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

Rec'd MT DOR
FEB 26 2019

Date: 2/22/2019

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 2018 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 2018 from NorthWestern Energy is attached for your reference. In 2018 American Chemet requested an additional $55,883.00 be added to our 2017 Carryover Request of $19,210.96, totaling $75,093.96 qualifying expenditures for 2018. After NorthWestern Energy's 2018 payments of $9,286.48 in credits, American Chemet has a Current Request Balance of $65,807.48 ending 2018.

In 2018, American Chemet was charged $9221.52 in USBC funds, added to 2017 Carryover Credit $749.47, it totals $9,970.99. With the $9,286.48 in 2018 payments made, it leaves a year ending Credit Balance of $684.51

American Chemet Corp. submitted a new claim in 2018 for USBC related expenditures and a copy of our Form B 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 2018.

Best Regards,

Jeff Poole

Jeff Poole
American Chemet Corporation

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

AMERICAN CHEMET

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$1,009,496.19
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$19,210.96	Total Payment Requests:	$75,093.96
Payment Requests Made YTD:	$55,883.00	Current Request Balance:	$65,807.48
2017 Carryover USBC Credit:	$749.47	Total USBC Credit:	$9,970.99
USBC Credit YTD:	$9,221.52	Payments Issued YTD:	$9,286.48
Average Monthly Credit Earned:	$768.46	USBC Credit Balance:	$684.51
		Payment Pending:	$684.51

Payment Requests Made

Submitted By	Date	Amount
Jeff Poole	11/30/2018	$55,883.00

Payments Issued

Date	Amount
04/05/2018	$3,154.88
07/11/2018	$2,481.31
10/03/2018	$2,162.10
12/10/2018	$1,488.19

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
133450	20125	DA16344230	KWH >	841,469	951,560	879,655	1,004,052	874,998	877,954	764,922	794,400	843,015	812,607	840,936	760,570	10,246,138
			KW >	1,919	1,838	1,942	1,834	1,830	1,732	1,632	1,695	1,765	1,763	1,895	1,719	1,797
			Elec Revenue >	$84,812.93	$92,743.42	$87,755.50	$97,223.39	$86,709.85	$85,932.80	$75,915.40	$77,029.95	$81,753.89	$79,979.86	$83,234.53	$75,655.39	$1,008,746.91
			Total KWH	841,469	951,560	879,655	1,004,052	874,998	877,954	764,922	794,400	843,015	812,607	840,936	760,570	10,246,138
			Combined Average KW	1,919	1,838	1,942	1,834	1,830	1,732	1,632	1,695	1,765	1,763	1,895	1,719	1,797
			USBC Charge	$757.32	$856.40	$791.69	$903.65	$787.50	$790.16	$688.43	$714.96	$758.71	$731.35	$756.84	$684.51	$9,221.52
			Total Elec Revenue	$84,812.93	$92,743.42	$87,755.50	$97,223.39	$86,709.85	$85,932.80	$75,915.40	$77,029.95	$81,753.89	$79,979.86	$83,234.53	$75,655.39	$1,008,746.91

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 FAX: (406) 497-4008

DATE:	11/30/2018
NAME OF BUSINESS:	**American Chemet Corp.**
CITY/TOWN LOCATION:	East Helena
CONTACT PERSON:	Jeff Poole
MAILING ADDDRESS:	PO Box 1160
CITY, STATE AND ZIP:	East Helena, Montana 59635
PHONE NUMBER:	(406) 459-2070
FAX NUMBER:	
E-MAIL ADDRESS	jpoole@chemet.com

AMOUNT OF CREDIT REQUESTED:	**$ 55,883. After rebate of $ 12,740.**

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 note attached paper.

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

ESTIMATED kWh SAVINGS:	156,489 kWH Annually
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: Jeff Poole

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 Energy
Delivering a Bright Future

11 FEB 2019

USBC Annual Report – Year 2018

RE: USBC Annual Report

Ash Grove, operating at Clancy, MT reports there was a significant 2017 USBC Payment Pending Balance. Listed below is a summary of our Credits including Payments Issued and Pending Balance remaining.

Payment Pending Balance of -	$3,034.95
Our USBC Credit YTD of -	$27,512.08
For a Total USBC Credit of -	$30,547.03
YTD Payments Received -	$27,632.47
With a USCB Credit Balance -	$3,034.95

A significant effect of our efforts is reflected in reduced Kilowatt consumption with LED lighting of 198 KWH's this year as a result of our 2017 efforts.

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.

Included with this report is FORM B for our 2018 efforts

Sincerely,

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

FORM B

NorthWestern Energy

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
FAX: (406) 497-4034

DATE: Feb-11-2019
NAME OF BUSINESS: Ash Grove Cement
CITY/TOWN LOCATION: Montana City
CONTACT PERSON: Clifton Strang
MAILING ADDRESS: 100 State Hwy 518
CITY, STATE AND ZIP: Clancy MT 59634-9665

PHONE NUMBER: (406) 444-7109
FAX NUMBER: (406)442-9264
E-MAIL ADDRESS Clifton.Strang@Ashgrove.com

*AMOUNT OF CREDIT REQUESTED: $404,095.60

*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 Conversion = 144.95 KWh Savings
Secondary Crusher Motor UPgrade = 40.44 KWh
Cyclone Delete = See Attched "AGEM SUCCESS STORIES" 829.21 KWh

ESTIMATED kWh SAVINGS: Total KWh = 1,014.6
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:

AGEM SUCCESS STORIES

Montana City Kiln Feed End Modifications

Chris Hines

Colby Thomas

Ray Murphy

Kevin Grotheer

Spencer Ready

ASH GROVE

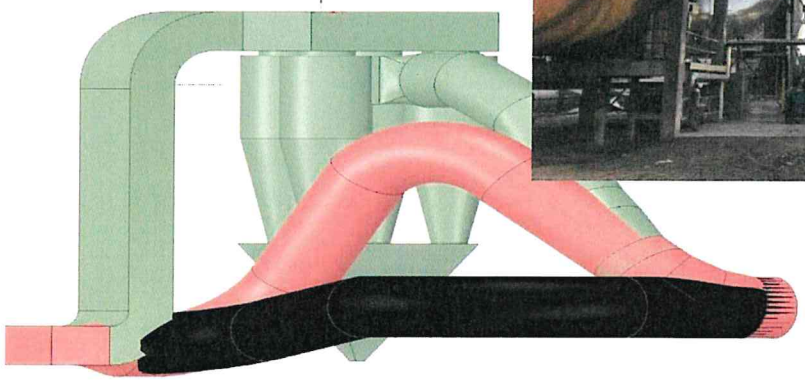
11011 Cody Street
Overland Park, Kansas
(913) 451-8900
www.ashgrove.com

The cyclones at Montana City were installed in 2012 as part of the kiln baghouse project. They were designed to collect coarse dust from the kiln flue gas and return a portion back to the kiln through the dust scoops. With the installation of the SNCR system and injection of ammonia at the dust scoops, the coarse dust is no longer returned to the kiln and the cyclones no longer served their intended purpose. They were essentially just a large pressure drop for the kiln line.

The plant team, including Chris Hines, Colby Thomas and Ray Murphy, decided to bypass the cyclones with a new duct. Kevin Grotheer from the Ash Grove corporate office modeled various duct designs in-house with Ansys Fluent, a computational fluid dynamics (CFD) software package. The diagram below shows the options considered in the CFD software. Through the use of the software and consultation with the plant, a grasshopper duct design was chosen.

Chris, Colby and Ray worked diligently with Northside Welding to design a grasshopper duct that would fit in the existing layout with minimal movement of structural supports and conduit. The project was completed during the 2018 winter outage and the kiln restarted in March without a hitch. Along with the cyclone removal, the plant replaced much of the conveying equipment, including 2 incline screw conveyors. Spencer Ready helped oversee replacing the rotary feeder/blower system with a dense phase conveying system for moving kiln dust.

The result of the project has been a reduction of 110 kW on the system – 13 kW from removal of equipment, 40 kW from the dense phase conveying system and 57 kW removing pressure drop (a decrease of over 50 RPM on the ID Fan). This corresponds to $36,900 in annual power savings. More runtime is needed to estimate the maintenance cost savings coming from equipment replacement.



Secondary Crusher Motor

Efficiency Comparison Calculator

Operating Hrs/ year	2116.7
Energy Cost	4.45
HP	500
RPM	1190

(Cents per KW Hour)

Motor #1 (Premium Efficiency)

Motor Cost

Description: Toshiba High Efficiency - 5811

Eff'y @ F/L (%)	94.4%
Eff'y @ 3/4 (%)	94.3%
Eff'y @ 1/2 (%)	92.8%

Motor #2 (Comparison Motor)

Motor Cost

Description: G.E. Custon 800 Series - 8211

Eff'y @ F/L (%)	90.0%
Eff'y @ 3/4 (%)	89.4%
Eff'y @ 1/2 (%)	88.9%

Delta Cost

Motor #1		Motor #2	
Energy cost @ F/L	$37,218	Energy cost @ F/L	$39,038
Energy cost @ 3/4	$27,943	Energy cost @ 3/4	$29,475
Energy cost @ 1/2	$18,930	Energy cost @ 1/2	$19,760

Difference in Operating Costs per year
$1,820
$1,532
$830

Energy Savings versus Years of operation

1	2	3	4	5
$1,820	$3,640	$5,460	$7,280	$9,100
$1,532	$3,064	$4,596	$6,128	$7,660
$830	$1,660	$2,490	$3,320	$4,150

6	7	8	9	10
$10,920	$12,740	$14,560	$16,380	$18,200
$9,192	$10,724	$12,256	$13,788	$15,320
$4,980	$5,810	$6,640	$7,470	$8,300

NorthWestern Energy
Delivering a Bright Future

February 4, 2019

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

RE: "Self-Directed USBC Progress Report for 2018" for Department of Revenue Annual Report

Dear Dick:

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2018, and I am contacting you regarding your 2018 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end *"Self-Directed USBC Progress Report for 2018"* showing a summary of your USB activity during 2018 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 2018 USB credits into 2019. If your final progress report shows a "Payment Pending", it reflects your December 2018 USB credits that were carried over into 2019, 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 2018*" 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, 2019. 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 2018 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 2018.**
- ✓ **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, 2019** to the address below.

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

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

Sincerely,

Dale

Dale Mahugh
Specialist, Key Accounts

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

ASH GROVE CEMENT

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$218,942.52
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$44,792.96	Total Payment Requests:	$44,792.96
Payment Requests Made YTD:	$0.00	Current Request Balance:	$17,160.49
2017 Carryover USBC Credit:	$3,155.34	Total USBC Credit:	$30,667.42
USBC Credit YTD:	$27,512.08	Payments Issued YTD:	$27,632.47
Average Monthly Credit Earned:	$2,292.67	USBC Credit Balance:	$3,034.95
		Payment Pending:	$3,034.95

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$5,147.72
07/11/2018	$7,701.60
10/03/2018	$8,247.65
12/10/2018	$6,535.50

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100043	1050	DA15843429	KWH >	1,702,532	272,912	238,311	2,598,519	2,743,399	3,215,409	2,882,350	2,739,424	3,542,279	3,615,806	3,645,858	3,372,162	30,568,961
			KW >	5,797	872	578	5,797	5,564	5,693	5,590	5,832	5,762	5,745	5,676	5,797	4,892
			Elec Revenue >	$16,480.76	$2,682.39	$2,051.13	$19,947.37	$20,155.29	$22,263.65	$20,756.24	$20,478.99	$23,552.77	$23,816.50	$23,823.79	$22,933.64	$218,942.52
			Total KWH	1,702,532	272,912	238,311	2,598,519	2,743,399	3,215,409	2,882,350	2,739,424	3,542,279	3,615,806	3,645,858	3,372,162	30,568,961
			Combined Average KW	5,797	872	578	5,797	5,564	5,693	5,590	5,832	5,762	5,745	5,676	5,797	4,892
			USBC Charge	$1,532.28	$245.62	$214.48	$2,338.67	$2,469.06	$2,893.87	$2,594.12	$2,465.48	$3,188.05	$3,254.23	$3,281.27	$3,034.95	$27,512.08
			Total Elec Revenue	$16,480.76	$2,682.39	$2,051.13	$19,947.37	$20,155.29	$22,263.65	$20,756.24	$20,478.99	$23,552.77	$23,816.50	$23,823.79	$22,933.64	$218,942.52

ASPENAIR

February 19, 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

Self-Directed USBC Progress Report for 2018 – Aspen Air

Dear Ms. Hensley:

Please find an enclosed copy of our 2018 USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018.

In 2018, we received $78,694.92 in USB credit payments. These payments were composed of $37,058.29 in 2017 USB credits that were carried over into 2018 and $41,636.63 in 2018 USB credits.

These USB payments were for self-directed five energy efficient projects submitted to NorthWestern Energy in 2018, and copies of the Form B's for these projects are attached.

At year-end 2018, we had a request balance, which covers the $3,304.27 in remaining 2018 USB credits.

Sincerely,

Brad Cowen
Plant Manager
Aspen Air

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 2/14/2019

ASPEN AIR

Account Summary

2017 Carryover Reservation:	$37,100.00	YTD Elec Revenue:	$170,320.68
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$198,381.58
Payment Requests Made YTD:	$198,381.58	Current Request Balance:	$119,686.66
2017 Carryover USBC Credit:	$37,058.29	Total USBC Credit:	$81,999.19
USBC Credit YTD:	$44,940.90	Payments Issued YTD:	$78,694.92
Average Monthly Credit Earned:	$3,745.08	USBC Credit Balance:	$3,304.27
		Payment Pending:	$3,304.27

Payment Requests Made

Submitted By	Date	Amount
Bradley Cowan	08/08/2018	$12,962.50
Brad Cowan	08/16/2018	$9,897.50
Brad Cowan	08/16/2018	$3,605.00
Brad Cowan	09/08/2018	$155,200.00
Brad Cowen	09/20/2018	$16,716.58

Payments Issued

Date	Amount
08/28/2018	$12,962.50
10/03/2018	$16,716.58
12/10/2018	$49,015.84

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1542392	94951	DA06183442	KWH >	11,680	9,160	10,000	9,680	8,960	9,280	11,920	10,560	11,640	9,760	9,880	4,120	116,640
			KW >	20	19	20	18	19	20	20	21	19	19	22	20	20
			Elec Revenue >	$256.98	$225.86	$238.04	$219.09	$220.14	$228.50	$259.41	$249.43	$249.11	$231.14	$250.92	$101.23	$2,729.85
1645209	415891	DA06183399	KWH >	4,409,321	4,140,306	3,609,074	4,111,790	4,647,976	3,897,538	3,828,413	3,847,235	4,694,357	3,973,750	4,990,653	3,661,137	49,811,550
			KW >	8,019	8,100	8,118	7,875	7,893	7,893	7,767	7,443	7,641	7,749	7,812	7,776	7,841
			Elec Revenue >	$14,487.72	$14,331.15	$13,742.74	$13,910.49	$14,414.15	$13,738.75	$13,528.91	$13,226.64	$14,222.62	$13,701.49	$14,691.02	$13,451.98	$167,447.66
3620322	94951	DA06183442	KWH >	0	0	0	0	0	0	0	0	0	0	0	6,160	6,160
			KW >	0	0	0	0	0	0	0	0	0	0	0	20	20
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$143.17	$143.17
			Total KWH	4,421,001	4,149,466	3,619,074	4,121,470	4,656,936	3,906,818	3,840,333	3,857,795	4,705,997	3,983,510	5,000,533	3,671,417	49,934,350
			Combined Average KW	8,039	8,119	8,138	7,893	7,912	7,913	7,787	7,464	7,660	7,768	7,834	7,816	7,880
			USBC Charge	$3,978.90	$3,734.52	$3,257.17	$3,709.32	$4,191.24	$3,516.13	$3,456.30	$3,472.01	$4,235.40	$3,585.16	$4,500.48	$3,304.27	$44,940.90
			Total Elec Revenue	$14,744.70	$14,557.01	$13,980.78	$14,129.58	$14,634.29	$13,967.25	$13,788.32	$13,476.07	$14,471.73	$13,932.63	$14,941.94	$13,696.38	$170,320.68

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 FAX: (406) 497-4008

DATE:	September 20th, 2018
NAME OF BUSINESS:	Aspen Air Corporation
CITY/TOWN LOCATION:	Lockwood, Montana
CONTACT PERSON:	Bradley R. Cowan
MAILING ADDDRESS:	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:	$16,716.58

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):
Replace existing metal halide lighting in shop with LED lighting. Replace existing floodlights on back of shop and around the compressor building with LED.

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

ESTIMATED kWh SAVINGS:	52,028 kWh Annually
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.

NorthWestern® Energy
Delivering a Bright Future

Project Wide Parameters	
Client:	
Project Type:	
Project Name:	ASPEN AIR SHOP LIGHTING & EXTERIOR LIGHTS
Project Address:	
City:	BILLINGS
State:	MT
Postal Code:	
Prepared By:	PW. J. BRYAN, LC

Cost of Money:	0.00%	%
Federal Tax Rate:	0.00%	%
Electricity (Peak Rate):	$0.1000	$/kWh
Electricity (Non-peak Rate):		$/kWh
Escalation Rate (electricity):	2.00%	%
Avg Monthly Demand Charge:		$/kW
Depreciation:	15	Year Straight Life
Include Tax Benefits?	NO	
Project Type:	Renovation	

Average in Summer: $/kW

Product Info	Existing	Proposed	
# of Luminaires:	26	26	Shop Lights: based upon 6,570 hours of operation per year
Total Lighting Load (kW):	17.54	7.404	Outdoor Floods: based upon 4,380 hours of operation per year.
Total Lighting Use (kWh):	93,951	41,923	Annually

Financial Info	Existing	Proposed	
Initial Capitalized Investment:	$0	$7,517	<-- Compute This figure is the net project cost less rebates.
Total EPAct Deduction:	$0	$0	<-- See Additional Requirements for EPAct
Annual Cost of Electricity:	$9,395	$4,192	
Standard Annual Depreciation:	$0	$501	
Additional Initial Costs:	$0	$0	
Lamp Replacement Costs:	$1,498	$0	<-- Compute
Change in HVAC Costs:	$0	$0	<-- Compute
Additional Annual Costs:	$0	$0	
Total Initial Costs:	$0	$7,517	
Average Annual Costs:	$10,893	$4,192	
Simple Payback (Years):	---	1.1	
ROI:	---	89.9%	
Discounted Payback (Years):	---	1.1	

Net Savings at Year #	
3	$13,046
5	$27,297
7	$42,003
9	$57,182

Environmental Savings Info	Existing	Proposed	
kWh Saved Annually:	---	52,028	
CO_2 Equivalent[1]:	---	79,093	lbs using US Averages
Enviromental Equivalents			
	---	7.0	Cars taken off the road
	---	4,022	Gallons of gas consumed
	---	83.4	Barrels of crude oil saved
	---	7.6	Acres of Pine & Douglas Fir storing carbon
	---	0.20	Railroad cars of coal burned

[1] = http://www.epa.gov/cleanenergy/energy-resources/calculator.html

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 FAX: (406) 497-4008

DATE:	August 16, 2018
NAME OF BUSINESS:	**Aspen Air Corporation**
CITY/TOWN LOCATION:	Lockwood, Montana
CONTACT PERSON:	Bradley R. Cowan
MAILING ADDDRESS:	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:	$3605.00

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):
Redesigned exciter assembly for the 3500hp synchronous motor to allow unity leading power factor rather than lagging. Consulting, parts, and labor.

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

ESTIMATED kWh SAVINGS:	16.5 kWh
ESTIMATED KW SAVINGS:	144,144 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.

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 FAX: (406) 497-4008

DATE:	August 16, 2018
NAME OF BUSINESS:	**Aspen Air Corporation**
CITY/TOWN LOCATION:	Lockwood, Montana
CONTACT PERSON:	Bradley R. Cowan
MAILING ADDDRESS:	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:	$9,897.50

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):
Redesigned the brushless exciter for the 5000hp synchronous motor to allow unity leading power factor rather than lagging. Consulting, parts, and labor.

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

ESTIMATED kWh SAVINGS:	17.5 kWh
ESTIMATED KW SAVINGS:	152,880 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.

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 FAX: (406) 497-4008

DATE:	September 8th, 2018
NAME OF BUSINESS:	Aspen Air Corporation
CITY/TOWN LOCATION:	Lockwood, Montana
CONTACT PERSON:	Bradley R. Cowan
MAILING ADDDRESS:	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:	$155,200

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):

Engineering of a 350,000 gallon flat bottom tank vertical nitrogen storage tank. This tank is going will add 75% to the total onsite storage for the expansion plant. This will allow less startups directly resulting in less runtime of multiple electric motors while product isn't being produced.

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

ESTIMATED kWh SAVINGS:	162,000 kWh Annually
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: _____ 11/28/2017

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® Energy
Delivering a Bright Future

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

ISO · 9000:2000

MINERALS TECHNOLOGIES

Rec'd MT DOR
FEB 14 2019

February 6, 2019

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

Dear Nicole,

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 $501,702

For 2018 Barretts Minerals Inc received $29,357 with a pending payment of $2,509 in USBC credit. (See attached NorthWestern Energy USBC progress report for 2018).

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

Sincerely,

Tom Waldorf

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

Attachments:
USBC credit report 2018

"THIS PAPER CONTAINS SPECIALTY MINERALS INC.'S PCC"

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

BARRETTS MINERALS

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$225,207.08
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$530,429.41	Total Payment Requests:	$530,429.41
Payment Requests Made YTD:	$0.00	Current Request Balance:	$501,072.40
2017 Carryover USBC Credit:	$2,293.00	Total USBC Credit:	$31,866.34
USBC Credit YTD:	$29,573.34	Payments Issued YTD:	$29,357.01
Average Monthly Credit Earned:	$2,464.45	USBC Credit Balance:	$2,509.33
		Payment Pending:	$2,509.33

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$9,240.27
07/11/2018	$7,567.77
10/03/2018	$7,458.57
12/10/2018	$5,090.40

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100620	1624	DA19312279	KWH >	2,723,113	2,487,427	2,508,656	2,830,240	2,811,721	2,766,671	2,643,334	2,707,399	2,936,570	2,839,990	2,816,012	2,788,144	32,859,277
			KW >	4,631	4,584	4,730	4,713	4,709	4,571	4,471	4,804	4,808	4,782	5,016	4,972	4,733
			Elec Revenue >	$18,682.41	$17,633.54	$17,868.26	$19,135.28	$19,054.30	$18,650.93	$17,976.80	$18,686.45	$19,602.28	$19,176.93	$19,460.88	$19,279.02	$225,207.08
			Total KWH	2,723,113	2,487,427	2,508,656	2,830,240	2,811,721	2,766,671	2,643,334	2,707,399	2,936,570	2,839,990	2,816,012	2,788,144	32,859,277
			Combined Average KW	4,631	4,584	4,730	4,713	4,709	4,571	4,471	4,804	4,808	4,782	5,016	4,972	4,733
			USBC Charge	$2,450.80	$2,238.68	$2,257.79	$2,547.22	$2,530.55	$2,490.00	$2,379.00	$2,436.66	$2,642.91	$2,555.99	$2,534.41	$2,509.33	$29,573.34
			Total Elec Revenue	$18,682.41	$17,633.54	$17,868.26	$19,135.28	$19,054.30	$18,650.93	$17,976.80	$18,686.45	$19,602.28	$19,176.93	$19,460.88	$19,279.02	$225,207.08

BARRICK GOLD CORPORATION
Golden Sunlight Mines
453 Montana Hwy 2 East
Whitehall, Montana
U.S.A.
59759

Tel: (406) 287-3257
Fax: (406) 287-2035

February 20, 2019

Nicole Hensley
Department of Revenue
P.O. Box 5805
Helena, MT 59604-0756

RE: Barrick Golden Sunlight Mines 2018 Universal System's Benefits Report

Barrick Golden Sunlight Mines submitted one request forms for USB refunds totaling $95,252.56 for projects contributing a total estimated annual power savings of 874,247 kW-hours. The following narrative recaps the USB activity for Barrick Golden Sunlight Mines for the year 2018.

Replace 3hp fan motor with high efficiency model
Replace 3hp ventilation fan motor on mill building with high efficiency 3hp fan motor meeting 2016 energy conservation standard. Parts $378.00, Labor $150.00. Estimated 1,672 kWh savings annually.

Replace 5hp fan motor with high efficiency model
Replace 5hp ventilation fan motor on mill building with high efficiency 3hp fan motor meeting 2016 energy conservation standard. Parts $391.00, Labor $150.00. Estimated 2,917 kWh savings annually.

Replace 50hp evaporator fan motor with high efficiency model
Replace 50hp evaporator fan motor with high efficiency 50hp fan motor meeting 2016 energy conservation standard. Parts $3,869.00, Labor $600.00. Estimated 7,459 kWh savings annually.

Install adjustable speed drives on four pump-back wells
Install adjustable speed drives on four pump-back wells allowing for pumps to run at a reduced rate and only when needed. Parts $811.44, Labor $150.00. Estimated 10,512 kWh savings annually.

Improved Energy Efficiency Lighting
Replace 100, 40-watt T12 lamps with 17-watt T8 LED tubes in admin building. Annual estimated power savings resulting from the lamp replacements total 14,732 kWh. Parts $936.00 Labor $1,350.00. Estimated 7,800 kWh annually.

Improved Energy Efficiency Lighting
Replace 35, 400w metal halide lamps in high bay lights with 150W LED retrofit lamp. Parts$5,784.00 Labor $1,968.75. Estimated 42,968 kWh annually.

BARRICK GOLD CORPORATION
Golden Sunlight Mines
453 Montana Hwy 2 East
Whitehall, Montana
U.S.A.
59759

Tel: (406) 287-3257
Fax: (406) 287-2035

Three phase voltage regulator bank
Install three phase voltage regulator bank on tails feeder line to correct voltage drop and run tails equipment at rated voltage. Parts $46,615.47 Labor $15,194.00. Estimated 770,675 kWh annually.

Internal reclaim pump RVSS
Install RVSS for 200hp internal reclaim pump motor. Estimated 30,240 kWh annually.
If you have questions or concerns regarding either of the above described refund requests, please contact me.

Regards,

Steve Coleman
Electrical Supervisor
Golden Sunlight Mines, Inc.
Office: 406/287-2061
Email: scoleman@barrick.com

C: Dale Mahugh
Key Account & Economic Development Representative

Rick Jordan
Golden Sunlight Mine Mill Superintendent

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

GOLDEN SUNLIGHT MINES, INC.

Account Summary

2017 Carryover Reservation:	$37,900.00	YTD Elec Revenue:	$3,746,877.42
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$95,252.56
Payment Requests Made YTD:	$95,252.56	Current Request Balance:	$21,549.44
2017 Carryover USBC Credit:	$37,858.36	Total USBC Credit:	$77,467.59
USBC Credit YTD:	$39,609.23	Payments Issued YTD:	$73,703.12
Average Monthly Credit Earned:	$3,300.77	USBC Credit Balance:	$3,764.47
		Payment Pending:	$3,764.47

Payment Requests Made

Submitted By	Date	Amount
Steve Coleman	11/07/2018	$95,252.56

Payments Issued

Date	Amount
12/10/2018	$73,703.12

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100335	1335	DA18683739	KWH >	3,868,480	2,837,584	4,133,005	3,799,811	3,870,704	3,499,955	3,040,278	2,899,793	3,776,380	3,439,369	4,636,815	4,179,069	43,981,243
			KW >	10,152	9,860	9,945	10,017	10,080	9,936	9,644	9,891	9,945	9,981	10,445	9,797	9,974
			Elec Revenue >	328,914.38	255,662.96	345,796.88	325,919.17	329,997.66	302,919.47	268,246.04	253,278.39	314,522.39	294,038.59	377,911.24	344,549.92	$3,741,757.09
602740	258806	DA08289283	KWH >	3,520	2,800	3,680	4,080	1,840	3,600	960	880	800	1,120	2,080	3,680	29,040
			KW >	10	8	19	10	5	8	4	4	4	4	7	10	8
			Elec Revenue >	$385.62	$314.05	$397.41	$430.71	$207.05	$368.57	$121.92	$114.24	$107.92	$132.93	$238.24	$393.74	$3,212.40
			Total KWH	3,872,000	2,840,384	4,136,685	3,803,891	3,872,544	3,503,555	3,041,238	2,900,673	3,777,180	3,440,489	4,638,895	4,182,749	44,010,283
			Combined Average KW	10,162	9,868	9,964	10,027	10,085	9,944	9,648	9,895	9,949	9,985	10,452	9,807	9,982
			USBC Charge	$3,484.80	$2,556.35	$3,723.01	$3,423.50	$3,485.29	$3,153.20	$2,737.11	$2,610.60	$3,399.46	$3,096.44	$4,175.00	$3,764.47	$39,609.23
			Total Elec Revenue	329,300.00	255,977.01	346,194.29	326,349.88	330,204.71	303,288.04	268,367.96	253,392.63	314,630.31	294,171.52	378,149.48	344,943.66	$3,744,969.49

Benefis
HEALTH SYSTEM

Rec'd MT DOR
FEB 28 2019

February 21, 2019

Nicole Hensley

Department of Revenue

PO Box 5805

Helena, Mt. 59604-5805

RECEIVED
FEB 27 2019 N
MT DOR

Dear Mrs. Nicole Hensley

Please see the attached copies of projects we used the Benefis Health Systems 2017 USB Funding for, during the year of 2018

Sincerely,

Gunnar VanderMars

Benefis Health Systems

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 FAX: (406) 497-4008

DATE:	November 19,2018
NAME OF BUSINESS:	Benefis Healthcare
CITY/TOWN LOCATION:	Great Falls, Mt.
CONTACT PERSON:	Gunnar vanderMars
MAILING ADDDRESS:	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:	4213.09 2017 USB CREDIT

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 West Campus Pharmacy Remodel
chaned 3 lamp t8 2x4 fixtures to Cree CR24 led fixtures

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

ESTIMATED kWh SAVINGS:	3942 annually
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.

NorthWestern Energy
Delivering a Bright Future

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

ENTERED: 10/31/2018

REGISTER NO.	REGISTER DATE
2808-747285	10/31/18
THIS IS NOT AN INVOICE	

SOLD TO: BENEFIS HEALTHCARE
1101 26TH ST SO
GREAT FALLS, MT 59405

SHIP TO: BENEFIS HEALTHCARE
901 RIVER DRIVE, SOUTH
GREAT FALLS, MT 59405

ACCOUNT NO.	JOB NAME AND ADDRESS	CUSTOMER ORDER	WHEN SHIP
GB-07552	BENEFIS HEALTHCARE DEAN	MAINTENENCE	10/31/18
SALESPERSON	SHIPPING INFORMATION	SHIP VIA	SHIP DATE / CARTONS / COILS / BUNDLES
0006 JB	PREPAID	WILL CALL	

QUANTITY ORDERED	PRODUCT CODE	DESCRIPTION	CODE	QUANTITY SHIPPED	PRICE	PER	DISC.	EXTENSION	TYPE	TAX
24	CREE CR2440L35KS	40W TROF			223.00	E		5352.00	X	T

TITLE TO MERCHANDISE AND RISK OF LOSS OR DAMAGE 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 THRU ERROR ON OUR PART.

A SERVICE CHARGE OF 1 12% 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.OUR-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 YOUR INVOICES.
B - BACK ORDERED. WILL SHIP AS SOON AS RECEIVED UNLESS INSTRUCTED TO CANCEL.
C - CANCELLED. NOT IN STOCK. UNABLE TO PURCHASE LOCALLY.

MERCHANDISE	5,352.00
SALES TAX	0.00
SHIPPING CHARGE	
TOTAL DUE	5,352.00

THIS MATERIAL WAS SPECIFICALLY ORDERED FOR AND WILL BE USED ON THE JOB NAME HEREIN. ABOVE MATERIAL REC EIVED:

SIGNED DATE

DEPOSIT:
BAL DUE:

CUSTOMER COPY

Lighting Payback Calculator

Basic

Advanced

Existing Lighting

Fixture Category

Fluorescent Troffer 2x4

Fixture

2x4, 3 Lamp, F32 T8 Prismatic

Quantity

24

Fixture Wattage

85.00

Total System Wattage

2,040.00

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

24

Price/Unit ($)

223

Fixture Wattage

40.00

Total System Wattage

960.00

TOTAL INVESTMENT ($) 5,352.00

ANALYZE MY SAVINGS

Analysis Period (Years)	10
Discount Rate (%)	6
Payback (Years)	
Return on Investment (%)	-17.30
Annual Electricity Savings (kWh)	3,942
Total Energy Cost Savings ($)	4,730

Total Maintenance Cost Savings ($)	960
Total Operating Savings ($)	5,690
NPV ($)	-926
IRR (%)	1.36

CALCULATE NOW

Email Me This Report

NorthWestern Energy

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

1494831

BENEFIS HEALTH CARE-GREAT FALLS
ATTN: GUNNAR VANDERMARS
1101 26TH STREET SOUTH
GREAT FALLS, MT 59405-5104

Payment No.: **201839120**
Payment Date: **12/18/2018**
Company Code: **MTU**
Vendor No.: **253393**
Page: **1 of 1**

Invoice Number	Invoice Date	Document Number Text	Gross Amount	Discount	Net Amount
CKRDEC421309	12/14/2018	Please accept this check as settlement for the items listed below subject to the goods and services supplied and the invoice therefore being correct. 190466641 *LARGE CUSTOMER USBC PMT 12/102018*	4,213.09	0.00	4,213.09
		Check Total.....			$ 4,213.09

DETACH FROM CHECK AND KEEP FOR YOUR RECORDS

NorthWestern Energy

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

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

1494831

12/18/2018

PAY TO THE ORDER OF BENEFIS HEALTH CARE-GREAT FALLS $ ***4,213.09

***FOUR THOUSAND TWO HUNDRED THIRTEEN & 09/100 *** DOLLARS

BENEFIS HEALTH CARE-GREAT FALLS
ATTN: GUNNAR VANDERMARS
1101 26TH STREET SOUTH
GREAT FALLS, MT 59405-5104

⑈1494831⑈ ⑆042205038⑆ 1301030123 52⑈

Billings Clinic

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

February 15, 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Email: nhensley@mt.gov

RE: Self-Directed USBC Progress Report for 2018 – BILLINGS CLINIC

Dear Ms. Hensley:

Large customers of NorthWestern Energy that participate in the Universal Systems Benefit Program are required to submit an Annual Summary Report, pursuant to 69-9-402, MCA,(Montana Code Annotated), of its Universal Systems Benefit Program (USB) activities and expenditures for the previous calendar year to the Montana Department of Revenue and to the large customer's electric utility. This 2018 summary report is for Billings Clinic.

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018. In 2018, we received a total of $23,533.64 in USB credit reimbursement payments; composed of $1,747.98 in 2017 USB credits (carried over into 2018) and $21,785.66 in 2018 credits. These USB payments were for energy efficient projects submitted in previous years.

At year-end 2018, we had a 2018 USB credit balance of $1,790.92 carried over into 2019, because we have a Request Balance from projects submitted in previous years.

Sincerely,

Mitch Goplen
Vice President Facility Services
Billings Clinic

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/15/2019

BILLINGS CLINIC

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$2,465,104.13
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$57,521.66	Total Payment Requests:	$57,521.66
Payment Requests Made YTD:	$0.00	Current Request Balance:	$33,968.02
2017 Carryover USBC Credit:	$1,747.98	Total USBC Credit:	$25,344.56
USBC Credit YTD:	$23,596.58	Payments Issued YTD:	$23,553.64
Average Monthly Credit Earned:	$1,966.38	USBC Credit Balance:	$1,790.92
		Payment Pending:	$1,790.92

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$7,103.23
07/11/2018	$5,698.19
10/03/2018	$6,835.24
12/10/2018	$3,916.98

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100604	1608	DA06613312	KWH >	1,178,401	1,170,046	1,059,903	1,175,654	1,269,510	1,525,820	1,549,053	1,792,714	1,655,374	1,401,883	1,288,006	1,151,496	16,217,860
			KW >	2,143	2,056	2,022	2,082	2,713	3,050	3,171	3,534	3,128	3,059	2,773	2,419	2,679
			Elec Revenue >	108,255.46	106,989.21	$98,039.98	108,065.23	120,201.11	142,624.28	144,580.52	162,966.66	150,025.79	131,136.34	119,985.48	107,163.19	$1,500,033.25
721115	303183	DG35855513	KWH >	25,000	22,000	21,640	20,640	20,360	24,520	25,080	29,960	25,240	25,240	21,960	22,840	284,480
			KW >	54	53	54	58	71	84	99	91	85	72	62	56	70
			Elec Revenue >	$2,498.39	$2,257.40	$2,235.95	$2,206.84	$2,306.53	$2,764.28	$2,924.94	$3,187.95	$2,787.13	$2,663.11	$2,309.07	$2,327.78	$30,469.37
722288	330974	DA17754351	KWH >	1,270	1,240	1,339	1,044	731	442	560	596	533	543	858	937	10,093
			KW >	7	7	7	7	7	4	7	5	5	5	7	7	6
			Elec Revenue >	$182.61	$178.84	$184.15	$163.14	$140.73	$86.57	$122.50	$102.58	$102.75	$99.22	$150.47	$153.90	$1,667.46
722289	330975	DS84042718	KWH >	4,354	3,875	4,708	3,547	3,310	2,609	2,813	2,994	2,571	2,998	3,444	3,580	40,803
			KW >	15	15	14	13	11	9	9	10	9	12	14	14	12
			Elec Revenue >	$498.98	$462.41	$514.54	$416.13	$379.74	$307.39	$321.26	$334.10	$292.94	$364.97	$410.79	$422.55	$4,725.80
723405	331995	DA04587420	KWH >	5,260	5,340	4,880	4,560	5,620	6,800	860	8,320	6,920	5,300	4,580	4,720	63,160
			KW >	12	13	13	15	20	22	22	24	24	18	15	12	18
			Elec Revenue >	$541.80	$553.50	$518.03	$513.96	$645.41	$758.90	$293.24	$877.38	$774.58	$592.81	$509.88	$496.24	$7,075.73
723634	332212	DS94408274	KWH >	2,091	1,618	1,392	1,177	1,089	848	1,060	1,379	1,511	2,276	2,064	2,579	19,084
			KW >	8	4	4	4	4	4	4	4	4	5	5	5	5
			Elec Revenue >	$251.24	$179.04	$164.32	$144.01	$137.44	$113.90	$135.72	$158.56	$168.78	$236.49	$220.47	$261.24	$2,171.21
723640	332218	DA03614155	KWH >	149,400	138,180	124,980	126,060	134,880	118,320	125,220	126,720	119,100	139,980	112,800	131,280	1,546,920
			KW >	213	214	207	202	200	196	196	183	193	194	196	199	199
			Elec Revenue >	$13,262.32	$12,402.26	$11,350.79	$11,424.74	$12,060.09	$10,743.24	$11,136.12	$10,994.02	$10,566.92	$12,175.10	$10,151.26	$11,606.24	$137,873.10

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/15/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
724461	333005	DG21203269	KWH >	416,400	394,800	356,400	359,400	381,600	336,600	376,200	398,400	370,200	435,000	353,400	397,800	4,576,200
			KW >	720	726	726	702	714	702	756	726	732	738	732	732	726
			Elec Revenue >	$37,975.14	$36,334.02	$33,454.76	$33,560.07	$35,300.63	$31,702.29	$34,798.86	$35,777.32	$33,898.97	$38,908.96	$32,738.79	$36,183.22	$420,633.03
1064261	366753	DG21316973	KWH >	28,720	26,560	24,080	24,640	31,680	33,120	38,160	42,480	34,720	30,800	22,880	26,160	364,000
			KW >	54	55	52	66	72	94	110	93	88	77	77	77	76
			Elec Revenue >	$2,792.74	$2,628.85	$2,408.52	$2,600.09	$3,210.18	$3,532.20	$4,044.10	$4,162.79	$3,544.24	$3,141.03	$2,534.89	$2,794.19	$37,393.82
1658336	79097	DA14692134	KWH >	1,069	876	813	771	674	681	603	682	697	926	885	998	9,675
			KW >	1	2	2	1	1	1	1	1	1	1	1	1	1
			Elec Revenue >	$110.06	$95.72	$90.98	$87.23	$79.45	$79.92	$73.20	$78.11	$79.72	$97.47	$94.36	$103.34	$1,069.56
1682517	79096	DA08154390	KWH >	4,325	4,408	3,776	3,405	3,657	4,542	5,041	6,554	4,280	3,939	3,602	3,344	50,873
			KW >	11	11	11	11	14	18	22	21	21	15	12	12	15
			Elec Revenue >	$463.56	$468.54	$414.35	$386.63	$438.47	$543.98	$620.28	$721.84	$544.99	$467.02	$410.17	$391.38	$5,871.21
1709487	420271	DG35953881	KWH >	60,640	57,920	53,120	53,280	67,600	82,400	98,960	111,360	85,440	79,040	60,240	65,120	875,120
			KW >	116	141	142	148	193	218	257	256	215	190	190	158	185
			Elec Revenue >	$5,899.89	$5,934.94	$5,577.32	$5,665.17	$7,218.91	$8,614.60	$10,192.07	$11,006.23	$8,678.03	$7,962.35	$6,523.96	$6,599.48	$89,872.95
1936593	322782	DG90055164	KWH >	141,440	112,720	106,720	93,520	78,000	82,640	78,080	92,480	72,960	93,120	90,960	102,880	1,145,520
			KW >	268	266	268	214	201	200	206	206	205	204	208	219	222
			Elec Revenue >	$13,725.43	$11,454.06	$11,014.60	$9,478.08	$8,113.88	$8,452.98	$8,077.71	$9,079.44	$7,627.31	$9,186.81	$9,056.57	$10,113.39	$115,380.26
3125069	388205	DA04895558	KWH >	16,840	15,840	15,560	16,120	17,960	19,600	20,760	25,440	18,920	16,240	13,280	13,320	209,880
			KW >	46	45	44	51	53	61	71	74	63	52	42	42	54
			Elec Revenue >	$1,781.64	$1,693.05	$1,668.69	$1,780.17	$1,940.74	$2,149.93	$2,314.49	$2,677.75	$2,081.03	$1,773.88	$1,448.07	$1,454.98	$22,764.42
3373216	64623	DD56118081	KWH >	36,920	30,880	32,520	36,520	33,720	40,120	38,760	49,400	48,440	44,600	33,280	35,360	460,520
			KW >	92	86	175	94	100	118	138	166	159	159	98	80	122
			Elec Revenue >	$3,814.43	$3,280.03	$3,412.21	$3,810.34	$3,639.92	$4,317.20	$4,399.50	$5,409.17	$5,279.38	$5,017.16	$3,537.14	$3,532.53	$49,449.01
3373218	257035	DG90072343	KWH >	14,920	12,560	12,960	14,480	12,920	16,080	14,640	20,040	19,800	17,600	14,400	14,680	185,080
			KW >	40	40	76	39	41	46	50	82	70	70	70	37	55
			Elec Revenue >	$1,578.87	$1,388.67	$1,401.07	$1,538.19	$1,427.63	$1,729.84	$1,653.26	$2,348.09	$2,217.55	$2,061.95	$1,813.17	$1,507.15	$20,665.44
3461984	370680	DD49232644	KWH >	11,320	9,360	10,000	9,600	9,800	11,120	11,000	12,320	11,360	10,360	10,440	10,000	126,680
			KW >	28	26	26	27	30	33	40	40	40	29	29	29	31
			Elec Revenue >	$1,175.06	$1,003.69	$1,052.54	$1,034.10	$1,071.84	$1,209.26	$1,247.85	$1,340.68	$1,274.37	$1,095.75	$1,103.59	$1,072.28	$13,681.01
3461985	380805	DA04732494	KWH >	1,182	1,048	1,102	1,115	1,157	1,319	1,289	1,447	1,309	1,096	1,087	1,045	14,196
			KW >	3	3	3	4	5	5	6	6	6	4	5	5	5
			Elec Revenue >	$134.31	$122.76	$127.26	$138.87	$153.81	$164.36	$172.95	$184.14	$174.43	$134.20	$144.20	$141.24	$1,792.53
3461986	370679	DG21490226	KWH >	2,052	1,708	1,790	1,418	1,313	1,197	1,045	1,311	1,580	1,473	1,597	1,782	18,266
			KW >	4	4	4	4	3	3	4	4	4	4	4	4	4
			Elec Revenue >	$209.35	$182.51	$190.83	$160.62	$147.90	$136.37	$136.18	$155.72	$177.09	$168.07	$177.85	$192.48	$2,034.97
			Total KWH	2,101,604	2,010,979	1,837,683	1,946,951	2,075,581	2,308,778	2,389,184	2,724,597	2,480,955	2,312,414	2,039,763	1,989,921	26,218,410
			Combined Average KW	3,835	3,767	3,850	3,742	4,453	4,868	5,169	5,526	5,052	4,908	4,540	4,108	4,485
			USBC Charge	$1,891.45	$1,809.89	$1,653.91	$1,752.25	$1,868.02	$2,077.92	$2,150.24	$2,452.13	$2,232.87	$2,081.19	$1,835.79	$1,790.92	$23,596.58
			Total Elec Revenue	195,151.28	187,609.50	173,820.89	183,173.61	198,614.41	220,031.49	227,244.75	251,562.53	230,296.00	217,282.69	193,320.18	186,516.80	$2,464,624.13

NorthWestern Energy
Delivering a Bright Future

February 4, 2019

Luke Peterson
Boeing of Helena
3200 Skyway Drive MC 74-320
Helena, MT 59602

Dear Luke:

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2018, and I am contacting you regarding your 2018 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end *"Self-Directed USBC Progress Report for 2018"* showing a summary of your USB activity during 2018 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 2018 USB credits into 2019.

