated 69-8-402. Universal system benefits programs.** Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the Department of Revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form B. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

## FORM A - UNIVERSAL SYSTEMS BENEFITS (USB) LARGE CUSTOMER PROGRESS REPORT FORM OR RESERVATION

Complete and mail to: NorthWestern Energy  
 Attn: Rick Edwards  
 Customer Services Department  
 11 E. Park Street  
 Butte, MT 59701  
 Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
 FAX: (406) 497-4008

|                      |                                     |
|----------------------|-------------------------------------|
| DATE:                | 11/28/17                            |
| NAME OF BUSINESS:    | Yellowstone Club                    |
| CITY/TOWN LOCATION:  | Big Sky, MT                         |
| CONTACT PERSON:      | Mike Ducuennois                     |
| MAILING ADDRESS:     | PO Box 161097                       |
| CITY, STATE AND ZIP: | Big Sky, MT 59716                   |
| PHONE NUMBER:        | 406-995-7385                        |
| FAX NUMBER:          |                                     |
| E-MAIL ADDRESS       | mike.ducuennois@yellowstoneclub.com |

1) BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. (Please provide the estimated completion date and estimated USB credit to be claimed.)

Harmonics Monitoring and Engineering Analysis/ Filters

2) IF YOUR BUSINESS DOES NOT INTEND TO SUBMIT A USB CREDIT CLAIM FOR THE YEAR, DO YOU INTEND TO DIRECT THE FUNDS FOR ANOTHER USE, IF SO PLEASE SPECIFY THE OTHER USE? (This could include donations to qualified energy assistance organizations.)

Filter Procurement. -\$2,298.70 CARRY OVER.

NorthWestern Energy must receive notice of credits to be requested in advance of November 30th of each calendar year. If notice has not been received by November 30th, the Large Customer will not have the opportunity to self-direct USB credits accumulated during the calendar year.

LARGE CUSTOMER:

Signature:



MIKE DUCUENNOIS VP

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: \_\_\_\_\_

DISTRIBUTION: \_\_\_\_\_

Montana Code Annotated 69-8-402. Universal system benefits programs. Large Customers are responsible for all documentation of their claim per Section (9) A large customer filing for a credit shall develop and maintain appropriate documentation to support the large customer's claim for the credit. (10) (b) If a large customer claims a credit that the department of revenue disallows in whole or in part, the large customer is financially responsible for the disallowance. This section of the code also allows the approval of the credits by the utility, but NorthWestern Energy is not approving the use of the credits by accepting this Form A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.



February 13, 2017

Mike DuCuennois  
Yellowstone Development  
PO BOX 161097  
Big Sky, MT 59716

ENERGY

FACILITIES

COMMUNICATIONS

ENVIRONMENTAL

Subject: **144215**      YC HARMONIC ANALYSIS  
January Invoice

Dear Mike:

Enclosed is POWER's invoice 215933 reflecting charges incurred through February 04, 2017 in the amount of \$9,462.19. Following is the status for each project describing the work performed on this invoice and anticipated services for next month.

Below please find a brief recap of the project:

| Budget Summary Task Order 001 |              |
|-------------------------------|--------------|
| Original Budget-Item 0 :      | \$ 22,310.00 |
| Invoiced To Date:             | \$ 7,026.11  |
| Received to Date:             | \$ 7,026.11  |
| Outstanding:                  | \$ -         |
| Invoiced this Period:         | \$ 9,462.19  |
| Total Budget Remaining        | \$ 5,821.70  |

\$ 16,498.30

**Work completed this period:**

- POWER reviewed the existing harmonic reports provided by Northwestern Energy
- POWER reviewed the harmonic data for the various facilities
- POWER delivered a report of our findings including recommendations for further action

**Anticipated work for next period:**

- Provide technical review of harmonic filter vendor submittals/proposals, if requested

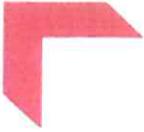
**Trends, Problems and/or Delays:**

- None

If you have any questions regarding the project status report or the invoice, please contact me.

Sincerely,

Scott Olson, P.E.  
Project Manager



October 10, 2017

Mike Ducuennois  
 Vice President  
 Yellowstone Development  
 PO Box 161097  
 Big Sky, MT 59716

Dear Mike:

As we approach the end of 2017, I am writing to remind you of the opportunities your company may have under the Universal System Benefits (USB) large customer program. Your company has been paying and accumulating USB credits throughout 2017. To assist you, enclosed is a year-to-date report showing your USB credits through September 2017, USB requests, year-to-date payments. Here is a summary of the actions you need to take by November 30, 2017 regarding your USB credits.

**REMAINING 2016 USB FUNDS MUST BE REQUESTED BY NOVEMBER 30TH FOR PROJECT OR DONATION**

Your report shows you have **\$3,569.46 in 2016 USB** credits that were carried over into 2017 for a project that must be completed this year. However, we have not received a *Form B* (copy attached) to request these 2016 credits. **You must submit a Form B by November 30, 2017 to utilize these 2016 funds** as you cannot reserve them another year. If you do not have a project, you can also donate these funds to a qualifying energy-related low-income program (i.e. Energy Share) by completing a *Form B* and requesting the funds be donated. If you donate these funds you will receive a USB check, and you will then need to reissue your donation check directly to the qualifying low-income program as a charitable contribution. If you do not request these 2016 funds for a project/donation they will be reallocated year end.

**2017 REMAINING USB CREDITS & PROJECTED CREDITS AT YEAR END NEED PROJECT REQUEST OR RESERVATION TO PROTECT BY NOVEMBER 30, 2017**

Here is the status of your 2017 USB credits and the estimated amount of credits you will have at year end and your options to address these credits. (Note: These totals are rounded to whole numbers.)

|  |                 |
|--|-----------------|
| 2017 USB Credit Balance (thru September)                             | <b>\$14,090</b> |
| 2017 Estimated 4 <sup>th</sup> Quarter USB Credits (Oct-Dec)         | <b>\$ 4,697</b> |
| Less Request Balance Y-T-D   | <b>None</b>     |
| Total Projected 2017 USB Credits Subject to Reallocation at Year End | <b>\$18,787</b> |

**OPTION 1: REQUEST 2017 USB CREDITS FOR ENERGY EFFICIENCY PROJECT.** You may claim your remaining 2017 credits for projects completed in your facility that result in a reduction of electric consumption by **submitting a Form B by November 30, 2017**. (See *Form B* attached.) If the requested credit amount is greater than the amount accumulated to date, we will send a check on a quarterly basis until the request is paid. If you will not be utilizing or reserving your 2017 USB funds, you can also donate these funds to a qualifying energy-related low-income program (i.e. Energy Share) by completing a *Form B* and requesting the 2017 funds be donated on the form. If your project is less than your 2017 estimated year-end balance, you can also protect any remaining balance with a reservation.

**OPTION 2: SUBMIT RESERVATION FOR 2017 CREDITS FOR PROJECT IN 2018.** You may reserve your remaining 2017 USB funds for energy efficiency projects underway that will not be completed this year or projects planned in 2017. **To reserve your 2017 funds for use in 2018, submit the enclosed Form A – Reservation Form by November 30, 2017.** On the Form A indicate: "Reserve all remaining 2017 USB credits at year-end for use in 2018."

Remember, if you fail to complete your requests or reservations for your USB funds by November 30, 2017 they will be reallocated for use on energy-related low-income customers projects at the end of the year. Thank you in advance for your assistance with this matter. If you have any questions please do not hesitate to call me at 406-497-3621.

Sincerely,

Rick Edwards  
 Director, Key Accounts

December 16, 2016

# YELLOWSTONE DEVELOPMENT

---

**Yellowstone Club**  
*Harmonic Analysis*

*Revision A*

**PROJECT NUMBER:**  
144215

**PROJECT CONTACT:**  
Dan Jones, P.E.  
**EMAIL:**  
Dan.Jones@POWERENG.COM  
**PHONE:**  
(208) 288-6440



## HARMONICS ANALYSIS

**PREPARED FOR:**  
YELLOWSTONE DEVELOPMENT

**PREPARED BY:**  
NATHAN WIEDEBACK, P.E. – (208) 288-6104 – NATHAN.WIEDEBACK@POWERENG.COM  
DAN JONES, P.E. – (208) 288-6440 – DAN.JONES@POWERENG.COM  
SIVASIS PANIGRAHI, P.E. – (503) 892-6742 – SIVASIS.PANIGRAHI@POWERENG.COM

| REVISION HISTORY |            |            |         |         |         |                                |
|------------------|------------|------------|---------|---------|---------|--------------------------------|
| REV.             | ISSUE DATE | ISSUED FOR | PREP BY | CHKD BY | APPD BY | NOTES                          |
| A                | 12/16/16   | Appvl      | NJW     | DLJ     | SP      | Issued for review and approval |
|                  |            |            |         |         |         |                                |
|                  |            |            |         |         |         |                                |
|                  |            |            |         |         |         |                                |
|                  |            |            |         |         |         |                                |
|                  |            |            |         |         |         |                                |
|                  |            |            |         |         |         |                                |
|                  |            |            |         |         |         |                                |
|                  |            |            |         |         |         |                                |