Your "*Self-Directed USBC Progress Report for 2018*" 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, 2019.** 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, including requests to donate USB credits to Energy Share. So, if any new Form B's were submitted to the utility during 2018 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 2018.**
- ✓ **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, 2019** to the address below.

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

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

Sincerely,

Dale Mahugh
Specialist, Key Accounts

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/4/2019

BOEING OF HELENA

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$619,847.92
Reservations Made YTD:	$6,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$0.00
Payment Requests Made YTD:	$0.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$0.00	Total USBC Credit:	$5,876.86
USBC Credit YTD:	$5,876.86	Payments Issued YTD:	$0.00
Average Monthly Credit Earned:	$489.74	USBC Credit Balance:	$5,876.86
		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
3161063	602478	DA17677676	KWH >	393,399	508,364	463,797	504,472	526,729	567,739	588,283	0	1,286,692	549,790	572,428	568,134	6,529,827
			KW >	1,024	1,063	1,102	1,067	1,356	1,356	1,473	1,477	1,477	1,236	1,158	1,184	1,248
			Elec Revenue >	$38,766.52	$47,848.01	$44,831.12	$47,768.63	$51,783.55	$54,874.90	$56,714.65	$0.00	119,949.57	$51,698.09	$52,787.06	$52,825.82	$619,847.92
			Total KWH	393,399	508,364	463,797	504,472	526,729	567,739	588,283	0	1,286,692	549,790	572,428	568,134	6,529,827
			Combined Average KW	1,024	1,063	1,102	1,067	1,356	1,356	1,473	1,477	1,477	1,236	1,158	1,184	1,248
			USBC Charge	$354.06	$457.53	$417.42	$454.02	$474.06	$510.97	$529.45	$0.00	$1,158.03	$494.81	$515.19	$511.32	$5,876.86
			Total Elec Revenue	$38,766.52	$47,848.01	$44,831.12	$47,768.63	$51,783.55	$54,874.90	$56,714.65	$0.00	119,949.57	$51,698.09	$52,787.06	$52,825.82	$619,847.92

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
FAX: (406) 497-4008

DATE:	November 30, 2018
NAME OF BUSINESS:	**Boeing of Helena**
CITY/TOWN LOCATION:	Helena, MT
CONTACT PERSON:	Luke Peterson
MAILING ADDDRESS:	3200 Skyway Drive MC74 320
CITY, STATE AND ZIP:	Helena, MT 59602
PHONE NUMBER:	406-437-2169
FAX NUMBER:	
E-MAIL ADDRESS	Lucas.s.peterson@boeing.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 wish to carry over our 2018 USB dollars in the approximate amount of $6,000.00 for projects identified and completed in 2019.

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: Luke Peterson

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

February 15, 2019

CERTIFIED MAIL RRR

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

RE: Self-Directed USBC Progress Report for 2018 – CHS

Dear Ms. Hensley:

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018. All the USB payments we received in 2018 were self-directed for energy efficiency projects previously submitted. During 2018, we received USB payments totaling $299,359.17 that was composed of $272,917.28 in 2018 USB credits and $26,441.89 in 2017 credits that had been carried over into 2018.

We also had a request balance to carry over all remaining 2018 USB credits at year-end of $26,441.89 into 2019.

Sincerely,

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

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

CHS

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$3,464,162.74
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$4,526,669.86	Total Payment Requests:	$4,526,669.86
Payment Requests Made YTD:	$0.00	Current Request Balance:	$4,227,310.69
2017 Carryover USBC Credit:	$26,441.89	Total USBC Credit:	$327,194.85
USBC Credit YTD:	$300,752.96	Payments Issued YTD:	$299,359.17
Average Monthly Credit Earned:	$25,062.75	USBC Credit Balance:	$27,835.68
		Payment Pending:	$27,835.68

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$108,253.65
07/11/2018	$52,199.06
10/03/2018	$82,747.79
12/10/2018	$56,158.67

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100339	1339	DA06212512	KWH >	468,063	411,637	362,248	285,918	173,507	116,592	306,108	446,230	437,125	440,253	483,926	421,808	4,353,415
			KW >	1,143	950	1,020	942	896	694	876	907	924	927	942	968	932
			Elec Revenue >	$3,911.06	$3,367.02	$3,259.70	$2,826.97	$2,300.50	$1,746.41	$2,802.04	$3,400.57	$3,391.99	$3,409.27	$3,606.85	$3,402.50	$37,424.88
100341	1341	DG21120147	KWH >	216,862	255,998	189,295	159,849	77,401	74,244	156,964	357,300	360,776	317,615	278,197	281,791	2,726,292
			KW >	976	1,000	922	868	633	845	959	1,045	1,028	963	860	1,013	926
			Elec Revenue >	$6,863.63	$7,422.70	$6,220.27	$5,643.03	$3,663.91	$4,545.27	$6,003.53	$8,741.82	$8,708.20	$7,921.65	$7,013.02	$7,722.13	$80,469.16
100342	1342	DA06183396	KWH >	29,088,504	29,345,795	25,268,266	28,753,642	14,144,989	11,004,079	27,219,988	28,971,357	28,006,461	28,127,812	28,806,193	28,332,054	307,069,140
			KW >	41,765	42,439	42,526	41,506	40,936	33,048	42,068	47,857	41,567	41,627	41,783	41,919	41,587
			Elec Revenue >	185,448.29	187,506.84	170,288.37	182,676.66	122,959.24	$97,625.06	177,407.30	192,652.26	178,633.08	179,212.63	182,156.36	180,495.48	$2,037,061.57
100622	1626	DA17458973	KWH >	633,174	699,335	500,362	664,446	224,824	226,299	451,079	671,555	641,460	630,143	596,156	616,002	6,554,835
			KW >	2,065	2,134	1,616	2,048	1,572	2,100	1,961	2,013	2,030	2,143	1,901	2,048	1,969
			Elec Revenue >	$6,081.33	$6,456.40	$4,774.56	$6,130.06	$3,594.72	$4,450.18	$5,131.27	$6,086.50	$5,994.63	$6,132.79	$5,605.87	$5,922.77	$66,361.08
239790	73973	DG16553126	KWH >	1,120	2,560	-560	1,040	960	3,120	960	-880	880	1,040	800	960	12,000
			KW >	0	21	28	28	0	19	0	22	0	0	0	1	10
			Elec Revenue >	$102.72	$422.58	$247.69	$373.20	$90.54	$441.18	$89.86	$157.91	$82.45	$95.15	$76.66	$97.21	$2,277.15
239792	73975	DG35830665	KWH >	2,460	1,320	1,540	3,740	-1,700	780	980	1,200	1,080	940	820	1,380	14,540
			KW >	3	58	4	5	4	2	2	2	5	1	4	4	8
			Elec Revenue >	$235.26	$694.48	$171.16	$359.02	($83.43)	$88.20	$105.21	$120.24	$143.39	$97.41	$113.94	$157.39	$2,202.27
341487	127435	DS85573092	KWH >	3,400	10,280	10,800	8,880	8,280	1,640	1,720	6,640	12,480	5,240	6,120	10,120	85,600
			KW >	58	100	168	100	97	58	58	112	156	170	96	102	106
			Elec Revenue >	$856.86	$1,809.76	$2,506.68	$1,696.77	$1,615.40	$711.79	$717.65	$1,626.62	$2,507.92	$2,097.80	$1,437.55	$1,799.79	$19,384.59

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
341502	127449	DS61269094	KWH >	1,360	1,320	1,720	1,280	2,000	3,880	4,080	-2,960	240	680	1,240	1,600	16,440
			KW >	19	19	11	23	33	35	35	27	15	26	35	27	25
			Elec Revenue >	$309.51	$306.31	$256.11	$336.92	$495.57	$662.61	$676.71	$49.46	$180.53	$325.67	$455.87	$404.66	$4,459.93
650546	286830	DA11010378	KWH >	1,860	1,059	1,244	2,065	2,030	1,401	384	1,421	824	1,277	1,112	999	15,676
			KW >	19	23	24	38	38	38	19	28	24	24	20	22	26
			Elec Revenue >	$346.36	$319.87	$346.87	$544.95	$541.77	$492.25	$233.42	$398.47	$311.94	$346.89	$291.64	$308.05	$4,482.48
658370	291042	DG57404409	KWH >	13,440	19,600	43,040	52,800	78,720	73,440	75,200	94,160	96,080	114,160	92,480	29,120	782,240
			KW >	27	82	79	139	260	275	244	314	312	312	317	200	213
			Elec Revenue >	$1,328.79	$2,353.42	$4,167.23	$5,528.75	$8,745.20	$8,469.40	$8,197.65	$10,287.84	$10,474.06	$11,859.00	$10,271.13	$4,238.40	$85,920.87
717591	223533	DD39637311	KWH >	33,520	32,560	33,600	36,320	36,400	39,360	42,400	43,920	43,760	36,800	35,840	33,280	447,760
			KW >	57	58	57	59	75	79	83	83	88	69	61	61	69
			Elec Revenue >	$3,198.73	$3,132.09	$3,203.12	$3,449.85	$3,604.36	$3,872.47	$4,112.78	$4,166.41	$4,231.90	$3,523.45	$3,369.69	$3,183.95	$43,048.80
789497	348794	DG78971247	KWH >	10,606	10,686	9,519	0	11,192	3,116	2,858	2,803	3,704	6,199	8,210	9,711	78,604
			KW >	30	29	29	0	26	15	14	7	17	2	2	26	18
			Elec Revenue >	$1,144.49	$1,135.28	$1,048.19	$0.00	$1,346.26	$408.08	$367.26	$297.79	$464.69	$505.19	$663.43	$1,015.26	$8,395.92
854961	352908	DA21325529	KWH >	294,000	360,299	404,625	237,406	138,862	290,821	393,223	426,785	399,899	403,033	423,040	423,440	4,195,433
			KW >	726	1,015	1,020	989	1,002	959	1,041	1,054	1,050	1,032	1,028	1,024	995
			Elec Revenue >	$24,915.76	$31,169.88	$34,492.21	$22,521.28	$15,620.86	$26,033.64	$33,067.97	$35,228.84	$33,604.29	$33,739.64	$35,166.93	$35,269.85	$360,831.15
957338	360251	DA15843439	KWH >	634,916	606,998	593,568	581,126	77,485	215,714	575,878	700,391	742,651	649,048	732,186	680,670	6,790,631
			KW >	1,706	1,793	1,771	1,793	1,447	1,534	2,182	2,074	2,138	2,160	2,138	2,117	1,904
			Elec Revenue >	$51,117.41	$49,502.34	$48,599.55	$48,005.16	$11,414.13	$21,371.31	$48,233.37	$55,518.44	$58,959.29	$52,881.54	$58,472.52	$55,091.86	$559,166.92
1576974	410164	DA04364410	KWH >	15,520	14,240	14,880	14,240	12,320	11,520	12,960	13,600	14,080	12,160	13,920	14,560	164,000
			KW >	68	68	72	60	62	59	62	59	65	60	62	64	63
			Elec Revenue >	$1,906.45	$1,804.92	$1,881.03	$1,727.68	$1,589.11	$1,493.76	$1,627.53	$1,627.21	$1,734.26	$1,544.58	$1,695.20	$1,764.96	$20,396.69
1579195	410404	DA12999948	KWH >	3,097	2,541	2,416	2,116	1,521	1,524	1,422	1,314	1,362	1,311	4,736	-2,056	21,304
			KW >	9	9	7	5	5	5	5	5	3	2	9	2	6
			Elec Revenue >	$347.69	$303.12	$266.69	$228.98	$182.08	$182.04	$171.75	$163.11	$149.42	$136.52	$469.49	($121.89)	$2,479.00
3087812	597892	DA18683632	KWH >	99,305	70,839	97,088	0	0	0	0	0	0	0	0	0	267,232
			KW >	576	593	585	0	0	0	0	0	0	0	0	0	585
			Elec Revenue >	$10,105.05	$8,309.96	$9,971.67	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$28,386.68
3087812	597892	DA21705326	KWH >	0	0	0	101,584	24,441	11,724	61,886	57,598	78,609	75,295	90,518	73,095	574,750
			KW >	0	0	0	556	559	550	979	547	553	579	553	553	603
			Elec Revenue >	$0.00	$0.00	$0.00	$10,183.99	$4,975.64	$4,067.93	$9,858.76	$7,013.61	$8,440.22	$8,420.73	$9,251.53	$8,139.22	$70,351.63
			Total KWH	31,521,207	31,847,067	27,533,651	30,906,452	15,013,232	12,079,254	29,308,090	31,792,434	30,841,471	30,823,006	31,575,494	30,928,534	334,169,892
			Combined Average KW	49,247	50,391	49,939	49,159	47,645	40,315	50,588	56,156	49,975	50,097	49,811	50,151	50,047
			USBC Charge	$28,369.09	$28,662.37	$24,780.30	$27,815.82	$13,511.92	$10,871.32	$26,377.28	$28,613.20	$27,757.31	$27,740.71	$28,417.96	$27,835.68	$300,752.96
			Total Elec Revenue	298,219.39	306,016.97	291,701.10	292,233.27	182,655.86	176,661.58	298,804.06	327,537.10	318,012.26	312,249.91	320,117.68	308,891.59	$3,433,100.77

CALUMET
Montana Refining, LLC

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

February 8, 2019

Ms. Nicole Hensley
Department of Revenue
PO Box 5805
Helena, MT 59604-5805

RE: USB Annual Report for 2018 for Calumet Montana Refining, LLC

Dear Ms. Hensley:

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 $48,414.15 to the Energy Share of Montana Endowment from the USBC credits we received in 2018.

Should you have any questions or require any additional information, please do not hesitate to contact me.

Sincerely,

Wayne Leiker
VP Calumet Montana Refining

Enclosures

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

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
FAX: (406) 497-4008

DATE:	11/26/2018
NAME OF BUSINESS:	**Calumet Montana Refining**
CITY/TOWN LOCATION:	Great Falls, MT
CONTACT PERSON:	Wayne Leiker
MAILING ADDDRESS:	1900 19th St NE
CITY, STATE AND ZIP:	Great Falls, MT 59404
PHONE NUMBER:	406-454-9843
FAX NUMBER:	406-761-0174
E-MAIL ADDRESS	wayne.leiker@clmt.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.)

Please reserve any remaining 2018 USB credits at year-end for use in 2019.

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: Ronald F Schelf SOA for Wayne Leiker

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.

COPY

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 FAX: (406) 497-4008

DATE:	11/26/2018
NAME OF BUSINESS:	**Calumet Montana Refining**
CITY/TOWN LOCATION:	Great Falls, MT
CONTACT PERSON:	Wayne Leiker
MAILING ADDDRESS:	1900 10th St NE
CITY, STATE AND ZIP:	Great Falls, MT 59404
PHONE NUMBER:	406-454-9843
FAX NUMBER:	406-761-0174
E-MAIL ADDRESS	wayne.leiker@clmt.com

AMOUNT OF CREDIT REQUESTED:	$48,414.15

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):
The remaining balance of 2017 USB funds ($48,414.15) will be donated to Energy Share of Montana Endowment Fund.

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: Ronald F Gabell SOA for Wayne Leiker

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.

COPY

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 FAX: (406) 497-4008

DATE:	11/26/2018
NAME OF BUSINESS:	**Calumet Montana Refining**
CITY/TOWN LOCATION:	Great Falls, MT
CONTACT PERSON:	Wayne Leiker
MAILING ADDDRESS:	1900 10th St NE
CITY, STATE AND ZIP:	Great Falls, MT 59404
PHONE NUMBER:	406-454-9843
FAX NUMBER:	406-761-0174
E-MAIL ADDRESS	wayne.leiker@clmt.com

AMOUNT OF CREDIT REQUESTED:	$49,517.00

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):
LED lighting improvements in plant

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

ESTIMATED kWh SAVINGS:	
ESTIMATED KW SAVINGS:	13.7KW

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: Wayne L. Leiker

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.

COPY

NorthWestern Energy
Delivering a Bright Future

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

CALUMET MONTANA REFINING, LLC

Account Summary

2017 Carryover Reservation:	$98,000.00	YTD Elec Revenue:	$756,280.57
Reservations Made YTD:	$100,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$97,931.15
Payment Requests Made YTD:	$97,931.15	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$97,931.15	Total USBC Credit:	$196,749.75
USBC Credit YTD:	$98,818.60	Payments Issued YTD:	$97,931.15
Average Monthly Credit Earned:	$8,234.88	USBC Credit Balance:	$98,818.60
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Wayne Leiker	11/26/2018	$48,414.15
Wayne Leiker	11/26/2018	$49,517.00

Payments Issued

Date	Amount
12/10/2018	$48,414.15
12/10/2018	$49,517.00

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100327	1327	DA13291234	KWH >	9,636,674	9,480,785	6,410,354	9,561,362	9,101,961	9,546,435	9,103,775	9,471,285	9,254,286	8,428,500	9,370,674	9,180,644	108,546,735
			KW >	13,248	13,248	13,122	13,284	13,248	13,266	13,284	13,248	13,050	12,798	13,014	13,176	13,166
			Elec Revenue >	$55,341.81	$54,699.69	$42,037.03	$54,849.76	$52,967.22	$54,768.87	$53,016.67	$54,023.80	$52,933.07	$49,373.94	$53,350.34	$52,790.82	$630,153.02
100340	1340	DA13291246	KWH >	280	240	280	320	280	280	320	400	120	320	320	320	3,480
			KW >	0	0	0	0	0	0	0	0	0	1	0	0	0
			Elec Revenue >	$33.18	$30.10	$33.17	$36.47	$33.29	$33.26	$36.34	$45.84	$24.43	$43.81	$39.82	$39.92	$429.63
1090836	370234	DA04974711	KWH >	0	10,400	9,760	9,440	9,780	11,160	11,980	12,140	12,520	10,420	10,260	9,400	117,260
			KW >	0	26	26	25	29	29	32	33	31	26	27	23	28
			Elec Revenue >	$280.77	$282.81	$278.07	$265.75	$295.48	$310.00	$334.50	$343.13	$337.43	$285.40	$286.53	$253.01	$3,552.88
1668214	303402	DS84493431	KWH >	0	4,566	4,204	3,504	3,127	2,869	2,650	3,121	5,007	5,381	4,418	5,028	43,875
			KW >	0	13	13	9	10	10	11	10	12	13	14	12	12
			Elec Revenue >	$389.30	$500.80	$473.96	$379.24	$358.21	$335.88	$324.78	$351.10	$510.34	$553.49	$486.26	$520.57	$5,183.93
2015670	135010	DG57850850	KWH >	0	25,280	22,880	22,320	20,480	23,680	23,200	22,080	26,160	25,040	24,240	24,400	259,760
			KW >	0	40	40	36	38	38	40	40	39	38	40	40	39
			Elec Revenue >	$2,400.38	$2,384.70	$2,206.89	$2,124.31	$1,992.32	$2,239.78	$2,181.93	$2,090.63	$2,399.94	$2,308.59	$2,268.34	$2,285.99	$26,883.80
2015680	135013	DG61355591	KWH >	0	40,880	37,840	36,880	32,880	36,960	34,880	35,760	39,680	39,760	36,960	37,520	410,000
			KW >	0	63	63	58	58	60	64	64	63	59	60	61	61
			Elec Revenue >	$3,777.19	$3,824.22	$3,602.89	$3,481.53	$3,162.11	$3,492.39	$3,314.92	$3,360.72	$3,673.63	$3,643.74	$3,452.90	$3,512.16	$42,298.40
2119616	438712	DG55885198	KWH >	19,500	19,680	17,580	15,360	8,460	6,780	5,640	5,520	8,040	13,500	16,200	16,980	153,240
			KW >	41	43	43	37	28	26	45	15	27	33	46	37	35
			Elec Revenue >	$1,862.40	$1,977.39	$1,820.15	$1,587.16	$954.89	$798.43	$891.28	$575.82	$891.13	$1,370.12	$1,711.68	$1,691.99	$16,132.44

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3098480	598626	DG57846948	KWH >	0	21,600	20,520	20,160	17,640	21,600	20,520	19,800	21,600	24,480	20,880	19,080	227,880
			KW >	0	61	68	61	68	64	64	64	57	79	64	61	65
			Elec Revenue >	$2,139.47	$2,299.76	$2,293.66	$2,195.15	$2,065.37	$2,337.26	$2,222.07	$2,155.63	$2,233.43	$2,670.73	$2,256.20	$2,086.26	$26,954.99
3399083	304987	DA04974716	KWH >	0	2,740	2,740	2,480	2,480	2,760	3,500	3,800	3,400	2,620	2,280	2,280	31,080
			KW >	0	8	8	9	10	10	18	17	17	13	6	7	11
			Elec Revenue >	$305.40	$308.43	$309.35	$296.91	$304.42	$329.90	$461.83	$468.92	$440.48	$345.26	$250.18	$254.65	$4,075.73
			Total KWH	9,656,454	9,606,171	6,526,158	9,671,826	9,197,088	9,652,524	9,206,465	9,573,906	9,370,813	8,550,021	9,486,232	9,295,652	109,793,310
			Combined Average KW	13,289	13,502	13,383	13,519	13,489	13,503	13,558	13,491	13,296	13,060	13,271	13,417	13,416
			USBC Charge	$8,690.81	$8,645.56	$5,873.54	$8,704.64	$8,277.36	$8,687.25	$8,285.83	$8,616.52	$8,433.74	$7,695.02	$8,537.61	$8,366.09	$98,813.97
			Total Elec Revenue	$66,529.90	$66,307.90	$53,055.17	$65,216.28	$62,133.31	$64,645.77	$62,784.32	$63,415.59	$63,443.88	$60,595.08	$64,102.25	$63,435.37	$755,664.82

CITY OF BILLINGS
DEPARTMENT OF ADMINISTRATIVE SERVICES

P.O. BOX 1178
BILLINGS, MONTANA 59103

Rec'd MT DOR
MAR 04 2019

Facilities Management 237-6294

February 22, 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

RE: Self-Directed USBC Progress Report for 2018 – City of Billings

Dear Ms. Hensley:

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018.

- All the USB payments we received in 2018 were self-directed for an energy efficiency LED lighting project we submitted this year and a Form B for that project is attached.
- During 2018, we received USB payments totaling $5,808 composed of $4,025.67 in 2017 credits and $1,782.33 in 2018 credits.

At year-end 2018, we also had a Reservation to carry over all remaining 2018 USB credits of $29,009.44 into 2019 for a potential project this year.

If you need to, feel free to contact me.

Sincerely,

Saree Couture

Saree Couture
City of Billings
Facilities Manager
406-237-6294

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email: 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 FAX: (406) 497-4008

DATE:	11-30-2018
NAME OF BUSINESS:	City of Billings
CITY/TOWN LOCATION:	Billings, MT
CONTACT PERSON:	Saree Couture
MAILING ADDDRESS:	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

AMOUNT OF CREDIT REQUESTED:	$5,808

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):
Remainder of funds not covered by Rebates for parking Garages 1,2 and 3 Exterior LED Retrofit (See attached breakdown)

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: Saree Couture

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.

10/1/2016 Update

NorthWestern Energy
Delivering a Bright Future

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 2/25/2019

CITY OF BILLINGS

Account Summary

2017 Carryover Reservation:	$26,000.00	YTD Elec Revenue:	$3,188,921.06
Reservations Made YTD:	$30,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$5,808.00
Payment Requests Made YTD:	$5,808.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$4,025.67	Total USBC Credit:	$34,817.44
USBC Credit YTD:	$30,791.77	Payments Issued YTD:	$5,808.00
Average Monthly Credit Earned:	$2,565.98	USBC Credit Balance:	$29,009.44
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Saree Couture	11/30/2018	$5,808.00

Payments Issued

Date	Amount
12/10/2018	$5,808.00

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100473	1483	DG15004079	KWH >	30,240	29,160	29,680	29,800	28,080	26,120	29,360	30,800	30,160	29,800	27,280	29,280	349,760
			KW >	86	85	162	80	78	78	78	78	76	77	77	79	86
			Elec Revenue >	$3,232.56	$3,136.98	$3,130.35	$3,138.90	$2,986.00	$2,832.86	$3,073.98	$3,132.70	$3,064.42	$3,063.47	$2,868.38	$3,046.57	$36,707.17
100476	1485	DA05479680	KWH >	28,280	28,240	26,520	26,560	27,320	32,680	32,760	38,760	31,160	26,600	19,800	23,680	342,360
			KW >	58	56	53	52	62	71	72	66	67	53	53	55	60
			Elec Revenue >	$2,802.10	$2,777.10	$2,613.74	$2,617.42	$2,761.80	$3,269.53	$3,255.52	$3,613.49	$3,056.34	$2,580.92	$2,059.64	$2,380.54	$33,788.14
100477	1487	DG21486718	KWH >	3,040	2,720	2,680	2,700	2,440	3,420	2,600	3,280	2,840	0	0	0	25,720
			KW >	12	13	14	13	12	19	15	13	14	0	0	0	14
			Elec Revenue >	$372.72	$356.28	$363.80	$347.69	$324.93	$466.37	$357.27	$385.76	$365.99	$114.58	$114.58	$0.00	$3,569.97
100478	1489	DD80999979	KWH >	6,580	8,760	7,000	11,660	5,300	10,840	4,980	5,040	8,940	11,800	5,220	7,260	93,380
			KW >	20	84	89	24	16	37	38	38	143	134	18	35	56
			Elec Revenue >	$723.08	$1,529.63	$1,434.79	$1,164.22	$582.79	$1,222.78	$771.40	$773.76	$2,112.08	$2,244.57	$595.43	$918.63	$14,073.16
100482	1492	DA17677701	KWH >	359,569	328,981	278,834	285,908	251,949	251,307	256,021	278,738	263,026	259,352	287,209	319,915	3,420,809
			KW >	747	699	645	674	584	508	639	568	530	628	688	711	635
			Elec Revenue >	$33,848.40	$31,063.66	$26,815.31	$27,654.64	$24,245.15	$23,537.98	$24,676.42	$25,542.47	$24,181.65	$24,772.48	$27,386.66	$30,123.84	$323,848.66
100483	1493	DG28586546	KWH >	28,320	22,520	27,560	22,200	19,680	19,560	21,240	18,000	21,160	27,320	27,120	25,280	279,960
			KW >	90	83	87	89	86	76	82	55	73	90	90	68	81
			Elec Revenue >	$3,120.40	$2,597.73	$3,024.52	$2,635.60	$2,407.26	$2,290.45	$2,477.89	$1,923.92	$2,345.96	$3,003.82	$2,984.17	$2,630.14	$31,441.86
100484	1494	DG79201031	KWH >	17,800	16,440	20,120	13,960	13,040	13,200	15,360	16,600	13,920	16,920	14,560	14,560	186,480
			KW >	44	40	42	37	34	33	34	41	38	40	32	37	38
			Elec Revenue >	$1,843.73	$1,695.25	$2,001.46	$1,477.74	$1,369.66	$1,369.74	$1,538.53	$1,678.78	$1,444.99	$1,712.36	$1,445.33	$1,498.44	$19,076.01

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 2/25/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100485	1495	DD80999996	KWH >	4,840	7,920	7,640	4,880	3,840	4,240	6,800	10,520	7,840	7,800	3,600	5,080	75,000
			KW >	30	32	29	27	26	35	35	79	34	35	33	35	36
			Elec Revenue >	$688.98	$949.72	$892.22	$659.95	$572.88	$686.89	$888.01	$1,591.19	$950.07	$956.09	$616.97	$748.19	$10,201.16
100506	1515	DA05131417	KWH >	11,320	11,160	10,680	10,600	9,720	11,680	11,160	14,200	9,960	10,360	8,520	10,080	129,440
			KW >	50	48	56	52	52	58	58	63	54	47	47	55	53
			Elec Revenue >	$1,390.77	$1,356.01	$1,396.32	$1,358.00	$1,286.52	$1,502.15	$1,451.32	$1,716.95	$1,304.81	$1,271.06	$1,130.09	$1,336.29	$16,500.29
100507	1516	DG79201023	KWH >	62,080	55,400	55,280	54,760	59,480	70,000	69,600	76,960	65,560	65,200	55,760	58,360	748,440
			KW >	120	120	124	124	141	142	182	152	145	134	134	124	137
			Elec Revenue >	$6,060.27	$5,524.62	$5,566.81	$5,541.63	$6,065.50	$6,894.86	$7,181.63	$7,364.16	$6,465.15	$6,341.28	$5,619.14	$5,744.65	$74,369.70
100540	1549	DA17801226	KWH >	31,232	34,570	31,314	35,770	37,144	42,670	42,927	62,227	46,358	44,845	30,763	31,274	471,094
			KW >	208	179	175	175	244	251	394	477	462	404	178	181	277
			Elec Revenue >	$4,524.62	$4,489.36	$4,183.10	$4,548.25	$5,327.11	$5,825.62	$7,225.76	$9,465.30	$8,135.00	$7,461.88	$4,134.57	$4,214.41	$69,534.98
100591	1595	DA20155001	KWH >	884,302	855,944	758,225	795,801	776,621	789,082	792,926	825,810	829,545	833,113	835,160	864,890	9,841,419
			KW >	1,395	1,339	1,252	1,203	1,248	1,289	1,263	1,278	1,302	1,358	1,272	1,384	1,299
			Elec Revenue >	$69,995.76	$67,820.72	$60,371.21	$63,293.75	$61,948.50	$63,017.65	$62,859.50	$63,483.14	$64,214.68	$65,284.13	$64,743.79	$67,770.66	$774,803.49
100606	1610	DA06183573	KWH >	870,512	895,657	0	0	0	0	0	0	0	0	0	0	1,766,169
			KW >	1,555	1,546	0	0	0	0	0	0	0	0	0	0	1,551
			Elec Revenue >	$79,736.79	$81,677.33	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$161,414.12
100606	1610	DA18683669	KWH >	0	0	832,058	895,553	874,742	1,060,582	1,268,778	1,929,386	1,711,642	1,280,833	794,167	800,107	11,447,848
			KW >	0	0	1,417	1,503	1,624	2,462	2,462	3,110	3,231	2,592	1,442	1,373	2,122
			Elec Revenue >	$0.00	$0.00	$75,559.25	$81,640.06	$80,801.46	101,976.01	117,307.41	169,614.63	155,100.30	118,124.30	$71,765.11	$71,909.16	$1,043,797.69
712537	322858	DA04147885	KWH >	5,400	5,220	4,980	5,040	5,100	4,740	5,580	5,520	5,280	5,340	4,380	5,280	61,860
			KW >	16	15	29	13	13	15	15	16	15	15	14	13	16
			Elec Revenue >	$590.33	$571.10	$544.31	$539.66	$544.03	$532.92	$597.76	$594.11	$563.91	$571.73	$485.99	$544.67	$6,680.52
712538	322859	DG97282715	KWH >	1,220	0	2,560	1,280	1,080	1,720	2,060	5,700	4,880	3,760	1,140	1,240	26,640
			KW >	4	0	7	4	4	41	41	42	38	40	6	4	21
			Elec Revenue >	$134.40	$0.00	$246.62	$149.46	$123.79	$543.21	$568.79	$837.35	$745.74	$677.15	$150.25	$136.28	$4,313.04
712792	323113	DS01543992	KWH >	3,762	3,376	4,027	3,069	3,150	2,927	2,629	2,445	2,257	2,963	3,448	2,977	37,030
			KW >	9	11	6	5	5	9	12	8	9	11	12	12	9
			Elec Revenue >	$390.77	$380.96	$386.09	$298.40	$303.80	$330.53	$335.38	$272.13	$268.63	$344.22	$390.83	$355.85	$4,057.59
712800	323120	DG50574311	KWH >	10,680	9,560	10,360	8,840	9,320	9,800	8,960	10,360	8,320	8,760	9,360	9,280	113,600
			KW >	25	27	24	21	22	29	46	36	38	22	21	20	28
			Elec Revenue >	$1,092.36	$1,029.91	$1,057.42	$916.68	$963.39	$1,067.65	$1,158.80	$1,154.11	$1,018.40	$898.78	$939.43	$928.82	$12,225.75
719225	328323	DA13291191	KWH >	4,768	4,012	4,718	2,744	2,773	2,999	544	1,749	1,907	3,368	2,107	4,263	35,952
			KW >	12	10	23	11	9	8	8	6	7	8	11	9	10
			Elec Revenue >	$499.95	$427.30	$497.59	$332.08	$321.44	$328.23	$130.63	$208.95	$227.49	$354.09	$278.54	$427.22	$4,033.51
720817	329694	DA19428727	KWH >	2,308	2,470	2,366	1,785	1,614	1,810	2,800	3,748	3,629	2,714	1,714	2,072	29,030
			KW >	11	9	19	10	9	11	12	13	14	15	11	12	12
			Elec Revenue >	$301.25	$297.30	$297.98	$249.67	$228.72	$261.02	$350.34	$423.60	$427.35	$364.76	$250.32	$289.29	$3,741.60
720821	329698	DG90051183	KWH >	1,960	320	18,320	10,640	6,280	3,280	23,120	29,320	21,960	2,720	2,280	1,440	121,640
			KW >	8	1	51	23	19	22	58	67	64	64	22	4	34
			Elec Revenue >	$240.17	$44.36	$1,700.69	$1,077.98	$689.70	$481.51	$2,395.96	$2,904.58	$2,318.40	$855.60	$408.34	$157.94	$13,275.23
720829	329705	DS01563742	KWH >	8,800	6,480	7,040	5,000	4,000	2,200	2,480	3,120	2,600	3,680	3,880	6,520	55,800
			KW >	32	26	28	20	16	16	16	16	16	14	16	20	20
			Elec Revenue >	$1,014.20	$771.49	$835.34	$597.84	$478.89	$337.42	$356.91	$403.16	$365.02	$428.73	$464.17	$708.53	$6,761.70

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 2/25/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
723050	331664	DA21076340	KWH >	0	0	0	0	0	30	407	1,008	844	508	0	0	2,797
			KW >	0	0	0	0	0	8	9	9	9	9	0	0	9
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$90.15	$120.27	$164.73	$153.11	$130.86	$0.00	$0.00	$659.12
723054	331668	DG28887542	KWH >	196	148	523	542	-555	191	1,138	3,729	3,150	2,140	0	0	11,202
			KW >	0	0	0	0	0	2	20	26	26	26	0	0	10
			Elec Revenue >	$25.04	$21.50	$50.80	$52.61	($40.59)	$34.35	$292.18	$537.03	$497.27	$423.40	$0.00	$0.00	$1,893.59
723090	331701	DG97272252	KWH >	0	0	0	0	0	0	80	0	0	0	0	0	80
			KW >	0	0	0	0	0	0	2	0	0	0	0	0	2
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$37.26	$31.18	$31.18	$31.18	$7.35	$7.35	$145.50
723170	331777	DA04750404	KWH >	0	0	0	0	444	536	2,296	8,715	4,158	2,242	82	0	18,473
			KW >	0	0	0	0	0	12	39	40	43	0	1	0	19
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$34.91	$168.61	$564.56	$1,047.46	$736.52	$168.83	$21.99	$0.00	$2,742.88
723879	332451	DA13291229	KWH >	0	0	160	0	112	678	155	1,128	614	55	142	56	3,100
			KW >	0	0	0	0	8	8	8	8	8	0	0	0	4
			Elec Revenue >	$0.00	$0.00	$13.19	$0.00	$89.00	$138.74	$99.67	$170.72	$132.41	$6.48	$11.68	$12.66	$674.55
793134	349162	DD58543408	KWH >	0	0	0	0	56	10	420	1,078	222	10	9	0	1,805
			KW >	0	0	0	0	0	0	20	20	20	0	0	0	9
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$4.47	$0.86	$232.73	$282.30	$217.35	$0.94	$0.87	$0.00	$739.52
871546	351410	DA03451324	KWH >	7,700	6,460	7,440	7,120	5,600	5,520	6,220	6,380	5,500	6,760	2,960	0	67,660
			KW >	20	22	23	25	21	20	21	15	18	19	19	0	20
			Elec Revenue >	$809.94	$735.90	$822.62	$820.72	$659.71	$641.34	$699.50	$645.79	$605.02	$721.36	$320.95	$0.00	$7,482.85
925496	331631	DA05551496	KWH >	920	2,000	1,500	1,820	1,500	2,860	2,440	2,660	2,780	2,920	2,680	2,080	26,160
			KW >	2	2	2	12	17	18	9	11	12	15	15	12	11
			Elec Revenue >	$101.12	$185.52	$146.28	$270.98	$292.57	$416.88	$293.71	$324.29	$338.65	$380.53	$361.81	$286.76	$3,399.10
975808	381443	DG79751903	KWH >	5,780	4,680	5,020	4,500	5,020	3,800	4,460	5,500	4,940	6,580	2,880	4,760	57,920
			KW >	13	13	14	12	12	12	12	13	12	14	12	13	13
			Elec Revenue >	$594.26	$510.52	$541.78	$480.02	$519.52	$425.48	$480.58	$553.55	$511.32	$657.66	$353.29	$503.19	$6,131.17
1059093	279444	DG21208863	KWH >	2,880	800	720	760	800	920	880	1,080	920	1,080	600	2,160	13,600
			KW >	7	4	3	7	3	6	9	12	12	14	2	6	7
			Elec Revenue >	$304.12	$109.55	$95.33	$138.11	$101.65	$146.48	$166.27	$216.45	$204.78	$233.20	$81.21	$241.36	$2,038.51
1116452	372359	DG93778435	KWH >	5,500	4,560	6,580	3,840	3,440	4,260	6,520	9,180	7,700	7,620	3,640	4,000	66,840
			KW >	11	11	13	11	11	13	28	42	42	34	19	10	20
			Elec Revenue >	$550.32	$477.46	$653.61	$420.26	$389.66	$473.51	$797.14	$1,128.20	$1,010.89	$932.34	$481.03	$420.78	$7,735.20
1141284	331674	DG23524403	KWH >	0	0	0	0	408	85	1,166	3,407	2,181	910	0	0	8,157
			KW >	0	0	0	0	0	4	6	6	6	7	0	0	5
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$32.28	$53.52	$148.70	$312.64	$223.59	$143.94	$0.00	$0.00	$914.67
1160780	331770	DA15269521	KWH >	151	1,805	1,769	117	2,014	4,946	900	13,362	6,880	437	0	0	32,381
			KW >	0	2	2	0	5	52	62	62	59	26	0	0	27
			Elec Revenue >	$21.03	$177.11	$175.39	$21.58	$206.30	$891.73	$690.17	$1,607.94	$1,100.24	$297.21	$0.00	$0.00	$5,188.70
1160802	381868	DA19880570	KWH >	9,580	6,120	7,740	6,860	7,100	8,320	7,840	11,280	8,920	8,040	7,000	7,080	95,880
			KW >	20	17	20	17	22	28	32	42	34	26	16	16	24
			Elec Revenue >	$960.67	$662.89	$813.41	$719.12	$785.26	$935.59	$939.04	$1,279.84	$1,029.41	$884.89	$711.00	$719.68	$10,440.80
1160804	381869	DG76859592	KWH >	23,800	22,360	24,240	20,960	18,040	18,360	14,880	13,720	12,000	30,440	800	21,680	221,280
			KW >	88	84	49	94	94	47	46	46	36	38	48	57	61
			Elec Revenue >	$2,748.25	$2,591.51	$2,391.34	$2,584.78	$2,349.57	$1,911.78	$1,622.73	$1,508.58	$1,280.26	$2,722.23	$549.25	$2,245.74	$24,506.02

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 2/25/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
720834	329709	DS68011844	KWH >	35,400	36,840	74,320	-9,560	21,920	12,880	12,680	14,000	12,640	20,280	19,120	24,880	275,400
			KW >	83	76	79	79	67	39	37	35	39	48	59	58	58
			Elec Revenue >	$3,605.81	$3,639.19	$6,617.43	$52.07	$2,393.34	$1,406.65	$1,358.31	$1,423.86	$1,366.88	$2,044.10	$2,067.30	$2,508.90	$28,483.84
720840	329715	DG89630437	KWH >	4,080	3,390	3,330	3,510	3,180	3,390	3,330	3,330	3,270	3,720	3,210	3,870	41,610
			KW >	14	13	10	10	11	10	11	10	12	12	12	11	11
			Elec Revenue >	$466.68	$406.61	$374.34	$390.09	$369.23	$376.53	$377.86	$367.30	$382.08	$412.10	$372.73	$418.77	$4,714.32
720841	329716	DA17677821	KWH >	1,560	1,080	1,440	1,360	3,120	7,960	21,960	19,560	9,280	4,200	1,360	1,600	74,480
			KW >	2	3	3	2	28	40	52	54	42	42	3	2	23
			Elec Revenue >	$157.06	$123.58	$151.55	$141.98	$536.09	$1,025.52	$2,225.63	$2,031.83	$1,140.75	$754.75	$143.45	$158.45	$8,590.64
722251	330939	DG93700374	KWH >	872	596	946	992	-605	0	0	0	0	0	0	0	2,801
			KW >	3	3	3	3	2	0	0	0	0	0	0	0	3
			Elec Revenue >	$110.55	$89.92	$116.65	$121.01	$8.50	$152.09	$194.95	$298.57	$235.70	$259.52	$0.00	$0.00	$1,587.46
722252	330940	DD33455510	KWH >	2,880	2,080	2,720	1,920	1,280	1,760	5,280	4,800	14,400	-2,880	1,600	4,320	40,160
			KW >	6	6	6	6	44	102	172	172	102	172	6	105	75
			Elec Revenue >	$295.98	$233.75	$282.93	$221.69	$549.51	$1,155.06	$2,124.00	$2,086.81	$2,122.17	$1,506.54	$193.57	$1,388.65	$12,160.66
722257	81078	DG23689620	KWH >	307	272	305	285	334	953	2,233	3,325	4,136	1,851	315	286	14,602
			KW >	0	0	0	0	24	29	29	29	30	30	0	0	14
			Elec Revenue >	$35.39	$32.69	$35.22	$33.85	$269.42	$359.75	$456.87	$539.80	$605.01	$437.98	$28.19	$25.92	$2,860.09
722260	330947	DD82180941	KWH >	0	0	0	0	0	88	476	2,233	1,241	366	0	0	4,404
			KW >	0	0	0	0	0	18	20	19	19	19	0	0	19
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$189.14	$236.29	$360.72	$288.68	$225.06	$0.00	$0.00	$1,299.89
722264	330951	DG16604929	KWH >	17,120	22,000	20,000	22,320	18,000	34,320	79,440	142,720	148,480	108,480	28,800	17,360	659,040
			KW >	44	45	88	59	58	186	238	295	291	249	128	128	151
			Elec Revenue >	$1,790.10	$2,181.78	$2,010.68	$2,346.61	$1,996.56	$4,536.91	$8,573.51	$13,786.44	$14,196.42	$10,806.47	$3,485.01	$2,614.14	$68,324.63
722270	330957	DA19272334	KWH >	22,720	18,720	19,200	20,800	21,920	49,440	33,440	65,120	46,080	39,360	20,480	20,320	377,600
			KW >	68	67	67	67	78	148	212	232	115	163	108	104	119
			Elec Revenue >	$2,469.30	$2,133.67	$2,178.14	$2,304.50	$2,499.67	$5,345.22	$4,679.05	$7,261.09	$4,682.56	$4,645.63	$2,662.29	$2,606.82	$43,467.94
722287	330973	DD81892660	KWH >	0	669	324	102	101	192	970	8,826	7,940	4,809	0	0	23,933
			KW >	0	3	0	0	0	0	16	56	45	45	0	0	18
			Elec Revenue >	$0.00	$93.51	$34.08	$16.85	$10.25	$17.59	$231.49	$1,209.48	$1,042.18	$813.84	$0.00	$0.00	$3,469.27
723040	331655	DA15191578	KWH >	33,480	29,000	26,560	25,960	27,600	41,000	100,240	74,840	109,200	92,800	29,760	31,120	621,560
			KW >	123	112	198	94	115	166	272	314	317	315	112	112	188
			Elec Revenue >	$3,853.89	$3,400.79	$3,061.85	$2,986.48	$3,310.07	$4,863.49	$10,531.81	$8,819.85	$11,473.19	$10,266.07	$3,398.62	$3,515.36	$69,481.47
723043	331658	DA17236706	KWH >	1,480	1,400	1,480	1,320	2,960	4,040	11,120	35,200	24,200	9,640	1,480	1,400	95,720
			KW >	3	4	3	3	50	89	106	141	141	140	141	4	69
			Elec Revenue >	$158.79	$156.69	$158.46	$146.81	$732.59	$1,203.67	$1,924.16	$4,077.15	$3,254.72	$2,141.89	$1,522.74	$162.86	$15,640.53
723044	331659	DG23689619	KWH >	276	120	126	135	125	128	260	300	626	-290	41	189	2,036
			KW >	0	0	0	0	0	0	4	4	4	4	0	0	1
			Elec Revenue >	$31.17	$19.03	$19.45	$19.96	$11.51	$12.31	$64.51	$66.74	$90.49	$22.80	$4.06	$15.89	$377.92
723045	331660	DG23689614	KWH >	475	481	435	493	476	573	2,734	7,559	8,723	6,464	1,275	655	30,343
			KW >	2	0	0	5	0	43	39	40	36	38	14	1	18
			Elec Revenue >	$72.01	$51.54	$47.80	$101.08	$45.90	$474.01	$597.42	$957.50	$1,003.90	$866.81	$239.31	$59.70	$4,516.98
723048	331662	DG21220089	KWH >	0	0	0	0	0	1	487	289	375	259	0	0	1,411
			KW >	0	0	0	0	0	3	7	6	6	6	0	0	6
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$37.14	$110.68	$84.81	$90.48	$82.23	$0.00	$0.00	$405.34

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 2/25/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1175972	377151	DG90025399	KWH >	734	694	928	703	737	682	704	789	740	850	729	791	9,081
			KW >	4	3	3	3	4	4	3	1	5	2	0	0	3
			Elec Revenue >	$106.59	$94.56	$116.32	$97.24	$104.64	$109.15	$93.97	$78.09	$118.27	$98.42	$66.66	$71.71	$1,155.62
1183483	377663	DG15107552	KWH >	9,740	8,880	8,760	9,780	13,660	15,460	14,860	19,460	17,160	15,780	11,880	12,360	157,780
			KW >	27	23	53	31	37	40	45	51	51	44	35	24	38
			Elec Revenue >	$1,044.59	$932.98	$957.93	$1,089.76	$1,445.14	$1,622.14	$1,615.87	$2,006.97	$1,825.17	$1,658.50	$1,269.23	$1,198.64	$16,666.92
1191404	378526	DG23689621	KWH >	18	8	0	0	27	85	3,616	2,508	3,001	3,901	0	0	13,164
			KW >	0	0	0	0	1	25	30	29	28	32	0	0	18
			Elec Revenue >	$1.47	$0.72	$0.00	$0.00	$21.29	$258.63	$575.85	$475.12	$501.83	$608.33	$0.00	$0.00	$2,443.24
1269391	380261	DA04680721	KWH >	33,920	28,960	33,440	26,960	25,920	32,560	29,680	36,480	31,440	30,400	26,240	28,240	364,240
			KW >	79	83	81	71	81	104	95	108	108	108	108	74	92
			Elec Revenue >	$3,445.57	$3,099.04	$3,426.07	$2,832.45	$2,845.55	$3,592.71	$3,255.55	$3,846.36	$3,478.23	$3,414.17	$3,092.06	$2,921.97	$39,249.73
1569636	1486	DS49353753	KWH >	19,560	16,600	17,200	15,080	13,160	11,440	10,960	11,920	11,280	15,600	13,760	17,320	173,880
			KW >	40	40	36	36	32	32	28	24	26	32	32	32	33
			Elec Revenue >	$1,933.97	$1,700.57	$1,710.71	$1,548.39	$1,355.16	$1,218.88	$1,129.73	$1,158.86	$1,127.98	$1,522.14	$1,381.67	$1,660.19	$17,448.25
1669567	81113	DG21203263	KWH >	5,600	4,820	5,940	4,480	4,680	5,120	6,620	6,500	5,760	6,540	5,660	4,700	66,420
			KW >	15	13	14	13	13	16	19	20	20	17	14	12	16
			Elec Revenue >	$596.14	$521.75	$613.46	$494.35	$508.63	$572.49	$714.13	$704.64	$650.64	$686.53	$582.28	$494.54	$7,139.58
1984150	79279	DG76643841	KWH >	4,209	3,326	3,101	2,604	1,960	1,178	1,393	1,549	1,274	1,930	1,998	2,906	27,428
			KW >	11	11	10	10	9	10	11	10	8	10	11	10	10
			Elec Revenue >	$448.88	$380.24	$357.93	$319.64	$255.76	$202.17	$226.56	$228.25	$189.15	$255.72	$270.00	$339.58	$3,473.88
1984155	79281	DG90051658	KWH >	2,875	2,466	2,449	1,922	1,504	1,280	1,773	2,117	1,627	2,125	1,971	2,311	24,420
			KW >	9	8	9	9	7	9	13	13	10	10	10	10	10
			Elec Revenue >	$329.56	$288.97	$289.15	$248.33	$197.49	$200.78	$281.40	$305.94	$235.41	$274.08	$262.36	$289.15	$3,202.62
3039007	437588	DA19249943	KWH >	54,000	60,960	52,800	46,800	66,320	83,600	85,760	100,480	77,520	65,520	55,040	56,160	804,960
			KW >	140	141	132	132	200	222	268	240	240	210	210	188	194
			Elec Revenue >	$5,621.91	$6,173.25	$5,455.98	$4,997.71	$7,181.67	$8,747.96	$9,273.53	$10,029.03	$8,325.48	$7,124.06	$6,322.80	$6,210.99	$85,464.37
3252194	609375	DA19487345	KWH >	0	0	0	0	0	0	0	0	0	0	0	20,000	20,000
			KW >	0	0	0	0	0	0	0	0	0	0	0	70	70
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,243.38	$2,243.38
			Total KWH	2,684,826	2,621,205	2,473,458	2,453,035	2,415,031	2,723,503	3,082,503	4,018,415	3,694,146	3,148,695	2,382,980	2,515,442	34,213,239
			Combined Average KW	5,366	5,232	5,253	4,971	5,358	6,775	7,610	8,477	8,402	7,757	5,312	5,290	8,089
			USBC Charge	$2,416.36	$2,359.04	$2,226.10	$2,207.71	$2,173.53	$2,451.15	$2,774.22	$3,616.56	$3,324.72	$2,833.85	$2,144.66	$2,263.87	$30,791.77
			Total Elec Revenue	245,293.77	239,723.60	226,638.80	226,258.65	226,405.60	262,784.39	296,996.85	369,100.15	345,175.75	300,088.79	219,096.49	229,213.25	$3,186,776.09

Rec'd MT DOR
FEB 07 2019

CITY OF GREAT FALLS
MONTANA

P.O. Box 5021, 59403-5021

February 6, 2019

Ms. Nicole Hensley
Montana Department of Revenue
PO Box 5805
Helena, MT 59604-5805

Dear Nicole,

This letter is to report the Universal System Benefits funds that were directed for the City of Great Falls. During 2018 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 2018 the City received $17,799.50 with a pending payment of $1,253.41. No new Form B's were submitted under this program.

If you have any questions please let me know.

Sincerely,

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

Attachments:
Self Directed USBC Progress Report for 2018
City of Great Falls Qualifying Projects 2018

cc: Rick Edwards

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

CITY OF GREAT FALLS

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$716,316.84
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$3,756,532.49	Total Payment Requests:	$3,756,532.49
Payment Requests Made YTD:	$0.00	Current Request Balance:	$3,738,732.99
2017 Carryover USBC Credit:	$1,195.59	Total USBC Credit:	$19,052.91
USBC Credit YTD:	$17,857.32	Payments Issued YTD:	$17,799.50
Average Monthly Credit Earned:	$1,488.11	USBC Credit Balance:	$1,253.41
		Payment Pending:	$1,253.41

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$5,131.42
07/11/2018	$4,201.04
10/03/2018	$5,829.75
12/10/2018	$2,637.29

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100390	1393	DD39206846	KWH >	41,840	40,000	39,520	52,720	39,600	40,400	39,280	32,720	69,040	40,160	39,360	42,800	517,440
			KW >	190	184	136	216	222	237	170	300	173	171	171	164	195
			Elec Revenue >	$1,689.12	$1,621.68	$1,290.67	$1,940.96	$1,857.69	$1,965.90	$1,512.80	$2,318.19	$1,823.17	$1,531.32	$1,523.67	$1,508.57	$20,583.74
100391	1394	DG78944355	KWH >	11,160	10,440	10,200	10,800	7,920	7,200	8,040	8,400	7,320	7,080	8,400	10,320	107,280
			KW >	37	33	33	34	30	36	36	34	36	30	31	33	34
			Elec Revenue >	$364.67	$331.45	$327.27	$340.95	$281.63	$314.42	$323.25	$319.39	$317.06	$274.80	$295.41	$329.74	$3,820.04
100392	1395	DG23747229	KWH >	8,720	8,640	8,160	7,760	6,800	7,200	6,640	8,160	7,840	7,200	6,960	7,440	91,520
			KW >	26	26	27	26	24	26	26	28	25	22	22	25	25
			Elec Revenue >	$268.69	$266.59	$265.40	$256.28	$231.22	$250.92	$245.99	$277.14	$252.76	$225.32	$223.03	$248.93	$3,012.27
100398	1403	DG52303327	KWH >	28,600	25,800	25,280	25,320	25,280	27,240	27,480	30,640	30,240	25,160	24,120	23,960	319,120
			KW >	62	54	54	50	61	61	73	75	73	48	48	49	59
			Elec Revenue >	$699.51	$615.80	$606.60	$585.82	$656.88	$675.65	$755.77	$800.94	$783.78	$570.07	$560.14	$563.93	$7,874.89
100401	1404	DG35953899	KWH >	22,760	28,880	28,080	24,960	19,680	19,480	17,080	15,840	19,760	19,560	22,600	22,880	261,560
			KW >	51	48	48	41	36	36	36	28	32	34	38	40	39
			Elec Revenue >	$570.56	$606.98	$596.36	$521.50	$433.90	$434.64	$409.77	$347.83	$411.92	$425.98	$479.00	$494.99	$5,733.43
100448	1456	DG93700236	KWH >	3,880	2,960	3,760	3,280	2,920	2,440	2,680	3,000	2,520	2,440	2,560	3,200	35,640
			KW >	10	9	10	10	9	8	9	10	9	7	8	9	9
			Elec Revenue >	$111.96	$100.30	$114.79	$104.90	$96.17	$83.63	$96.52	$102.60	$95.38	$81.27	$87.76	$101.87	$1,177.15
100466	1475	DA18484075	KWH >	13,000	8,240	6,480	9,160	8,760	16,640	30,280	29,320	48,520	26,240	10,480	9,120	216,240
			KW >	92	30	178	31	30	67	86	86	102	83	70	54	76
			Elec Revenue >	$753.26	$293.44	$663.52	$301.43	$294.95	$611.20	$868.80	$862.49	$1,155.56	$814.87	$573.72	$454.16	$7,647.40

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100468	1479	DG93770327	KWH >	1,040	960	1,240	1,280	880	640	880	800	880	800	600	1,000	11,000
			KW >	5	7	7	7	5	7	8	5	8	6	3	6	6
			Elec Revenue >	$54.99	$64.84	$66.85	$67.22	$52.82	$61.10	$68.72	$49.64	$71.70	$54.97	$37.06	$56.87	$706.78
100470	1480	DG16639312	KWH >	25,920	23,200	27,840	17,760	31,840	56,640	74,240	118,240	68,800	40,800	27,040	22,880	535,200
			KW >	120	120	120	120	120	228	451	352	233	121	120	120	185
			Elec Revenue >	$1,062.60	$1,027.23	$1,067.71	$971.20	$1,106.01	$2,063.18	$3,715.59	$3,481.44	$2,220.52	$1,207.06	$1,064.95	$1,025.21	$20,012.70
100472	1482	DA20062888	KWH >	22,560	24,240	21,480	19,560	16,200	16,920	17,040	17,640	16,560	16,080	17,880	19,200	225,360
			KW >	80	81	81	66	62	63	70	66	64	62	67	74	70
			Elec Revenue >	$764.52	$782.81	$752.79	$631.21	$575.23	$590.06	$640.66	$615.48	$597.15	$576.59	$625.74	$686.32	$7,838.56
100486	1496	DG35734578	KWH >	15,280	14,000	14,000	14,240	52,560	-23,520	17,360	21,600	18,960	15,840	13,920	14,480	188,720
			KW >	48	48	48	37	44	52	63	71	68	49	49	51	52
			Elec Revenue >	$482.38	$468.34	$458.92	$392.42	$806.92	$131.46	$592.33	$687.93	$641.39	$489.04	$470.69	$486.71	$6,108.53
100490	1500	DG90038328	KWH >	25,280	20,400	25,680	25,840	24,480	31,920	31,280	35,120	34,320	27,280	23,760	25,120	330,480
			KW >	74	74	75	73	112	138	164	158	156	120	75	74	108
			Elec Revenue >	$750.75	$701.10	$750.67	$741.63	$982.62	$1,228.49	$1,398.93	$1,397.92	$1,379.62	$1,072.57	$735.20	$742.88	$11,882.38
100515	1524	DS81105850	KWH >	6,440	3,720	3,760	3,400	2,560	2,720	3,040	3,200	3,200	3,160	3,360	3,000	41,560
			KW >	10	10	10	10	9	8	8	8	8	9	10	10	9
			Elec Revenue >	$139.32	$115.32	$114.79	$108.70	$92.72	$88.96	$89.46	$96.54	$93.87	$101.49	$111.37	$107.95	$1,260.49
100516	1525	DA15607722	KWH >	3,520	3,680	3,760	3,400	3,160	3,480	3,240	4,000	4,320	3,640	3,360	3,880	43,440
			KW >	13	13	11	12	12	11	12	12	14	12	12	13	12
			Elec Revenue >	$129.93	$131.12	$117.43	$121.92	$116.98	$117.40	$120.47	$125.49	$141.87	$124.71	$122.02	$135.01	$1,504.35
100517	1526	DG36058725	KWH >	11,600	19,520	17,360	18,160	18,480	17,600	18,560	16,160	6,640	29,600	17,840	19,280	210,800
			KW >	33	28	28	28	28	28	30	30	29	28	31	30	29
			Elec Revenue >	$344.87	$387.82	$364.07	$371.73	$374.80	$361.08	$386.41	$364.19	$267.96	$481.93	$385.58	$394.00	$4,484.44
100518	1527	DD37113681	KWH >	5,620	4,780	4,980	5,160	3,920	3,800	4,800	4,740	3,420	2,160	3,720	4,820	51,920
			KW >	18	18	18	11	14	12	13	15	12	9	10	10	13
			Elec Revenue >	$186.44	$177.70	$178.06	$130.84	$138.82	$128.40	$143.43	$152.55	$123.95	$93.26	$109.50	$122.67	$1,685.62
100519	1528	DG28164629	KWH >	26,560	2,000	2,080	26,560	15,120	22,800	24,400	35,760	36,240	30,880	16,240	18,560	257,200
			KW >	125	128	255	128	128	128	132	130	129	130	131	146	141
			Elec Revenue >	$1,107.03	$885.11	$874.79	$1,108.37	$998.85	$1,072.38	$1,114.16	$1,217.19	$1,216.79	$1,170.90	$1,036.41	$1,159.79	$12,961.77
100542	1550	DA18683606	KWH >	311,898	309,519	276,452	295,688	331,527	517,131	604,866	1,045,837	802,312	416,932	318,986	286,100	5,517,248
			KW >	547	717	734	527	855	1,051	1,900	2,027	1,975	1,065	754	547	1,058
			Elec Revenue >	$6,690.83	$7,774.64	$7,512.29	$6,324.45	$8,839.98	$11,912.22	$18,397.02	$23,502.26	$20,831.08	$11,087.81	$8,080.65	$6,385.05	$137,338.28
100696	1660	DA19166558	KWH >	2,536	2,371	2,266	2,356	2,645	2,562	2,528	2,352	2,305	2,322	2,372	2,328	28,943
			KW >	12	9	12	9	10	20	15	9	10	11	9	8	11
			Elec Revenue >	$112.36	$90.22	$108.42	$89.45	$98.82	$164.19	$131.02	$89.77	$95.96	$102.80	$89.96	$82.89	$1,255.86
100698	1662	DA18683608	KWH >	600,411	591,051	567,796	640,972	583,615	595,696	549,017	574,454	538,045	541,475	537,662	536,128	6,856,322
			KW >	1,113	1,090	1,105	1,052	1,075	1,069	1,084	1,130	1,096	1,046	1,038	965	1,072
			Elec Revenue >	$13,279.07	$13,000.75	$12,759.14	$13,104.48	$12,707.51	$12,784.80	$12,446.03	$13,027.41	$12,449.17	$12,149.54	$12,061.84	$11,561.60	$151,331.34
715007	325033	DA16528765	KWH >	11,560	5,800	9,960	8,320	7,000	7,120	8,640	15,720	3,920	7,120	7,320	8,360	100,840
			KW >	36	30	59	29	26	24	29	39	32	24	27	31	32
			Elec Revenue >	$1,268.57	$760.39	$1,080.75	$950.50	$821.10	$810.28	$971.25	$1,596.12	$623.46	$792.32	$838.16	$964.85	$11,477.75
715024	325044	DG54580881	KWH >	81,000	72,000	63,000	54,000	42,840	48,240	51,120	56,520	44,280	51,120	59,400	61,920	685,440
			KW >	158	165	165	126	100	97	118	118	97	108	122	129	125
			Elec Revenue >	$7,560.43	$6,912.62	$6,247.18	$5,225.49	$4,151.11	$4,529.96	$4,851.24	$5,228.65	$4,158.30	$4,764.74	$5,520.48	$5,782.37	$64,932.57

Self-Directed USBC Progress Report for 2018

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Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
715046	325060	DA20154990	KWH >	26,520	21,240	23,160	21,840	21,000	19,920	20,760	31,320	21,240	23,280	20,400	26,400	277,080
			KW >	60	57	58	52	51	49	54	67	64	52	50	62	56
			Elec Revenue >	$2,555.08	$2,130.89	$2,283.71	$2,143.80	$2,063.46	$1,959.08	$2,051.01	$2,912.80	$2,150.23	$2,213.30	$1,974.74	$2,534.64	$26,972.74
715055	325066	DA03890964	KWH >	20,800	20,000	20,000	25,600	25,600	26,400	32,800	24,800	27,200	24,000	24,000	20,000	291,200
			KW >	64	48	80	80	112	104	216	104	72	80	48	48	88
			Elec Revenue >	$637.54	$519.20	$728.05	$781.66	$993.34	$948.07	$1,755.13	$936.98	$746.75	$769.48	$556.33	$518.12	$9,890.65
715215	325168	DG57908291	KWH >	13,760	11,840	11,840	13,760	13,120	12,480	12,800	11,840	17,600	14,080	12,800	13,440	159,360
			KW >	22	22	44	25	25	32	25	25	25	25	28	25	27
			Elec Revenue >	$290.52	$271.10	$417.07	$308.42	$302.30	$338.51	$299.50	$290.96	$345.98	$312.36	$321.46	$306.26	$3,804.44
715217	325170	DA18997909	KWH >	7,191	7,288	7,103	6,824	6,603	6,418	6,212	6,885	7,081	7,306	4,293	4,912	78,116
			KW >	14	18	17	21	18	19	18	13	22	34	14	17	19
			Elec Revenue >	$176.81	$204.49	$193.50	$215.64	$192.08	$194.88	$186.88	$161.83	$223.06	$305.75	$143.48	$171.16	$2,369.56
715320	325263	DA05147669	KWH >	12,720	10,520	12,760	9,600	8,160	8,640	8,800	12,360	12,800	9,120	9,280	10,800	125,560
			KW >	44	37	37	32	33	30	32	33	35	27	33	32	34
			Elec Revenue >	$1,439.55	$1,200.78	$1,374.82	$1,078.99	$974.92	$988.35	$1,009.00	$1,277.74	$1,332.95	$982.01	$1,048.47	$1,161.17	$13,868.75
715322	325264	DG57850854	KWH >	16,560	13,600	13,760	14,080	13,280	17,760	17,840	18,880	17,840	17,680	14,000	14,800	190,080
			KW >	39	39	39	28	29	40	38	41	42	39	28	28	36
			Elec Revenue >	$1,691.35	$1,460.07	$1,470.02	$1,391.67	$1,341.02	$1,801.44	$1,769.54	$1,852.70	$1,790.07	$1,754.07	$1,367.34	$1,433.90	$19,123.19
715550	325468	DA18979694	KWH >	859	670	854	545	226	273	278	248	151	270	264	494	5,132
			KW >	7	7	6	6	6	8	7	7	8	7	3	4	6
			Elec Revenue >	$64.15	$62.12	$58.46	$53.45	$50.59	$67.25	$62.24	$62.20	$64.28	$60.22	$34.39	$39.51	$678.86
715568	325484	DG36338704	KWH >	3,640	2,880	3,040	3,160	3,240	2,880	2,800	2,840	3,160	3,280	3,120	3,600	37,640
			KW >	9	6	6	7	7	7	15	15	11	11	11	12	10
			Elec Revenue >	$106.93	$75.20	$76.15	$85.22	$88.64	$85.19	$137.49	$138.39	$114.80	$115.94	$114.41	$121.68	$1,260.04
721400	308650	DG15003051	KWH >	989	-203	333	606	563	811	1,189	447	443	669	399	395	6,641
			KW >	13	12	12	12	12	24	23	13	13	23	12	13	15
			Elec Revenue >	$104.85	$87.47	$89.98	$97.10	$94.70	$174.67	$176.11	$104.45	$99.37	$171.47	$92.17	$99.92	$1,392.26
724912	333416	DA04801144	KWH >	0	0	0	0	3,704	5,848	6,690	5,911	6,234	5,832	0	0	34,219
			KW >	0	0	0	0	7	9	9	8	8	8	0	0	8
			Elec Revenue >	$7.35	$7.35	$7.35	$7.35	$91.61	$128.36	$131.07	$123.16	$124.12	$117.81	$7.35	$7.35	$760.23
724931	333434	DG23524464	KWH >	0	0	0	0	0	0	0	9,860	14,820	7,200	20	0	31,900
			KW >	0	0	0	0	0	0	0	37	35	34	0	0	27
			Elec Revenue >	$7.35	$7.35	$7.35	$7.35	$7.35	$7.35	$7.35	$347.93	$383.37	$306.58	$7.54	$7.35	$1,104.22
725214	333704	DA17487923	KWH >	1,466	1,188	1,554	3,665	5,778	7,358	8,531	8,706	7,656	4,793	3,475	1,189	55,359
			KW >	4	4	12	15	21	23	24	26	26	17	17	4	16
			Elec Revenue >	$51.29	$45.95	$106.57	$145.90	$203.44	$233.98	$249.20	$263.83	$259.46	$167.56	$156.72	$50.15	$1,934.05
725215	333705	DD55413459	KWH >	0	40	240	360	1,120	1,600	1,480	1,520	1,520	840	520	200	9,440
			KW >	0	0	1	6	14	15	12	14	12	10	9	1	9
			Elec Revenue >	$7.35	$7.74	$17.59	$50.48	$110.68	$123.22	$106.49	$115.12	$107.13	$81.99	$76.26	$17.26	$821.31
725219	333708	DD33455515	KWH >	0	-3,240	1,120	1,120	7,600	8,080	14,840	20,200	12,920	5,280	3,960	2,920	74,800
			KW >	0	0	0	27	160	144	160	146	139	156	128	128	108
			Elec Revenue >	$7.35	($23.93)	$23.36	$200.65	$1,141.18	$1,042.59	$1,215.17	$1,172.80	$1,060.63	$1,099.55	$900.44	$890.51	$8,730.30
725220	333709	DG90038814	KWH >	702	707	549	1,896	14,891	14,292	16,797	26,705	16,034	5,410	2,968	609	101,560
			KW >	0	1	0	49	27	28	50	51	51	52	51	0	30
			Elec Revenue >	$20.78	$25.36	$19.02	$354.60	$348.01	$354.18	$546.32	$646.57	$550.13	$455.57	$431.80	$13.08	$3,765.42

Self-Directed USBC Progress Report for 2018

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Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
725221	333710	DG16639320	KWH >	2,080	3,120	240	1,200	5,280	7,520	12,880	21,520	10,720	1,520	1,760	560	68,400
			KW >	132	88	132	4	130	129	132	131	130	128	129	0	105
			Elec Revenue >	$918.39	$627.25	$882.85	$45.30	$1,057.66	$1,072.13	$1,144.59	$1,220.05	$1,114.53	$1,017.51	$1,025.94	$11.38	$10,137.58
725229	333718	DA21260673	KWH >	0	0	0	0	0	0	0	0	0	0	1,786	702	2,488
			KW >	0	0	0	0	0	0	0	0	0	0	9	2	6
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$88.49	$33.10	$121.59
725229	333718	DD39910450	KWH >	1,202	770	671	2,746	5,819	6,275	7,598	8,615	6,005	3,802	0	0	43,503
			KW >	16	2	4	12	18	21	25	27	20	20	0	0	17
			Elec Revenue >	$132.08	$34.34	$41.41	$116.33	$183.72	$211.77	$252.24	$271.09	$201.58	$177.62	$0.00	$0.00	$1,622.18
725464	333924	DA07808268	KWH >	200	0	160	120	120	4,640	14,280	15,320	14,160	880	200	240	50,320
			KW >	1	0	0	0	3	22	24	23	24	19	3	0	11
			Elec Revenue >	$20.02	$10.04	$8.88	$11.15	$29.67	$202.61	$305.47	$310.85	$302.47	$143.64	$30.57	$9.64	$1,385.01
827705	351134	DG21120155	KWH >	0	3,200	2,160	720	6,840	10,920	15,080	23,400	17,680	2,160	2,240	760	85,160
			KW >	0	0	2	2	82	84	138	137	109	68	96	2	65
			Elec Revenue >	$7.35	$38.25	$46.55	$25.87	$620.57	$667.58	$1,070.46	$1,144.75	$906.27	$486.25	$673.53	$27.93	$5,715.36
917087	357114	DG63924078	KWH >	400	440	360	400	400	2,800	30,600	42,000	38,040	520	400	480	116,840
			KW >	0	0	0	0	1	148	151	151	150	13	1	0	51
			Elec Revenue >	$13.91	$14.29	$13.44	$13.83	$19.12	$1,018.50	$1,300.52	$1,415.49	$1,375.18	$102.90	$19.17	$17.26	$5,323.61
920779	355986	DA03705229	KWH >	25,600	24,720	24,440	20,320	13,440	12,120	12,000	11,200	14,120	16,360	18,000	21,920	214,240
			KW >	51	51	51	38	32	23	20	18	23	32	43	40	35
			Elec Revenue >	$598.06	$586.73	$580.04	$455.93	$353.01	$276.86	$257.46	$239.57	$299.43	$382.10	$469.71	$483.17	$4,982.07
1356777	392254	DA03986632	KWH >	22,240	20,560	20,560	20,640	20,800	7,920	1,840	1,120	1,520	1,840	2,240	3,600	124,880
			KW >	84	100	104	96	101	92	44	22	47	24	24	24	64
			Elec Revenue >	$790.93	$874.34	$892.16	$845.31	$878.59	$697.07	$322.67	$167.24	$336.27	$184.79	$193.95	$206.95	$6,390.27
1451728	333403	DA05310602	KWH >	0	0	0	0	0	0	0	0	0	0	0	728	728
			KW >	0	0	0	0	0	0	0	0	0	0	0	1	1
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$26.97	$26.97
1605637	134897	DA12391162	KWH >	0	0	0	0	0	0	0	0	0	0	0	5,483	5,483
			KW >	0	0	0	0	0	0	0	0	0	0	0	19	19
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$190.29	$190.29
1824494	256652	DG83017557	KWH >	0	0	0	0	0	0	0	0	0	0	0	19,640	19,640
			KW >	0	0	0	0	0	0	0	0	0	0	0	30	30
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$400.10	$400.10
2111985	438429	DA14667363	KWH >	0	0	0	0	0	0	0	0	0	0	0	11,653	11,653
			KW >	0	0	0	0	0	0	0	0	0	0	0	35	35
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$357.40	$357.40
3106008	595942	DG57908290	KWH >	97,560	82,260	76,500	70,920	60,660	75,060	86,940	99,180	72,900	75,600	83,520	77,760	958,860
			KW >	210	190	190	180	163	158	199	210	178	160	176	174	182
			Elec Revenue >	$9,268.36	$7,908.15	$7,496.49	$6,976.76	$6,043.95	$7,096.70	$8,217.95	$9,177.88	$6,984.61	$7,040.94	$7,789.85	$7,355.21	$91,356.85
			Total KWH	1,535,674	1,443,801	1,384,538	1,490,818	1,486,031	1,684,364	1,875,526	2,485,100	2,111,286	1,548,771	1,377,585	1,390,061	19,813,555
			Combined Average KW	3,630	3,604	4,009	3,335	4,064	4,616	5,949	6,050	5,625	4,234	3,759	3,289	4,470
			USBC Charge	$1,382.09	$1,299.43	$1,246.05	$1,341.72	$1,337.41	$1,515.97	$1,688.00	$2,236.61	$1,900.18	$1,393.88	$1,239.83	$1,251.06	$17,832.23
			Total Elec Revenue	$57,309.21	$53,290.78	$53,153.29	$49,804.21	$52,906.34	$60,070.66	$71,853.48	$81,015.54	$70,625.09	$56,642.77	$52,556.45	$49,887.82	$709,115.64

City of Great Falls Qualifying Projects 2018

DATE	LOCATION	DESCRIPTION	AMOUNT REQUESTED	BALANCE OF REQUEST
11/30/2000	Eagle Falls	New irrigation pump & installation	83,043.02	$21,940.27
11/17/2000	Parking Garage	Light repairs & installation of new light system	15,355.60	$3,007.98
5/4/2001	Water Plant/WWTP	Installed premium efficient motor & variable frequency drive on Water Sample Pump; replacement of sludge	8,272.00	$1,281.73
11/9/2005	G.F. Housing Authority	Insulation of Heat Lines and Several Housing upgrade Projects	1,039,814.59	$838,498.78
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	$9,627.79
11/23/2005	Civic Center	Air conditioner in Theater and new ballasts in building	20,665.14	$15,388.18
11/10/2005	P.W. Traffic Division	Replaced signal displays with LED displays	24,217.30	$17,863.57
11/10/2005	Library	Lamp & ballast Replacement Caulking of front windows	8,395.89	$4,151.87
Balance left to be distributed with Large Customer Credit Checks from NW Energy				$3,733,227.56

P O Box 823, Troy, Montana 59935 (406) 295-4151 FAX (406)295-7026

THE CITY OF TROY

Dallas Carr, Mayor

COUNCIL
Crystal Denton
Shawna Kelsey
Chuck Ekstedt
TJ Boswell

February 8, 2019

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

Re: Universal Systems Benefit Programs-Annual Report for 2018

Enclosed is the 2018 Annual Report for the Universal System Benefit Program. Please Contact me if you have any questions at 406-295-4151 ext #3. Thank you.

Sincerely,

Tracy Rebo

Tracy Rebo
City Clerk/Treasurer

Rec'd MT DOR
FEB 15 2019

USBP Credit Activities Report

Jan 1, 2018 to Dec 31, 2018

Reporting Cooperative City 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)	$41,788
18. Other	$

B. Low-Income USBP Expenditures and Credits

1. Outreach for LIEAP 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 City of Troy Benefit Fund	$ 1800
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)	$ 1393
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)	$ 11 840
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
Telecopier (208) 344-3984

January 29th, 2019

Rec'd MT DOR
FEB 05 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908
FAX: 406-444-7997
Email: nhensley@mt.gov

RE: Self-Directed USBC Progress Report for 2018 – Colstrip Energy Partnership

Dear Nicole Hensley:

Please find an enclosed copy of our *2018 USBC Report* that we receive from NorthWestern Energy showing our USB activities during 2018.

In 2018, we received $2,957.30 in USB credit payments. These payments were composed of $1,480.03 in 2017 USB credits that were carried over into 2018 and $477.27 in 2018 USB credits.

This USB payments was self-directed for an energy efficiency project. A copy of the Form B submitted to NorthWestern Energy is attached.

At year end we had no 2018 USB credits remaining. We do have a request balance of $474.18 remaining on the project we submitted.

Sincerely,

Owen H. Orndorff
VP, Rosebud Energy Corp., CELP's General Partner

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

COLSTRIP ENERGY LTD PARTNERSHIP

Account Summary

2017 Carryover Reservation:	$2,500.00	YTD Elec Revenue:	$86,671.53
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$3,431.48
Payment Requests Made YTD:	$3,431.48	Current Request Balance:	$474.18
2017 Carryover USBC Credit:	$2,480.03	Total USBC Credit:	$2,957.30
USBC Credit YTD:	$477.27	Payments Issued YTD:	$2,957.30
Average Monthly Credit Earned:	$39.77	USBC Credit Balance:	$0.00
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Joel Zimmerman	11/29/2018	$3,431.48

Payments Issued

Date	Amount
12/10/2018	$2,957.30

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100629	1633	DS86354086	KWH >	130,061	0	393,350	6,787	0	0	101	0	0	0	0	0	530,299
			KW >	3,706	0	4,147	2,861	0	0	211	0	0	0	0	0	2,731
			Elec Revenue >	$23,029.65	$983.70	$42,694.11	$11,357.58	$983.70	$983.70	$1,720.59	$983.70	$983.70	$983.70	$983.70	$983.70	$86,671.53
			Total KWH	130,061	0	393,350	6,787	0	0	101	0	0	0	0	0	530,299
			Combined Average KW	3,706	0	4,147	2,861	0	0	211	0	0	0	0	0	2,731
			USBC Charge	$117.05	$0.00	$354.02	$6.11	$0.00	$0.00	$0.09	$0.00	$0.00	$0.00	$0.00	$0.00	$477.27
			Total Elec Revenue	$23,029.65	$983.70	$42,694.11	$11,357.58	$983.70	$983.70	$1,720.59	$983.70	$983.70	$983.70	$983.70	$983.70	$86,671.53

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 FAX: (406) 497-4008

DATE:	11-29-18
NAME OF BUSINESS:	**Colstrip Energy Limited Partnership**
CITY/TOWN LOCATION:	Colstrip, MT
CONTACT PERSON:	Joel Zimmerman
MAILING ADDDRESS:	PO Box 189
CITY, STATE AND ZIP:	Colstrip, MT 59323
PHONE NUMBER:	406-748-4729
FAX NUMBER:	406-748-4732
E-MAIL ADDRESS	joelz@rosi-colstrip.com

AMOUNT OF CREDIT REQUESTED:	$3,431.48

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):

Office Areas, Control Room, Shop, Relay Room lighting upgrade project.
Lighting fixtures cost - $5,837.48
Less estimated rebate - $2,406.00
Balance (credit requested)- $3,431.48

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

ESTIMATED kWh SAVINGS:	169,996
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: _____, V.P., Rosebud Energy Corp., its general partner

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 Energy
Delivering a Bright Future

Columbia Mountain Holdings, LLC

1263 Colony Drive
Marietta, GA 30068

Phone 770.595.6789

January 28, 2019

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

Re: Annual USBP Report Filing

Dear MT Department of Revenue:

We are a new electrical power customer of Flathead Electric Cooperative beginning June 2018. FEC recently notify us that we are required to file a Universal Services Benefit Program report each year.

Our Federal Tax Payer ID Number is 82-4090410

They sent us the attached form and said that all we needed to do was mail it to the above address. If there is further action required on our part, please contact me by phone or email as indicated below.

Sincerely,

Donald E. Kinser
Managing Member
770.595.6789
dkinser@teakettle.io

Enclosures

CC: Jeff Russell, CMH LLC
Don Newton, FEC

Flathead Electric Cooperative, Inc.
Large Customer USB Information
January 1, 2018 - December 31, 2018

FEC Customer	2018 kWh Purchases through Dec 31, 2018	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
Columbia Mountain Holdings, LLC	6,868,800	$15,812	$639	$4,437		$0

COMMUNITY
MEDICAL CENTER

2827 Fort Missoula Road ▪ Missoula, MT 59804
(406) 728-4100 ▪ www.communitymed.org

February 19, 2019

Nicole Hensley
Department of Revenue (DOR)
PO Box 5805
Helena MT 59604-5805

RE: Community Medical Center Self-Directed USBC Program 2018

Dear Ms. Hensley,

In accordance with Montana Code Annotated (MCA) 69-8-402 and Montana Administrative Rule 4.29.103, find attached our "Self-Directed USBC Progress Report for 2018", as well as a copy of Form A - Universal Systems Benefits (USB) Reservation form for 2018.

Please do not hesitate to contact me directly, should you require further information on this matter.