**"Issued For" Definitions:**

- "Prelim" means this document is issued for preliminary review, not for implementation
- "Appvl" means this document is issued for review and approval, not for implementation
- "Impl" means this document is issued for implementation
- "Record" means this document is issued after project completion for project file

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## SUMMARY

This report summarizes the site visit and data review performed by POWER Engineers, Inc. (POWER) for Yellowstone Development to investigate harmonics analysis reports done by others and harmonic metering data for the Yellowstone Club. Details on the negative effects of harmonics and recommendations for next steps are provided.

From analyzing the data, POWER found that the Northwestern Energy reports and harmonic metering data provided by Yellowstone Club were in agreement. Current harmonic distortion is well in excess of the limits recommended by IEEE Std 519-2014, Recommended Practices and Requirements for Harmonic Control in Electrical Power Systems. The notable harmonics are at the 5<sup>th</sup>, 7<sup>th</sup> and occasionally the 2<sup>nd</sup>.

Based on the electrical system's distributed topology and the nature of the large harmonic loads, POWER recommends that Yellowstone Club's harmonics be mitigated at their sources. The highest priority loads to be mitigated are the ski lifts as they are the largest harmonic contributors in the system. After mitigating the ski lifts, either through firmware upgrades and/or passive filtering, centrally-placed active filtering may be investigated. The bullet list below is a summary of POWER's recommendations in descending order of priority.

- POWER recommends that Yellowstone Development contact the manufacturer of the ski lift and snow-making pump drives to inquire about possible firmware updates to the drives to reduce harmonic contributions. Firmware upgrades may be a lower cost first step toward bringing harmonic levels within IEEE 519-2014 recommended limits.
- POWER recommends the drive manufacturers be consulted about the availability of passive filter upgrades to the drives. The cost may vary by manufacturer. If the manufacturer does not support filter upgrades, third party filters can be considered.
- If the above approaches do not reduce harmonic content to acceptable levels, one or more centrally-located active filters should be considered. This is likely to be the most expensive option but is expected to provide the greatest reduction in system harmonics.

## ANALYSIS

### Objective

This report details analysis performed by POWER Engineers, Inc. (POWER) for Yellowstone Development to identify next steps in order to mitigate harmonic issues experienced at the Yellowstone Club. Background data on the effect of harmonics on electrical systems is also provided.

### Harmonics Background

Power systems may experience harmonics from a wide variety of system devices. Any device which relies upon conversion of power, either DC to DC, DC to AC, AC to DC, or AC to AC will produce some level of harmonic content. Examples of converters include but are not limited to, arc furnaces, inverters for wind and solar plants, motor drives, consumer electronics with switch-mode power supplies, cyclo-converters, and static VAR systems. Of specific interest to Yellowstone Development are expected to be the motor drives and consumer electronics. Most modern consumer appliances provide some level of harmonic distortion, though the overall magnitude of current is relatively small. Depending on the size of the residence, the sum total of these currents could become excessive. Loads such as heaters or incandescent lights do not provide harmonic distortion.

Harmonics can cause problems for the system owner. These problems may be as simple as not meeting harmonic limit requirements for a connected utility to as damaging as failed equipment. Harmonics can lead to excess heating in equipment and misoperation of devices dependent on a clean waveform for accurate switching leading to equipment damage. IEEE Std 519-2014 provides recommendations for system harmonic limits; utilities will typically adopt the limits provided by this standard for larger customers. Additionally, while the limits are typically thought of as conservative, they provide a good starting point for harmonic control within systems in addition to their use as limits at the point of common coupling.

The IEEE Std 519-2014 limits for voltage and current distortion are given in **Figure 1** and **Figure 2** respectively. To comply with the voltage standard, voltage individual harmonic distortion (VIHD) should be less than 3.0% for each harmonic order and voltage total harmonic distortion (VTHD) should be less than 5.0% for the 24.9 kV system.