Respectfully,

Jim Gillhouse, Executive Director

Sent via email to: nhensley@mt.gov
Tuesday, February 19, 2019

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/4/2019

COMMUNITY MEDICAL CENTER

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$806,631.96
Reservations Made YTD:	$4,500.00		
2017 Carryover Payment Request:	$3,589.07	Total Payment Requests:	$3,589.07
Payment Requests Made YTD:	$0.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$573.14	Total USBC Credit:	$8,007.27
USBC Credit YTD:	$7,434.13	Payments Issued YTD:	$3,589.07
Average Monthly Credit Earned:	$619.51	USBC Credit Balance:	$4,418.20
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$2,271.70
07/11/2018	$1,317.37

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100037	1042	DA06183580	KWH >	538,082	551,967	492,584	564,702	568,770	644,318	630,133	709,062	678,440	595,024	575,026	521,802	7,069,910
			KW >	941	959	941	998	1,036	1,087	1,149	1,218	1,195	1,119	978	904	1,044
			Elec Revenue >	$51,369.46	$52,725.02	$47,697.59	$54,350.97	$54,848.87	$61,251.63	$60,610.08	$65,822.43	$63,552.16	$56,855.73	$53,757.58	$49,172.49	$672,014.01
477714	198984	DA08581526	KWH >	9,720	9,920	11,280	10,000	11,280	14,000	13,600	16,800	15,520	10,680	11,200	10,280	144,280
			KW >	30	30	32	30	42	41	44	48	41	35	31	27	36
			Elec Revenue >	$1,065.83	$1,088.76	$1,209.93	$1,093.99	$1,306.35	$1,514.32	$1,493.65	$1,759.07	$1,602.32	$1,176.68	$1,176.82	$1,073.74	$15,561.46
477745	199010	DG90054875	KWH >	12,800	13,040	14,720	13,920	13,600	13,440	12,240	13,200	13,280	11,680	13,600	14,160	159,680
			KW >	28	31	30	31	31	28	28	27	26	25	29	28	29
			Elec Revenue >	$1,294.06	$1,336.46	$1,459.53	$1,410.34	$1,381.87	$1,344.24	$1,238.26	$1,279.32	$1,284.23	$1,158.14	$1,345.17	$1,376.77	$15,908.39
613197	265363	DG90052688	KWH >	1,645	1,045	1,402	1,047	1,044	1,916	2,007	3,292	2,418	1,145	1,284	1,956	20,201
			KW >	5	5	5	6	8	9	10	11	9	7	5	5	7
			Elec Revenue >	$190.21	$145.33	$168.18	$158.16	$175.61	$251.12	$261.46	$373.19	$288.62	$166.53	$164.30	$208.84	$2,551.55
622256	270818	DG93792775	KWH >	2,262	2,505	2,188	1,930	1,377	1,580	1,443	900	637	2,022	1,483	1,612	19,939
			KW >	11	12	9	11	11	10	8	8	8	13	11	9	10
			Elec Revenue >	$297.97	$327.55	$275.78	$277.35	$226.89	$230.02	$207.77	$161.42	$141.80	$292.03	$233.17	$228.51	$2,900.26
646459	284571	DG28550496	KWH >	44,800	44,000	50,560	45,440	45,520	44,960	44,080	44,480	45,680	43,520	47,040	42,960	543,040
			KW >	113	119	120	120	115	109	108	108	111	112	111	112	113
			Elec Revenue >	$4,639.13	$4,630.46	$5,148.95	$4,766.19	$4,714.14	$4,610.25	$4,490.42	$4,453.69	$4,601.96	$4,468.11	$4,722.13	$4,438.55	$55,693.98
682349	303209	DG99722644	KWH >	3,849	4,272	4,402	4,557	4,481	4,554	5,078	4,544	4,307	4,777	4,328	4,460	53,609
			KW >	9	10	11	11	12	12	12	12	13	11	12	9	11
			Elec Revenue >	$407.26	$441.92	$468.03	$482.28	$483.95	$485.93	$521.84	$476.28	$467.39	$490.71	$462.45	$448.49	$5,636.53

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/4/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
863556	303210	DD38466544	KWH >	2,302	2,181	2,273	2,287	2,138	2,394	2,628	2,894	2,378	2,372	2,211	2,183	28,241
			KW >	5	6	6	5	6	6	7	8	7	6	6	7	6
			Elec Revenue >	$244.42	$240.38	$250.01	$243.76	$234.21	$259.20	$281.28	$309.52	$265.12	$255.96	$244.04	$246.54	$3,074.44
1078450	360611	DD82361679	KWH >	7,520	6,960	7,800	6,800	6,600	6,720	7,600	9,520	9,600	8,920	8,000	8,360	94,400
			KW >	20	20	42	19	19	25	27	32	34	34	26	22	27
			Elec Revenue >	$797.54	$750.99	$829.37	$736.11	$718.76	$782.86	$870.28	$1,051.44	$1,079.40	$1,037.17	$878.56	$869.11	$10,401.59
1268037	198983	DG35787692	KWH >	6,320	6,000	6,800	6,240	6,680	7,200	6,960	7,760	7,760	6,640	7,120	6,400	81,880
			KW >	14	14	15	14	17	20	21	22	21	17	14	16	17
			Elec Revenue >	$648.49	$619.31	$689.60	$640.36	$704.92	$772.57	$758.91	$814.78	$814.78	$687.86	$696.85	$659.50	$8,507.93
1463766	199021	DD38050681	KWH >	2,032	1,819	2,244	1,681	1,429	1,359	1,107	1,350	1,074	1,155	1,521	1,934	18,705
			KW >	7	8	9	7	8	10	8	10	8	8	6	8	8
			Elec Revenue >	$242.13	$238.66	$274.15	$212.11	$201.60	$215.45	$175.96	$217.06	$178.26	$176.24	$190.03	$242.11	$2,563.76
1772493	360127	DA03936632	KWH >	7,160	5,040	3,800	4,080	3,680	2,520	0	0	0	0	0	0	26,280
			KW >	18	19	10	6	15	14	0	0	0	0	0	0	14
			Elec Revenue >	$750.19	$591.47	$403.95	$395.19	$449.81	$242.12	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,832.73
			Total KWH	638,492	648,749	600,053	662,684	666,599	744,961	726,876	813,802	781,094	687,935	672,813	616,107	8,260,165
			Combined Average KW	1,201	1,233	1,230	1,258	1,320	1,371	1,422	1,504	1,473	1,387	1,229	1,147	1,321
			USBC Charge	$574.64	$583.87	$540.05	$596.42	$599.93	$670.46	$654.20	$732.42	$702.99	$619.14	$605.54	$554.47	$7,434.13
			Total Elec Revenue	$61,946.69	$63,136.31	$58,875.07	$64,766.81	$65,446.98	$71,959.71	$70,909.91	$76,728.20	$74,276.04	$66,765.16	$63,871.10	$58,964.65	$797,646.63

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
FAX: (406) 497-4008

DATE:	11-30-2018
NAME OF BUSINESS:	COMMUNITY MEDICAL CENTER
CITY/TOWN LOCATION:	MISSOULA MT
CONTACT PERSON:	RUSS LAWRENCE
MAILING ADDDRESS:	2827 FORT MISSOULA RD
CITY, STATE AND ZIP:	MISSOULA MT 59804
PHONE NUMBER:	406 - 327-4140
FAX NUMBER:	
E-MAIL ADDRESS	rlawrence@communitymed.org

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.)

LED LIGHTING IN OUTDOOR COURTYARD USED BY PATIENTS

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: Russ Lawrence

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

Decker	8792201	
Billing Period		0.0009
	Usage	USB Obligation
16-Dec	3,605,000	3244.5
16-Nov	2,555,000	2299.5
16-Oct	3,605,000	3244.5
16-Sep	3,500,000	3150
16-Aug	2,590,000	2331
16-Jul	3,583,720	3225.348
16-Jun	3,080,000	2772
16-May	2,824,173	2541.7557
16-Apr	3,640,000	3276
16-Mar	3,675,000	3307.5
16-Feb	3,535,000	3181.5
16-Jan	4,165,000	3748.5
total	40,357,893	$36,322.10
Less USB Credit		$ 151,958.19
Amont (due) carry forward		$115,636.09

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

date	work order or cost code	Equipment	parts	labor	watts old fixture	watts new fixture
5/23/2018	AFE-1718	EAST LAB	$ 16,171.58	$ 2,102.00	0	
7//12/2018	381677	1300 bom lights	$ 51,804.60	$ 6,734.52	20,000	8,700
7/12/2018	afe-1702	east lab yard lights	$ 2,763.28	$ 2,880.00	0	1740
10/12/2018	afe-1810	dragline house lighting	$ 56,002.00	$ 7,280.26	19000	9290
12/4/2018	384600	replace aleg lights	$ 5,504.38	$ 715.57	2000	870
		total	$ 132,245.84	$ 19,712.35	41000	20600
		Project Total	$ 151,958.19			

Denbury

14 February 2019

Ms. Nicole Hensley
Montana Department of Revenue
PO Box 5085
Helena, MT 59604-5805

Ms. Hensley,

Denbury Onshore, LLC has accrued $1,031,424.53 in the Montana Universal System Benefit Fund (USBF) through our energy purchases from Montana-Dakota Utilities Company in 2018. Under the guidelines of the USBF, Denbury Onshore, LLC is requesting a refund of $242,866.02 for our 2018 energy reduction expenditures.

Attached is a breakdown of the expenditures that Denbury Onshore incurred during 2018.

Please feel free to call me should you have questions or need any additional information.

Respectfully,

Anna Schultz
Administrative Assistant
Denbury Onshore LLC
PO Box 1533
Baker, MT 59313
406-778-3361 x5407

MONTANA-DAKOTA
UTILITIES CO.
A Division of MDU Resources Group, Inc.
400 North Fourth Street
Bismarck, ND 58501

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:	02/06/2019
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: 1,031,424.53

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 heat tape on lines, insulate treaters to prevent heat loss. Downsize sheaves on pumping units which results in fewer startups and shutdowns. Install 11 new VFDs' to control power surges and sudden startups.

ESTIMATED kWh and KW SAVINGS: 535425

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:

VENDOR	INVOICE #	DATE	DESCRIPTION	AMOUNT	PURCHASE ORDER #	WORK ORDER#	LOCATION
Direct Electric	22143	1/24/2018	Install heat tape	1324.17	43000100778-20		Pennel Sec 30
Boomhower Cor	1786	1/29/2018	Insulate inline line	1080.88	4300100777	210535524	Pennel Sec 30
Direct Electric	22447	3/15/2018	Heat tape H-pump	1239.21	4300105423	210559520	Coral 24-04
D&D Oilfield	14352	6/11/2018	Slow down sheave	434	4300112365		Pennel 42-23
DNOW	912323931	6/26/2018	Slow down sheave	131.41	4300110608-30	210595623	Pennel 42-23
Direct Electric	23278	7/5/2018	Install heat tape	161	4300114004	210544355	Pennel Sec 29
Direct Electric	23286	7/6/2018	Install heat tape	3793.93	4300114004	210544355	Pennel Sec 29
Direct Electric	23313A	7/11/2018	Trench power to heat tape	885.5	4300114568 - 20		Pennel Sec 29
Direct Electric	23313	7/11/2018	Trench power to heat tape, parts	213.9	4300114523		Pennel Sec 29
D&D Oilfield	14453	7/26/2018	Slow down sheave	563.5	4300115414 - 20	210623340	Gas City 13-16
K&S	CD25002276	8/8/2018	heat trace survey	579.22	4300116584-180	210629865	Monarch Sec 26
K&S	CD25002277	8/2/2018	check heat tapes	543.75	4300116584-110	210629848	monarch 41-35
K&S	CD25002278	8/10/2018	check heat tapes	200	4300116584-80	210629845	Monarch 14-23
K&S	CD25002279	8/10/2018	check heat tapes	200	4300116584-90	210629846	Monarch 41-25H
K&S	CD25002280	8/10/2018	check heat tapes	200	4300116584-100	210629847	Monarch 41-31
D&D Oilfield	14557	8/27/2018	Slow down sheave	483	4300118057-10		Little Beaver 44-30
Summit ESP	196566	9/5/2018	VSD	87391.37	DR1821083CAPCMP		Pennel MC22-19SH
Summit ESP	196560	9/5/2018	VSD	83583.66	DR1821082CAPCMP		Pennel MC22-19NH
Summit ESP	197846	9/7/2018	VSD	83856.96	DR1720645CAPCMP		Pennel MC14-29H
Mitchell's	5218	8/16/2018	Insulate flare	200	4300112589-100	21044354	Pennel Sec 29
Direct Electric	24058	10/4/2018	Install heat tape	1448.07	4300121731 30&40	210633056	Coral 24-11
Boomhower Cor	1860	10/9/2018	Installed pads on flare line	1526	4300113403-10	210544354	Pennel Sec 29
Boomhower Cor	1844	8/14/2018	Insulated & metaled new flare line	3817.42	4300113403-10	210544354	Pennel Sec 29
Direct Electric	24127	10/11/2018	Energize heat tape	1462.3	4300123655-10&40		Pennel Sec 28
Direct Electric	24089	10/9/2018	Heat tape flare	3832.35	43001236955-10&50		Pennel Sec 28
Boomhower Cor	1877	12/8/2018	Insulate water tank	1663.73	4300126739 - 10	210658887	Coral Gap Rusley
K&S	104309	12/20/2018	Run conduit for heat trace	1266.88	4300126124-10&40	210617576	Coral SO
K&S	103949	12/19/2018	Install heat trace	6145.26	4300126124-10&50	210617576	Coral SO
Weatherford	14476969	7/22/2018	VSD	2743	4300113586-10	210599259	ELOB 32-13NH
K&S	CD25002218	6/29/2018	VSD	2046.35	4300113645	210599259	ELOB 32-13NH
K&S	CD25002061	5/17/2018	VSD	37.12	4300109376	210511534	ELOB Sec 4
K&S	CD25002357	10/3/2018	VSD	505.65	4300116451	210511534	ELOB Sec 4
DNOW	912687316	10/3/2018	Slow down sheave	228.35	4300119579	210643512	South Pine 32X-10AH
D&D Oilfield	14617	9/25/2018	Slow down sheave	483	4300119501	210643512	South Pine 32X-10AH
D&D Oilfield	14404	7/20/2018	Slow down sheave	1236	4300113382	210610749	Cabin 22-08R
Mitchell's	4820	8/2/2018	Slow down sheave	693	4300113395	210610749	Cabin 22-08R

DNOW	912795803	10/31/2018	Slow down sheave	261.34	4300112765	210602042	Gas City 11X-12H
D&D Oilfield	14369	7/9/2018	Slow down sheave	644	4300112753	210602042	Gas City 11X-12H
DNOW	912573440	8/31/2018	Slow down sheave	159.69	4300116773	210595913	Cabin 42X-10
DNOW	912136946	5/2/2018	Slow down sheave	203.65	4300107201-30	210577100	South Pine 21-15A
D&D Oilfield	14305	5/4/2018	Slow down sheave	1224.5	4300107073-20	210577100	South Pine 21-15A
Mitchell's	4167	4/30/2018	Slow down sheave	718	4300107483	210577100	South Pine 21-15A
DNOW	911905750	3/1/2018	Slow down sheave	176.2	4300101290	210539006	North Pine 11-12DH
D&D Oilfield	14239	2/9/2018	Slow down sheave	542.5	4300101324-10	210539006	North Pine 11-12DH
D&D Oilfield	14236	2/9/2018	Slow down sheave	322	4300101449-20	210537905	Cabin 43X-29R
DNOW	911797305	1/31/2018	Slow down sheave	203.08	4300100646	210531247	Cabin 43-20
Choice Const.	2018-3668	1/26/2018	Slow down sheave	286	4300099823-20	210531247	Cabin 43-20
Boomhower Cor	1836	8/15/2018	Install headswitch pads	883	4300113717-10	210599056	Pennel Sec 5
Boomhower Cor	1819	7/16/2018	Pads for headswitch	117	4300113717-10	210599056	Pennel Sec 5
Baker Hughes	909585408	12/17/2018	VSD	92647.5			Cabin 44-20NH
Baker Hughes	909618376	12/18/2018	VSD	109727.28			Little Beaver MC22-30NH
Baker Hughes	909536543	10/23/2018	VSD	124826.7			Little Beaver MC22-17SH
Baker Hughes	909492614	10/30/2018	VSD	128717			Pennel MC33-29NH
Baker Hughes	909447057	10/9/2018	VSD	130208.7			Coral MC44-09NH
Baker Hughes	909435401	10/17/2018	VSD	131518.7			Coral MC44-09SH
Boomhower Cor	1873	12/10/2018	Insulate Flare	3596.33	4300126939		Pennel Sec 28
Pro Insulation	3366	11/14/2018	Pipe Insulation	2170	4300126930-20		Cabin Sec 17
Pro Insulation	3367	11/21/2018	Pipe Insulation	1076	4300126930		Cabin Sec 28
Pro Insulation	3368	11/22/2018	Pipe Insulation	3065	4300126930		Cabin Sec 28
Boomhower Cor	1879	12/11/2018	Insulate block valves	1930.42	4300127415	210587281	ELOB Sec 5
TOTAL				**1031424.53**			

ENBRIDGE

Great Lakes Office
Superior, WI 54880

February 26, 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email:

RE: Self-Directed USBC Progress Report for 2018 – Express Pipeline

Dear Ms. Hensley:

Please find an enclosed copy of our 2018 USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018. In 2018, we earned $45,722.08 in 2018 USB credits.

In 2018, we received $45,208.81 in USB credit payments. These payments were composed of $3,354.62 in 2017 USB credits that were carried over into 2018 and $ 41,854.19 in 2018 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 $3,867.89 in 2018 USB credits that were brought forward into 2019 since we have a current request balance of $178,591.31 from that project previously submitted.

Sincerely,

Nick Kaneski
Enbridge Energy
DBA Express Pipeline

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

EXPRESS PIPELINE LLC

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$3,974,730.52
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$223,800.12	Total Payment Requests:	$223,800.12
Payment Requests Made YTD:	$0.00	Current Request Balance:	$178,591.31
2017 Carryover USBC Credit:	$3,354.62	Total USBC Credit:	$49,076.70
USBC Credit YTD:	$45,722.08	Payments Issued YTD:	$45,208.81
Average Monthly Credit Earned:	$3,810.17	USBC Credit Balance:	$3,867.89
		Payment Pending:	$3,867.89

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$15,045.59
07/11/2018	$11,971.39
10/03/2018	$10,955.28
12/10/2018	$7,236.55

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100731	1692	DA18683614	KWH >	25,344	21,302	26,675	20,640	18,082	12,002	9,909	10,698	11,004	11,545	14,283	19,475	200,959
			KW >	74	81	74	54	60	40	34	34	34	40	40	54	52
			Elec Revenue >	$2,925.31	$2,685.32	$3,012.62	$2,558.70	$2,401.39	$1,924.80	$1,761.94	$1,790.64	$1,814.65	$1,878.25	$2,053.53	$2,448.64	$27,255.79
100733	1693	DA06212507	KWH >	1,910,172	2,155,112	2,159,447	2,360,551	2,239,581	1,928,380	2,124,684	1,816,858	1,914,703	1,728,863	2,108,734	2,079,632	24,526,717
			KW >	4,939	4,812	5,100	4,711	4,879	4,758	4,664	4,247	4,617	4,213	4,778	4,993	4,726
			Elec Revenue >	145,080.96	161,273.15	162,152.47	176,045.19	167,744.32	146,419.60	158,769.37	132,708.94	141,047.41	128,754.58	155,007.34	154,723.26	$1,829,726.59
933549	358344	DA17677691	KWH >	104,995	102,519	135,098	0	0	0	0	0	0	0	0	0	342,612
			KW >	412	576	605	0	0	0	0	0	0	0	0	0	531
			Elec Revenue >	$9,541.11	$10,332.86	$12,627.48	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$32,501.45
933549	358344	DA21629779	KWH >	0	0	0	131,429	100,005	111,829	107,850	109,340	101,306	136,885	130,087	139,388	1,068,119
			KW >	0	0	0	593	576	524	544	567	567	562	579	593	567
			Elec Revenue >	$0.00	$0.00	$0.00	$12,412.40	$10,159.04	$10,654.98	$10,470.64	$10,478.48	$9,999.13	$12,376.23	$11,993.79	$12,740.25	$101,284.94
3322054	612606	DA19066011	KWH >	1,866,845	2,295,097	2,187,392	2,342,466	2,159,633	1,878,397	2,149,816	1,818,410	1,994,188	1,769,404	2,144,459	2,062,735	24,668,842
			KW >	3,658	5,846	5,659	4,925	5,040	5,861	4,882	3,528	5,861	3,485	5,630	4,709	4,924
			Elec Revenue >	145,832.97	187,404.74	178,496.16	186,571.47	174,130.17	159,775.18	172,022.98	138,037.14	163,526.23	136,499.60	172,849.43	163,094.97	$1,978,241.04
			Total KWH	3,907,356	4,574,030	4,508,612	4,855,086	4,517,301	3,930,608	4,392,259	3,755,306	4,021,201	3,646,697	4,397,563	4,301,230	50,807,249
			Combined Average KW	9,083	11,315	11,438	10,283	10,555	11,183	10,124	8,376	11,079	8,300	11,027	10,349	10,799
			USBC Charge	$3,516.62	$4,116.63	$4,057.75	$4,369.59	$4,065.56	$3,537.55	$3,953.04	$3,379.78	$3,619.08	$3,282.03	$3,957.80	$3,871.11	$45,726.54
			Total Elec Revenue	303,380.35	361,696.07	356,288.73	377,587.76	354,434.92	318,774.56	343,024.93	283,015.20	316,387.42	279,508.66	341,904.09	333,007.12	$3,969,009.81

ENBRIDGE

Great Lakes Office
Superior, WI 54880

February 26, 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email:

RE: Self-Directed USBC Progress Report for 2018 Cooperatives – Express Pipeline (Hill County Electric, Fergus Electric and Big Horn Rural Electric)

Dear Ms. Hensley:

Please find our 2018 USBC Progress Report showing our USB activities for 2018. In 2018, Express Pipeline used 181,019,286 kWh's served by Montana Cooperatives. This translates to a USB charge of $162,916.46 (0.9 mills per kWh).

In 2018, Express Pipeline spent ~$42,782.85 on internal energy efficiency projects that resulted in a reduction of consumed electrical energy. Further details regarding the internal energy efficiency expenditures and the associated impact on energy consumption can be found in the enclosed summary. Express Pipeline carried forward a USB credit balance of $123,902.17 from previous projects in the prior year.

2018 Project Descriptions		Cost
-Express Pipeline Internal Pipe Cleaning Tool Runs:		$42,782.85
Summary:	2018 Implemented USB projects	$42,782.85
	Credits brought forward from 2017	$123,902.17
	USB funds to self-direct in 2018	($162,916.46)
Total USB Credits Remaining at year end 2018		$3,768.56

At year end of 2018, Express Pipeline had $3,768.56 in USB credits to carry forward into 2019.

Sincerely,

Nick Kaneski
Enbridge Energy
DBA Express Pipeline

Express Pipeline 2018 Internal Pipe Cleaning Energy Efficiency Project

Throughout 2018, Express Pipeline conducted an internal pipe cleaning project to increase its energy efficiency and decrease its overall energy use. The internal pipe cleaning project reduces sidewall friction in the pipeline allowing liquid product to flow more efficiently and thus using less energy to pump the liquid. The cleaning process requires Express Pipeline to send a cleaning tool (called a "PIG") down the length of the pipeline from Hardisty, Alberta to Casper, Wyoming. The tool then must be shipped back to Hardisty to repeat the process. Express Pipeline generally completes the process monthly, and ships the PIG tools in groups of four, approximately three times per year. Shipping receipts are enclosed within this report.

A major expense in this internal pipe cleaning project is the internal labor expense. Express Pipelines internal labor expense is $118.00 per hour. To apportion the cost of the internal labor expense on a Montana-jurisdictional basis, Express Pipeline conducted the following analysis:

- Three employees spend 25 hours each per month on the internal pipeline cleaning project. Express Pipeline conducts the project monthly. Three employees x 25 hours x 12 months = 900 hours.
- 900 hours x $118/hour = $106,200.
- The internal pipeline cleaning project benefits the entire Express Pipeline running from Hardisty, Alberta to Casper, Wyoming. The Express Pipeline is 785 miles in length, but only 304 miles (or 38.7%) of the pipeline are in Montana.
- Therefore, Express Pipeline calculated 38.7% of the internal labor expense as a benefit to Montana energy efficiency. This equates to $41,099.40.
- Express Pipeline also calculated 38.7% of the PIG tool shipping costs (a total of $4,350) to Montana energy efficiency. This equates to $1,683.45.
- $41,099.40 + $1,683.45 = $42,782.85

The total 2018 expense of the internal pipeline energy efficiency project was $42,782.85.

J.B. Express, Inc.
P.O. Box 91
27311 U.S. RT. 35
Chillicothe, OH 45601
Ph: 740-702-9830 Fax: 740-702-9821

DUE DATE	SHIPPER NUMBER	PRO NUMBER
02/14/18	22245	264096

INVOICE DATE	DATE LOADED	DATE DELIVERED	MILES
1/30/18	1/17/18	1/18/18	918

UNIT NUMBER	CUSTOMER NUMBER
	32629

BILL TO
ENBRIDGE
PO BOX 1642 EMAIL INVOICE
ATTN VIOLETTA FLORES
HOUSTON, TX 77251

Bill-to Ref# 22245

ORIG
PLATTE PIPELINE
5800 W. ZERO RD.
CASPER, WY 82604-

CONS
EXPRESS PIPELINE LIMITED PARTNERSHIP
1 KM EAST OF RANGE RD. 95
HARDISTY, AB T0B 1V0

DESCRIPTION OF ARTICLES OR COMMODITY	WEIGHT	RATE	CHARGES
PIG LAUCHER	2,400 lbs	1 pallets	
LINE HAUL		1,450.00 / flat	$1,450.00

Pipeline Cleaning Tool
Shipping Costs from
Casper WY to Hardisty Alberta.
(Shipping occurs (3) times per year)
- Typically (4) tools are shipped at a time.
- Tools are sent down the pipeline monthly.

Terms: Net 15

PLEASE REMIT TO: **J.B. Express, Inc.**
P.O. Box 91
Chillicothe, OH 45601

TOTAL **$1.450.00**

2640946

STRAIGHT BILL OF LADING

SHORT FORM

Broussard, LA	866-688-2162	Laurel, MS	601-649-2397
California	800-272-7870	Longview, TX	866-884-3357
Calgary, AB	877-392-4466	Mt. Clare, WV	304-625-6073
Casper, WY	800-443-3349	Odessa, TX	866-572-3157
Corpus Christi, TX	888-280-7420	Oklahoma City, OK	888-672-7182
Dallas, TX	800-386-4285	Tulsa, OK	800-722-2262
Edmonton, AB	800-661-5970	Tunkhannock, PA	570-836-8411
Houston, TX	800-441-0197	Williston, ND	701-572-1402

Date 1-17-18
Cargo Control # 3122527
Tracking / I.D. #
PARS/PAPS # 33913122527

SHIPPER Reference #

Name: Platte pipeline
Address: 5800 west Zero Rd
City, ST, ZIP: Casper, WY 82604

The property described below, in apparent good order, except as noted (contents and condition of contents of packages unknown) marked, consigned, and destined as shown below, which said carrier agrees to carry to destination, if on its route, or otherwise to deliver to another carrier on the route to destination. Every service to be performed hereunder shall be subject to all terms and conditions of the Uniform Bill of Lading. Shipper hereby certifies that Shipper is familiar with all the terms and conditions of the Uniform Bill of Lading, and said terms and conditions are hereby agreed to by the Shipper and accepted by the Shipper and its assigns.

FREIGHT CHARGES

☒ Prepaid
☐ Collect
☒ 3rd Party 214455

C.O.D. $

For Freight Collect Shipments

Subject to Section 7 of the standard terms and conditions of the Uniform Straight Bill of Lading, if this shipment is to be delivered to the consignee/receiver without recourse on the consignor, the consignor shall sign the following statement:

The carrier shall not make delivery of this shipment without payment of freight and all other lawful charges.

Signature of Consignor

CONSIGNEE Reference #

Name: Express Pipeline limited Partnership
Address: Hardesty Terminal 1 km East of Range Road 95 Hardesty, Alberta T0B 1V0
City, ST, ZIP

P.O. #

Delivery Contact: c/o Waggoners Trucking

Customs Broker: Livingston

Note: Without a Customs Broker specified, "The Waggoners Trucking" will not be responsible for ensuring paperwork reaches the correct broker and will not assume responsibility for any "BOND" charges that may result.

# Pieces	Freight Description	Weight (Subject to Correction)	Dimensions*	HAZMAT
4	Pipeline pigs	2400		
	ON 1 plt			
	WAGGONERS COPY			
	Note: Unless a higher value is declared, Carrier if liability for the shipment shall be limited to an amount not exceeding $2.50 per pound.		*Footage charge may apply	
	Total Pieces	2400	Total Weight	

Shipper

Shipped By: Brian Bruette
Print Name
Signature
1-17-18
Date

This is to certify that the above named materials are properly classified, described, packaged, marked and labeled, and are in proper condition for transportation according to the applicable regulations of the Department of Transportation.

Waggoners

Picked-Up By: GMC 101
Print Name
Total pieces: 1
Signature
Date / Time: 9:06

Delivered By:
Print Name
Total pieces
Signature
Date / Time

Receiver

Received By:
Print Name
Signature
Date

The consignee has received above listed freight in apparent good order with no transportation damages unless otherwise noted.

YOUR Success is OUR Success

WF 122 Rev. 01/10

David Nichelson

From:	Kelley Elkins <Kelley.Elkins@enbridge.com>
Sent:	Monday, January 15, 2018 5:10 PM
To:	David Nichelson
Subject:	Emailing: moveOrder.htm

Global Logistics
Kelley Elkins

Move Order

Reference Number: 22245

Requested By:	Rut Yoosook	**Phone:**	(307)995-2046
Date:	1/15/2018	**P.O.#:**	Verbal
		WO#:	

Shipper:	Platte Pipe Line Company, LLC		
Address:	5800 w. Zero Road		
City:	Casper		
State:	WY		
Zip Code:	82604		
Contact:	Rut Yoosook	**Phone:**	(307)259-0205

Consignee:	Express Pipeline Limited Partnership		
Address:	Hardisty Terminal		
Address:	1 km east of Range Road 95		
City:	Hardisty		
State:	Alberta		
Zip Code:	T0B 1V0		
Contact:	Kevin	**Phone:**	(780)888-7087

ThreePL:	JB Express	**Pick up date:**	1/17/2018
Required on site:	01/22/2018	**Close at:**	3:00 pm
Contract#:	On file		
PCS/Wt/Dims:	2400 Lbs.		
Material Desc:	Pipeline Pigs 1 ea. pallet @ 4'x4' pallet @ 2400 Lbs.		

264096

J.B. Express, Inc.
P.O. Box 91
27311 U.S. RT. 35
Chillicothe, OH 45601
Ph: 740-702-9830 Fax: 740-702-9821

DUE DATE	SHIPPER NUMBER	PRO NUMBER
06/02/18	22769	270400

INVOICE DATE	DATE LOADED	DATE DELIVERED	MILES
5/18/18	4/30/18	5/2/18	918

UNIT NUMBER	CUSTOMER NUMBER
	31440

BILL TO
EXPRESS PIPELINE LIMITED PARTNERSHIP
PO BOX 1642-EMAIL INV
ATTN: VIOLETA FLORES OFFI
HOUSTON, TX 77251

Bill-to Ref# 22769

ORIG
PLATTE PIPELINE
5800 W. ZERO RD.
CASPER, WY 82604-

CONS
EXPRESS PIPELINE LIMITED PARTNERSHIP
1 KM EAST OF RANGE RD. 95
HARDISTY, AB T0B 1V0

DESCRIPTION OF ARTICLES OR COMMODITY	WEIGHT	RATE	CHARGES
PALLETS	2,400 lbs	1 pallets	
LINE HAUL		1,450.00 / flat	$1,450.00

Terms: Net 15

PLEASE REMIT TO: J.B. Express, Inc.
P.O. Box 91
Chillicothe, OH 45601

TOTAL **$1,450.00**

270400

THE WAGGONERS TRUCKING

STRAIGHT BILL O

SHORT FORI

BL-3141564

Broussard, LA	866-688-2162	Laurel, MS	601-649-2397
California	800-272-7670	Longview, TX	866-864-3357
Calgary, AB	877-392-4486	Mt. Clare, WV	304-625-6073
Casper, WY	800-443-3349	Odessa, TX	866-572-3157
Corpus Christi, TX	888-280-7420	Oklahoma City, OK	888-672-7182
Dallas, TX	800-388-4285	Tulsa, OK	800-722-2262
Edmonton, AB	800-661-5970	Tunkhannock, PA	570-836-8411
Houston, TX	800-441-0197	Williston, ND	701-572-1402

Date 4-30-18
Cargo Control # 3141564
Tracking / I.D. #
PARS/PAPS # 3391 3141564

SHIPPER

Reference #

Name: Platte Pipeline
Address: 5800 W. Zero Rd
City, ST, ZIP: Casper, WY

The property described below, in apparent good order, except as noted (contents and condition of contents of packages unknown) marked, consigned, and destined as shown below, which said carrier agrees to carry to destination, if on its route, or otherwise to deliver to another carrier on the route to destination. Every service to be performed hereunder shall be subject to all terms and conditions of the Uniform Bill of Lading. Shipper hereby certifies that Shipper is familiar with all the terms and conditions of the Uniform Bill of Lading, and said terms and conditions are hereby agreed to by the Shipper and accepted by the Shipper and its assigns.

FREIGHT CHARGES

☐ Prepaid
☐ Collect
☒ 3rd Party

C.O.D. $

For Freight Collect Shipments

Subject to Section 7 of the standard terms and conditions of the Uniform Straight Bill of Lading, if this shipment is to be delivered to the consignee/receiver without recourse on the consignor, the consignor shall sign the following statement:

The carrier shall not make delivery of this shipment without payment of freight and all other lawful charges.

Signature of Consignor

CONSIGNEE

Reference #

Name: Express Pipeline c/o WW Nisker, AB
Address: Range Rd 45
City, ST, ZIP: Hardesty, Alberta CA

P.O. #
Delivery Contact

Customs Broker LV

Note: Without a Customs Broker specified, "The Waggoners Trucking" will not be responsible for ensuring paperwork reaches the correct broker and will not assume responsibility for any "BOND" charges that may result.

# Pieces	Freight Description	Weight (Subject to Correction)	Dimensions*	HAZMAT
1	Pallette	2400		
	WAGGONERS COPY			

Note: Unless a higher value is declared, Carrier's liability for the shipment shall be limited to an amount not exceeding $2.50 per pound.

Total Pieces

* Footage charge may apply

Total Weight

www.hi-way9.com
31336823

Shipper	Waggoners		Receiver
Shipped By: Enbridge P.L. / Platte pipeline	Picked Up By: FP 602	1	Received By:
Print Name: Rut Yoosook	Print Name: 4-30-18	Total pieces	Print Name
Signature: [signature] 4/30/18	Signature	Date / Time	Signature
Date	Delivered By:		Date
	Print Name	Total pieces	
	Signature	Date / Time	

This is to certify that the above named materials are properly classified, described, packaged, marked and labeled, and are in proper condition for transportation according to the applicable regulations of the Department of Transportation.

The consigned has received above listed freight in apparent good order with no transportation damages unless otherwise noted.

YOUR Success is OUR Success

WF 122 Rev. 01/10

Cindy Streitenberger

From:	David Nichelson
Sent:	Thursday, April 26, 2018 12:35 PM
To:	Billing
Subject:	FW: Emailing: moveOrder.htm

From: Kelley Elkins
Sent: Thursday, April 26, 2018 12:34:44 PM (UTC-05:00) Eastern Time (US & Canada)
To: David Nichelson
Cc: Logistics
Subject: Emailing: moveOrder.htm

Global Logistics
Kelley Elkins

Move Order

Reference Number: 22769

Requested By:	Rut Yoosook	**Phone:**	(307)995-2046
Date:	4/26/2018	**P.O.#:**	Verbal
		WO#:	

Shipper:	Platte Pipe Line Company, LLC		
Address:	5800 w. Zero Road		
City:	Casper		
State:	WY		
Zip Code:	82604		
Contact:	Rut Yoosook	**Phone:**	(307)995-2046

Consignee:	Express Pipeline Limited Partnership		
Address:	Hardisty Terminal		
Address:	1 km east of Range Road 95		
City:	Hardisty		
State:	Alberta		
Zip Code:	T0B 1V0		
Contact:	Kevin	**Phone:**	(780)888-7087

ThreePL:	JB Express	**Pick up date:**	4/26/2018
Required on site:	05/03/2018	**Close at:**	3:00 pm

J.B. Express, Inc.
P.O. Box 91
27311 U.S. RT. 35
Chillicothe, OH 45601
Ph: 740-702-9830 Fax: 740-702-9821

DUE DATE	SHIPPER NUMBER	PRO NUMBER
10/13/18	23966	276805

INVOICE DATE	DATE LOADED	DATE DELIVERED	MILES
9/28/18	9/21/18	9/27/18	918

UNIT NUMBER	CUSTOMER NUMBER
	32629

BILL TO
ENBRIDGE
PO BOX 1642 EMAIL INVOICE
ATTN VIOLETTA FLORES
HOUSTON, TX 77251

Bill-to Ref# 23966

ORIG
PLATTE PIPELINE
5800 W. ZERO RD.
CASPER, WY 82604-

CONS
EXPRESS PIPELINE LIMITED
HARDISTY TERMINAL
HARDISTY, AB T0B 1V0

DESCRIPTION OF ARTICLES OR COMMODITY	WEIGHT	RATE	CHARGES
PALLETS	2,400 lbs	1 pallets	
LINE HAUL		1,450.00 / flat	$1,450.00

Terms: Net 15

PLEASE REMIT TO: **J.B. Express, Inc.**
P.O. Box 91
Chillicothe, OH 45601

TOTAL **$1,450.00**

THE WAGGONERS TRUCKING

STRAIGHT BILL OF LA

SHORT FORM

BL-3165675

Calgary, AB	877-392-4466	Houston, TX	800-441-0197
Casper, WY	800-443-3349	Odessa, TX	432-561-8515
Commerce City, CO	720-590-8927	Oklahoma City, OK	888-672-7182
Dallas, TX	800-386-4285	Sweetgrass, MT	866-931-0779
Edmonton, AB	800-661-5970	Tulsa, OK	800-722-2262
		Williston, ND	701-572-1402

Date: 09/21/18
Cargo Control #: 3165675
Tracking/I.D. #:
PARS/PAPS #: 33913165675

SHIPPER Reference #:

Cust #: 130375 Phone: 307-472-2016
Platte Pipe Line Company
5800 W Zero Rd
Casper, WY 82604

The property described below, in apparent good order, except as noted (contents and condition of contents of packages unknown) marked, consigned, and destined as shown below, which said carrier agrees to carry to destination, if on its route, or otherwise to deliver to another carrier on the route to destination. Every service to be performed hereunder shall be subject to all terms and conditions of the Uniform Bill of Lading. Shipper hereby certifies that Shipper is familiar with all the terms and conditions of the Uniform Bill of Lading, and said terms and conditions are hereby agreed to by the Shipper and accepted by the Shipper and its assigns.

FREIGHT CHARGES

- [ ] Prepaid
- [ ] Collect
- [x] 3rd Party- J B EXPRESS

C.O.D $

For Freight Collect Shipments

Subject to Section 7 of the standard terms and conditions of the Uniform Straight Bill of Lading, if this shipment is to be delivered to the consignee/receiver without recourse on the consignor, the consignor shall sign the following statement:

The carrier shall not make delivery of this shipment without payment of freight and all other lawful charges.

Signature of Consignor

CONSIGNEE Reference #: 23966

Cust #: 56529 Phone: 0
Express Pipeline % Ww
%ww
Nisku, AB T9E 0B3

P.O. # 23966
Delivery Contact
0
Customs Broker livingston international

Note: Without a Customs Broker specified, "The Waggoners Trucking" will not be responsible for ensuring paperwork reaches the correct broker and will not assume responsibility for any "BOND" charges that may result.

# Pieces	Freight Description	Weight (Subject to Correction)	Dimensions*	Hazmat
1	1PLT	2400		NO

PARS#33913165675

HI-WAY9 www.hi-way9.com 31415571

WAGGONERS COPY

Note: Unless a higher value is declared, Carrier's liability for the shipment shall be limited to an amount not exceeding $2.60 per pound.

1 Total Pieces

2400 Total Weight

*Footage charge may apply

Shipper	Waggoners	Receiver
Shipped By: Brian Brunette (Print Name)	Picked Up By: CMC 001 (Print Name)	Received By: Paminder Singh Garcha (Print Name)
(Signature)	9/21/18 (Signature)	(Signature)
9/21/18 (Date)	Total Pieces: 1	Sep/26/018 (Date)
This is to certify that the above named materials are properly classified, described, packaged, marked and labeled, and are in proper condition for transportation according to the applicable regulations of the Department of Transportation.	Date / Time: 1:17	The consigned has received above listed freight in apparent good order with no transportation damages unless otherwise noted.
	Delivered By:	
	Print Name / Total Pieces	
	Signature / Date / Time	

YOUR Success is OUR Success

WF 122 Rev. 01/10

Cindy Streitenberger

From: David Nichelson
Sent: Friday, September 21, 2018 8:52 AM
To: Billing
Subject: FW: MO 23966

From: Lanie Mills
Sent: Friday, September 21, 2018 8:51:55 AM (UTC-05:00) Eastern Time (US & Canada)
To: Josh Bell; David Nichelson
Subject: MO 23966

Global Logistics
Kelley Elkins

Move Order

Reference Number: 23966

Requested By: Rut Yoosook **Phone:** (307)995-2046
Date: 9/20/2018 **P.O.#:** Verbal
WO#:

Shipper: Platte Pipe Line Company, LLC
Address: 5800 w. Zero Road
City: Casper
State: WY
Zip Code: 82604
Contact: Rut Yoosook **Phone:** (307)995-2046

Consignee: Express Pipeline Limited Partnership
Address: Hardisty Terminal
Address: 1 km east of Range Road 95
City: Hardisty
State: Alberta
Zip Code: T0B 1V0
Contact: Kevin **Phone:** (780)888-7087

ThreePL: JB Express **Pick up date:** 9/20/2018

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 05 2019

ExxonMobil

January 31, 2019

Ms. Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805

RE: Self – Directed USBC Progress Report for 2018 – ExxonMobil Refinery

Dear Ms. Hensley,

Please find an attached copy of our 2018 Self – Directed USBC Report that we receive from NorthWestern Energy that shows our USB activities during 2018. This is to notify you that these USB payments we received in 2018 were for projects we submitted in previous years and were a combination of 2017 and 2018 USB credits. We did not submit any new projects in 2018.

We also have a request balance carry over for all remaining 2018 USB credits at year-end into 2019.

Regards,

January 31, 2019

Chris B. Jessup

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

NorthWestern Energy
Delivering a Bright Future

January 14, 2019

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

RE: "Self-Directed USBC Progress Report for 2018" for Department of Revenue Annual Report

Dear Brock:

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2018, and I am contacting you regarding your 2018 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end *"Self-Directed USBC Progress Report for 2018"* showing a summary of your USB activity during 2018 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 2018 USB credits into 2019. If your final progress report shows a "Payment Pending", it reflects your December 2018 USB credits that were carried over into 2019, 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 2018*" 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, 2019.** 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 2018 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 2018.**
- ✓ **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, 2019** to the address below.