**Table 1—Voltage distortion limits**

| Bus voltage $V$ at PCC  | Individual harmonic (%) | Total harmonic distortion THD (%) |
|-------------------------|-------------------------|-----------------------------------|
| $V \leq 1.0$ kV         | 5.0                     | 8.0                               |
| 1 kV < $V \leq 69$ kV   | 3.0                     | 5.0                               |
| 69 kV < $V \leq 161$ kV | 1.5                     | 2.5                               |
| 161 kV < $V$            | 1.0                     | 1.5*                              |

\*High-voltage systems can have up to 2.0% THD where the cause is an HVDC terminal whose effects will have attenuated at points in the network where future users may be connected.

**Figure 1: IEEE Std 519-2014 Voltage Distortion Limits**

Current distortion limits are chosen based off the short circuit to load ratio of the system at the point of common coupling under normal operating conditions. From reports available to POWER, this puts Yellowstone Club in the first bracket in **Figure 2**. To comply with the standard current individual demand distortion (CIDD) for odd harmonics should be less than 4.0% for orders less than 11, less than 2.0% for orders 11 to less than 17, less than 1.5% for orders 17 to less than 23, 0.6% for orders 23 to less than 35, and 0.3% for orders 35 or greater. Even harmonics are limited to 25% of the odd harmonic values within each bracket. Current total demand distortion (CTDD) should be less than 5.0%.

**Table 2—Current distortion limits for systems rated 120 V through 69 kV**

| Maximum harmonic current distortion<br>in percent of $I_L$ |                 |                  |                  |                  |                     |      |
|--|-----------------|------------------|------------------|------------------|---------------------|------|
| Individual harmonic order (odd harmonics) <sup>a, b</sup>  |                 |                  |                  |                  |                     |      |
| $I_{sc}/I_L$   | $3 \leq h < 11$ | $11 \leq h < 17$ | $17 \leq h < 23$ | $23 \leq h < 35$ | $35 \leq h \leq 50$ | TDD  |
| $< 20^c$   | 4.0             | 2.0              | 1.5              | 0.6              | 0.3                 | 5.0  |
| $20 < 50$  | 7.0             | 3.5              | 2.5              | 1.0              | 0.5                 | 8.0  |
| $50 < 100$   | 10.0            | 4.5              | 4.0              | 1.5              | 0.7                 | 12.0 |
| $100 < 1000$   | 12.0            | 5.5              | 5.0              | 2.0              | 1.0                 | 15.0 |
| $> 1000$   | 15.0            | 7.0              | 6.0              | 2.5              | 1.4                 | 20.0 |

<sup>a</sup>Even harmonics are limited to 25% of the odd harmonic limits above.

<sup>b</sup>Current distortions that result in a dc offset, e.g., half-wave converters, are not allowed.

<sup>c</sup>All power generation equipment is limited to these values of current distortion, regardless of actual  $I_{sc}/I_L$ .

where

$I_{sc}$  = maximum short-circuit current at PCC

$I_L$  = maximum demand load current (fundamental frequency component)  
at the PCC under normal load operating conditions

**Figure 2: IEEE Std 519-2014 Current Distortion Limits**

## Report and Meter Data Analysis

POWER received and reviewed the three reports listed below. A summary of each report is provided.

### NorthWestern Energy – Lone Mountain Primary Meter & Power Quality Analysis, 12/14/2015

Three PMI Revolution meters were installed by NorthWestern Energy. Meters were installed at the NorthWestern Energy Point of Common Coupling (PCC), at the bottom of the ski hill, and near the end of Yellowstone Club line. The meter at the PCC was used to determine compliance with IEEE Std 519.

Metering found Total Demand Distortion (TDD) to be double the recommended current limit for short time duration. Excessive 2<sup>nd</sup> and 5<sup>th</sup> current harmonics were also seen. Voltage harmonics were generally within limit. The meters were limited to monitoring the 1<sup>st</sup> through the 15<sup>th</sup> harmonics.

### NorthWestern Energy – Yellowstone Club Harmonic Analysis, Date Unknown, Likely after 12/14/2015

The report details the results of harmonic metering at multiple ski lifts. The report found current TDD well in excess of IEEE 519 limits, notably 5<sup>th</sup> and 7<sup>th</sup>, with occasional problems with the 2<sup>nd</sup>. Current distortion sits around 50% with voltage distortion sitting at around 5% typical. The report suggests the ski lift VFD manufacturer be consulted in order to provide manufacturer harmonic filtering.