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

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

Sincerely,

Deborah Singer
Senior Key Account & Economic Development Specialist

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

EXXONMOBIL

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$1,705,702.16
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$7,191,138.26	Total Payment Requests:	$7,191,138.26
Payment Requests Made YTD:	$0.00	Current Request Balance:	$7,006,992.69
2017 Carryover USBC Credit:	$4,513.95	Total USBC Credit:	$195,878.19
USBC Credit YTD:	$191,364.24	Payments Issued YTD:	$184,145.57
Average Monthly Credit Earned:	$15,947.02	USBC Credit Balance:	$11,732.62
		Payment Pending:	$11,732.62

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$46,687.99
07/11/2018	$53,456.08
10/03/2018	$54,671.06
12/10/2018	$29,330.44

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100316	1315	DA15063056	KWH >	10,732,479	17,664,096	17,546,221	20,512,121	18,007,165	19,870,826	19,677,545	20,189,205	19,751,784	18,885,801	13,048,003	12,761,000	208,646,246
			KW >	22,792	26,023	29,376	29,911	27,043	28,874	28,961	28,702	27,941	27,907	21,202	18,697	26,452
			Elec Revenue >	$80,580.20	113,709.50	118,049.05	130,848.73	116,150.96	126,599.33	125,960.40	126,771.70	123,804.26	120,311.98	$86,285.43	$81,087.27	$1,350,158.81
248123	77884	DA13025465	KWH >	72,480	60,520	63,680	63,600	45,040	42,680	47,440	45,160	50,640	49,320	50,840	66,920	658,320
			KW >	169	170	168	164	158	146	157	156	145	157	172	186	162
			Elec Revenue >	$7,360.88	$6,426.17	$6,666.61	$6,629.19	$5,106.03	$4,789.07	$5,216.96	$4,994.95	$5,329.02	$5,354.94	$5,620.96	$7,021.14	$70,515.92
652196	287717	DD37190734	KWH >	63,400	50,760	53,080	53,520	31,040	27,000	25,840	28,080	33,640	33,800	47,360	37,760	485,280
			KW >	132	134	142	135	128	126	118	122	127	126	125	130	129
			Elec Revenue >	$6,285.32	$5,295.09	$5,578.52	$5,546.10	$3,704.02	$3,363.10	$3,165.39	$3,352.64	$3,846.49	$3,853.95	$4,896.82	$3,950.86	$52,838.30
1416614	396985	DG28376228	KWH >	77,643	230,278	245,408	317,935	298,512	126,197	294,832	269,622	331,824	275,458	198,802	170,570	2,837,081
			KW >	830	759	736	867	870	759	803	810	766	793	763	776	794
			Elec Revenue >	$9,050.02	$18,969.55	$19,840.60	$25,366.38	$23,970.98	$12,049.69	$23,417.77	$21,157.79	$25,138.28	$21,765.35	$16,592.98	$14,869.74	$232,189.13
			Total KWH	10,946,002	18,005,654	17,908,389	20,947,176	18,381,757	20,066,703	20,045,657	20,532,067	20,167,888	19,244,379	13,345,005	13,036,250	212,626,927
			Combined Average KW	23,923	27,086	30,422	31,077	28,199	29,905	30,039	29,790	28,979	28,983	22,262	19,789	27,538
			USBC Charge	$9,851.40	$16,205.09	$16,117.55	$18,852.46	$16,543.59	$18,060.03	$18,041.10	$18,478.85	$18,151.11	$17,319.94	$12,010.50	$11,732.62	$191,364.24
			Total Elec Revenue	103,276.42	144,400.31	150,134.78	168,390.40	148,931.99	146,801.19	157,760.52	156,277.08	158,118.05	151,286.22	113,396.19	106,929.01	$1,705,702.16

Rec'd MT DOR

JAN 24 2019

F. H. STOLTZE LAND & LUMBER CO.

Lumber Manufacturers

Box 1429 COLUMBIA FALLS, MONTANA 59912

January 22, 2019

Rec'd MT DOR

JAN 30 2019

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,

Josef Kuchera

Josef Kuchera
Plant Accountant
F. H. Stoltze Land & Lumber Co

Flathead Electric Cooperative, Inc.
Large Customer USB Information
January 1, 2018 - December 31, 2018

FEC Customer	2018 kWh Purchases through Dec 31, 2018	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 Stoltze Land & Lumber Inc	14,601,600	$33,613	$1,358	$9,433		$0

GCC Trident Plant 4070 Trident Road ▪Three Forks, MT 59752 Phone: 406 ▪ 385 ▪ 3241 Fax: 406 ▪ 285 ▪ 3100

02/25/2019

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

RE: USB Summary of Activity 2018

Dear Mr. Schoenfeld,

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

During 2018, no new projects were submitted. Credits of $39,588.04 were earned during 2018 for projects submitted in previous years. Please see attached report prepared by NorthWestern Energy for details of credits received during 2018.

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

Sincerely,

Riley Siddoway
Controller
CRH US Trident Plant

Cc: Rick Edwards, NWE

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

GCC THREE FORKS LLC

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$284,970.28
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$408,251.44	Total Payment Requests:	$408,251.44
Payment Requests Made YTD:	$0.00	Current Request Balance:	$372,024.67
2017 Carryover USBC Credit:	$3,270.30	Total USBC Credit:	$39,588.04
USBC Credit YTD:	$36,317.74	Payments Issued YTD:	$36,226.77
Average Monthly Credit Earned:	$3,026.48	USBC Credit Balance:	$3,361.27
		Payment Pending:	$3,361.27

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$10,880.30
07/11/2018	$8,630.96
08/10/2018	$2,289.02
10/03/2018	$8,144.09
12/10/2018	$6,282.40

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3237469	1039	DA06183555	KWH >	2,851,006	3,295,579	2,308,972	3,317,672	2,900,351	3,371,938	2,543,360	0	0	0	0	0	20,588,878
			KW >	6,718	6,149	6,127	5,998	5,760	5,875	5,688	0	0	0	0	0	6,045
			Elec Revenue >	$22,606.77	$23,455.72	$19,312.25	$23,164.72	$21,102.07	$23,185.23	$17,066.04	$0.00	$0.00	$0.00	$0.00	$0.00	$149,892.80
3563730	1039	DA06183555	KWH >	0	0	0	0	0	0	938,630	3,926,993	4,183,364	3,898,292	3,082,151	3,734,748	19,764,178
			KW >	0	0	0	0	0	0	5,688	6,545	6,718	6,574	6,638	6,631	6,466
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$5,939.98	$26,346.40	$27,643.96	$26,279.50	$23,144.74	$25,722.90	$135,077.48
			Total KWH	2,851,006	3,295,579	2,308,972	3,317,672	2,900,351	3,371,938	3,481,990	3,926,993	4,183,364	3,898,292	3,082,151	3,734,748	40,353,056
			Combined Average KW	6,718	6,149	6,127	5,998	5,760	5,875	11,376	6,545	6,718	6,574	6,638	6,631	12,511
			USBC Charge	$2,565.91	$2,966.02	$2,078.07	$2,985.90	$2,610.32	$3,034.74	$3,133.79	$3,534.29	$3,765.03	$3,506.46	$2,773.94	$3,361.27	$36,317.74
			Total Elec Revenue	$22,606.77	$23,455.72	$19,312.25	$23,164.72	$21,102.07	$23,185.23	$23,006.02	$26,346.40	$27,643.96	$26,279.50	$23,144.74	$25,722.90	$284,970.28

General Mills
Making Food People Love

February 6, 2019

Attn: Nicole L. Hensley
Montana Department of Revenue
P.O. Box 5805
Helena MT 59604-5805
NHensley@mt.gov

RE: 2018 USBP Annual Report of qualified expenditures for General Mills Operations, LLC located in Great Falls Montana

In 2018, GMOL received credit in the amount of $22,763.98 on our FORM B submitted 10/24/2018 for upgrading the lighting (12 light fixtures and installation) in our Quality Lab area. We also purchased and installed 45 lights in our production areas. All of the lighting in our production areas are explosion proof and retrofit.

The $22,763.98 received in calendar 2018 consisted of $16,335.38 carry over from 2017 and $6,428.60 of 2018 funds. GMOL has requested the carryover of the earned 2018 fund balance of $9,740.321 for use in 2019. 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 2018.

Regards,

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

GENERAL MILLS

Account Summary

2017 Carryover Reservation:	$16,500.00	YTD Elec Revenue:	$366,037.66
Reservations Made YTD:	$10,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$22,763.98
Payment Requests Made YTD:	$22,763.98	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$16,335.38	Total USBC Credit:	$32,504.19
USBC Credit YTD:	$16,168.81	Payments Issued YTD:	$22,763.98
Average Monthly Credit Earned:	$1,347.40	USBC Credit Balance:	$9,740.21
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Lisa Blades	10/24/2018	$22,763.98

Payments Issued

Date	Amount
12/10/2018	$22,763.98

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100619	1623	DA06183421	KWH >	1,534,861	1,506,726	1,485,939	1,645,000	1,552,968	1,287,884	1,498,560	1,435,239	1,609,794	1,406,580	1,605,214	1,396,591	17,965,356
			KW >	3,123	3,091	3,059	3,026	3,143	3,000	2,948	2,819	2,858	2,903	2,890	2,974	2,986
			Elec Revenue >	$31,819.81	$31,319.12	$30,594.59	$32,306.33	$31,739.96	$28,029.75	$30,261.00	$29,042.75	$31,247.45	$29,075.04	$31,333.63	$29,268.23	$366,037.66
			Total KWH	1,534,861	1,506,726	1,485,939	1,645,000	1,552,968	1,287,884	1,498,560	1,435,239	1,609,794	1,406,580	1,605,214	1,396,591	17,965,356
			Combined Average KW	3,123	3,091	3,059	3,026	3,143	3,000	2,948	2,819	2,858	2,903	2,890	2,974	2,986
			USBC Charge	$1,381.37	$1,356.05	$1,337.35	$1,480.50	$1,397.67	$1,159.10	$1,348.70	$1,291.72	$1,448.81	$1,265.92	$1,444.69	$1,256.93	$16,168.81
			Total Elec Revenue	$31,819.81	$31,319.12	$30,594.59	$32,306.33	$31,739.96	$28,029.75	$30,261.00	$29,042.75	$31,247.45	$29,075.04	$31,333.63	$29,268.23	$366,037.66

GRAIN CRAFT

900 16th St North, Great Falls, Montana 59401 406-727-7366 Fax: 406-761-3471

February 6, 2019

Rec'd MT DOR

MAR 19 2019

Montana Department of Revenue
Nicole Hensley
P.O. Box 5805
Helena, MT 59604-5805

RE: Universal System Benefits Program (USBP) – 2018 Large Customer Credits

Dear Nicole,

We continue to upgrade existing metal halide light fixtures in the mill and warehouse buildings to LED lighting. In the calendar year 2018 we spent a total of $12,586.30 on lighting upgrades.

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

Please call if you have any questions.

Sincerely,

Travis Devlin
Plant Manager
Grain Craft
Great Falls, MT 59401

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 FAX: (406) 497-4008

DATE:	10/26/2018
NAME OF BUSINESS:	**Grain Craft**
CITY/TOWN LOCATION:	Great Falls, MT
CONTACT PERSON:	Travis Devlin
MAILING ADDDRESS:	900 16th St N
CITY, STATE AND ZIP:	59401
PHONE NUMBER:	406-727-7366
FAX NUMBER:	406-761-3471
E-MAIL ADDRESS	tdevlin@graincraft.com

AMOUNT OF CREDIT REQUESTED:	$6685.00

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):

We converted 27 -4ft fluorescent light fixtures in the 2nd floor lab and breakroom to LED tubes, as well as replacing 7 Metal Halide fixtures in the plant with 4 ft LED fixtures

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

ESTIMATED kWh SAVINGS:	24,139
ESTIMATED KW SAVINGS:	3.55

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.

NorthWestern Energy
Delivering a Bright Future

GRAYMONT

February 23, 2019

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

Dear Mr. Schoenfeld;

We have been a large USB customer for several years and have used these funds to complete energy savings projects at our Townsend MT plant.

Attached is form B and the USB. As you will see in the Form B and summary report, we made a request for $28,635.81 and of that $20,855.24 has been reimbursed. We have made improvements by replacing old metal halide and mercury vapor lighting with new energy saving fluorescent and LED lighting. The cost exceeded $28,000 for this work.

Please contact me if you have any questions

Thank you

Rec'd MT DOR
FEB 25 2019

Paul Liner
Plant Manager
Graymont

Indian Creek Plant
450 Indian Creel Road
PO Box 550
Townsend, MT 59644

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 FAX: (406) 497-4008

DATE:	10/26/18
NAME OF BUSINESS:	**Graymont Western US**
CITY/TOWN LOCATION:	Townsend
CONTACT PERSON:	Doug Held
MAILING ADDDRESS:	PO Box 550
CITY, STATE AND ZIP:	Townsend, MT 59644
PHONE NUMBER:	406-465-5102
FAX NUMBER:	
E-MAIL ADDRESS	dheld@graymont.com

AMOUNT OF CREDIT REQUESTED:	$28,635.81

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):

The lights on our firing floor and hydrate building have been upgraded to 4' T8 fluorescent. 50% of the lighting replaced was 1000W mercury vapor and the other half were 400W metal halide. The two projects totaled over $28,000.

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

ESTIMATED kWh SAVINGS:	$5,724 annually
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: Doug Held

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 Energy
Delivering a Bright Future

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/4/2019

GRAYMONT WESTERN US INC.

Account Summary

2017 Carryover Reservation:	$10,000.00	YTD Elec Revenue:	$1,087,905.98
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$2,863,581.00
Payment Requests Made YTD:	$2,863,581.00	Current Request Balance:	$2,842,725.76
2017 Carryover USBC Credit:	$9,923.87	Total USBC Credit:	$21,846.45
USBC Credit YTD:	$11,922.58	Payments Issued YTD:	$20,855.24
Average Monthly Credit Earned:	$993.55	USBC Credit Balance:	$991.21
		Payment Pending:	$991.21

Payment Requests Made

Submitted By	Date	Amount
Doug Held	10/26/2018	$2,863,581.00

Payments Issued

Date	Amount
12/10/2018	$20,855.24

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
00623	1627	DA18618463	KWH >	1,337,988	1,246,057	915,762	1,456,377	909,085	902,042	764,107	780,338	1,183,322	1,272,779	1,256,788	1,087,271	13,111,916
			KW >	2,713	2,529	2,557	2,736	1,725	1,722	1,544	2,028	2,451	2,491	2,520	2,218	2,270
			Elec Revenue >	109,287.06	101,986.35	$78,800.62	118,728.52	$73,981.78	$73,421.59	$62,431.94	$64,676.63	$94,917.89	102,024.29	100,805.87	$87,880.35	$1,068,942.89
96774	255054	DS82081027	KWH >	17,760	13,760	13,360	13,840	8,040	7,760	5,640	5,600	9,280	13,160	13,120	14,080	135,400
			KW >	69	64	66	61	56	58	58	58	90	98	89	72	70
			Elec Revenue >	$2,084.74	$1,721.57	$1,705.66	$1,704.81	$1,190.31	$1,195.44	$1,027.16	$1,015.65	$1,608.45	$1,995.44	$1,898.84	$1,815.02	$18,963.09
			Total KWH	1,355,748	1,259,817	929,122	1,470,217	917,125	909,802	769,747	785,938	1,192,602	1,285,939	1,269,908	1,101,351	13,247,316
			Combined Average KW	2,782	2,593	2,623	2,797	1,781	1,780	1,602	2,086	2,541	2,589	2,609	2,290	2,339
			USBC Charge	$1,220.17	$1,133.83	$836.21	$1,323.20	$825.42	$818.82	$692.78	$707.34	$1,073.34	$1,157.34	$1,142.92	$991.21	$11,922.58
			Total Elec Revenue	111,371.80	103,707.92	$80,506.28	120,433.33	$75,172.09	$74,617.03	$63,459.10	$65,692.28	$96,526.34	104,019.73	102,704.71	$89,695.37	$1,087,905.98

IDAHO FOREST GROUP

PO Box 513 St. Regis, MT 59866 taunya.voll@idfg.com 406-649-2495

Rec'd MT DOR
FEB 21 2019

Nicole Hensley
Department of Revenue
P.O. Box 5805
Helena, MT 59604-5805

February 18th, 2019

Dear Nicole Hensley,

The VFD was installed in forks for the sawmill stacker and the LED lights were installed in the mechanic shop. This has been an estimated savings of 12,983.23 KWH per year and an estimated 1.792 KW savings.

I have attached all the information for your review along with a copy of our 2018 USBC Progress Report.

Sincerely,

Curt Smith
Plant Superintendent
Idaho Forest Group

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 FAX: (406) 497-4008

DATE:	11/30/2018
NAME OF BUSINESS:	Idaho Forest Group
CITY/TOWN LOCATION:	163 Old Mill Loop St. Regis, MT 59866
CONTACT PERSON:	Tawnya Voll
MAILING ADDDRESS:	PO Box 513
CITY, STATE AND ZIP:	St. Regis, MT 59866
PHONE NUMBER:	406-649-2495
FAX NUMBER:	406-649-2653
E-MAIL ADDRESS	tawnya.voll@idfg.com

AMOUNT OF CREDIT REQUESTED:	$2324.92

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):

VFD installed in forks for sawmill stacker + LED lights were installed in the mechanic shop.

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

ESTIMATED kWh SAVINGS:	12,983.23 KWH per year
ESTIMATED KW SAVINGS:	1.792 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.

NorthWestern Energy

IDAHO FOREST GROUP

PO NUMBER **16-18112339**

ISSUED: 11/19/2018

ST REGIS PURCHASE ORDER

Vendor: **DYK001**

ISSUED PO

DYKMAN ELECTRICAL, INC.
5629 E. BROADWAY
SPOKANE, WA
USA 99212

Contact:
Tel: **888-284-3953** Fax: **509-536-7999**

BILL TO:
PO Box 513
St. Regis, MT
USA 59866
T: 406-649-2495
E: taunya.voll@idfg.com

SHIP TO:
162 Old Mill Loop
St. Regis, MT
USA 59866
T: 406-649-2495

CONFIRM TO	RELEASE	SHIPPING	FOB	TERMS	FUNDS
				NET 30 DAYS	USD

LINE	QUANTITY	PART NUMBER / VENDOR PART NUMBER	UNIT COST	UOM	EXTENDED
	1.0000	CIMRVU4A31F **CIMRVU4A31F** DRIVE	965.0000	EA	965.00
1	**Date Due:**	11/19/2018	Acct: 16-4513-30-00-00		

**** PURCHASE ORDER NUMBER MUST APPEAR ON ALL INVOICES, DELIVERY SLIPS AND CORRESPONDENCE ****

Equal Employment Opportunity Clause
This contractor and subcontractor shall abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

Notice of Employee Rights under the National Labor Relations Act
The provisions of 29 CFR Part 471, Appendix A to Subpart A (relating to the obligation to post a notice of employee rights under the National Labor Relations Act and to notify covered subcontractors of their obligation to do so) are incorporated by reference in this contract.

USD **Sub-Total:**	965.00
Discount:	0.00
	0.00
Total:	965.00

BUYER:
Pat Horn
pat.horn@idfg.com

Approved By:
Pat Horn
11/19/2018

INVOICE

DYKMAN

Invoice Number: 0482864-IN
Invoice Date: 11/27/2018

Remit Payment To:
DYKMAN ELECTRICAL INC
2323 FEDERAL WAY
BOISE, ID 83705

Order Number: 0482864
Order Date 11/19/2018
Salesperson: CNB
Customer Number 10-IDAMTST
Division: SPOKANE

Sold To:
IDAHO FOREST GROUP-ST REGIS
PO BOX 513
SAINT REGIS, MT 59866

Ship To:
IDAHO FOREST GROUP-ST REGIS
162 OLD MILL LOOP
SAINT REGIS, MT 59866

Confirm To:

Customer P.O.	Ship VIA	Ship Terms	F.O.B.	Terms
16-18112339	UPS GROUND	PREPAID&ADD	SPOKANE	NET 30

Item Number	Unit	Ordered	Shipped	Back Ordered	Price	Amount
CIMRVU4A31F	EACH	1	1	0	965.00	965.00
YASK-VFD-VU-20HP@460V-N1-31A		CIMRVU4A0031FAA		**Whse:** SPO		
UPS TRK# 1Z2T11T80348732934 11/19/2018						

If you have questions on your invoice, please contact accounting at 208-336-1668 or accounting@dykman.com. A 3.5% Convenience Fee may be added to Credit Card Payments.

Net Invoice:	965.00
Less Discount:	0.00
Freight:	18.20
Sales Tax:	0.00
Invoice Total: USD	**983.20**

IDAHO FOREST GROUP

PO NUMBER **16-18112354**

Revision: 1

ISSUED: 11/20/2018

ST REGIS PURCHASE ORDER

Vendor: **ECO002**

E-CONOLIGHT LLC

,

Contact:

Tel: Fax:

ISSUED PO

BILL TO:
PO Box 513
St. Regis, MT
USA 59866
T: 406-649-2495
E: taunya.voll@idfg.com

SHIP TO:
162 Old Mill Loop
St. Regis, MT
USA 59866
T: 406-649-2495

CONFIRM TO	RELEASE	SHIPPING	FOB	TERMS	FUNDS
				NET 30 DAYS	USD

LINE	QUANTITY	PART NUMBER / VENDOR PART NUMBER	UNIT COST	UOM	EXTENDED
1	**8.0000**	E-HLE21A-HK50UW **E-HLE21A-HK50UW** LIGHT HIGH BAY LIGHTS	169.9900	EA	1,359.92
	Date Due:	12/18/2018	Acct: 16-4512-34-00-00		

**** PURCHASE ORDER NUMBER MUST APPEAR ON ALL INVOICES, DELIVERY SLIPS AND CORRESPONDENCE ****

Equal Employment Opportunity Clause
This contractor and subcontractor shall abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

Notice of Employee Rights under the National Labor Relations Act
The provisions of 29 CFR Part 471, Appendix A to Subpart A (relating to the obligation to post a notice of employee rights under the National Labor Relations Act and to notify covered subcontractors of their obligation to do so) are incorporated by reference in this contract.

USD **Sub-Total:**	1,359.92
Discount:	0.00
	0.00
Total:	1,359.92

BUYER:
Pat Horn
pat.horn@idfg.com

Approved By:
Pat Horn
11/20/2018

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
FAX: (406) 497-4008

DATE:	11/30/2018
NAME OF BUSINESS:	Idaho Forest Group
CITY/TOWN LOCATION:	162 Old Mill LOOP St. Regis MT 59866
CONTACT PERSON:	Taunya Voll
MAILING ADDDRESS:	PO Box 513
CITY, STATE AND ZIP:	St. Regis MT 59866
PHONE NUMBER:	406-649-2495
FAX NUMBER:	406-649-2653
E-MAIL ADDRESS	taunya.voll@idfg.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 carry forward all remaining 2018 funds in the approximate amount of $6000.00 for projects identified & completed in 2019

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

IDAHO FOREST GROUP LLC

Account Summary

2017 Carryover Reservation:	$1,200.00	YTD Elec Revenue:	$818,216.11
Reservations Made YTD:	$6,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$2,324.92
Payment Requests Made YTD:	$2,324.92	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$1,134.31	Total USBC Credit:	$8,040.36
USBC Credit YTD:	$6,906.05	Payments Issued YTD:	$2,324.92
Average Monthly Credit Earned:	$575.50	USBC Credit Balance:	$5,715.44
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Taunya Voll	11/30/2018	$2,324.92

Payments Issued

Date	Amount
12/10/2018	$2,324.92

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3506717	1628	DA21629749	KWH >	547,331	683,331	694,228	712,108	657,190	563,392	619,758	675,631	600,394	650,350	646,697	622,966	7,673,376
			KW >	2,238	2,432	2,445	2,445	2,527	2,376	2,316	2,333	2,225	2,290	2,216	2,328	2,348
			Elec Revenue >	$60,744.11	$72,721.79	$73,615.68	$75,216.43	$71,518.87	$62,996.05	$66,269.80	$69,820.16	$63,584.22	$68,070.78	$67,165.26	$66,492.96	$818,216.11
			Total KWH	547,331	683,331	694,228	712,108	657,190	563,392	619,758	675,631	600,394	650,350	646,697	622,966	7,673,376
			Combined Average KW	2,238	2,432	2,445	2,445	2,527	2,376	2,316	2,333	2,225	2,290	2,216	2,328	2,348
			USBC Charge	$492.60	$615.00	$624.81	$640.90	$591.47	$507.05	$557.78	$608.07	$540.35	$585.32	$582.03	$560.67	$6,906.05
			Total Elec Revenue	$60,744.11	$72,721.79	$73,615.68	$75,216.43	$71,518.87	$62,996.05	$66,269.80	$69,820.16	$63,584.22	$68,070.78	$67,165.26	$66,492.96	$818,216.11

Invenergy

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

February 12. 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908
FAX: 406-444-7997 Email: nhensley@mt.gov

RE: Self-Directed USBC Progress Report for 2018 – Judith Gap Energy LLC

Dear Ms. Hensley:

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we received from NorthWestern Energy that shows our USB activities during 2018.

- We had $1,208.45 in 2017 credits brought forward into 2018. We earned $1,492.78 in 2018 credits.
- In 2018, we received $1,208.45 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 $1,492.78 in 2018 USB credits that were carried over into 2019 because we submitted a Reservation to NorthWestern Energy to reserve these remaining 2018 funds for a potential project in 2019.

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

JUDITH GAP ENERGY LLC

Account Summary

2017 Carryover Reservation:	$1,300.00	YTD Elec Revenue:	$167,758.69
Reservations Made YTD:	$1,800.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$1,208.45
Payment Requests Made YTD:	$1,208.45	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$1,208.45	Total USBC Credit:	$2,701.23
USBC Credit YTD:	$1,492.78	Payments Issued YTD:	$1,208.45
Average Monthly Credit Earned:	$124.40	USBC Credit Balance:	$1,492.78
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Michael Prater	11/28/2018	$1,208.45

Payments Issued

Date	Amount
12/10/2018	$1,208.45

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1428100	398081	DA18413804	KWH >	4,024	3,578	3,582	3,869	3,444	3,695	4,048	3,742	3,469	3,947	3,391	3,543	44,332
			KW >	16	16	17	16	17	18	16	17	16	15	18	16	17
			Elec Revenue >	$484.44	$446.70	$458.60	$473.91	$449.26	$483.89	$482.17	$467.50	$432.52	$468.76	$448.51	$442.81	$5,539.07
1437192	398952	DD81153244	KWH >	121,600	91,850	116,550	208,130	128,170	154,570	118,900	166,050	143,870	156,010	146,390	62,220	1,614,310
			KW >	1,200	1,200	1,160	1,080	1,080	1,040	960	920	920	1,000	1,000	1,040	1,050
			Elec Revenue >	$13,265.99	$11,304.27	$12,742.69	$18,717.87	$13,297.24	$14,919.36	$12,231.45	$14,875.03	$13,504.06	$14,672.40	$14,003.86	$8,685.40	$162,219.62
			Total KWH	125,624	95,428	120,132	211,999	131,614	158,265	122,948	169,792	147,339	159,957	149,781	65,763	1,658,642
			Combined Average KW	1,216	1,216	1,177	1,096	1,097	1,058	976	937	936	1,015	1,018	1,056	1,067
			USBC Charge	$113.06	$85.89	$108.12	$190.80	$118.45	$142.44	$110.65	$152.82	$132.60	$143.96	$134.80	$59.19	$1,492.78
			Total Elec Revenue	$13,750.43	$11,750.97	$13,201.29	$19,191.78	$13,746.50	$15,403.25	$12,713.62	$15,342.53	$13,936.58	$15,141.16	$14,452.37	$9,128.21	$167,758.69

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
FAX: (406) 497-4008

DATE:	11-28-18
NAME OF BUSINESS:	Judith Gap Energy Center
CITY/TOWN LOCATION:	Harlowton
CONTACT PERSON:	Michael Prater
MAILING ADDDRESS:	P.O. Box 890
CITY, STATE AND ZIP:	Harlowton MT 59036
PHONE NUMBER:	406-632-4540
FAX NUMBER:	
E-MAIL ADDRESS	mprater@invenergyllc.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.)

Installation (and purchase) of occupation lighting sensors in the O+M office building

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: X _____

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 FAX: (406) 497-4008

DATE:	11-28-18
NAME OF BUSINESS:	Judith Gap Energy Center
CITY/TOWN LOCATION:	Harlowton MT
CONTACT PERSON:	Michael Prater
MAILING ADDDRESS:	P.O. Box 890
CITY, STATE AND ZIP:	Harlowton, MT 59036
PHONE NUMBER:	406-632-4540
FAX NUMBER:	
E-MAIL ADDRESS	mprater@invenergyllc.com

AMOUNT OF CREDIT REQUESTED:	$1,208.45

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 issue a USB check to the following, for donation to Energy Share: "Invenergy Wind Finance Co. LLC". We will then make a charitable 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:	

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: X

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 Energy
Delivering a Bright Future

NorthWestern Energy

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

1494878

INVENERGY WIND FINANCE CO LLC
JUDITH GAP ENERGY LLC
ATTN: MICHAEL PRATER
PO Box 890
HARLOWTON, MT 59036

Payment No.: **201839167**
Payment Date: **12/18/2018**
Company Code: **MTU**
Vendor No.: **268907**
Page: **1 of 1**

Invoice Number	Invoice Date	Document Number Text	Gross Amount	Discount	Net Amount
		Please accept this check as settlement for the items listed below subject to the goods and services supplied and the invoice therefore being correct.			
CKRDEC120845	12/14/2018	190466632 *LARGE CUSTOMER USBS PMT 12/10/2018*	1,208.45	0.00	1,208.45
		Check Total.....			**$ 1,208.45**

COPY

DETACH FROM CHECK AND KEEP FOR YOUR RECORDS

NorthWestern Energy

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

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

1494878

12/18/2018

PAY TO THE ORDER OF INVENERGY WIND FINANCE CO LLC $ ***1,208.45

***ONE THOUSAND TWO HUNDRED EIGHT & 45/100 *** DOLLARS

COPY COPY

INVENERGY WIND FINANCE CO LLC
JUDITH GAP ENERGY LLC
ATTN: MICHAEL PRATER
PO Box 890
HARLOWTON, MT 59036

⑈1494878⑈ ⑆042205038⑆ 1301030123 52⑈

IMERYS Talc

Rec'd MT DOR
FEB 20 2019

February 15, 2019

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

RE: Self-Directed USBC Progress Report for 2018 – Imerys Talc America

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy that shows our USB activities during 2018. During 2018 we received payments including $23,289.97 in 2018 USB credits and $1,959.04 in 2017 USB credits that were carried over into 2018. At year-end 2018, we had $1,845.98 in remaining 2018 USB credits that will be carried forward into 2019 because we have a request balance for these funds from energy efficiency projects submitted in previous years.

Sincerely,

Lisa Andersen

Lisa Andersen

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

IMERYS TALC AMERICA, INC.

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$305,347.79
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$4,822,726.23	Total Payment Requests:	$4,822,726.23
Payment Requests Made YTD:	$0.00	Current Request Balance:	$4,797,477.22
2017 Carryover USBC Credit:	$1,959.04	Total USBC Credit:	$27,094.99
USBC Credit YTD:	$25,135.95	Payments Issued YTD:	$25,249.01
Average Monthly Credit Earned:	$2,094.66	USBC Credit Balance:	$1,845.98
		Payment Pending:	$1,845.98

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$8,417.56
07/11/2018	$6,321.62
10/03/2018	$5,984.23
12/10/2018	$4,525.60

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100322	1321	DA06183423	KWH >	778,656	916,355	696,966	813,439	772,690	0	0	0	0	0	0	0	3,978,106
			KW >	1,776	1,741	1,847	1,767	1,700	0	0	0	0	0	0	0	1,766
			Elec Revenue >	$6,194.93	$6,688.83	$5,937.55	$6,277.65	$6,005.82	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$31,104.78
100322	1321	DA21705318	KWH >	0	0	0	0	0	767,496	828,541	1,011,987	966,910	977,439	897,318	732,981	6,182,672
			KW >	0	0	0	0	0	1,732	1,711	1,750	1,739	1,730	1,724	1,722	1,730
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$6,036.41	$6,248.32	$7,011.26	$6,814.57	$6,841.77	$6,514.12	$5,858.80	$45,325.25
100325	1324	DA15843440	KWH >	1,409,552	1,507,859	1,476,965	1,548,326	1,423,305	1,372,147	1,168,913	1,122,774	1,325,713	1,449,922	1,462,877	1,175,765	16,444,118
			KW >	3,210	3,452	3,525	3,313	3,175	3,210	2,994	3,080	2,886	2,976	3,050	2,959	3,153
			Elec Revenue >	$11,076.11	$11,860.68	$11,776.90	$11,723.02	$10,997.77	$10,848.18	$9,682.62	$9,605.59	$10,096.56	$10,735.22	$10,906.53	$9,619.83	$128,929.01
188337	47739	DG62206298	KWH >	11,080	10,180	10,060	10,320	5,140	10,260	6,700	3,400	3,680	6,100	7,740	8,000	92,660
			KW >	28	29	28	30	18	24	19	18	17	21	22	20	23
			Elec Revenue >	$307.49	$297.50	$294.18	$309.90	$180.94	$265.66	$200.37	$161.06	$157.07	$209.49	$231.83	$220.99	$2,836.48
206570	55858	DA19409930	KWH >	11,440	13,160	11,840	9,520	10,040	6,880	6,400	6,240	6,160	8,480	13,440	15,600	119,200
			KW >	35	36	38	35	37	30	28	31	25	28	40	44	34
			Elec Revenue >	$1,252.68	$1,398.37	$1,320.66	$1,106.32	$1,165.54	$841.63	$774.65	$791.78	$733.74	$939.44	$1,438.47	$1,647.54	$13,410.82
206573	55861	DA19814683	KWH >	2,080	1,920	1,840	1,920	1,760	1,680	1,600	1,600	1,440	2,080	2,320	2,240	22,480
			KW >	13	15	15	17	12	12	13	18	14	12	8	12	13
			Elec Revenue >	$305.76	$307.61	$301.87	$331.74	$271.60	$257.15	$264.55	$311.73	$260.72	$293.90	$273.20	$307.23	$3,487.06
206575	55862	DA19164785	KWH >	9,620	8,660	8,160	6,180	3,060	1,700	1,660	200	200	1,920	4,180	3,300	48,840
			KW >	17	17	16	0	21	8	8	2	3	7	9	9	10
			Elec Revenue >	$932.54	$859.20	$810.50	$492.87	$460.33	$223.24	$215.65	$50.36	$52.46	$232.00	$418.27	$351.26	$5,098.68

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
206579	55866	DG28181022	KWH >	57,689	59,897	56,073	58,385	44,605	56,720	38,529	34,351	36,181	59,451	66,982	74,513	643,376
			KW >	260	303	272	258	236	234	225	227	254	293	306	316	265
			Elec Revenue >	$2,308.19	$2,591.44	$2,343.51	$2,273.04	$1,995.57	$2,098.34	$1,872.51	$1,847.51	$2,044.83	$2,526.89	$2,685.42	$2,823.96	$27,411.21
611286	264188	DA19409931	KWH >	15,120	16,460	15,320	14,840	9,040	3,040	2,280	2,080	2,360	8,360	14,520	14,920	118,360
			KW >	28	34	33	30	25	13	14	12	14	32	28	33	25
			Elec Revenue >	$1,472.01	$1,633.69	$1,542.93	$1,469.08	$964.86	$375.45	$324.54	$292.66	$331.24	$973.91	$1,406.38	$1,487.89	$12,274.64
613766	265743	DA19814682	KWH >	2,280	2,560	2,000	2,680	2,080	2,800	2,080	1,800	1,760	2,320	2,200	2,240	26,800
			KW >	16	15	13	17	13	12	12	11	12	13	13	14	13
			Elec Revenue >	$349.40	$357.55	$298.67	$391.45	$300.64	$352.70	$285.45	$259.43	$269.36	$320.24	$311.63	$319.14	$3,815.66
620119	269490	DG62220735	KWH >	-2,020	2,160	3,320	3,280	1,440	540	540	720	780	2,160	2,680	3,120	18,720
			KW >	4	7	7	6	6	2	3	2	2	6	6	6	5
			Elec Revenue >	($107.72)	$247.20	$341.17	$326.27	$181.44	$77.22	$82.42	$89.88	$94.91	$240.48	$280.97	$315.46	$2,169.70
648917	285892	DG28171513	KWH >	933	638	207	214	509	1,537	4,059	3,660	2,797	664	319	363	15,900
			KW >	5	7	0	0	11	11	10	11	11	10	2	2	7
			Elec Revenue >	$138.41	$127.20	$30.80	$32.15	$161.36	$243.01	$424.18	$403.20	$335.74	$164.99	$51.94	$56.30	$2,169.28
651175	287203	DD58429322	KWH >	9,960	8,720	9,080	8,520	10,120	8,800	8,080	8,080	8,040	9,680	8,400	9,160	106,640
			KW >	43	49	50	44	54	47	42	30	38	39	42	48	44
			Elec Revenue >	$1,217.03	$1,178.95	$1,213.79	$1,110.81	$1,333.56	$1,161.53	$1,050.59	$927.40	$1,000.67	$1,142.71	$1,070.32	$1,198.20	$13,605.56
711387	322052	DD56126252	KWH >	5,340	4,520	4,660	3,280	3,560	3,320	3,600	2,220	-580	2,660	3,240	3,500	39,320
			KW >	17	18	18	17	17	19	16	19	10	10	12	12	15
			Elec Revenue >	$596.35	$542.07	$553.11	$438.59	$456.17	$460.44	$448.97	$368.86	$64.99	$318.51	$375.75	$396.47	$5,020.28
962195	360625	DA14062473	KWH >	5,100	5,360	4,340	5,100	6,740	7,000	7,160	7,360	7,100	6,320	4,660	5,380	71,620
			KW >	23	23	23	23	16	16	15	15	14	22	11	20	18
			Elec Revenue >	$639.58	$661.25	$581.05	$640.88	$693.78	$715.00	$712.68	$717.77	$696.34	$716.32	$476.91	$620.78	$7,872.34
			Total KWH	2,316,830	2,558,469	2,300,831	2,486,004	2,294,089	2,243,920	2,080,142	2,206,472	2,362,541	2,537,556	2,490,876	2,051,082	27,928,812
			Combined Average KW	5,475	5,746	5,885	5,557	5,341	5,370	5,110	5,226	5,039	5,199	5,273	5,217	7,121
			USBC Charge	$2,085.16	$2,302.60	$2,070.76	$2,237.41	$2,064.68	$2,019.53	$1,872.12	$1,985.83	$2,126.28	$2,283.80	$2,241.80	$1,845.98	$25,135.95
			Total Elec Revenue	$26,682.76	$28,751.54	$27,346.69	$26,923.77	$25,169.38	$23,955.96	$22,587.50	$22,838.49	$22,953.20	$25,655.87	$26,441.74	$25,223.85	$304,530.75

Flathead Electric Cooperative, Inc.
Large Customer USB Information
January 1, 2018 - December 31, 2018

FEC Customer	2018 kWh Purchases through Dec 31, 2018	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	12,300,000	$28,315	$1,144	$7,946		$0

Malteurop

North America

Jeremy Tweet
2800 Great Bear Ave
Great Falls MT 59404

February 12, 2019

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

Mr. Schoenfeld,

This letter is to inform you of Malteurops' use of the USB credits received in 2018. We received USB funds four times in 2018, in the amounts of $7,223.94, $5,195.13, $5,185.06, and $1,522.35. The total received was $19,126.48, the carryover balance requested from projects completed in 2017. 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 from 2017, submitted to NorthWestern Energy, listing the initial requests and the project overviews. The Self-Directed USB Progress Report for 2018 is included, showing the four payments received in 2018.

Also included is Form A, submitted to NorthWestern Energy, for USB reservation of the balance of 2018 funds.

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

Sincerely,

Jeremy Tweet
Process Engineer
Malteurop North America Inc.
406-791-2814

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
FAX: (406) 497-4008

DATE:	11-13-18
NAME OF BUSINESS:	Malteurop
CITY/TOWN LOCATION:	Great Falls
CONTACT PERSON:	Jeremy Tweet
MAILING ADDDRESS:	2800 Great Bear Ave.
CITY, STATE AND ZIP:	Great Falls MT 59404
PHONE NUMBER:	406-791-2800
FAX NUMBER:	
E-MAIL ADDRESS	jeremy.tweet@malteurop.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.)

Reserve all remaining 2018 USB credits at year end for use in 2019 VFD upgrades
Please reserve the Malteurop USB credits for use in 2019. pump upgrades

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: Richard P. Stafford

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

NorthWestern Energy
Delivering a Bright Future

October 15, 2018

Richard Slotness
Malteurop North America
415 US Highway 87
Great Falls, MT 59404

Dear Rick:

As we approach the end of 2018, 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 2018. To assist you, enclosed is a year-to-date report showing your USB credits through September 2018, USB requests, year-to-date payments and if you have any remaining 2017 USB credits you carried over into 2018. Here is a summary of the actions you need to take by November 30, 2018 regarding your USB credits.

2018 REMAINING USB CREDITS & PROJECTED CREDITS AT YEAR END NEED PROJECT REQUEST OR RESERVATION TO PROTECT BY NOVEMBER 30, 2018

Here is the status of your 2018 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.)

2018 USB Credit Balance (thru September)	None
2018 Projected 4th Quarter USB Credits (Oct-Dec)	$5,291
Less Current Request Balance YTD	- $1,522
Total Projected 2018 USB Credits Subject to Reallocation at Year End	$3,769

OPTION 1: REQUEST 2018 USB CREDITS FOR ENERGY EFFICIENCY PROJECT. You may claim your remaining 2018 credits for projects completed in your facility that result in a reduction of electric consumption by **submitting a *Form B* by November 30, 2018**. (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 2018 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 2018 funds be donated on the form. If your project doesn't cover all your remaining year-end credits you can also do a reservation for any remaining balance.

OPTION 2: SUBMIT RESERVATION FOR 2018 CREDITS FOR PROJECT IN 2019. You may reserve your remaining 2018 USB funds for energy efficiency projects underway that will not be completed this year or projects planned in 2019. **To reserve your 2018 funds for use in 2019, submit the enclosed *Form A – Reservation Form* by November 30, 2018.** On the Form A indicate: *"Reserve all remaining 2018 USB credits at year-end for use in 2019."*

Remember, if you fail to complete your requests or reservations for your USB funds by November 30, 2018 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 406-497-3756.

Sincerely,

Dale Mahugh
Specialist, Key Accounts

Dale Mahugh | Specialist, Key Accounts | 11 E. Park Street | Butte, MT 59701 | 406-497-3756 | dale.mahugh@northwestern.com

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

MALTEUROP NORTH AMERICA, INC.

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$2,061,404.20
Reservations Made YTD:	$3,800.00		
2017 Carryover Payment Request:	$19,126.48	Total Payment Requests:	$19,126.48
Payment Requests Made YTD:	$0.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$1,729.34	Total USBC Credit:	$22,431.51
USBC Credit YTD:	$20,702.17	Payments Issued YTD:	$19,126.48
Average Monthly Credit Earned:	$1,725.18	USBC Credit Balance:	$3,305.03
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$7,223.94
07/11/2018	$5,195.13
10/03/2018	$5,185.06
12/10/2018	$1,522.35

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1206942	379953	DA20155006	KWH >	2,048,086	1,996,251	1,820,476	2,018,209	1,737,327	1,824,973	1,842,921	1,949,314	1,845,262	1,749,935	1,750,926	1,735,871	22,319,551
			KW >	3,819	3,888	3,828	3,897	3,516	3,508	3,551	4,069	3,655	3,482	3,378	3,344	3,661
			Elec Revenue >	182,414.06	179,543.95	165,338.99	181,908.97	157,394.95	163,730.92	165,046.41	172,938.70	162,740.29	155,542.11	154,311.17	153,609.82	$1,994,520.34
1308400	387952	DG35598150	KWH >	48,280	46,920	47,040	50,560	45,960	41,600	40,720	37,720	45,080	41,160	44,560	41,160	530,760
			KW >	92	92	92	92	92	92	92	92	92	92	92	92	92
			Elec Revenue >	$4,704.18	$4,590.95	$4,612.07	$4,897.60	$4,527.37	$4,179.95	$4,057.29	$3,794.59	$4,378.78	$4,085.90	$4,352.94	$4,098.30	$52,279.92
1865214	427970	DA14726085	KWH >	31,769	33,024	33,260	15,649	29,049	9,052	51	48	50	56	59	53	152,120
			KW >	55	56	1	49	54	40	2	0	0	0	0	0	21
			Elec Revenue >	$3,046.92	$3,144.29	$2,634.51	$1,725.37	$2,827.83	$1,119.34	$40.88	$12.47	$12.59	$13.04	$13.47	$13.23	$14,603.94
			Total KWH	2,128,135	2,076,195	1,900,776	2,084,418	1,812,336	1,875,625	1,883,692	1,987,082	1,890,392	1,791,151	1,795,545	1,777,084	23,002,431
			Combined Average KW	3,966	4,036	3,921	4,038	3,662	3,640	3,645	4,161	3,747	3,574	3,470	3,436	3,775
			USBC Charge	$1,915.32	$1,868.58	$1,710.70	$1,875.97	$1,631.09	$1,688.07	$1,695.33	$1,788.37	$1,701.36	$1,612.03	$1,615.98	$1,599.37	$20,702.17
			Total Elec Revenue	190,165.16	187,279.19	172,585.57	188,531.94	164,750.15	169,030.21	169,144.58	176,745.76	167,131.66	159,641.05	158,677.58	157,721.35	$2,061,404.20

NorthWestern Energy

Self-Directed USBC Progress Report for 2017

Prepared by Dale Mahugh on 2/5/2018

MALTEUROP NORTH AMERICA, INC.

Account Summary

2016 Carryover Reservation:	$25,000.00	YTD Elec Revenue:	$2,163,303.45
Reservations Made YTD:	$0.00		
2016 Carryover Payment Request:	$0.00	Total Payment Requests:	$62,000.00
Payment Requests Made YTD:	$62,000.00	Current Request Balance:	$19,126.48
2016 Carryover USBC Credit:	$22,988.29	Total USBC Credit:	$44,602.86
USBC Credit YTD:	$21,614.57	Payments Issued YTD:	$42,873.52
Average Monthly Credit Earned:	$1,801.21	USBC Credit Balance:	$1,729.34
		Payment Pending:	$1,729.34

Payment Requests Made

Submitted By	Date	Amount
Richard Slotness	05/05/2017	$28,000.00
Richard Slotness	11/15/2017	$34,000.00

Payments Issued

Date	Amount
07/07/2017	$28,000.00
12/06/2017	$14,873.52

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1206942	379953	DA15063031	KWH >	1,851,403	1,876,755	1,767,895	2,028,329	1,897,590	1,966,970	1,895,281	2,073,859	0	0	0	0	15,358,082
			KW >	3,750	3,672	4,095	3,819	3,516	3,586	3,603	3,879	0	0	0	0	3,740
			Elec Revenue >	169,478.97	173,664.41	163,229.18	179,513.75	169,728.70	174,672.74	168,247.66	183,662.76	$0.00	$0.00	$0.00	$0.00	$1,382,198.17
1206942	379953	DA20155006	KWH >	0	0	0	0	0	0	0	0	2,014,146	1,868,083	1,988,187	1,839,813	7,710,229
			KW >	0	0	0	0	0	0	0	0	3,871	3,491	3,750	3,793	3,726
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	179,286.29	165,708.18	177,424.37	166,504.93	$688,923.77
1308400	387952	DG35598150	KWH >	54,240	57,800	49,000	46,640	44,040	46,960	42,320	46,800	46,360	43,880	46,160	52,240	576,440
			KW >	107	107	107	107	107	108	107	93	93	93	93	92	101
			Elec Revenue >	$5,445.60	$5,641.36	$4,874.50	$4,725.76	$4,528.72	$4,735.97	$4,353.36	$4,559.75	$4,530.37	$4,353.00	$4,531.87	$5,002.64	$57,282.90
1865214	427970	DA14726085	KWH >	32,228	37,160	32,110	31,810	29,808	29,352	31,913	29,176	28,285	31,679	28,474	29,438	371,433
			KW >	56	56	56	44	45	43	43	41	42	45	54	51	48
			Elec Revenue >	$3,168.16	$3,488.61	$3,060.31	$2,940.81	$2,794.75	$2,722.34	$2,912.90	$2,679.35	$2,626.90	$2,925.42	$2,767.24	$2,811.82	$34,898.61
			Total KWH	1,937,871	1,971,715	1,849,005	2,106,779	1,971,438	2,043,282	1,969,514	2,149,835	2,088,791	1,943,642	2,062,821	1,921,491	24,016,184
			Combined Average KW	3,913	3,835	4,258	3,970	3,668	3,737	3,753	4,013	4,006	3,629	3,897	3,936	7,615
			USBC Charge	$1,744.09	$1,774.54	$1,664.11	$1,896.11	$1,774.30	$1,838.95	$1,772.56	$1,934.85	$1,879.91	$1,749.27	$1,856.54	$1,729.34	$21,614.57
			Total Elec Revenue	178,092.73	182,794.38	171,163.99	187,180.32	177,052.17	182,131.05	175,513.92	190,901.86	186,443.56	172,986.60	184,723.48	174,319.39	$2,163,303.45

[redacted]

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 FAX: (406) 497-4008

DATE:	5-15-17
NAME OF BUSINESS:	Malteurop
CITY/TOWN LOCATION:	Great Falls
CONTACT PERSON:	Jim Cox / Rick Slotness
MAILING ADDDRESS:	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@malteurop.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
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.

NorthWestern Energy
Delivering a Bright Future

GTF 1600297

GTF 1600297

Malteurop

Malteurop North America / Malteurop Canada
Project Appropriation Request

GTF RESOLVE MH EXTERIOR BELT VFDS (3)

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 GTF			Cost Center:	3130F330	GL Account:	21500000
Original Request:	Apr-17			SAP Number:	1600297	Internal Order Number:	313017INV07
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			
TOTAL PROJECT	$8,500	$0	$0	$0
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 tranfer equipment. One belt (of 3) in the kiln unloading equipment is lacking a VFD, and both belts for transfers of barley to the malthouse lack 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 ~$2.2K annually ($.0925kwh). 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:

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

Budgetary Responsibility:	Date:	Project Manager:
Rick Slotness		Jeremy Tweet

APPROVALS

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

5/18 Email - need amounts checked

S:\Gary\CE-NR FY 2017\Exterior VFDs\Exterior VFD CAPEX Project Appropriation request 4.2017

GTF 160039

Malteurop

CAPEX Opening Submission

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

FY	18	BU	MENA	Plant	3130

Project description & scope

Contractor to install (5) 20' poles and (5) LED 1000 watt equivilent lights along South Rail Spur. Concrete bases to be poured n 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				
Tender			17-Sep	Material and Labor	$17,400.00
Purchase order		Mission Electric	17-Oct		
Purchase order					
Purchase order				3% Contingency	$522.00
Execution		Mission Electric	17-Oct		
Commissioning			17-Nov		
Completion date			17-Oct	Total	**$17,922.00**

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	

GTF 1600316

GTF 1600316

Malteurop

CAPEX Opening Submission

Project name	GTF-RESOLVE GERM BUILDING-600 LIGHTS REPLACE WITH LED	Project Start Date	8/1/2017
As per Capex list		Budget Category	PRODUCTIVITY
		Asset Class/GL Acct	2135 0008
		Useful Life	50,000 HRS
		Cost Center	3130 E340
		Internal Order Number	313017/NN13

FY	18	BU	MNA	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 buld 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 withoug 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	$653 ~~$22,409~~
Purchase order		Rebate	~~$3,000~~
Purchase order		Project capital	~~$19,409~~ 22,409
Execution			
Commissioning	Aug 17		
Completion date	OCT 17	Rebate Expected 12/1/17	(3,000)

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.	Brenda Ketter
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

GTF 1600329

GTF 1600329

Malteurop

CAPEX Opening Submission

Project name	GTF RESOLVE PLANT	Project Start Date	11/3/2017
As per Capex list	LED lighting upgrade	Budget Category	PRODUCTIVITY Resolve
		Asset Class/GL Acct	21350000
		Useful Life	10 years
		Cost Center	3130F330
		Internal Order Number	3130171NV21

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		
Tender			Lights/material	43391.76
Purchase order	1000bulbs	17-Dec	Labor/installation	15720
Purchase order	Mission Electric	17-Dec	3% contingency	$1,773
Purchase order			Total	$60,885
Execution		18-Mar	Rebate	-$14,500
Commissioning		18-Mar		
Completion date		18-Apr	Total less Rebate	$46,385

Project cash out

<=FY17		FY18	$46,385	FY19		>=FY20	

Comments

Date	11-8-17	Jeremy Tweet	Requestor	[signature]
Date	11/8/17	Rick Slotness	Plant Mgr	[signature]
Date	11/13/17	Brenda Ketter	Fin. Anal - Oper.	Brenda Ketter
Date	11-13-17	Rabah Bellir	FP&A Mgr, SC& Ops	[signature]
Date	11-10-17	Andras Bogyay	VP - Operations	See email attached.
Date		Kevin Eikermann	President	

11/9/17 Steve Rush EHS [signature]

11/8 email rec'd from JEREMY

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 FAX: (406) 497-4008

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

AMOUNT OF CREDIT REQUESTED:	~~$46,000~~ 34,000 JT

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: Richard P Slotness

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® Energy
Delivering a Bright Future

MONTANA-DAKOTA
UTILITIES CO.
A Subsidiary of MDU Resources Group, Inc.

400 North Fourth Street
Bismarck, ND 58501
(701) 222-7900

March 1, 2019

Montana Department of Revenue
Sam W. Mitchell Building
125 N. Roberts, 3rd Floor
Helena, MT 59604-5805

RE: Montana-Dakota Utilities Co.
2018 Electric USB Report

Montana-Dakota Utilities Co., a Division of MDU Resources Group, Inc. herewith submits its Annual Report regarding Universal System Benefit Programs (USBP) pursuant to MCA § 69.8.402 (8) as part of the Electric Utility Industry Restructuring Law.

In accordance with 69-8-402 (MCA) Montana-Dakota, hereby submits the funds collected in 2018 that exceeded the credits for internal programs and large customer credits of $38,075.93 described in the attached report.

Please acknowledge receipt by stamping or initialing the duplicated copy of this letter attached hereto and returning the same in the enclosed, self-addressed, stamped envelope.

Sincerely,

Tamie A. Aberle
Directory of Regulatory Affairs

Cc: Montana Public Service Commission
Montana Consumer Counsel
Sonja Nowakowski – MT Legislative Services Division (Via Email)
Mike Green

Montana-Dakota Utilities Co.
Universal System Benefits Program
2018 Annual Report

The total dollars collected under the Universal System Benefit Charges (USBC) approved by the Montana Public Service Commission (Commission) during the period January 1, 2018 through December 31, 2018 was $1,042,295.45. The large customer group, defined as customers with monthly electric billing demands of 1,000 kW or higher, accounted for $309.962.68 of the total amount collected.

The following USBP expenditures were made in calendar year 2018 in accordance with programs approved by the Commission:

Low-Income Discount	281,054.17
Low-Income Weatherization (AEM & HRDC)	45,000.00
Low-Income Energy Audits (AEM)	10,000.00
Energy Share Endowment & Admin	35,000.00
Energy Share Bill Assistance	90,000.00
Energy Share & HRDC Furnace Safety	50,000.00
Low-Income Program Promotion (Energy Share)	4,877.70
Commercial Lighting Rebates	215,026.69

Following is a description of each program:

Montana-Dakota offers a low-income discount to all customers that have qualified for Low-Income Energy Assistance (LIEAP). The discount remains in place on a calendar basis and qualifying customer's accounts are updated annually upon the start of the LIEAP qualification process the following heating season. Beginning with the 2008-2009 LIEAP season customers qualifying for LIEAP also qualified for a discount on their electric bill based on a new discount structure filed as part of the Stipulation in Docket No. D2006.1.2 and approved by the Commission on August 20, 2008. Three levels of discount are available under this discount rate structure; 30% discount for customers at 0-60% of the federal poverty level, 25% discount for customers at 61-90% of the federal

poverty level and a 20% discount for customers at 91% to the ceiling of the federal poverty percentage of income as established by the Department of Health and Human Services in determining LIEAP benefits.

The income data used to administer the discount is received from the State Department of Health and Human Services at the time a customer qualifies for LIEAP. When combined with a LIEAP benefit, the bill discount serves to mitigate the higher percentage of disposable income necessary to pay utility bills that this group of customers pays in comparison to other customers. Following are statistics regarding the distribution of the electric discounts among the various discount levels based the percentage of poverty for calendar year 2018. On average, 1,262 customers received benefit of the discounts with the months or number of bills discounted for each customer dependent upon the time LIEAP benefits were first received on their behalf. As shown, approximately 40 percent of the recipients were in the lowest percentage of federal poverty.

Low Income Discounts January 1, 2018- December 31, 2018

% of Federal Poverty	Discount	Customers	Average Discount/Bill
0-60%	30%	499	$(22.39)
61-90%	25%	292	(17.64)
91%-ceiling %	20%	471	(15.07)

The other low-income related programs include weatherization, energy audits, bill assistance and a furnace/water heater repair program. These programs provide assistance to low income customers located in Montana-Dakota's service territory. The bill assistance and furnace/water heater programs are administered by Energy Share of Montana in accordance with their established guidelines to provide assistance to qualifying low-income customers. In 2018, 158 households received bill assistance at an average cost of $336 per household. The furnace safety program recognizes the problem that arises when a low-income customer is faced with a costly repair bill or in some cases the cost

of replacing space or water heating equipment. Thirty-three households were assisted through this program in 2018. The Weatherization and Energy Audit Programs are administered by Action for Eastern Montana and the HRDC District VII in accordance with guidelines established by the State Department of Health & Human Services and the Department of Energy and assist low-income customers with conservation measures that result in energy savings. Weatherization services were provided to fifty-two households utilizing USB funds in 2018 at an average cost of $2,774 per household.

The Energy Share endowment will provide for the long-term needs of the low-income customers of Montana by providing a stable funding source for energy assistance dollars and is a cost effective program that will benefit Montana-Dakota's customers. Customer education consists of outreach required to better inform customers of the available assistance programs noted above and the Federal LIEAP program. Bill inserts, web site promotion and advertising done in conjunction with Energy Share of Montana were tools utilized in 2018. Montana-Dakota has developed a package of bill inserts, posters and direct mail pieces to assist with educating customers regarding assistance available under the programs.

In addition to the low-income related conservation programs, funds were also made available for all residential and commercial customers for conservation measures. The cost effectiveness of the conservation program offerings was determined based on the cost/benefit analyses provided in the Company's Integrated Resource Plan filed in Docket No. N2015.7.54. The Commercial Lighting program was well accepted and accounts for the increase in conservation related funds expended in 2018.

As noted above, a total of $309,962.68 was collected from the Large Customer Group. In accordance with 69-8-402 (MCA) the Large Customer Group has the right to self-direct funds collected through the USBC. Funds totaling $273,260.96

will be refunded to three customers in the Large Customer group in the following amounts. Montana-Dakota currently has seven customers on its system that qualify as Large Customers. One of the seven customers will receive the total USBC dollars they each remitted in 2018 through utility service bills in the amount of $14,407.20. A second customer submitted a claim for $32,050.26 with a carry-over from 2017 of funds of $7,005.16 and funds collected in 2018 of $15,987.74 collected in 2018 resulting in a carry over to 2019 of $9,057.36 and the return of the $15,987.74 collected in 2018 to the customer. The third customer submitted a claim of $1,031,424.53 utilizing the total funds collected in 2018 of $242,866.02 and resulting in a carry-over of $788,558.51 to future periods. No other large customers submitted claims resulting in $36,701.72 of large customer funds submitted as part of the total amount submitted to the Department of Revenue.

In accordance with 69-8-402 (MCA) Montana-Dakota, hereby submits the unexpended balance of $38,075.93 to the Department of Revenue. The determination of this amount is summarized below:

Total USB Funds Collected	$1,042,295.45
Less: Program Expenditures	
Low-Income Discount	281,054.17
Low-Income Weatherization (AEM & HRDC)	45,000.00
Low-Income Energy Audits (AEM)	10,000.00
Energy Share Endowment & Admin	35,000.00
Energy Share Bill Assistance	90,000.00
Energy Share & HRDC Furnace Safety	50,000.00
Low-Income Program Promotion (Energy Share)	4,877.70
Commercial Lighting Rebates	215,026.69
Total Montana-Dakota Programs	$730,958.56
Less Large Customer Self-Directed Funds	273,260.96
Amount to Remit to Department of Revenue	$38,075.93

Nicole Hensley

Department of Revenue

PO Box 5805

Helena, MT 59604-5805

Rec'd MT DOR

FEB 05 2019

RE: MetraPark 2018 Annual USB Report

Dear Nicole:

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 2018. For your reference, a copy of our "Self-Directed USBC Progress Report for 2018" from NorthWestern Energy is attached.

In 2018 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 2018 we received a total of $3216.98 in USB payments that were composed of $225.73 in 2017 USB credits carried over into 2018 and $2991.25 in 2018 USB credits. At year-end our remaining 2018 USB credits earned of $222.16 were carried over into 2019.

Sincerely,

Jeff Seward

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

METRA PARK-BILLINGS

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$354,441.97
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$167,388.56	Total Payment Requests:	$167,388.56
Payment Requests Made YTD:	$0.00	Current Request Balance:	$164,393.74
2017 Carryover USBC Credit:	$225.73	Total USBC Credit:	$3,216.98
USBC Credit YTD:	$2,991.25	Payments Issued YTD:	$2,994.82
Average Monthly Credit Earned:	$249.27	USBC Credit Balance:	$222.16
		Payment Pending:	$222.16

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$1,022.12
07/11/2018	$655.66
10/03/2018	$779.19
12/10/2018	$537.85

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
256622	81088	DA21480963	KWH >	253,819	290,793	340,269	283,448	231,026	214,040	164,298	278,045	423,421	272,617	324,994	246,842	3,323,612
			KW >	719	708	810	714	936	1,040	486	1,662	2,271	1,106	1,097	664	1,018
			Elec Revenue >	$25,501.67	$28,232.88	$32,863.87	$27,809.95	$25,549.08	$25,083.12	$16,532.95	$34,590.37	$50,687.69	$29,765.16	$33,620.72	$24,204.51	$354,441.97
			Total KWH	253,819	290,793	340,269	283,448	231,026	214,040	164,298	278,045	423,421	272,617	324,994	246,842	3,323,612
			Combined Average KW	719	708	810	714	936	1,040	486	1,662	2,271	1,106	1,097	664	1,018
			USBC Charge	$228.44	$261.71	$306.24	$255.10	$207.92	$192.64	$147.87	$250.24	$381.08	$245.36	$292.49	$222.16	$2,991.25
			Total Elec Revenue	$25,501.67	$28,232.88	$32,863.87	$27,809.95	$25,549.08	$25,083.12	$16,532.95	$34,590.37	$50,687.69	$29,765.16	$33,620.72	$24,204.51	$354,441.97

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

Nicole Hensley

Montana Department of Revenue (DOR)

P.O. Box 5805

Helena, MT 59604-5805

Rec'd MT DOR

FEB 15 2019

Dear Nicole:

Enclosed you will find this years annual USB summary report in accordance with 2015 legislative changes to the MCA.

If you have any questions, please contact me Shane Morse at 406-846-1320 Ext.2347 or email me at smorse@mt.gov

Sincerely,

Shane Morse

Montana State Prison, Maintenance Manager

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
FAX: (406) 497-4008

DATE:	11/30/2018
NAME OF BUSINESS:	**Montana State Prison**
CITY/TOWN LOCATION:	Deer Lodge
CONTACT PERSON:	Shane Morse
MAILING ADDDRESS:	400 Conley Lk Rd
CITY, STATE AND ZIP:	Deer Lodge Mt 59722
PHONE NUMBER:	406-846-1320 Ext. 2347
FAX NUMBER:	
E-MAIL ADDRESS	smorse@mt.gov

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.)

Update lighting fixtures and lamps that have been missed on prior project. Currently do not have accurate count of fixtures that need to be updated. (Expected carryover of 2018 to 2019 is approximately $2,800.00).

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: Shane Morse

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/4/2019

MONTANA DEPARTMENT OF CORRECTIONS

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$775,381.32
Reservations Made YTD:	$2,800.00		
2017 Carryover Payment Request:	$5,455.46	Total Payment Requests:	$5,455.46
Payment Requests Made YTD:	$0.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$678.97	Total USBC Credit:	$8,061.32
USBC Credit YTD:	$7,382.35	Payments Issued YTD:	$5,455.46
Average Monthly Credit Earned:	$615.20	USBC Credit Balance:	$2,605.86
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$2,577.47
07/11/2018	$1,920.00
10/03/2018	$957.99

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100608	1612	DA06183550	KWH >	665,183	671,913	643,810	692,647	611,281	606,155	569,176	570,600	631,348	515,031	625,430	701,377	7,503,951
			KW >	1,324	1,352	1,368	1,281	1,310	1,211	1,212	1,216	1,199	1,190	1,233	1,302	1,267
			Elec Revenue >	$62,065.77	$62,917.76	$60,648.79	$64,146.77	$57,921.66	$56,681.65	$53,653.94	$52,617.02	$57,264.14	$48,758.09	$57,295.91	$63,846.65	$697,818.15
611592	264374	DS75942654	KWH >	35,200	29,760	32,480	34,320	30,720	37,920	44,560	44,320	43,040	39,760	26,160	32,080	430,320
			KW >	65	65	65	65	96	105	121	144	144	97	64	68	92
			Elec Revenue >	$3,409.57	$2,985.16	$3,195.05	$3,355.16	$3,363.85	$4,019.96	$4,659.49	$4,808.38	$4,730.78	$4,029.06	$2,649.55	$3,162.65	$44,368.66
699170	312857	DA04596883	KWH >	3,960	3,040	3,640	3,360	3,120	2,400	1,200	3,440	1,680	2,080	3,280	3,640	34,840
			KW >	14	14	27	13	13	14	12	14	10	14	12	14	14
			Elec Revenue >	$456.06	$384.81	$429.76	$405.80	$386.39	$333.61	$227.47	$416.70	$242.42	$305.93	$381.79	$430.39	$4,401.13
699193	312875	DA07693129	KWH >	1,105	898	987	797	873	708	758	554	574	806	849	1,150	10,059
			KW >	7	7	13	3	6	2	10	2	4	7	6	14	7
			Elec Revenue >	$165.21	$153.17	$154.17	$101.41	$137.43	$86.45	$168.21	$75.61	$92.43	$140.87	$134.24	$241.98	$1,651.18
824609	245787	DA17749941	KWH >	0	0	0	0	2,259	8,838	49	7,848	8,170	1,683	0	0	28,847
			KW >	0	0	0	0	14	15	14	14	14	13	0	0	14
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$319.44	$821.29	$144.83	$725.89	$754.23	$261.44	$0.00	$0.00	$3,027.12
824617	275247	DG74382788	KWH >	0	0	0	0	33,361	50,740	12,491	31,947	9	3	0	0	128,551
			KW >	0	0	0	0	77	80	77	76	0	0	0	0	52
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$3,305.05	$4,650.02	$1,702.60	$3,119.34	$0.79	$0.33	$0.00	$0.00	$12,778.13
1065150	311624	DA19880569	KWH >	6,880	5,640	4,960	4,760	3,760	5,320	6,440	7,960	5,960	5,280	4,240	4,880	66,080
			KW >	24	23	20	21	19	36	38	40	38	32	28	23	29
			Elec Revenue >	$784.16	$678.97	$596.51	$590.99	$491.63	$783.13	$889.45	$1,008.57	$847.58	$730.44	$618.56	$617.73	$8,637.72

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/4/2019

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
		Total KWH	712,328	711,251	685,877	735,884	685,374	712,081	634,674	666,669	690,781	564,643	659,959	743,127	8,202,648
		Combined Average KW	1,434	1,461	1,493	1,383	1,535	1,463	1,484	1,506	1,409	1,353	1,343	1,421	1,473
		USBC Charge	$641.08	$640.13	$617.29	$662.29	$616.83	$640.88	$571.20	$600.00	$621.70	$508.17	$593.96	$668.82	$7,382.35
		Total Elec Revenue	$66,880.77	$67,119.87	$65,024.28	$68,600.13	$65,925.45	$67,376.11	$61,445.99	$62,771.51	$63,932.37	$54,226.16	$61,080.05	$68,299.40	$772,682.09

Montana Electric Cooperatives' Association

Touchstone Energy®

2018 FINAL YEAR-END MECA USBP POOL REPORT

SUMMARY

Through December 31, 2018

Total USBP Spending		
Minimum Pool Spending Requirement		
(2.4% of 1995 Electricity Sales Revenue)	$	3,828,438.21
* 2018 Large Customer USB Revenues Collected & Expended	$	102,904.68
2018 Actual Pool Expenditures	$	9,900,032.11
Surplus Above Requirement	$	6,174,498.58
Actual Expenditures as a Percent of Base-Year Revenues		**6.21%**
Low-Income Spending		
Minimum Pool Spending Requirement		
(17 % of Total USBP Minimum Pool Spending Requirement)	$	650,834.50
2018 Actual Pool Expenditures	$	1,488,357.54
Surplus Above Requirement	$	837,523.04
Actual Expenditures as a Percent of Minimum Pool Spending Requirement		**38.88%**

*Excludes large customers directly reporting to the Department of Revenue who made direct USB expenditures without those expenditures being collected in rates.

	1995 Electricity Revenue Sales	Energy Conservation	Low-Income USBP Expenditures & Credits	Renewable Resource Projects & Applications	Research & Development	Market Transformation	Total USBP Expenditures
Beartooth	*$ 2,947,731.00*	$ -	$ 3,545.80	$ -	$ -	$ -	**$ 3,545.80**
Big Flat	*3,090,220.00*	$ 10,020.79	$ 7,300.33	$ -	$ 424.00	$ -	**17,745.12**
Big Horn	*3,263,034.00*	$ 1,379.26	$ 12,838.20	$ -	$ -	$ -	**14,217.46**
Fall River	*2,288,300.00*	$ 90,980.71	$ 9,798.67	$ -	$ -	$ -	**100,779.38**
Fergus	*5,359,940.00*	$ 31,907.28	$ 34,632.01	$ -	$ -	$ -	**66,539.29**
Flathead	*50,214,236.00*	$ 3,158,148.00	$ 699,708.00	$ 1,190,319.00	$ -	$ -	**5,048,175.00**
Glacier	*9,230,882.00*	$ 386,252.69	$ 46,135.86	$ 101,185.00	$ -	$ -	**533,573.55**
Goldenwest	*525,154.56*	$ 17,805.00	$ 3,686.06	$ 250.00	$ -	$ -	**21,741.06**
Hill County	*3,860,963.00*	$ 70,051.63	$ 18,250.00	$ -	$ -	$ -	**88,301.63**
Lincoln	*5,449,237.00*	$ 436,656.58	$ 61,374.84	$ 21,203.27	$ -	$ -	**519,234.69**
LYREC	*4,714,641.00*	$ 13,372.00	$ 19,235.00	$ -	$ -	$ -	**32,607.00**
Marias River	*3,675,396.00*	$ 10,519.08	$ 25,609.46	$ -	$ 626.25	$ -	**36,754.79**
McCone	*5,538,237.00*	$ 138,194.03	$ 9,400.00	$ -	$ -	$ -	**147,594.03**
Mid-Yellowstone	*1,596,165.00*	$ 16,736.95	$ 3,349.57	$ -	$ -	$ -	**20,086.52**
Missoula	*8,943,402.00*	$ 566,383.00	$ 51,146.00	$ 156,955.00	$ -	$ -	**774,484.00**
NorVal	*3,736,575.00*	$ 29,390.13	$ 958.96	$ -	$ -	$ -	**30,349.09**
Northern Lights	*2,799,775.00*	$ 133,201.92	$ 10,969.51	$ 40,311.11	$ -	$ -	**184,482.54**
Park	*3,731,388.20*	$ 20,287.50	$ 17,846.98	$ 6,013.49	$ -	$ -	**44,147.97**
Powder River	*58,988.00*	$ -	$ 1,415.00	$ -	$ -	$ -	**1,415.00**
Ravalli	*6,341,387.00*	$ 453,111.00	$ 163,703.00	$ 33,948.00	$ -	$ -	**650,762.00**
Sheridan	*4,629,678.00*	$ 6,082.00	$ 45,894.78	$ -	$ -	$ -	**51,976.78**
Southeast	*1,543,712.00*	$ 19,819.65	$ 31,652.87	$ -	$ -	$ -	**51,472.52**
Sun River	*5,252,060.00*	$ 100,186.70	$ 18,407.70	$ 2,238.35	$ 1,249.00	$ -	**122,081.75**
Tongue River	*4,796,392.02*	$ 40,854.06	$ 11,000.00	$ -	$ -	$ -	**51,854.06**
Vigilante	*6,711,438.91*	$ 419,642.14	$ 36,617.94	$ 117,080.00	$ 2,088.00	$ -	**575,428.08**
Yellowstone Valley	*9,219,326.00*	$ 549,090.00	$ 143,881.00	$ 17,712.00	$ -	$ -	**710,683.00**
Large Customer USB Revenues Collected & Expended for Reporting Year							**102,904.68**
TOTAL	*$ 159,518,258.69*	$ 6,720,072.10	$ 1,488,357.54	$ 1,687,215.22	$ 4,387.25	$ -	**$ 10,002,936.79**

Line Item Spending - Energy Conservation (Page 3 of 17)

	Item #1	Item #2	Item #3	Item #4	Item #5	Item #6	Item #7
Beartooth							
Big Flat		300.00			8,554.82		
Big Horn							
Fall River		1,534.74	821.01				
Fergus					7,257.71		
Flathead	73,811.00	382,215.00	993,672.00		192,553.00	384,670.00	22,500.00
Glacier			180,116.91		6,515.26		
Goldenwest		5,715.00					
Hill County					4,475.98		1,000.00
Lincoln	19,581.18						210,879.21
LYREC		600.00					
Marias River					4,400.08		
McCone	2,263.55	23,210.48			5,471.00		2,400.00
Mid-Yellowstone					1,340.56		
Missoula	1,956.00	728.00					
NorVal		1,050.00			2,229.39		
Northern Lights							
Park	3,111.66	200.00			8,589.99		
Powder River							
Ravalli	59,506.00				93,510.00		
Sheridan	240.00						
Southeast	49.36	3,115.65			9,204.27		
Sun River	5,384.82	5,350.00			19,253.59		
Tongue River							
Vigilante					2,437.14		
Yellowstone Valley	6,197.00	29,200.00			1,850.00	15,708.00	2,428.00
TOTAL	***$ 172,100.57***	***$ 453,218.87***	***$ 1,174,609.92***	***$ -***	***$ 367,642.79***	***$ 400,378.00***	***$ 239,207.21***

****See Exhibit A for Item Descriptions*

Line Item Spending - Energy Conservation (Page 4 of 17)

	Item #8	Item #9	Item #10	Item #11	Item #12	Item #13	Item #14
Beartooth							
Big Flat							
Big Horn						1,379.26	
Fall River							
Fergus						20,380.00	4,269.57
Flathead	13,220.00	40,767.00					12,600.00
Glacier	5,615.62	19,419.00					
Goldenwest						12,090.00	
Hill County						64,575.65	
Lincoln		5,388.71					
LYREC						12,772.00	
Marias River		6,119.00					
McCone						99,548.00	
Mid-Yellowstone						3,249.38	
Missoula		4,394.00					
NorVal						26,110.74	
Northern Lights							
Park		8,190.00					
Powder River							
Ravalli		17,163.00	17,002.00				
Sheridan				5,842.00			
Southeast						5,407.70	
Sun River							67,375.00
Tongue River						40,854.06	
Vigilante							
Yellowstone Valley						64,296.00	414,411.00
TOTAL	***$ 18,835.62***	***$ 101,440.71***	***$ 17,002.00***	***$ 5,842.00***	***$ -***	***$ 350,662.79***	***$ 498,655.57***

****See Exhibit A for Item Descriptions*

Line Item Spending - Energy Conservation (Page 5 of 17)

	Item #15	Item #16	Item #17	Item #18	Item #18a	Item #19	Total Energy Conservation
Beartooth							$ -
Big Flat				1,165.97			10,020.79
Big Horn							1,379.26
Fall River			85,026.17	3,043.00	555.79		90,980.71
Fergus							31,907.28
Flathead		66,259.00	1,851,387.00	833,109.00	(1,708,615.00)		3,158,148.00
Glacier			360,570.00		(185,984.10)		386,252.69
Goldenwest							17,805.00
Hill County							70,051.63
Lincoln			199,440.58			1,366.90	436,656.58
LYREC							13,372.00
Marias River							10,519.08
McCone	5,301.00						138,194.03
Mid-Yellowstone	3,987.36			8,159.65			16,736.95
Missoula			559,305.00				566,383.00
NorVal							29,390.13
Northern Lights			133,201.92				133,201.92
Park				195.85			20,287.50
Powder River							-
Ravalli			265,930.00				453,111.00
Sheridan							6,082.00
Southeast				2,042.67			19,819.65
Sun River	2,823.29						100,186.70
Tongue River							40,854.06
Vigilante			417,205.00				419,642.14
Yellowstone Valley			15,000.00				549,090.00
TOTAL	***$ 12,111.65***	***$ 66,259.00***	***$ 3,887,065.67***	***$ 847,716.14***	***$ (1,894,043.31)***	***$ 1,366.90***	***$ 6,720,072.10***

****See Exhibit A for Item Descriptions*

Line Item Spending - Low-Income USBP Expenditures (Page 6 of 17)

	Item #1	Item #2	Item #3	Item #4	Item #5	Item #6	Item #7
Beartooth							
Big Flat	6,000.00	200.00		150.33			
Big Horn	3,583.32						
Fall River		9,798.67					
Fergus	12,632.01	22,000.00					
Flathead	150,329.00	103,666.00				217,179.00	
Glacier	7,904.00	18,979.44				4,685.42	
Goldenwest		2,464.08					
Hill County	1,125.00						14,875.00
Lincoln						5,068.11	25,223.82
LYREC		19,235.00					
Marias River	978.46	15,000.00					
McCone	100.00	9,300.00					
Mid-Yellowstone	349.57	3,000.00					
Missoula		15,000.00				2,159.00	
NorVal							
Northern Lights							
Park	1,971.80	3,500.00				5,926.02	
Powder River		1,415.00					
Ravalli	11,542.00	10,000.00			38,760.00		
Sheridan	200.00	13,091.00			1,253.75		
Southeast	2,666.49	9,000.00				19,986.38	
Sun River	6,356.62						6,563.19
Tongue River		11,000.00					
Vigilante	3,808.94	1,500.00				14,450.00	
Yellowstone Valley		38,098.00					
TOTAL	***$ 209,547.21***	***$ 306,247.19***	***$ -***	***$ 150.33***	***$ 40,013.75***	***$ 269,453.93***	***$ 46,662.01***

****See Exhibit B for Item Descriptions*

Line Item Spending - Low-Income USBP Expenditures (Page 7 of 17)

	Item #8	Item #9	Item #10	Item #11	Item #12	Item #13	Item #14
Beartooth				$ 2,534.09			
Big Flat						950.00	
Big Horn						9,254.88	
Fall River							
Fergus							
Flathead						43,726.00	
Glacier							
Goldenwest					1,221.98		
Hill County					2,250.00		
Lincoln				21,104.90			
LYREC							
Marias River						9,631.00	
McCone							
Mid-Yellowstone							
Missoula				11,391.00			
NorVal						958.96	
Northern Lights				5,711.54			
Park				6,449.16			
Powder River							
Ravalli							90,269.00
Sheridan						31,350.03	
Southeast							
Sun River					1,335.00	4,152.89	
Tongue River							
Vigilante							
Yellowstone Valley					65,685.00	40,098.00	
TOTAL	***$ -***	***$ -***	***$ -***	***$ 47,190.69***	***$ 70,491.98***	***$ 140,121.76***	***$ 90,269.00***

****See Exhibit B for Item Descriptions*

Line Item Spending - Low-Income USBP Expenditures (Page 8 of 17)

	Item #15	Item #16	Item #17	Item #18	Item #18a	Total Low-Income USBP Expenditures
Beartooth				$ 1,011.71		$ 3,545.80
Big Flat						7,300.33
Big Horn						12,838.20
Fall River						9,798.67
Fergus						34,632.01
Flathead			74,794.00	96,276.00	13,738.00	699,708.00
Glacier			14,567.00			46,135.86
Goldenwest						3,686.06
Hill County						18,250.00
Lincoln			9,978.01			61,374.84
LYREC						19,235.00
Marias River						25,609.46
McCone						9,400.00
Mid-Yellowstone						3,349.57
Missoula			22,596.00			51,146.00
NorVal						958.96
Northern Lights			5,257.97			10,969.51
Park						17,846.98
Powder River						1,415.00
Ravalli			13,132.00			163,703.00
Sheridan						45,894.78
Southeast						31,652.87
Sun River						18,407.70
Tongue River						11,000.00
Vigilante			16,859.00			36,617.94
Yellowstone Valley						143,881.00
TOTAL	***$ -***	***$ -***	***$ 157,183.98***	***$ 97,287.71***	***$ 13,738.00***	***$ 1,488,357.54***

****See Exhibit B for Item Descriptions*

Line Item Spending - Renewable Resource Projects (Page 9 of 17)

	Item #1	Item #2	Item #3	Item #4	Item #5	Item #6	Item #7
Beartooth							
Big Flat							
Big Horn							
Fall River							
Fergus							
Flathead						519,546.00	
Glacier						101,185.00	
Goldenwest				250.00			
Hill County							
Lincoln						21,203.27	
LYREC							
Marias River							
McCone							
Mid-Yellowstone							
Missoula						156,955.00	
NorVal							
Northern Lights						40,311.11	
Park	2,119.83			2,119.83		1,773.83	
Powder River							
Ravalli	6,042.00					27,906.00	
Sheridan							
Southeast							
Sun River						1,000.00	1,238.35
Tongue River							
Vigilante						117,080.00	
Yellowstone Valley	2,712.00					15,000.00	
TOTAL	***$ 10,873.83***	***$ -***	***$ -***	***$ 2,369.83***	***$ -***	***$ 1,001,960.21***	***$ 1,238.35***

****See Exhibit C for Item Descriptions*

Line Item Spending - Renewable Resource Projects (Page 10 of 17)

	Item #8	Total Renewable Resource Projects
Beartooth		$ -
Big Flat		$ -
Big Horn		$ -
Fall River		$ -
Fergus		$ -
Flathead	670,773.00	$ 1,190,319.00
Glacier		$ 101,185.00
Goldenwest		$ 250.00
Hill County		$ -
Lincoln		$ 21,203.27
LYREC		$ -
Marias River		$ -
McCone		$ -
Mid-Yellowstone		$ -
Missoula		$ 156,955.00
NorVal		$ -
Northern Lights		$ 40,311.11
Park		$ 6,013.49
Powder River		$ -
Ravalli		$ 33,948.00
Sheridan		$ -
Southeast		$ -
Sun River		$ 2,238.35
Tongue River		$ -
Vigilante		$ 117,080.00
Yellowstone Valley		$ 17,712.00
TOTAL	***$ 670,773.00***	***$ 1,687,215.22***

Line Item Spending - Research & Development (Page 11 of 17)

	Item #1	Total Research & Development
Beartooth		$ -
Big Flat	424.00	424.00
Big Horn		-
Fall River		-
Fergus		-
Flathead		-
Glacier		-
Goldenwest		-
Hill County		-
Lincoln		-
LYREC		-
Marias River	626.25	626.25
McCone		-
Mid-Yellowstone		-
Missoula		-
NorVal		-
Northern Lights		-
Park		-
Powder River		-
Ravalli		-
Sheridan		-
Southeast		-
Sun River	1,249.00	1,249.00
Tongue River		-
Vigilante	2,088.00	2,088.00
Yellowstone Valley		-
TOTAL	***$ 4,387.25***	***$ 4,387.25***

****See Exhibit D for Item Descriptions*

Line Item Spending - Market Transformation (Page 12 of 17)

	Item #1	Total Market Transformations
Beartooth		$ -
Big Flat		-
Big Horn		
Fall River		-
Fergus		-
Flathead		-
Glacier		-
Goldenwest		-
Hill County		-
Lincoln		-
LYREC		-
Marias River		-
McCone		-
Mid-Yellowstone		-
Missoula		-
NorVal		-
Northern Lights		-
Park		-
Powder River		-
Ravalli		-
Sheridan		-
Southeast		-
Sun River		-
Tongue River		-
Vigilante		-
Yellowstone Valley		-
TOTAL	***$ -***	***$ -***

Appendix A: Large Customers Names for USB Cooperative Reporting Form

Note: Listed below are names of Large Customers that request USB credit or reimbursement or those that have agreed to self-fund and self- report to the D.O.R.

The only large customers not listed are those that pay 9/10 of a mil in their rate and have not requested any USB credit or reimbursement in the prior year.

1. FH Stoltze Land & Lumber, Inc.
2. Kalispell Regional Medical Center
3. Weyerheauser Company
4. Semitool, Inc.
5. Columbia Mountain Holdings, LLC
6. Pyramid Mountain Lumber
7. Spring Creek Coal Company
8. Decker Coal Company
9. Signal Peak Energy, LLC
10. Express Pipeline, LLC

Total large-customer USB revenues collected & expended for the reporting year - $102,904.68
(This amount does not reflect any amount that Large Customers may have utilized as per 69-8-402(7)(a)(ii)(B) MCA)

Exhibit A: Energy Conservation

1 Energy audits
2 Water heater programs and energy efficient appliance incentives
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 conservation audits
9 Programs such as Super Good Cents, Energy Star, Vending Miser
10 Design or construction assistance for energy efficient construction
11 Design or implementation assistance for retrofits of existing loads
12 Waste heat generation expenses
13 Street lighting or security lighting upgrades for efficiency
14 Incremental cost of distribution efficiency expenditures attributable to increases in energy efficiency above acceptable minimum industry standards documented and verified by an electrical engineer
15 Peak-shaving devices applied in customer facilities to reduce 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)
18 Other:
Big Flat Electric - Office LED Light Conversion
Fall River - Commercial Lighting Retrofit
Flathead - Administrative Costs associated with Energy Efficiency
Mid-Yellowstone - Upgrade Office/Shop Lights to LED for energy effieciency
Park - Reporting costs
Southeast - Labor working on LIEAP Prgrams, USB Reporting & Rebate Programs

18a Fall River - Commercial window retrofit
Flathead/Glacier - Power supplier reimbursements or rebates for energy efficiency
19 Irrigation Conservation Measures

Exhibit B: Low-Income USBP Expenditures & Credits

1 Outreach for LIEAP enrollment
2 Energy Share or similar contributions
3 Funds contributed to endowments that qualify for low-income USBP purposes
4 Safety or repairs related to low-income energy issues
5 Energy efficient equipment or technologies that help low-income households meet the cost of home energy
6 Heating and energy crisis benefits including payments toward recipient household's energy costs
7 Payment toward recipient household weatherization costs
8 Purchase and delivery of fuels used by recipient households for home energy
9 Purchase, delivery, and installation of weatherization materials
10 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
11 Discounted utility and bulk fuel prices for recipient households
12 Partial or full waivers of utility and other income (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 employers 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 or 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)
18 Other: Beartooth Electric - Operation Roundup
Flathead - Education of Low Income Programs
18a Flathead - Administrative Costs

Exhibit C: Renewable Resource Projects & 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 and Conservation 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)
7. Co-op's infrastructure/capacity costs unrecovered above any benefits due to net-metering
8. Other: Flathead - Land Fill Gas to Energy

Exhibit D: Research & Development

1 Big Flat/Marias River/Sun River/Vigilante - NRECA CRN Dues

MONTANA
PRECISION PRODUCTS

ISO 9001:2008/AS9100C Certified

This is our third year participating in the Self Directed USB program. We requested the funds in the amount of $7158 in 2018 and have received a check in the amount of $6566.06 with the remaining balance of $333.04 to be paid in 2019. We plan on using future funds for more LED projects.