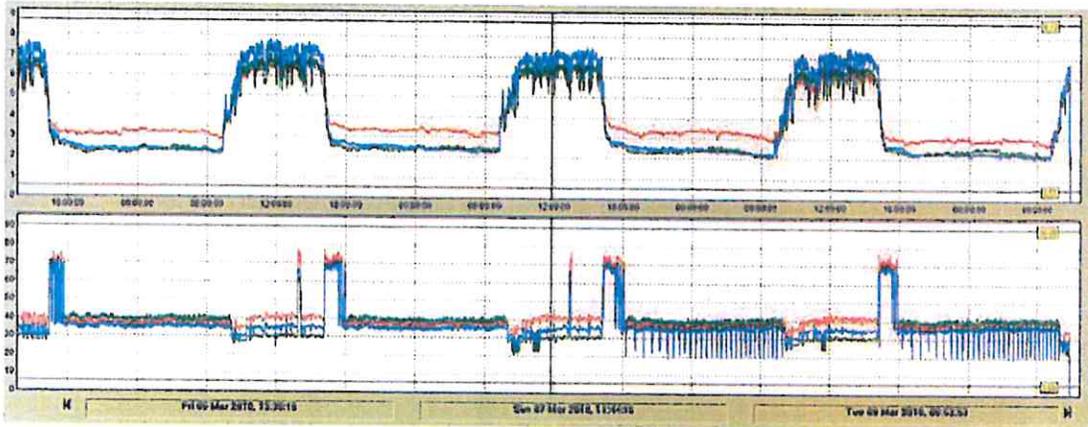
### HDR – Yellowstone Club – Long Range System Study 2008, February 2008

Report makes mention of a 2008 or prior NorthWestern energy harmonic study. Judging by the date it doesn't appear we have this study. Report did not review this harmonic study, but the report mentions that field personnel (presumably YC) mentioned that filters were recommended. Report mentions ski lifts have DC motors run off rectifiers. Report mentions an alternative improvement that would put the ski lift motors on a separate feed from the rest of the resort. This may be a viable alternative but will still likely require harmonic load filtering.

### Yellowstone Club Harmonic Meter Data

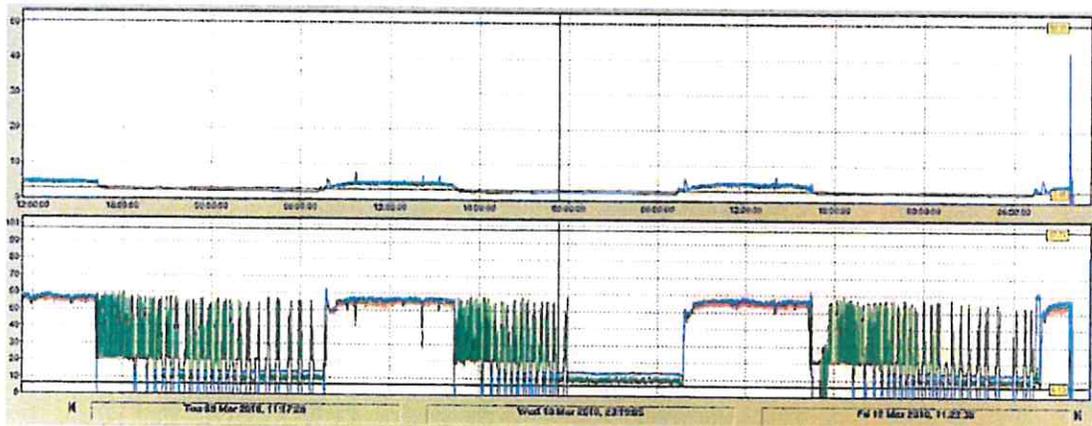
POWER reviewed multiple harmonic data sets gathered by Yellowstone Club personnel. The data POWER reviewed agrees with NorthWestern Energy's findings. CTDD is seen at up to 80% at drive terminals. VTHD sits closer to 3-8% typically. It appears as though the ski lift drives have no filtering and produce excessive 5<sup>th</sup> and 7<sup>th</sup> harmonics, which agrees with NorthWestern Energy's findings. Individual residences provide some level of phase harmonic content though, relative to the ski lifts, this contribution is smaller. For neutral harmonic distortion, the residences produce a significant amount of harmonic content, though in terms of relative magnitude the amount is small. A couple examples of these graphs are provided for reference. In the plots below, voltage THD is provided on the top graph and current THD is provided on the bottom graph. Red, green and blue traces represent phase values, while the pink trace represents the neutral value. The Y axis is the % VTHD and % CTDD from top to bottom. The X axis is the time of day.