Thanks Justin Parnell

119800 Rick Jones Way
Butte, Montana 59750

Phone: 406-496-3331
Fax: 406-496-3330

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

MONTANA PRECISION PRODUCTS LLC

Account Summary

2017 Carryover Reservation:	$3,200.00	YTD Elec Revenue:	$419,328.46
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$7,158.00
Payment Requests Made YTD:	$7,158.00	Current Request Balance:	$591.94
2017 Carryover USBC Credit:	$3,104.04	Total USBC Credit:	$6,899.10
USBC Credit YTD:	$3,795.06	Payments Issued YTD:	$6,566.06
Average Monthly Credit Earned:	$316.26	USBC Credit Balance:	$333.04
		Payment Pending:	$333.04

Payment Requests Made

Submitted By	Date	Amount
Justin Parnell	11/06/2018	$7,158.00

Payments Issued

Date	Amount
12/10/2018	$6,566.06

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1816576	405061	DA18683630	KWH >	317,032	343,777	303,093	357,096	333,305	336,353	334,934	364,133	380,404	394,759	381,808	370,043	4,216,737
			KW >	1,054	1,123	1,132	1,097	1,089	1,158	1,123	1,106	1,184	1,140	1,140	1,080	1,119
			Elec Revenue >	$32,149.40	$34,709.53	$31,677.36	$35,557.04	$33,639.82	$34,414.47	$33,847.58	$35,224.89	$37,190.01	$38,040.97	$37,049.67	$35,827.72	$419,328.46
			Total KWH	317,032	343,777	303,093	357,096	333,305	336,353	334,934	364,133	380,404	394,759	381,808	370,043	4,216,737
			Combined Average KW	1,054	1,123	1,132	1,097	1,089	1,158	1,123	1,106	1,184	1,140	1,140	1,080	1,119
			USBC Charge	$285.33	$309.40	$272.78	$321.39	$299.97	$302.72	$301.44	$327.72	$342.36	$355.28	$343.63	$333.04	$3,795.06
			Total Elec Revenue	$32,149.40	$34,709.53	$31,677.36	$35,557.04	$33,639.82	$34,414.47	$33,847.58	$35,224.89	$37,190.01	$38,040.97	$37,049.67	$35,827.72	$419,328.46

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 FAX: (406) 497-4008

DATE:	11/06/2018
NAME OF BUSINESS:	**Montana Precision Products**
CITY/TOWN LOCATION:	Butte Montana
CONTACT PERSON:	Justin Parnell
MAILING ADDDRESS:	119800 Rick Jones Way
CITY, STATE AND ZIP:	Butte, MT 59750
PHONE NUMBER:	406-565-2669
FAX NUMBER:	406-496-3330
E-MAIL ADDRESS	Justinp@mtpp.com

AMOUNT OF CREDIT REQUESTED:	$7158.09

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 parking lot light

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: Justin Parnell

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® Energy
Delivering a Bright Future

Montana Resources

Montana Resources, LLP
600 Shields Ave.
Butte, Montana
USA 59701

(406) 496-3200
(406) 723-9542 fax
www.montanaresources.com

February 25, 2019

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

Rec'd MT DOR
FEB 28 2019

Mr. Schoenfeld

Enclosed you will find a copy of Montana Resources annual USB report for 2018.

In 2018 Montana Resources submitted one new USB credit request. A total of $161,804.98 was requested and NorthWestern Energy issued payments totaling $161,804.98. MR also requested that the accrued 2018 USBC Credit Balance of $254,714.89 be carried over into 2019 for a LED Lighting project we are working and a project to install circulation fans. I have attached the credit request, project description, and the Self-Directed USBC Progress Reports for 2018. 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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

MONTANA RESOURCES

Account Summary

2017 Carryover Reservation:	$350,000.00	YTD Elec Revenue:	$2,316,194.49
Reservations Made YTD:	$180,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$161,804.98
Payment Requests Made YTD:	$161,804.98	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$103,468.25	Total USBC Credit:	$416,519.87
USBC Credit YTD:	$313,051.62	Payments Issued YTD:	$161,804.98
Average Monthly Credit Earned:	$26,087.64	USBC Credit Balance:	$254,714.89
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Rob Sanderson	11/28/2018	$161,804.98

Payments Issued

Date	Amount
12/10/2018	$161,804.98

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100062	1068	DA16344173	KWH >	21,408,397	21,230,035	18,700,480	20,166,987	20,052,878	19,998,975	19,601,078	20,487,290	20,564,967	20,424,099	20,102,716	20,383,459	243,121,361
			KW >	31,262	30,643	30,585	30,700	30,412	30,081	30,268	30,297	29,851	30,585	30,715	31,132	30,544
			Elec Revenue >	137,383.05	135,597.92	124,641.15	130,729.19	129,806.52	129,056.68	127,756.34	130,539.39	130,124.40	130,755.24	129,689.95	131,480.49	$1,567,560.32
100062	1068	DA17393382	KWH >	1,088,493	1,033,901	923,685	1,029,355	994,548	1,000,121	952,923	862,568	1,064,260	1,062,007	1,044,399	1,149,338	12,205,598
			KW >	1,633	1,814	1,884	1,892	1,547	1,728	1,780	1,521	1,598	1,875	1,979	1,944	1,766
			Elec Revenue >	$7,047.99	$7,120.52	$6,749.13	$7,187.31	$6,492.13	$6,805.78	$6,699.47	$5,886.85	$6,811.91	$7,251.75	$7,350.37	$7,710.06	$83,113.27
100062	1068	DA17677708	KWH >	600,598	613,525	526,767	585,829	607,047	658,882	534,346	581,675	453,035	440,570	430,691	452,169	6,485,134
			KW >	959	959	959	975	959	969	1,322	978	995	969	1,014	1,021	1,007
			Elec Revenue >	$3,983.53	$4,033.80	$3,663.24	$3,926.71	$3,986.36	$4,211.09	$4,277.79	$3,892.55	$3,409.64	$3,318.07	$3,351.77	$3,448.32	$45,502.87
100062	1068	DA18683600	KWH >	1,001,072	929,338	866,135	971,796	876,031	869,989	835,429	850,214	875,812	898,407	897,739	961,400	10,833,362
			KW >	1,859	1,885	1,981	1,947	1,932	1,893	1,789	1,805	1,836	1,889	1,939	1,997	1,896
			Elec Revenue >	$7,065.19	$6,815.48	$6,673.55	$7,044.14	$6,634.55	$6,547.49	$6,241.05	$6,297.95	$6,449.74	$6,625.26	$6,703.62	$7,050.19	$80,148.21
100062	1068	DA18683602	KWH >	1,995,729	1,991,828	1,728,148	1,908,330	1,958,553	2,007,151	1,938,593	2,019,867	1,934,614	1,961,421	1,943,113	1,984,533	23,371,880
			KW >	4,038	3,963	3,888	3,692	3,375	3,836	4,101	4,032	3,836	3,974	3,923	3,997	3,888
			Elec Revenue >	$14,627.16	$14,481.73	$13,211.45	$13,621.33	$13,313.44	$14,250.79	$14,401.21	$14,547.10	$13,891.28	$14,221.22	$14,065.95	$14,350.20	$168,982.86
100062	1068	DA18683605	KWH >	2,045,221	1,984,079	1,831,136	1,861,002	1,811,063	1,808,096	1,724,692	1,779,080	1,806,703	1,799,345	1,862,194	1,966,763	22,279,374
			KW >	3,269	3,139	3,254	3,096	2,880	2,952	2,981	2,981	2,880	3,139	2,923	3,269	3,064
			Elec Revenue >	$13,570.53	$13,106.40	$12,605.89	$12,471.90	$11,923.35	$12,027.26	$11,738.21	$11,888.93	$11,834.90	$12,225.32	$12,124.75	$13,100.25	$148,617.69
100062	1068	DA18683622	KWH >	1,850,047	1,854,371	1,610,287	1,762,571	1,766,552	1,857,751	1,808,712	1,908,263	1,812,157	1,779,419	1,777,669	1,822,306	21,610,105
			KW >	3,802	3,542	3,514	3,514	3,442	3,485	3,730	3,715	3,600	3,701	3,485	3,787	3,610
			Elec Revenue >	$13,655.38	$13,241.71	$12,135.32	$12,748.25	$12,648.45	$13,084.70	$13,281.52	$13,590.68	$13,023.03	$13,056.75	$12,699.86	$13,366.25	$156,531.90

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100062	1068	DA19312271	KWH >	699,970	707,210	666,315	701,588	616,708	629,532	621,296	642,978	637,436	661,234	663,401	680,668	7,928,336
			KW >	1,642	1,676	1,745	1,788	1,840	1,581	1,668	1,607	1,935	1,866	1,806	1,875	1,752
			Elec Revenue >	$5,498.88	$5,580.49	$5,489.55	$5,700.72	$5,442.75	$5,077.65	$5,184.47	$5,154.85	$5,664.24	$5,646.90	$5,558.28	$5,738.59	$65,737.37
			Total KWH	30,689,527	30,344,287	26,852,953	28,987,458	28,683,380	28,830,497	28,017,069	29,131,935	29,148,984	29,026,502	28,721,922	29,400,636	347,835,150
			Combined Average KW	48,464	47,621	47,810	47,604	46,387	46,525	47,639	46,936	46,531	47,998	47,784	49,022	47,527
			USBC Charge	$27,620.57	$27,309.85	$24,167.65	$26,088.72	$25,815.05	$25,947.46	$25,215.36	$26,218.74	$26,234.07	$26,123.86	$25,849.72	$26,460.57	$313,051.62
			Total Elec Revenue	202,831.71	199,978.05	185,169.28	193,429.55	190,247.55	191,061.44	189,580.06	191,798.30	191,209.14	193,100.51	191,544.55	196,244.35	$2,316,194.49

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
FAX: (406) 497-4008

DATE:	11/28/2018
NAME OF BUSINESS:	**Montana Resources**
CITY/TOWN LOCATION:	Butte, MT
CONTACT PERSON:	Rob Sanderson
MAILING ADDDRESS:	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.)

Install large diameter ceiling fans to recirculate warm air inside the very tall and expansive Concentrator building. This will decrease the heating demand by redirecting already warmed air away from the ceiling and back down to where it is needed. This project is estimated to be completed in December 2018 and cost $180,000

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 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
FAX: (406) 497-4008

DATE:	11/28/2018
NAME OF BUSINESS:	**Montana Resources**
CITY/TOWN LOCATION:	Butte, MT
CONTACT PERSON:	Rob Sanderson
MAILING ADDDRESS:	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 2019 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 FAX: (406) 497-4008

DATE:	11/28/2018
NAME OF BUSINESS:	**Montana Resources**
CITY/TOWN LOCATION:	Butte, MT
CONTACT PERSON:	Rob Sanderson
MAILING ADDDRESS:	600 Shields Ave.
CITY, STATE AND ZIP:	Butte, MT 59701
PHONE NUMBER:	406-496-3242
FAX NUMBER:	
E-MAIL ADDRESS	rsanderson@montanaresources.com

AMOUNT OF CREDIT REQUESTED:	$161,804.98

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):

In 2017 MR began a project to replace all incandescent and HPS lighting in Concentrator, Moly, and Garage with more efficient LED units. All of the replacement units are on 24 hours a day 365 days a year. This results in a total energy savings of 1,643,139kWh per year. With a total project cost of $546,108.95 this includes the $384,303.97 requested in 2017 and the additional $161,804.98 spent on this project in 2018, which is the portion MR is requesting credits for. This project provides for an annual savings of $90,700 with a simple payback period of about 6 years. Please see attached for more information.

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

ESTIMATED kWh SAVINGS:	1,643,139
ESTIMATED KW SAVINGS:	188

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.

NorthWestern Energy
Delivering a Bright Future

Montana Resources Concentrator, Moly, and Garage LED Upgrade Project

2017

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**

2018

Fixture Model and Description	# of Fixtures	LED Wattage	Existing Wattage	kWh/yr. savings
EV-U200W High Bay	20	200	400	35040
8L 5K Low Bay	26	77	200	28014.48
OLVTCM Jelly Jar	40	15	100	29784
KTLED43T8-96GC-850-D (8 foot T8)	160	43	59	22425.6
Phillips 16.5/T8 PRO LED (4 foot T8)	300	16.5	32	40734
KTLED15T8-48GC-850-D (4 foot T8)	300	15	32	44676
			Total	**200674.1**
			kW	**22.908**

Project Totals

Project Year	kW Savings	kWh/yr. Savings	$/yr. Savings	Project Cost	Payback (yr.)
2017	164.665	1442465.4	$79,681.79	$384,303.97	4.8
2018	22.908	200674.08	$11,085.24	$161,804.98	14.6
Totals	**187.573**	**1643139.5**	**$90,767.02**	**$546,108.95**	**6.0**

MONTANA
STATE UNIVERSITY

MONTANA STATE UNIVERSITY 125 YEARS IN THE PEOPLE'S INTEREST

February 13, 2019

Rec'd MT DOR
FEB 19 2019

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

RE: Self-Directed USBC Progress Report for 2018 – Montana State University Bozeman

Campus Planning, Design & Construction

Engineering & Utilities

Facilities Services

Mail Services

Safety & Risk Management

Space Planning & Management

Dear Ms. Hensley:

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018. All the USB payments we received in 2018 were self-directed for energy efficiency projects previously submitted. During 2018, we received USB payments totaling $48,083.37 that was composed of $44,083.40 in 2018 USB credits and $3,999.97 in 2017 credits that had been carried over into 2018.

We also have a request balance to carry over all remaining 2018 USB credits at year-end, of $4,055.53 into 2019.

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

Jill R. Zimbric
Accounting Associate Manager

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

University Services
Plew Building, 6th & Grant
P.O. Box 172760
Bozeman, MT 59717-2760

Tel 406-994-2001
Fax 406-994-5665

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/24/2019

MONTANA STATE UNIVERSITY - BOZEMAN

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$3,461,009.55
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$587,383.78	Total Payment Requests:	$587,383.78
Payment Requests Made YTD:	$0.00	Current Request Balance:	$539,300.41
2017 Carryover USBC Credit:	$3,999.97	Total USBC Credit:	$52,138.90
USBC Credit YTD:	$48,138.93	Payments Issued YTD:	$48,083.37
Average Monthly Credit Earned:	$4,011.58	USBC Credit Balance:	$4,055.53
		Payment Pending:	$4,055.53

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$15,418.07
07/11/2018	$11,923.97
10/03/2018	$12,267.01
12/10/2018	$8,474.32

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100611	1615	DA18683714	KWH >	3,555,286	3,743,815	3,559,535	3,900,447	3,953,336	3,812,784	3,754,110	4,134,965	4,205,760	4,141,519	4,173,748	3,868,445	46,803,750
			KW >	7,413	7,374	7,251	7,446	7,815	7,413	7,633	8,515	8,385	8,631	8,068	7,329	7,773
			Elec Revenue >	187,413.96	202,678.13	176,662.49	216,825.73	224,386.66	253,475.42	249,843.47	269,810.37	263,129.04	271,477.43	266,962.29	210,095.90	$2,792,760.89
163370	34943	DA06344948	KWH >	2,860	2,840	2,820	2,580	2,520	2,540	2,400	3,620	2,640	2,860	2,920	2,520	33,120
			KW >	11	13	13	13	13	12	9	14	11	15	13	11	12
			Elec Revenue >	$344.49	$362.75	$356.01	$338.67	$339.16	$330.67	$288.81	$428.83	$320.02	$379.88	$364.32	$318.68	$4,172.29
176372	40615	DA21011281	KWH >	0	0	0	0	0	0	1,778	-517	1,753	0	0	0	3,014
			KW >	0	0	0	0	0	0	33	12	32	0	0	0	26
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$469.96	$87.63	$453.68	$0.00	$0.00	$0.00	$1,011.27
176374	40617	DA05507285	KWH >	2,760	1,800	2,280	2,000	1,880	1,400	1,480	1,320	1,760	2,040	1,400	1,800	21,920
			KW >	18	13	10	16	12	14	11	10	12	14	11	12	13
			Elec Revenue >	$402.67	$283.96	$287.76	$330.62	$273.19	$255.18	$233.52	$210.78	$260.56	$303.04	$225.77	$269.12	$3,336.17
176376	40619	DG15027060	KWH >	0	0	0	0	0	0	537	4,632	351	746	0	0	6,266
			KW >	0	0	0	0	0	0	35	36	25	30	0	0	32
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$391.38	$706.45	$277.03	$355.28	$0.00	$0.00	$1,730.14
199197	52018	DG93700285	KWH >	2,460	2,200	2,080	2,060	1,600	1,440	1,220	1,440	1,300	1,660	1,700	2,200	21,360
			KW >	18	18	17	18	15	15	12	15	13	14	14	18	16
			Elec Revenue >	$385.31	$362.59	$339.55	$352.96	$288.69	$276.02	$228.62	$265.50	$241.60	$279.79	$282.68	$361.54	$3,664.85
199552	52106	DG93700196	KWH >	2,600	1,960	2,440	1,540	1,380	1,340	1,460	980	1,280	1,580	2,140	2,060	20,760
			KW >	17	16	16	16	15	15	14	15	12	15	16	15	15
			Elec Revenue >	$380.22	$325.90	$357.83	$288.34	$267.47	$264.23	$261.11	$234.59	$226.15	$279.60	$334.31	$320.94	$3,540.69

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/24/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
413082	165380	DA11667864	KWH >	349	164	701	785	172	320	2,800	4,279	5,961	5,663	259	-4,499	16,954
			KW >	1	0	1	1	0	1	20	18	18	18	1	14	8
			Elec Revenue >	$48.09	$24.41	$75.69	$82.46	$25.27	$47.21	$428.28	$518.03	$646.43	$624.03	$43.52	($195.46)	$2,367.96
413091	165387	DD82361657	KWH >	3,600	3,680	3,480	3,040	1,720	1,560	1,400	1,560	1,560	1,480	2,400	3,000	28,480
			KW >	14	11	11	10	7	7	6	6	7	7	12	9	9
			Elec Revenue >	$432.39	$405.74	$394.86	$348.84	$217.19	$200.47	$174.08	$185.51	$202.32	$196.32	$310.95	$333.99	$3,402.66
615185	266623	DA15843412	KWH >	257,400	318,000	301,200	296,400	228,000	212,400	207,000	244,800	259,800	246,600	273,000	346,800	3,191,400
			KW >	654	660	654	630	594	456	504	528	624	624	600	648	598
			Elec Revenue >	$25,241.90	$29,890.30	$28,628.09	$28,088.20	$22,483.51	$20,112.81	$19,789.48	$22,690.50	$24,746.63	$23,771.22	$25,597.91	$31,637.59	$302,678.14
710867	321643	DA04203289	KWH >	138,560	117,600	129,440	126,720	83,360	90,240	97,440	90,400	95,200	98,400	108,160	112,800	1,288,320
			KW >	265	248	288	361	211	217	264	248	259	232	227	246	256
			Elec Revenue >	$13,472.09	$11,664.93	$12,966.73	$13,547.40	$8,629.77	$9,226.25	$10,193.34	$9,325.73	$9,845.47	$9,867.70	$10,558.97	$11,145.27	$130,443.65
710869	321645	DS63328248	KWH >	14,800	11,840	12,560	13,920	9,680	10,480	8,400	15,760	12,880	12,960	12,800	7,840	143,920
			KW >	26	24	24	24	22	20	26	39	28	28	24	25	26
			Elec Revenue >	$1,425.86	$1,171.38	$1,225.94	$1,339.70	$987.64	$1,033.90	$921.41	$1,591.81	$1,268.21	$1,280.66	$1,235.35	$865.61	$14,347.47
711575	322182	DG94373902	KWH >	3,559	2,763	3,358	2,745	1,794	2,901	1,843	1,723	1,623	1,869	2,980	3,188	30,346
			KW >	11	11	19	10	10	11	8	6	6	8	10	9	10
			Elec Revenue >	$395.10	$333.71	$374.07	$322.89	$249.71	$348.36	$234.12	$204.94	$198.19	$230.91	$336.16	$348.39	$3,576.55
715994	325877	DG28992284	KWH >	0	0	0	0	80	4,760	5,520	12,160	4,080	40	0	0	26,640
			KW >	0	0	0	0	32	48	45	44	35	0	0	0	34
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$167.82	$835.45	$859.62	$1,341.55	$656.42	$2.99	$0.00	$0.00	$3,863.85
719536	328585	DG64792474	KWH >	12,360	11,840	10,560	10,640	13,240	9,080	14,000	12,600	13,520	12,440	11,800	11,040	143,120
			KW >	22	22	21	19	35	28	30	27	26	27	22	30	26
			Elec Revenue >	$1,191.51	$1,159.42	$1,041.96	$1,038.13	$1,397.12	$995.16	$1,400.47	$1,233.01	$1,305.12	$1,232.77	$1,138.77	$1,155.88	$14,289.32
721021	329867	DG36300741	KWH >	440	420	560	680	840	480	240	1,020	680	660	580	420	7,020
			KW >	2	2	2	3	4	3	2	6	4	6	4	2	3
			Elec Revenue >	$65.68	$62.09	$78.74	$90.46	$114.68	$78.50	$51.68	$150.24	$100.93	$117.60	$97.52	$61.57	$1,069.69
1987509	269040	DG55271826	KWH >	11,160	9,160	11,200	8,080	7,360	9,560	14,440	5,480	9,800	9,600	8,640	7,000	111,480
			KW >	38	33	39	27	29	34	50	41	35	35	30	30	35
			Elec Revenue >	$1,257.99	$1,053.75	$1,269.49	$911.55	$872.68	$1,091.95	$1,632.11	$832.01	$1,108.64	$1,094.09	$971.87	$844.58	$12,940.71
2075251	135993	DA18484023	KWH >	137,920	142,400	128,000	142,560	135,840	130,400	116,000	120,320	124,480	142,400	130,720	138,400	1,589,440
			KW >	348	348	661	331	332	284	286	283	308	312	318	318	344
			Elec Revenue >	$14,248.14	$14,619.91	$13,258.73	$14,504.01	$13,950.26	$13,041.79	$11,903.75	$11,962.48	$12,549.19	$14,041.19	$13,180.19	$13,829.94	$161,089.58
			Total KWH	4,146,114	4,370,482	4,170,214	4,514,197	4,442,802	4,291,685	4,232,068	4,656,542	4,744,428	4,682,517	4,733,247	4,503,014	53,487,310
			Combined Average KW	8,858	8,793	9,027	8,925	9,146	8,578	8,988	9,863	9,840	10,016	9,370	8,716	9,234
			USBC Charge	$3,731.48	$3,933.44	$3,753.18	$4,062.79	$3,998.51	$3,862.52	$3,808.87	$4,190.88	$4,269.97	$4,214.26	$4,259.92	$4,052.72	$48,138.54
			Total Elec Revenue	246,705.40	264,398.97	237,317.94	278,409.96	274,650.82	301,613.37	299,305.21	321,779.96	317,535.63	325,534.50	321,640.58	271,393.54	$3,460,285.88

USBC Large Customers Annual Report for Calendar Year 2018
submitted annually to MDOR

				Credits Received/Project Applied to																					
Qualifying Project	Amount Requested	Index	Date Requested	CY99	CY00	CY01	CY02	CY03	CY04	CY05	CY06	CY07	CY08	CY09	CY10	CY11	CY12	CY13	CY14	CY15	CY16	CY17	CY18		Total	Credit Balance
Cobleigh Hall Phase 1 (Floors 1-3)	73,096.00	584108 4A7110	8/26/1999	48,733.43	24,362.57																				73,096.00	0.00
Cobleigh Hall Phase 2 (Floors 4-6)	97,671.31	584109	7/19/2000		21,154.21	45,306.89	31,210.21																		97,671.31	0.00
Haynes Hall	60,132.83	453500	5/1/2002				8,579.56	45,353.00	6,200.27																60,132.83	0.00
Howard Hall	64,045.37	453500	9/24/2003						39,299.23	24,746.14															64,045.37	0.00
Renne Library Renovation:																										0.00
1) Lighting Retrofit	728,357.00	LRBP								20,670.56	46,737.63	47,292.74	49,340.62	48,280.19	47,359.65	46,651.84	46,651.91	48,528.21	47,880.79	47,534.65	47,906.77	48,609.33	48,083.37		641,528.26	86,828.74
2) VFD Motor Drives	21,010.00	LRBP																								21,010.00
3) Premium Eff. Motors	4,590.00	LRBP	9/24/2003																							4,590.00
4) Cooling System Retrofit	10,750.00	LRBP	9/24/2003																							10,750.00
Cheever Hall-Upgrade Lighting Systems	99,271.67	453500	10/26/2005																							99,271.67
Plant Growth Center Lighting Systems	70,445.00	453500	1/5/2007																							70,445.00
Leon Johnson Hall-Upgrade Lighting Systems	171,420.00	453500	1/5/2008																							171,420.00
Linfield Hall N. & S.-Upgrade Lighting Systems	74,985.00	453500	2/12/2009																							74,985.00
																										0.00
																										0.00
Total	1,475,774.18			48,733.43	45,516.78	45,306.89	39,789.77	45,353.00	45,499.50	45,416.70	46,737.63	47,292.74	49,340.62	48,280.19	47,359.65	46,651.84	46,651.91	48,528.21	47,880.79	47,534.65	47,906.77	48,609.33	48,083.37		936,473.77	539,300.41

63.46% % used

MONTANA
STATE UNIVERSITY
BILLINGS
Access & Excellence

Facilities Services

Rec'd MT DOR
FEB 01 2019

January 30, 2019

Nicole Hensley
Department of Revenue
PO Box 5805
Helena, MT 59604-5805

RE: USBC Large Customer Annual Report for 2018

Dear Nicole,

Enclosed is the MSU-Billings Self-Directed USBC Progress Report for 2018. 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,

Lance Icenogle for Chris Eagan

Chris Eagan
Director of Facilities Services, MSU-B

cc: Rick Edwards, Northwestern Energy

1500 University Drive | Billings, Montana 59101-0245 | Office: 406-657-2306 | Fax: 406-657-1719

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/25/2019

MONTANA STATE UNIVERSITY - BILLINGS

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$845,913.81
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$40,628.40	Total Payment Requests:	$40,628.40
Payment Requests Made YTD:	$0.00	Current Request Balance:	$32,977.75
2017 Carryover USBC Credit:	$609.82	Total USBC Credit:	$8,247.67
USBC Credit YTD:	$7,637.85	Payments Issued YTD:	$7,650.65
Average Monthly Credit Earned:	$636.49	USBC Credit Balance:	$597.02
		Payment Pending:	$597.02

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$2,418.04
07/11/2018	$1,847.05
10/03/2018	$2,048.80
12/10/2018	$1,336.76

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100631	1635	DA21629750	KWH >	517,254	556,739	486,697	555,696	513,039	519,982	553,217	585,773	602,568	558,019	571,688	514,668	6,535,340
			KW >	1,069	1,124	1,092	1,358	1,356	1,409	1,562	1,434	1,584	1,311	1,296	1,106	1,308
			Elec Revenue >	$48,649.53	$52,027.64	$46,574.54	$54,100.96	$50,726.59	$51,626.51	$54,602.17	$55,693.20	$58,513.62	$52,919.23	$53,916.62	$48,144.80	$627,495.41
228127	67210	DA18647576	KWH >	89,760	87,120	100,560	101,200	100,400	95,360	97,920	134,880	76,320	115,600	105,440	94,640	1,199,200
			KW >	267	300	618	305	389	331	324	345	367	360	340	313	355
			Elec Revenue >	$9,676.98	$9,812.62	$10,912.20	$10,982.53	$11,732.20	$10,751.68	$10,870.95	$13,698.41	$9,461.91	$12,465.19	$11,469.22	$10,407.58	$132,241.47
252225	79210	DG28214380	KWH >	5,100	6,840	5,860	6,580	4,620	1,820	1,900	1,540	1,540	3,900	5,100	7,240	52,040
			KW >	12	19	40	28	34	8	9	8	10	21	21	36	21
			Elec Revenue >	$529.32	$732.27	$861.06	$801.06	$710.92	$236.70	$245.04	$211.67	$228.37	$515.13	$613.39	$922.83	$6,607.76
260086	82733	DA08261258	KWH >	1,074	940	1,144	1,099	989	1,009	1,136	1,475	1,388	1,203	1,148	997	13,602
			KW >	3	4	3	3	3	4	5	7	7	5	4	3	4
			Elec Revenue >	$130.31	$125.35	$135.55	$132.74	$120.65	$131.03	$148.71	$195.00	$189.07	$158.83	$142.30	$122.98	$1,732.52
260195	82802	DG83128345	KWH >	7,440	6,680	7,320	7,160	5,920	5,760	5,800	5,640	6,200	6,520	6,560	7,200	78,200
			KW >	23	23	22	23	21	19	22	22	24	22	23	24	22
			Elec Revenue >	$823.69	$764.95	$800.01	$800.03	$684.82	$648.31	$676.63	$657.22	$718.44	$730.64	$740.63	$808.30	$8,853.67
260372	82912	DA17237077	KWH >	4,840	4,700	5,580	5,660	5,180	5,160	6,540	7,140	6,160	4,980	4,960	4,720	65,620
			KW >	11	11	12	12	13	14	17	18	18	15	10	10	13
			Elec Revenue >	$494.86	$492.38	$563.51	$577.37	$541.95	$551.96	$686.96	$731.20	$661.78	$540.84	$494.85	$478.23	$6,815.89
260420	82943	DG87256754	KWH >	2,179	1,791	1,905	1,726	1,555	2,179	2,071	2,863	2,537	2,019	1,751	1,692	24,268
			KW >	9	9	9	8	13	12	12	14	14	14	14	8	11
			Elec Revenue >	$267.64	$238.65	$246.86	$222.75	$264.44	$305.20	$295.90	$371.20	$347.67	$309.30	$288.46	$221.50	$3,379.57

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/25/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1631000	414555	DG64922893	KWH >	32,800	37,600	37,200	34,000	34,200	42,000	49,400	37,800	81,600	52,800	43,600	35,200	518,200
			KW >	82	128	175	90	100	226	196	254	218	210	194	90	164
			Elec Revenue >	$3,384.28	$4,224.43	$3,779.14	$3,569.70	$3,678.72	$5,529.64	$5,804.87	$5,403.08	$8,382.44	$6,146.26	$5,273.88	$3,611.08	$58,787.52
			Total KWH	660,447	702,410	646,266	713,121	665,903	673,270	717,984	777,111	778,313	745,041	740,247	666,357	8,486,470
			Combined Average KW	1,476	1,618	1,971	1,827	1,929	2,023	2,147	2,102	2,242	1,958	1,902	1,590	1,899
			USBC Charge	$594.41	$632.18	$581.63	$641.80	$599.32	$605.93	$646.19	$699.42	$700.48	$670.54	$666.22	$599.73	$7,637.85
			Total Elec Revenue	$63,956.61	$68,418.29	$63,872.87	$71,187.14	$68,460.29	$69,781.03	$73,331.23	$76,960.98	$78,503.30	$73,785.42	$72,939.35	$64,717.30	$845,913.81

DEPARTMENT OF HEALTH & HUMAN SERVICES

Public Health Service

National Institutes of Health
Bethesda, Maryland 20892

www.nih.gov

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

Rec'd MT DOR

FEB 14 2019

February 7, 2019

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

Re: 2018 Large Customer Universal System Benefits Program (USBP) Annual Report

Dear Ms. Hensley,

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, **$26,464.89** carried over in 2018. No new requests were filed in 2018.

- Payments issued in 2018 totaled **$14,913.26**.

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

Bryan Kercher
Rocky Mountain Laboratories
903 S. 4th St
Hamilton, MT 59840

kercherb2@mail.nih.gov

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

NATIONAL INSTITUTE OF HEALTH

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$1,511,799.96
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$26,464.89	Total Payment Requests:	$26,464.89
Payment Requests Made YTD:	$0.00	Current Request Balance:	$11,551.63
2017 Carryover USBC Credit:	$1,142.75	Total USBC Credit:	$16,054.04
USBC Credit YTD:	$14,911.29	Payments Issued YTD:	$14,913.26
Average Monthly Credit Earned:	$1,242.61	USBC Credit Balance:	$1,140.78
		Payment Pending:	$1,140.78

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$4,517.65
07/11/2018	$3,787.14
10/03/2018	$4,204.38
12/10/2018	$2,404.09

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1923677	430537	DA21629752	KWH >	1,269,145	1,305,603	1,175,146	1,301,467	1,385,310	1,521,150	1,512,905	1,644,814	1,513,823	1,339,224	1,331,986	1,267,531	16,568,104
			KW >	2,039	2,359	2,532	2,281	2,661	2,678	2,765	2,894	2,730	2,713	2,532	2,151	2,528
			Elec Revenue >	114,405.13	119,761.76	111,407.24	119,301.44	128,667.83	139,089.48	137,327.24	146,813.14	136,411.49	123,420.97	121,449.64	113,744.60	$1,511,799.96
			Total KWH	1,269,145	1,305,603	1,175,146	1,301,467	1,385,310	1,521,150	1,512,905	1,644,814	1,513,823	1,339,224	1,331,986	1,267,531	16,568,104
			Combined Average KW	2,039	2,359	2,532	2,281	2,661	2,678	2,765	2,894	2,730	2,713	2,532	2,151	2,528
			USBC Charge	$1,142.23	$1,175.04	$1,057.63	$1,171.32	$1,246.78	$1,369.04	$1,361.61	$1,480.33	$1,362.44	$1,205.30	$1,198.79	$1,140.78	$14,911.29
			Total Elec Revenue	114,405.13	119,761.76	111,407.24	119,301.44	128,667.83	139,089.48	137,327.24	146,813.14	136,411.49	123,420.97	121,449.64	113,744.60	$1,511,799.96

NorthWestern® Energy
Delivering a Bright Future

March 1, 2019

Ms. Nicole Hensley
Montana Department of Revenue
Miscellaneous Tax Unit
PO Box 5805
Helena MT 59620-5805

Dear Ms. Hensley:

Enclosed with this letter is the 2018 Electric Universal System Benefits (USB) report for NorthWestern Energy. Copies of this report are also being provided to the Montana Public Service Commission and members of the Energy and Telecommunications Interim Committee of the Montana Legislature.

The report documents the revenues collected by NorthWestern Energy through the USB Charge; summarizes the qualifying expenditures made by the utility in the implementation of internal programs and activities, and the credits claimed; and documents the collection and reimbursement of the USB charge from NorthWestern Energy's Large Customers.

A total of $10,063,092 in electric USB revenues was collected from NorthWestern Energy's electric distribution customers in 2018.

As required by statute and Montana Public Service Commission Order No. 7458, 50% of the 2018 USB funds, or $5,031,546 was directed to Low Income activities by NorthWestern Energy. Large Customers funds accounted for 31% of the total 2018 electric USB revenues, or $3,140,338 with $42,113 self-directed to Low Income activities and $3,085,038 self-directed to energy reduction activities. Allocations by NorthWestern Energy to the other public purpose categories are as follows: $614,558 to Local Conservation, $399,090 to Market Transformation, and $870,889 to Renewable Resources and Research and Development.

Included with the 2018 report are updates for the 2015, 2016, and 2017 reports.

No USB funds collected from NorthWestern Energy customers are being released to Statewide USB funds.

If you have questions, please contact our USB staff at (406) 497-2491.

Sincerely,

Deb Martin Young
Customer Care - DSM

Universal System Benefits Activities
2018 Annual Report

March 2019

NorthWestern® Energy | Efficiency Plus

NorthWestern Energy
Electric
Universal System Benefits Activities
2018 Annual Report

Executive Summary

NorthWestern Energy is committed to administering Universal System Benefits (USB) programs and activities to efficiently deliver public purpose benefits to its Montana distribution customers to the fullest extent possible.

Since 1999, electric customers in NorthWestern Energy's Montana service territory have funded nearly $183 million of Universal System Benefits programs. Through USB, funding of Low Income programs have been increased, conservation and market transformation programs have continued, and renewable generation opportunities have been initiated for NorthWestern Energy's customers.

A total of $10,063,092 was collected from NorthWestern Energy's electric distribution customers in 2018. This is about $224,500 more than 2017 revenues with Large Customer revenues up by nearly $131,000 and non-Large Customer revenues up by about $94,000 when compared to 2017 revenues.

The 2018 electric USB funds have been allocated to the categories consistent with guidelines provided in Montana Public Service Commission (MPSC) Orders No. 6679e and No. 7458. MPSC Order No. 6679e recognizes and allows for the pooling of electric and natural gas USB funds for residential audits, Free Weatherization for low income customers, and emergency energy assistance through Energy Share of Montana. MPSC Order No. 7458 directs 50% of the total electric USBC revenues to Low Income activities, consistent with statute and proportionally reduces allocations between the Market Transformation and Local Conservation categories, and the Research and Development and the Renewable Generation categories.

The portfolio of Low Income, Conservation, and Renewable generation programs in 2018 is similar to 2017.

Separate of the electric USB funded activities, NorthWestern Energy customers fund additional residential Local Conservation and Low Income Programs with natural gas USB funds. Other energy efficiency programs are included in NorthWestern Energy's electric and natural gas supply portfolios and are funded through supply rates.

Of the 2018 electric USBC revenues, $5,031,546 or 50% were allocated to Low Income activities by NorthWestern Energy separate of low income allocations from the Large Customer category. Large Customers self-directed an additional $42,113 of their 2018 electric USB funds to Low Income activities, bringing the 2018 Low Income electric USB funds total to $ 5,073,659 or 50.42% of the 2018 electric USBC revenues.

NorthWestern Energy implements its USB programs and activities consistent with the requirements of legislation for USB, the Department of Revenue (DOR) administrative rules for USB Programs, and tariffs and orders of the MPSC. NorthWestern Energy's allocations for 2018 are consistent with these requirements and with well-established past practices. To the extent that substantial changes have been made to programmatic or funding levels outside of those required by MPSC Order, these changes are noted in the appropriate activity summary.

The activities for 2018 are summarized and the qualifying expenditures and credits claimed by NorthWestern Energy are documented with this report. *No funds are being released to the Statewide USB fund(s).* Large Customers that self-direct their funds are required to separately report those activities. To the extent that a Large Customer has informed NorthWestern Energy that it has directed funds to Low Income activities, the totals have been reported.

This report includes brief highlights of activity in each category, a summary of the allocations of 2018 electric USB funds by category and activity, and a summary of the energy and demand savings and new renewable resources resulting from the 2018 allocations. The report also includes updates on previous years' activities, and a summary by public purpose category of electric USB funding from 1999-2018.

UNIVERSAL SYSTEM BENEFITS CHARGE REVENUES

NorthWestern Energy's Universal System Benefits Charge (USBC) tariffs went into effect January 1, 1999. As required in law, the tariffs were established to collect nearly $8.6M (2.4% of 1995 revenues) in a weather-normal year based upon 1998 electric loads. The electric USBC generated $10,063,092 in 2018. The table below shows that the electric USBC revenues are based upon electrical usage (kiloWatt hours or kWh), lists the electric USBC tariff rates by customer class, and the percentage of electric USBC revenues each sector contributed in 2018.

General Description	Tariffed Customer Class	Rate/kWh	Percent
Residential	Residential	$0.001334	*34%*
Commercial/Small Industrial	GS-1 & GS-2 under 1000 KW	$0.001143	*32%*
Large Customer per USB	GS-1 & GS-2 over 1000 KW	$0.000900	*31%*
Irrigation	Irrigation	$0.001144	*1%*
Lighting	Lighting	$0.003404	*2%*

A typical NorthWestern Energy residential customer using 750 kiloWatt hours (kWh)/month pays about $1 each month for electric USBC. The Large Customer USBC rate of $0.0009 per kWh was set by the Montana legislature.

Large Customers are those customers with an individual qualifying load greater than 1,000 kiloWatt (kW) average monthly demand in the previous calendar year. By law, Large Customers may self-direct their USB funds to qualifying public purposes. The Large Customer USBC rate is applied to the qualifying load and all associated demand metered accounts. Large Customers, representing 57 customers and their 561 accounts, make up $3.14 M of the electric USBC revenues.

Appendix 1 provides additional information regarding electric USBC revenues by customer class.

Segregated USB Account

NorthWestern Energy segregates its electric and natural gas USB funds from other utility operating funds by depositing them into a separate interest-bearing bank account, per MPSC Order No. 6504a. In 2018, the net gain in interest to USB was $7,618 of which $5,180 was credited to the electric USB categories on a pro rata basis and the balance was credited to natural gas USB activities.

UNIVERSAL SYSTEM BENEFITS EXPENDITURES

All electric USB funds collected from NorthWestern Energy customers in 2018 have been spent and/or committed to qualifying public purposes. No funds are being released to the Statewide USB fund(s).

This report includes information about the 2018 USB programs and activities for NorthWestern Energy customers. Sections are provided for Low Income, Local Conservation, Market Transformation, Renewable Resources, and Research and Development. A general summary of the Large Customer self-directed activities is provided. NorthWestern Energy does not "qualify" Large Customer self-directed activities and therefore, only provides the funding obligation and basic expenditure information. See Appendix 2 for a summary of the 2018 allocations and expenditures and Appendix 3 for energy savings and customer participation information.

NorthWestern Energy's mix of programs and activities have been guided by the MPSC through Orders No. 5986 f, g, and i; Order No. 6514; Order No. 6504a; Order No. 6574c; and Orders No. 6679a, b, c, and e; Order No. 7458, advice from members of NorthWestern Energy's USB Advisory Committee; input from the Montana Department of Health and Human Services (MDPHHS) and local Human Resource Councils (HRCs) for the Free Weatherization program; NorthWestern Energy's experience in program design and implementation; and in response to customer needs and market conditions.