The first of the plots presented here is of the Hideaway Lift data file 3. In **Figure 3**, harmonic voltage distortion sits at about 2 to 7%. Harmonic current distortion goes as high as about 75%. Phase currents are on the order of 30 to 40 A.



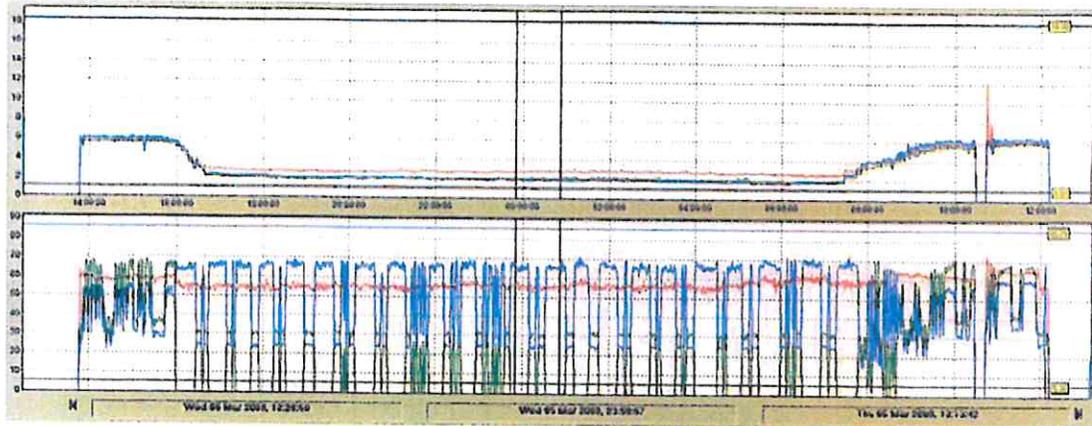
**Figure 3: Hideaway Lift – Harmonic Voltage and Current Distortion**

The second of the plots presented here is of the Andesite Lift. In **Figure 4** harmonic voltage distortion sits at about 4 to 6%. Harmonic current distortion goes above 60%. Phase currents are up to 200 A.



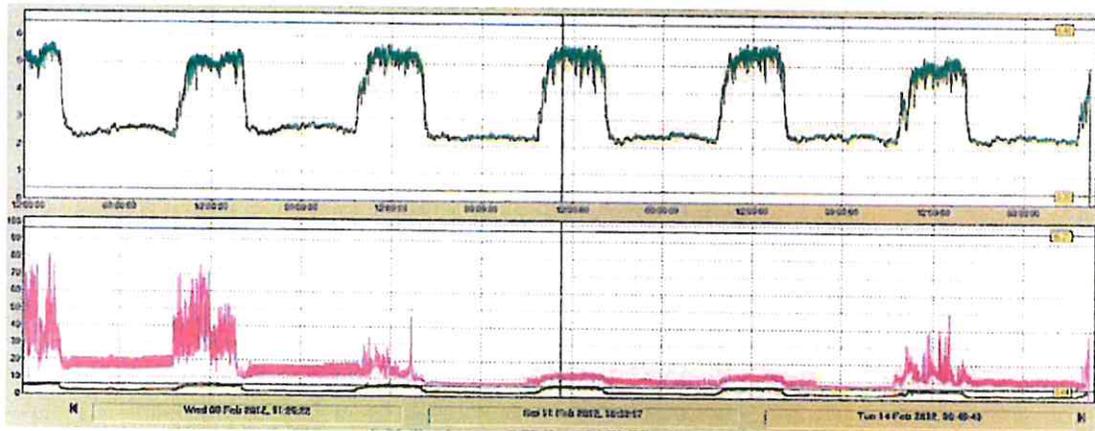
**Figure 4: Andesite Ski Lift – Harmonic Voltage and Current Distortion**

The third of the plots presented here is of the Service Lifts. In **Figure 5** harmonic voltage distortion sits at about 2 to 6%. Harmonic current distortion goes as high as 65 to 70%. Phase currents are on the order of 20A but spikes to 120 A.



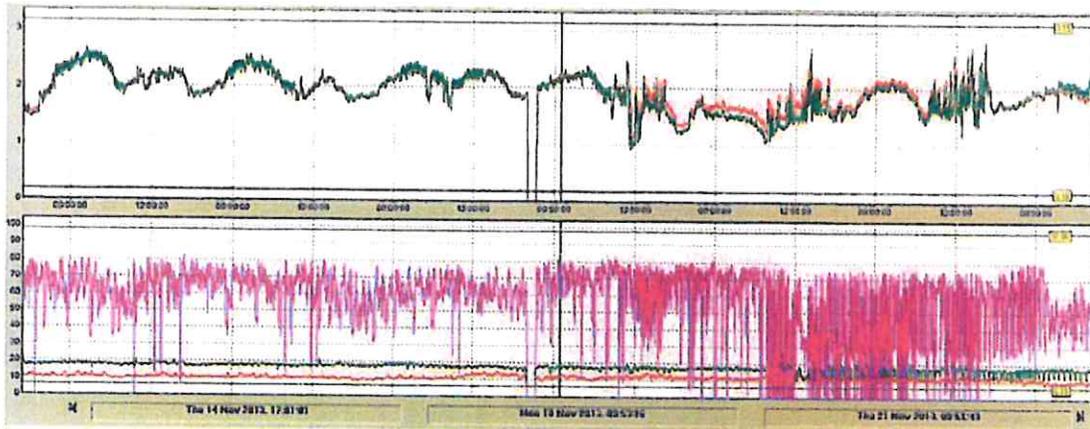
**Figure 5: Service Lifts – Harmonic Voltage and Current Distortion**

Figure 6 shows LOT 101 has harmonic voltage distortion sitting at about 2.0 to 5.5%. Harmonic current distortion goes as high as 80%. Even though distortion is very high on the neutral probe, the relative amount of current is small, only about 15 to 25% of the phase current at 120 V.



**Figure 6: LOT 101 – Harmonic Voltage and Current Distortion**

Figure 7 shows LOT 334 harmonic voltage distortion sitting at about 1.5 to 2.5%. Harmonic current distortion goes as high as 80%. Even though distortion is very high on the neutral probe, the relative amount of current is small, only about 12 to 25% of the phase current at 120 V.



**Figure 7: LOT 334 – Harmonic Voltage and Current Distortion**

The residences, while providing harmonic content, are difficult to reduce overall contribution. Active filters placed in the relative area would be able to reduce harmonics, but may not be cost effective. From analyzing the data, POWER found that the Northwestern Energy reports and harmonic metering data were in agreement. Current harmonic distortion is well in excess of the recommended IEEE Std 519-2014 limits with notable harmonics at the 5<sup>th</sup>, 7<sup>th</sup> and occasionally the 2<sup>nd</sup>.

## CONCLUSIONS

From analyzing the data, POWER found that the Northwestern Energy reports and harmonic metering data provided by Yellowstone Club were in agreement. Current harmonic distortion is well in excess of the limits recommended by IEEE Std 519-2014, Recommended Practices and Requirements for Harmonic Control in Electrical Power Systems. The notable harmonics are at the 5<sup>th</sup>, 7<sup>th</sup> and occasionally the 2<sup>nd</sup>.

Based on the electrical system's distributed topology and the nature of the large harmonic loads, POWER recommends that Yellowstone Club's harmonics be mitigated at their sources. The highest priority loads to be mitigated are the ski lifts as they are the largest harmonic contributors in the system. After mitigating the ski lifts, either through firmware upgrades and/or passive filtering, centrally-placed active filtering may be investigated. The bullet list below is a summary of POWER's recommendations in descending order of priority.

- POWER recommends that Yellowstone Development contact the manufacturer of the ski lift and snow-making pump drives to inquire about possible firmware updates to the drives to reduce harmonic contributions. Firmware upgrades may be a lower cost first step toward bringing harmonic levels within IEEE 519-2014 recommended limits.
- POWER recommends the drive manufacturers be consulted about the availability of passive filter upgrades to the drives. The cost may vary by manufacturer. If the manufacturer does not support filter upgrades, third party filters can be considered.

- If the above approaches do not reduce harmonic content to acceptable levels, one or more centrally-located active filters should be considered. This is likely to be the most expensive option but is expected to provide the greatest reduction in system harmonics.