As provided for in the Administrative Rules of Montana and Montana Statute, NorthWestern Energy implemented qualifying internal utility programs and activities in 2018 and has financial commitments to implement additional activities/projects for completion in 2019. These programs and activities are described in this report. The breakdown between qualifying expenditures in the current year and financial commitments for completion in 2019 is documented in Appendices 2 and 3 to this report.

NorthWestern Energy requested, and was granted by the DOR, time extensions for projects for which the timelines have been modified requiring more time for completion as reported in the Addendums for the 2016 and 2017 Reports. None of the projects to which 2018 funds have been committed are expected at this time to extend beyond 2019.

UNIVERSAL SYSTEM BENEFITS RESULTS

From 1999 through 2018, NorthWestern Energy has delivered USB activities to various customer classes and across all public purpose categories. General descriptions of the activities or programs for 2018, along with the funding total for each category, follow.

Large Customers-- $3,140,338

Large Customers are allowed to self-direct their USB funds by Montana statute. Those who self-direct funds are required to file individual reports with the DOR regarding their activities. NorthWestern Energy is required to collect the USBC from these customers pursuant to Montana Statute through a tariff. Individual customers file reimbursement claims with NorthWestern Energy for which the utility processes the payment. NorthWestern Energy does not pre-qualify Large Customer credits and bears no financial responsibility for any disallowance of their USB activities. Energy savings associated with Large Customer projects are not accounted for in NorthWestern Energy's report.

Large Customer revenues are included in the utility's annual USB obligation. Large Customers may self-direct their funds and do not have a minimum funding requirement for Low Income nor an obligation to fund any of the utility's activities. Likewise, Large Customers are not eligible to participate in NorthWestern Energy's USB funded Efficiency Plus (E+) programs.

In 2018, $3,140,338 was collected from 57 Large Customers to meet their 2018 obligations. All but one of these customers self-directed all of their 2018 USB funds. Large Customers self-directed $2,026,029 of 2018 funds toward energy reduction projects within their facilities, and have carried over $1,059,009 for additional projects in 2019. Large Customers self-directed $42,113 to Low Income activities in 2018.

The unclaimed 2018 Large Customer funds in the amount of $13,188 and the 2018 USB account interest amount of $1,616 were not sufficient to cover the NorthWestern Energy administrative costs for 2018 Large Customers of $21,474. NorthWestern Energy reallocated Local Conservation, Market Transformation, Renewable Resources and Research & Development funds to cover the $6,670 deficit and resulting in a total of $3,147,008 of the total 2018 electric USB funds being directed to the Large Customer category.

Claims to NorthWestern Energy for reimbursement are documented as received. Reimbursements are made after the USBC has been collected from the customer. NorthWestern sends reminders to the Large Customers of their reporting requirements to the DOR.

Consistent with statute, utilities are required to provide a list of Large Customers that self directed USB funds in the previous year. The list of the 56 Large Customers on NorthWestern's system that self-directed funds follows.

NorthWestern Energy
Electric
Universal System Benefits Activities
2018 Annual Report

Listing of Large Customers Self-Directing Funds in 2018

AMERICAN CHEMET	MONTANA PRECISION PRODUCTS LLC
ASH GROVE CEMENT	MONTANA RESOURCES
ASPEN AIR	MONTANA STATE UNIVERSITY - BILLINGS
ATK TACTICAL SYSTEMS	MONTANA STATE UNIVERSITY - BOZEMAN
BARRETTS MINERALS	PASTA MONTANA
BENEFIS HEALTH CARE	PHILLIPS 66 PIPELINE (YELLOWSTONE PIPELINE & PHILLIPS 66 CARRIER)
BILLINGS CLINIC	PHILLIPS 66 REFINERY
BOEING OF HELENA	R Y TIMBER
CALUMET MONTANA REFINING, LLC	REC SILICON
CHS, INC.	ROCKY MOUNTAIN POWER
CITY OF BILLINGS	ROSEBURG FOREST PRODUCTS
CITY OF GREAT FALLS	SAINT JAMES HOSPITAL
COLSTRIP PARTNERSHIP	SAINT PATRICK HOSPITAL
COMMUNITY MEDICAL CENTER	SAINT VINCENT HEALTHCARE
EXPRESS PIPELINE, LLC	STILLWATER MINING COMPANY
EXXONMOBIL	SUN MOUNTAIN LUMBER
GCC THREE FORKS (FORMERLY OLDCASTLE MATERIALS CEMENT HOLDINGS)	TALEN MONTANA, LLC
GENERAL MILLS	THOMPSON RIVER LUMBER
GOLDEN SUNLIGHT MINES, INC. (BARRICK)	UNITED MATERIALS INCORPORATED
GRAIN CRAFT	UNITED PROPERTIES, INC.
GRAYMONT WESTERN US INC.	UNIVERSITY OF MONTANA
HYPERBLOCK (FORMERLY PROJECT SPOKANE LLC)	US AIR FORCE
IMERYS TALC AMERICA, INC.	US DEPT VETERANS AFFAIRS
IDAHO FOREST PRODUCTS (FORMERLY TRICON TIMBER)	US PUBLIC HEALTH SERVICE (NATIONAL INSTITUTE OF HEALTH)
JUDITH GAP ENERGY LLC	WESTERN ENERGY
MALTEUROP NORTH AMERICA, INC.	WESTERN SUGAR COOPERATIVE
METRA PARK	WESTMORELAND RESOURCES INC.
MONTANA DEPARTMENT OF CORRECTIONS	YELLOWSTONE DEVELOPMENT (YELLOWSTONE CLUB)

Low Income Activities--$5,031,546

In Order No. 5986i (May 1999), the MPSC directed the utility to allocate 21% of the total electric USB funds collected to Low Income activities and to reallocate any unspent Large Customer funds to Low Income activities. In 2005, the MPSC issued Orders No. 6574c, 6679a and 6679b, all of which served to increase the allocation of electric USB funds to the Low Income sector. MPSC Order No. 6679e (December 2008) made permanent the Low Income bill discount levels and established a Low Income allocation guideline as part of the direction to guide allocations amongst the electric USB categories. In 2015, the MPSC issued Order No. 7458 increasing the funding of Low Income activities to 50% of the total annual electric USBC revenues as now required by statute and increasing allocations to the Free Weatherization Program and Energy Share of Montana.

NorthWestern Energy directed $5,031,546 in 2018 electric USB funds to Low Income activities, or 50% of electric USBC revenues. Large Customers reported self-directing an additional $42,113 to Low Income activities bringing the total 2018 funds committed to Low Income to $5,073,659 which is slightly more than 50% of the total funds collected.

Appendix 4 to the 2018 report provides a summary of NorthWestern Energy's Electric USB allocations for 1999-2018 by category and better illustrates the Low Income program funding changes.

Low Income USB funds are directed to a wide range of activities that benefit low income customers of the utility. Program offerings include bill assistance, weatherization and emergency energy assistance.

Households served by NorthWestern Energy that meet the Low Income Energy Assistance Program (LIEAP) eligibility requirements receive bill assistance in the form of a discount on their utility bill. LIEAP eligibility guidelines are set by MDPHHS each heating season which is defined as November through April. LIEAP eligibility is set at up to 150% of the Federal poverty.

LIEAP qualified customers may also qualify for the Free Weatherization Program and households with energy emergencies may receive assistance through Energy Share of Montana. More than 13,500 low income households were served in 2018 with electric USB funds. The financial impact of electricity costs on low income households was reduced through bill assistance, weatherization, and emergency energy assistance.

Bill Assistance

Consistent with MPSC Order No. 6679e the NorthWestern Energy electric Low Income bill discount is 25% from November through April and 15% from May through October. Electric USB funds cover the electric Low Income bill discount. Separately, natural gas USB funds cover the natural gas USB Low Income bill discount.

Customers qualifying for LIEAP, the federally funded heating assistance program, also receive the NorthWestern Energy bill discount. Customers may apply for LIEAP assistance through their local HRC. Participation in the bill discount in 2018 was slightly greater than the 2017 participation level. The funding of the electric Low Income bill discount totaled $2,451,697 in 2018 for the 11,576 low income customers served. The amount of money required to fund bill assistance fluctuates annually based upon the number of customers enrolled, rates, and weather.

The Free Weatherization Program

NorthWestern Energy partners with MDPHHS and local HRCs to offer the Free Weatherization Program.

Through the history of this program, NorthWestern Energy has made modifications to the Free Weatherization Program contract with MDPHHS in an effort to better maximize the weatherization results of all funding sources for NorthWestern Energy low income customers.

Contract changes to streamline the program and better mirror federal program requirements prior to 2018 have been noted in previous reports. Increased funding to the Low Income program with MPSC Order No. 7458 increased funding of Free Weatherization Program. As noted in previous reports since 2013, USB funds up to 100% of weatherization costs for homes where NorthWestern Energy is listed as the primary heating vendor and up to 50% of weatherization costs for homes where the NorthWestern Energy electric customer does not list NorthWestern as the primary heating vendor.

The 2018 Free Weatherization Program pooled unspent 2016 and 2017 electric USB funds, along with 2018 electric USB funds and 2018 natural gas funds for a total of $3,548,073. The HRCs performed low income weatherization work for 485 low income customers in 2018. An additional $408,260 of unspent 2018 Low Income electric funds has been committed to weatherization to be completed in 2019.

The Free Weatherization program includes a comprehensive energy audit, installation of air-sealing, hot water conservation, insulation measures and compact fluorescent light or LED bulbs, and energy related health and safety improvements such as heating equipment tune-ups, repairs and replacement. Customers whose homes are heated

primarily with electricity from NorthWestern Energy are considered for conversion to natural gas. Customers are provided with information to help them better manage their energy usage and to better understand their energy costs.

Customers served through the program provide comments back to NorthWestern Energy about their experiences through letters and customer response cards handed out by the HRCs.

- **"They were awesome explaining everything. I can feel the difference. My house stays warmer and I feel the heat more when it's cold."**

- **"The folks that worked in my home were all so good and very professional. I enjoyed working with them."**

- "**I will never forget the kindness & help you all gave me. Everyone was so wonderful to me. I thank you from the bottom of my heart!!!"**

- **"Thank you so much for making a positive change in our home & lives"**

- **"This was truly appreciated especially at a time when I did not have the means to weatherize my home and a new furnace."**

Energy Share

Energy Share of Montana offers assistance to those facing energy emergencies. It is intended to be a one-time, last resort safety net, used after all other resources have been exhausted. MPSC Order No. 7458 increased the minimum annual commitment of electric USB funds to Energy Share to $289,000. Separately, natural gas USB funds in the amount of $336,000 are also directed to Energy Share annually. An additional $114,143 of unspent 2018 Low Income electric funds have been committed to Energy Share for payment in 2019.

Local Conservation Activities-- $ 614,558

The mix of energy conservation and market transformation programs offered by NorthWestern Energy with USB funding has been more limited as some programs have been shifted to the electric supply portfolio as demand side management (DSM) acquisition. The primary focus of the USB-funded energy conservation and market transformation programs is to provide energy savings across customer sectors--residential, commercial, institutional, and small industrial facilities on NorthWestern Energy's system. Customers meeting Large Customer USB criteria are not eligible to participate in these USB funded programs.

Efficiency Plus (E+) Energy Audit Program

The E+ Audit for the Home is an on-site energy audit program for residential customers whose space and/or water heating fuels are delivered by NorthWestern Energy. It is a flagship of energy efficiency for NorthWestern Energy's non-low income customers. The E+ audit includes the installation of water-related energy efficiency measures that start saving right away. Customer education about where their energy dollar is going is supported through a blower door analysis, a natural gas appliance inspection for customers whose natural gas is delivered by NorthWestern Energy, and with specific suggestions for customers to better manage their homes or change behaviors to achieve greater energy-efficiency. Customers receive a report specific to their home and energy use habits. The report breaks out historical energy usage by end-use, provides recommendations on cost-effective weatherization measures, and offers tips on energyefficient practices and natural gas appliance maintenance. The pool of 2017 and 2018 electric USB funds, along with 2018 natural gas funds allowed for the completion of 2,021 on-site residential audits in 2018.

NorthWestern Energy *electric baseload-only customers (no space heat or water heat fuels delivered by NorthWestern Energy)* are offered a separate audit service. The E+ Energy Survey is a mail-out audit for baseload customers consisting of a survey mailed to residential customers with specific consumption profiles. Customers complete and return the survey; they receive a report similar to the on-site E+ Audit report. In addition to breaking out the historical energy usage by appliance end-use, the report includes customer-specific recommendations for appliance usage in the customer's home. General weatherization and water heating recommendations are provided. With the combination of the on-site audit, the Free Weatherization Program, and the E+ Energy Survey, almost every NorthWestern Energy residential customer has an energy efficiency assessment tool available for their home. More than 2,400 residential electric customers participated in the E+ Energy Survey program in 2018.

Customers are provided the opportunity to comment to NorthWestern Energy regarding the E+ Audit for the Home:

- **"This audit was very helpful! The auditors found a gas leak and made other suggestions. We have completed their to-do list and are so grateful!"**

- **"Absolutely Wonderful! I learned so much. They really helped me. Strongly recommend to others."**

- **"I just bought this house! So glad I made this appt! They were on time, very professional, knowledgeable, friendly and they gave me some great advice."**

- **"I've been receiving mailers for years - so glad I finally followed through. I started making changes the same day."**

The E+ Energy Appraisal Program for Businesses focuses on identifying electric conservation opportunities for commercial customers on NorthWestern Energy's electric distribution system with a primary emphasis on smaller, "main street" businesses. In addition to the obvious lighting efficiency opportunities, many small businesses benefit from a greater understanding of where their energy dollar is going within their operation and the significance maintenance plans can have on their energy use and bills. In 2018, approximately 105 commercial facilities were evaluated through this program offering with electric USB funding from 2017 and 2018.

Efficiency Plus (E+) Business Partners Program-New/Retrofit/Irrigation

Most of the NorthWestern Energy's E+ Business Partners Program activity is funded as DSM through electric supply rates. Irrigation projects and those electric non-Large commercial customers in Choice may qualify for the USB-funded portion of the program. Incentives are offered for energy conservation and load management projects in new and retrofit applications. Projects under this program frequently take more than a year to develop and implement.

In 2018, 12 irrigation efficiency improvement projects were funded and completed with 2018 USB funds. While such custom rebates have been reported in past years, there were no qualifying custom rebates for commercial electric Choice customers for nonlighting electric efficiency improvements in 2018.

Customers qualifying for Large Customer USBC are not eligible for this USB funded program.

Market Transformation – $399,090

Market Transformation is the process of bringing more energy efficient products, practices, and services into the marketplace with a goal of changing behaviors, practices, standards, and markets in such a way that the market, rather than an interventional program or activity, supports energy efficiency.

Commercial Lighting for Small Choice Customers

Consistent with historic practice, commercial electric Choice customers have been eligible for lighting electric efficiency improvements and 14 projects were funded in 2018.

ENERGY STAR® and New Homes

USB funds provide outreach for the ENERGY STAR homes program including builder and verifier training and the promotion of high energy efficiency in new home construction. Additionally, USB funds were used to provide training and develop educational information related to Montana's adoption of the 2012 Energy Code for builders, code officials, trade allies, and the general public.

Building Operator Certification Training

Training and education are important components in moving customers to more energy efficient products and practices that provide benefits to NorthWestern Energy's customers. Building Operator Certification classes held in 2018 specifically targeted public schools, government facilities, and non-profit hospitals. These activities help support other electric energy efficiency programs of NorthWestern Energy.

Regional Market Transformation

NorthWestern Energy has directed 2018 Market Transformation funds to regional collaborative and training efforts. Technical training targeting commercial and industrial customers and trade allies is included in these activities.

Renewable Resources, and Research and Development-- $870,889

Renewable energy development as a public purpose category was initiated with the Universal System Benefits programs in NorthWestern Energy's service territory in 1999. The Research and Development activities funded in 2018 were tied to renewable resources, so the two categories have been combined for this discussion. Costs for the separate categories are broken out in the appendices. Projects that maximize the partnering of funding, education, and that increase geographic representation on NorthWestern's electric system are encouraged.

When the USBC was established in 1999, there were few renewable generation installers in Montana. Installation costs of solar Photovoltaic (PV) projects were high and almost all net-metered systems received USB funding for at least a portion of the installation costs. Through the years, USBC has provided funding toward projects without net metering, most notably for some solar thermal systems and one biomass project and larger commercial, non-profit and government buildings. Residential solar PV projects represent the majority of the projects receiving USB funds over the years. A limited number of small scale wind projects have received funding. In the early years of USB funding, a number of schools received funds toward PV and/or small scale wind projects. At schools, the systems provide an educational opportunity for students to learn about the capabilities of renewable generation.

The initial cost to install small scale solar PV systems has been declining in recent years. As the installation costs have declined and the installer network has grown, the Renewable Energy custom incentives for PV systems on homes and businesses have been reduced and have now been eliminated. Currently, proposals are considered for incentives for small scale solar PV systems for non-profit and government/public buildings, such as libraries, non-profit community centers, and schools. Custom proposals are considered on a case-by-case basis depending upon geographic representation and other criteria and the availability of funds.

Fixed dollar per Watt incentives continue to be available to small scale wind projects on a case-by-case basis.

With USB funding a portion of the projects, 18 solar PV projects completed in 2018. The majority of these completed projects were funded with 2016 and 2017 funds. Projects completed in 2018 were installed on schools, public buildings, non-profit facilities, and a fire station.

Projects completed in 2018 with funds from previous years are noted in the Addendums to the 2015, 2016, and 2017 reports.

The following table summarizes renewable projects that have received USB funding since USB funding began in 1999.

USB Renewable Projects 1999-2018		
Facility Type	**#**	**KW**
Commercial Projects	68	639.57
Fire Stations	42	131.26
Irrigation Projects	6	103.52
Low Income	61	340.25
Non-Profit Projects	68	442.36
Private Residences	831	2653.96
Schools	99	683.11
Other Public Buildings	33	562.41
Biomass	1	750.00
Solar Thermal	19	NA
Biodiesel	2	15.00

NorthWestern Energy continues to consult with its USB Renewable Advisory Subcommittee regarding program modifications and allocations of Renewable Resources and Research and Development funds and works to maintain a mix of projects with diverse geographic distribution, and to a mix of government/public and non-profit electric customers.

NorthWestern Energy has instituted safety and experience qualification requirements for solar PV and small-scale wind installers. Since 2009, projects must be installed by a Qualified Installer that meets safety and experience requirements in order for projects to receive USB renewable resource funds. At the end of 2018, 41 firms met the solar PV installer qualification requirements and seven met the small-scale wind installer qualification requirements. These installers are listed on NorthWestern Energy's website. The Qualified Installer list is updated as installers are added or deleted based upon their meeting the Qualified Installer requirements.

USB funds are used in partnership with the Montana Renewable Energy Association (MREA) and the Occupational Safety and Health Administration (OSHA) to provide safety training to installers of small renewable generation systems. NorthWestern Energy

sponsored 76 training sessions throughout the state in 2018. These sessions covered a variety of topics including, OSHA electrical safety, Four Hazards Training, Fall Protection, NFPA 70E, utility worker and electrical inspector training. Additional training for installers, home inspectors and electrical inspectors has been committed to 2019. The Qualified Installers, as well as several program contractors, provide education and project development services.

Seminars, tours, workshops and exhibits for individuals interested in renewable energy technologies and sustainable building practices continue to be funded.

NorthWestern Energy initiated the E+ Green Power program in 2003. Through this program, customers may elect to purchase the environmental benefits associated with renewable energy generated in the Northwest and Wyoming. Consistent with historic practice, when revenues of the program are greater than expenses, funds are directed to the Renewable Resources category and when the program expenses exceed revenues, USB funds are used to support the program. In 2018, funds have been directed back to the renewable generation category. Generally, customer participation in the program is stable with a few customers enrolling or leaving each year. The majority of participating customers are homeowners, but a handful of commercial accounts purchase a substantial number of the E+ Green blocks of environmental benefits associated with renewable generation.

Conclusion

In every year since the inception of USB, NorthWestern Energy's activities have covered all public purpose categories—Low Income, Local Conservation, Market Transformation, Renewable Resources and Research and Development, *and*, the offerings have included all customers—low income, senior citizens, and other residential customers; main street businesses, schools and also government, office buildings, irrigation, and small industrial companies (with the exception of the Large Customers, who may self-direct USB funds).

Programs and funding activities continue to be coordinated by NorthWestern Energy staff with much of the implementation work being performed by others. The Free Weatherization Program is a cooperative effort between NorthWestern Energy, MDPHHS, and the local HRCs. The HRCs also qualify customers for the utility's bill discount, free weatherization and emergency energy assistance.

NorthWestern Energy collects the natural gas USBC from its customers and implements Low Income bill assistance, emergency energy assistance, free weatherization, and residential conservation activities. MPSC Order No. 6679e recognizes and allows for the pooling of electric and natural gas USB funds for residential on-site audits, Free Weatherization for low income customers, and emergency energy assistance through Energy Share of Montana. The natural gas USB activities are funded and implemented consistent with law and MPSC direction. Additional cost-effective energy efficiency, DSM programs for NorthWestern Energy customers are funded through electric and natural gas supply rates as part of NorthWestern Energy's supply portfolios.

Addendums for the years 2015, 2016 and 2017 Reports are included to provide an update of funded USB activities that were completed this past year.

Find out more about NorthWestern Energy USB programs and activities by visiting www.NorthWesternEnergy.com/Eplus.

For further information regarding this report, please contact:

Customer Care – DSM

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Appendices 1-4

Universal System
Benefits Activities
2018 Annual Report

Appendix 1
2018 Electric USBC Revenues

	USBC kWh (Load)	USBC Revenue By Class	% of USBC Revenue By Class
Residential			
Residential	2,536,631,945	$ 3,382,391	34%
General Service			
GS-1/GS-2 < 1000 kW	2,839,930,067	$ 3,245,985	32%
Irrigation	78,583,868	$ 89,181	1%
Lighting	60,247,308	$ 205,197	2%
Total Non-Large Customer	**5,515,393,188**	**$ 6,922,754**	**69%**
Large Customer			
GS-1/GS-2 > 1000 kW and Special Contracts	**3,488,638,916**	**$ 3,140,338**	**31%**
Total USBC	**9,004,032,104**	**$ 10,063,092**	**100%**

Note: The Residential class includes income-qualified customers receiving the 25% Low-Income discount from November 1st - April 30th and the 15% Low-Income discount from May 1st - October 31st. The discount is applied to the total bill, including the Universal System Benefits Charge.

NorthWestern Energy | Efficiency Plus

Appendix 2
2018 Electric USB Program Expenditures and Contractual Commitments

	Revenue Allocation		Spent in 2018	Contracted - Complete in 2019	Allocation & Expenses
	per Order 7458	Reallocation [a]			
Local Conservation [b]	**620,813**	**(6,255)**	322,667	291,891	**614,558**
E+ Residential Audit/Sm. Comm Audit			227,548	291,891	519,439
E+ Business Partners / Irrigation Projects			20,165	-	20,165
Promotion			46,185	-	46,185
Labor			29,014	-	29,014
Admin. Non-labor			74	-	74
Interest Income			(320)	-	(320)
Local Conservation Summary			322,667	291,891	614,558
Market Transformation [b]	**396,423**	**2,668**	389,090	10,000	**399,090**
E+ Commercial Lighting			117,717	-	117,717
Motor Management Training			-	-	-
Energy Star Homes			139,569	-	139,569
Building Operator Certification			42,198	10,000	52,198
Commercial Industrial Training & Conference			42,237	-	42,237
Promotion			21,331	-	21,331
Labor			17,950	-	17,950
Admin. Non-labor			8,292	-	8,292
Interest Income			(204)	-	(204)
Market Transformation Summary			389,090	10,000	399,090
Renewable Resources	**709,994**	**(2,504)**	20,825	686,665	**707,490**
Generation/Education			-	686,665	686,665
Green Power Product			(20,826)	-	(20,826)
Promotion			2,472	-	2,472
Labor			39,336	-	39,336
Admin. Non-labor			209	-	209
Interest Income			(365)	-	(365)
Renewable Resources Summary		-	20,825	686,665	707,490
Research & Development	**163,978**	**(578)**	13,109	150,290	**163,399**
R&D/ Infrastructure			-	150,290	150,290
Battery Storage			1,139	-	1,139
Promotion			3,869	-	3,869
Labor			7,922	-	7,922
Admin. Non-labor			264	-	264
Interest Income			(84)	-	(84)
Research & Development Summary			13,109	150,290	163,399
Low Income	**5,031,546**	**-**	4,509,143	522,403	**5,031,546**
Bill Assistance			2,451,697	-	2,451,697
Free Weatherization			1,708,524	408,260	2,116,784
Elec Wx Incentives			16,300	-	16,300
Fuel Switch Analyses			2,900	-	2,900
Energy Share			289,000	114,143	403,143
Promotion			9,347	-	9,347
Labor			33,149	-	33,149
Admin. Non-labor			816	-	816
Interest Income			(2,590)	-	(2,590)
Low Income Summary			4,509,143	522,403	5,031,546
Large Customer	**3,140,338**	**6,670**	2,087,999	1,059,009	**3,147,008**
Self-Directed Energy Reduction			2,026,029	1,059,009	3,085,038
Self-Directed to Low Income			42,113	-	42,113
Labor			21,474	-	21,474
Interest Income			(1,616)	-	(1,616)
Large Customer Summary		-	2,087,999	1,059,009	3,147,008
Unallocated	**-**	**-**	**-**	**-**	**-**
Totals	**10,063,092**	**-**	**7,342,834**	**2,720,258**	**10,063,092**
2018 USB Revenues less Expenses and Contractual Commitments					**-**

[a] The 2018 Large Customer Admin costs of $21,474 less the interest income of $1,616 exceeded the amount of unclaimed 2018 Large Customer funds of $13,188. NWE has reallocated Local Conservation, Market Transformaton, Renewable Resources and Research & Development funds to cover the deficit.
[b] Allocations have been adjusted between Local Conservation and Market Transformation consistent with past practice.

NorthWestern Energy | Efficiency Plus

Appendix 3
2018 Electric USB Funding Summary
Savings Estimates and Participation Summary

2018 USB FUNDING AND EXPENDITURE SUMMARY

USB Category	Allocation of 2018 funds based on Order 7458	Percentage by Category	Reallocation of 2018 funds	Percentage by Category	Allocation w/Lrg Cust funds self-directed to LI [a]	Percentage by Category	Total Electric USB Funds Spent in 2018	2018 Electric USB Funds Contracted to Spend in 2019
Local Conservation	$ 620,813	6%	$ 614,558	6%	$ 614,558	6%	$ 322,667	$ 291,891
Market Transformation	$ 396,423	4%	$ 399,090	4%	$ 399,090	4%	$ 389,090	$ 10,000
Renewables	$ 709,994	7%	$ 707,490	7%	$ 707,490	7%	$ 20,825	$ 686,665
Research & Development	$ 163,978	2%	$ 163,399	2%	$ 163,399	2%	$ 13,109	$ 150,290
Low Income	$ 5,031,546	50%	$ 5,031,546	50%	$ 5,073,659	50%	$ 4,509,143	$ 522,403
Large Customer	$ 3,140,338	31%	$ 3,147,008	31%	$ 3,104,896	31%	$ 2,087,999	$ 1,059,009
	$ 10,063,092	**100%**	**$ 10,063,092**	**100%**	**$ 10,063,092**	**100%**	**$ 7,342,834**	**$ 2,720,257**

2018 LOW INCOME FUNDING SUMMARY

2018 Low Income Expenditures	
Bill Assistance	$ 2,451,697
Free Weatherization	$ 1,708,524
Elec Wx Incentives	$ 16,300
Fuel Switch Analysis	$ 2,900
Energy Share	$ 289,000
*Promotion	$ 9,347
*Labor	$ 33,149
*Admin. Non-labor	$ 816
USB Interest Income	$ (2,590)
Self-Directed Large Customer	$ 42,113
Total:	**$ 4,551,256**
Low Income share of 2018 Electric USB revenues :	**45.2%**

2018 ENERGY SAVINGS & RENEWABLE RESOURCES ESTIMATES

Savings & Resources acquired in 2018 w/ 2018 $

	aMW	MWH	MW
Local Conservation	0.103	900	0.168
Market Transformation	0.014	123	-
Renewables	-	-	-
Research & Development	NA	NA	NA
Low Income	0.028	242	0.058
Large Customer [b]	NA	NA	NA
	0.144	**1,266**	**0.226**

Projected Savings & Resources to acquire in 2019 w/ 2018 $ (c)

	aMW	MWH	MW
Local Conservation	0.015	135	0.026
Market Transformation	0.014	123	-
Renewables	0.088	773	0.588
Research & Development	NA	NA	NA
Low Income	0.004	32	0.008
Large Customer [b]	NA	NA	NA
	0.121	**1,063**	**0.622**
Total Savings & Resources	**0.266**	**2,329**	**0.848**

2018 ELECTRIC USB PARTICIPATION SUMMARY

Electric USB Activity by Category	Quantity	Units
Conservation		
Residential Onsite Audits	1,707	homes
Residential Mail out Audits	2,063	homes
Business Appraisals	89	businesses
Business Partners / Irrigation	12	projects
Business Partners / Small Choice	-	projects
Market Transformation		
Commercial Lighting	14	projects
NWE Building Operator Certification	23	people
Motor Training	-	attendees
Market Transformation Training	42	attendees
Renewables		
Generation / Education	-	projects
Research & Development		
Renewable Energy Seminars/Workshops	-	attendees
Low-Income		
Bill Assistance	11,576	households
Free Weatherization	423	homes
Energy Share	1,569	households

[a] Large Customers may self-direct their USB dollars to energy saving and renewable activities in their own facilities, or to Low Income activities. In 2018 with 2018 funds, Large Customers self-directed a total of $42,113 to Low-Income.

[b] Large Customer energy savings estimates are reported by individual large customers and are not available in this report.

[c] Projected Savings & Resources are based on contracts that were in place at the end of 2018. Actual results will be reported in 2019.

NorthWestern Energy | Efficiency Plus

Appendix 4
Summary of Electric USB
1999 - 2018

Annual Electric USB Allocation

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

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

Current Allocation per D2015.7.58, Order 7458 *(a)*

	% by Category	$ by Category
Local Conservation	6%	620,813
Market Transformation	4%	396,423
Renewables	7%	709,994
Research & Development	2%	163,978
Low-Income	50%	5,031,546
Large Customers	31%	3,140,338
	100%	10,063,092

Historic Allocation of Electric USB Funds *(b)*

					USB Categories					
Year	Total Electric USB Funds	Large Customers	Low Income *(c)*	Supplemental Low Income *(d)*	Total Low Income	Conservation	Market Transformation	Renewables	Research Development	Irrigation
1999	**7,789,477**	2,715,626	1,666,669	-	1,666,669	1,622,585	721,031	654,449	409,117	-
2000	**8,631,017**	2,942,611	1,287,513	525,000	1,812,513	1,461,945	1,140,529	1,070,900	202,519	-
2001	**8,200,995**	2,469,907	1,294,533	500,000	1,794,533	1,660,401	852,251	1,113,545	64,328	246,030
2002	**8,237,435**	2,437,538	1,863,220	-	1,863,220	1,439,131	950,714	864,334	188,252	494,246
2003	**8,522,939**	2,543,165	1,986,700	725,604	2,712,304	1,142,524	1,077,120	916,703	114,849	16,274
2004	**8,886,755**	2,965,994	2,247,698	-	2,247,698	1,573,264	1,094,692	860,226	144,881	-
2005	**9,018,197**	3,046,997	2,387,502	586,394	2,973,896	1,446,761	586,332	838,336	125,876	-
2006	**9,329,518**	3,033,322	3,858,505	-	3,858,505	1,487,658	26,908	812,829	110,296	-
2007	**9,410,198**	3,063,311	4,170,445	-	4,170,445	1,315,910	77,023	673,328	110,179	-
2008	**9,625,630**	3,145,276	3,408,329	-	3,408,329	1,866,896	136,441	974,290	94,396	-
2009	**9,361,818**	2,897,568	3,146,326	-	3,146,326	1,340,555	444,078	1,362,237	171,054	-
2010	**9,191,653**	2,740,669	3,139,869	-	3,139,869	1,579,218	201,753	1,193,053	337,091	-
2011	**9,367,205**	2,748,767	3,221,373	-	3,221,373	1,483,095	344,107	1,243,669	326,195	-
2012	**9,372,359**	2,769,720	3,440,408	-	3,440,408	1,406,566	302,922	1,112,906	339,837	-
2013	**9,485,951**	2,840,538	3,879,499	-	3,879,499	1,238,110	243,855	979,534	304,414	-
2014	**9,543,001**	2,890,506	3,530,178	-	3,530,178	1,518,042	176,454	1,015,155	412,666	-
2015	**9,531,041**	2,950,657	4,765,520	-	4,765,520	671,655	304,518	729,125	109,566	-
2016	**9,447,558**	2,893,024	4,723,779	-	4,723,779	717,796	266,924	574,269	271,766	-
2017	**9,838,601**	3,009,528	4,919,301	-	4,919,301	758,514	268,707	743,991	138,559	
2018	**10,063,092**	3,147,008	5,031,546	-	5,031,546	614,558	399,090	707,490	163,399	-
	182,854,440	57,251,732	63,968,912	2,336,999	66,305,911	26,345,184	9,615,448	18,440,369	4,139,241	756,549

Allocation as % of Revenues by Category	**100%**	**31.3%**		**36.3%**	**14.4%**	**5.3%**	**10.1%**	**2.3%**	**0.4%**

Allocation as % of Revenues, excluding Large Customer Revenues	**100%**		**52.8%**	**21.0%**	**7.7%**	**14.7%**	**3.3%**	**0.6%**

(a) SB 390 required that utilities collect 2.4% of their 1995 electric revenues to fund approved USB activities, and direct 17% of the total to the low income category. The allocation set forth by MPSC in Order 5986g increased NorthWestern Energy's low-income requirement to 21% of total revenues. In December 2008 MPSC issued Order 6679e which increased the allocations to Low Income and adjusted allocations to the other non-Large Customer Categories. MPSC Order 7458 increased to 50% the allocation to Low Income and proportionally reduced non-Large Customer categories. These Orders did not affect the allocation for Large Customers, they effectively reduced the amount of USB funds available for other non-Low Income USB categories.

(b) The historic allocation table illustrates the expenditure or direction of electric USB by category from 1999 through 2018.

(c) This column summarizes all funds allocated to low-income activities by NorthWestern Energy, except those noted in (d). In addition to funds allocated by NorthWestern Energy, Large Customers have self-directed $3,017,053 to low-income activities since 1999.

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

Addendum
2017 Report

Universal System Benefits Activities
2018 Annual Report

ADDENDUM
to the
2017 Report

The 2017 NorthWestern Energy USBC revenues totaled $9,838,601. Of this, $7,416,004 was spent on projects completed in 2017, and $2,028,750 was spent on projects completed in 2018, leaving a balance of $393,848 for projects to complete in 2019.

The projects associated with $2,028,750 of 2017 USB funds, including $780,474 of Large Customer self-directed activities, $207,157 of Local Conservation residential audits, $10,000 of Market Transformation training sessions, $436,367 of combined Renewable generation projects and R & D, and $444,796 of Free Weatherization projects and $149,956 directed to Energy Share were completed in 2018.

NorthWestern Energy requested and was granted extensions from the Department of Revenue as allowed per ARM 49.29.111 for renewable generation and research and development projects totaling $393,848 for completion in 2019.

Updated results are provided in the 2017 Addendum in Appendices 2 and 3 (p. 2017-2 and p. 2017-3).

NorthWestern Energy | Efficiency Plus

Appendix 2
2017 Electric USB Program Expenditures and Contractual Commitments

	Revenue Allocation		Spent in 2017	Spent in 2018	Contracted - Complete in 2019	Allocation & Expenses
	per Order 7458	Reallocation [a]				
Local Conservation	**626,907**	**131,607**	551,357	207,157	-	**758,514**
E+ Residential Audit/Sm. Comm Audit			422,986	207,157	-	630,143
E+ Business Partners / Irrigation Projects			20,167	-	-	20,167
Promotion			79,129	-	-	79,129
Labor			28,031	-	-	28,031
Admin. Non-labor			1,138	-	-	1,138
Interest Income			(94)	-	-	(94)
Local Conservation Summary			551,357	207,157	-	758,514
Market Transformation	**400,314**	**(131,607)**	258,707	10,000	-	**268,707**
E+ Commercial Lighting			-	-	-	-
Motor Management Training			17,067	-	-	17,067
Energy Star Homes			123,307	-	-	123,307
Building Operator Certification			37,359	10,000	-	47,359
Commercial Industrial Training & Conference			40,455	-	-	40,455
Promotion			14,683	-	-	14,683
Labor			18,475	-	-	18,475
Admin. Non-labor			7,421	-	-	7,421
Interest Income			(60)	-	-	(60)
Market Transformation Summary			258,707	10,000	-	268,707
Renewable Resources	**716,963**	**27,027**	35,417	397,497	311,077	**743,991**
Generation/Education			-	397,497	311,077	708,574
Green Power Product			(12,728)	-	-	(12,728)
Promotion			2,341	-	-	2,341
Labor			45,302	-	-	45,302
Admin. Non-labor			609	-	-	609
Interest Income			(107)	-	-	(107)
Renewable Resources Summary		-	35,417	397,497	311,077	743,991
Research & Development	**165,587**	**(27,027)**	16,919	38,870	82,771	**138,559**
R&D/ Infrastructure			1,618	38,870	82,771	123,259
Battery Storage			1,034	-	-	1,034
Promotion			3,375	-	-	3,375
Labor			10,671	-	-	10,671
Admin. Non-labor			245	-	-	245
Interest Income			(25)	-	-	(25)
Research & Development Summary			16,919	38,870	82,771	138,559
Low Income	**4,919,301**	**0**	4,324,549	594,752	-	**4,919,301**
Bill Assistance			2,415,021	-	-	2,415,021
Free Weatherization			1,555,100	444,796	-	1,999,896
Elec Wx Incentives			19,047	-	-	19,047
Fuel Switch Analyses			3,500	-	-	3,500
Energy Share			289,000	149,956	-	438,956
Promotion			9,702	-	-	9,702
Labor			30,836	-	-	30,836
Admin. Non-labor			3,080	-	-	3,080
Interest Income			(737)	-	-	(737)
Low Income Summary			4,324,549	594,752	-	4,919,302
Large Customer	**3,009,528**	**(0)**	2,229,054	780,474	-	**3,009,528**
Self-Directed Energy Reduction			2,177,033	635,971	-	2,813,004
Self-Directed to Low Income			50,594	144,503	-	195,096
Labor			13,763	-		13,763
Interest Income			(451)	-	-	(451)
NWE Allocated from 2016 to cover LC Expense [b]			(11,884)	-	-	(11,884)
Large Customer Summary			2,229,054	780,474	-	3,009,528
Unallocated	**-**	**-**	**-**	**-**	**-**	**-**
Totals	**9,838,601**	**(0)**	**7,416,004**	**2,028,750**	**393,848**	**9,838,601**
2017 USB Revenues less Expenses and Contractual Commitments						**-**

(a) Allocations have been adjusted between Market Transformation and Local Conservation consistent with past practice.
(b) The 2017 Large Customer Admin Costs of $13,763 less the interest income of $451 exceeded the amount of unclaimed 2017 Large Customer funds of $1,428. NWE has committed unclaimed 2016 Large Customer funds in the amount of $13,312 to cover the deficit.

PROJECTS COMPLETED IN 2018 WITH 2017 FUNDS

Energy Savings & Renewable Resource Estimates

	Projects Completed in 2018 with 2017 USB $		
USB Category	**aMW**	**MWH**	**MW**
Local Conservation	0.015	128	0.027
Market Transformation	0.014	123	-
Renewables	0.040	350	0.267
Research & Development	NA	NA	NA
Low Income	0.004	36	0.009
Large Customer	NA	NA	NA
	0.073	**638**	**0.302**

Program Participation Summary

USB Category / Program Segment	Quantity	Units
Conservation		
Residential Onsite Audits	314	homes
Residential Mail out Audits	379	homes
Business Appraisals	16	businesses
Business Partners/Irrigation	-	projects
Business Partners/Small Choice	-	projects
Market Transformation		
Commercial Lighting	-	projects
NWE Building Operator Certification	5	people
Motor Training	-	people
Market Transformation Training	-	people
Renewables		
Generation / Education	10	projects
Research & Development		
Renewable Energy Seminars/Workshops	345	attendees
Low-Income		
Bill Assistance	-	households
Free Weatherization	62	homes
Energy Share	-	households

TOTAL OF PROJECTS COMPLETED WITH 2017 FUNDS

Energy Savings & Renewable Resource Estimates

	Total Projects Completed with 2017 USB $		
USB Category	**aMW**	**MWH**	**MW**
Local Conservation	0.129	1,128	0.196
Market Transformation	0.066	581	-
Renewables	0.040	350	0.267
Research & Development	NA	NA	NA
Low Income	0.042	371	0.035
Large Customer	NA	NA	NA
	0.277	**2,431**	**0.497**

Program Participation Summary

USB Category / Program Segment	Quantity	Units
Conservation		
Residential Onsite Audits	2,243	homes
Residential Mail out Audits	2,915	homes
Business Appraisals	128	businesses
Business Partners/Irrigation	7	projects
Business Partners/Small Choice	-	projects
Market Transformation		
Commercial Lighting	-	projects
NWE Building Operator Certification	22	people
Motor Training	104	people
Market Transformation Training	35	people
Renewables		
Generation / Education	10	projects
Research & Development		
Renewable Energy Seminars/Workshops	345	attendees
Low-Income		
Bill Assistance	11,337	households
Free Weatherization	470	homes
Energy Share	1,594	households

Addendum
2016 Report

Addendum **2016 Report**

Universal System Benefits Activities
2018 Annual Report

ADDENDUM
to the
2016 Report

The 2016 NorthWestern Energy USBC revenues totaled $9,447,558. Of this, $7,129,086 was spent on projects completed in 2016, and $1,956,385 was spent on projects completed in 2017, leaving a balance of $362,087 for projects to complete in 2018.

As reported in the 2017 report, unspent 2016 Large Customer funds identified in 2017 were reallocated to Low Income activities with $751 directed to Energy Share and $1,753 directed to Free Weatherization to be completed in 2018.

Renewable generation and Research and Development projects associated with $285,091 were completed in 2018.

NorthWestern Energy requested and was granted extensions from the Department of Revenue as allowed per ARM 49.29.111 for renewable generation and research and development projects totaling $74,493 for completion in 2019.

Updated results are provided in the 2016 Addendum in Appendices 2 and 3 (p. 2016-2 and p. 2016-3).

NorthWestern Energy | Efficiency Plus

Appendix 2
2016 Electric USB Program Expenditures and Contractual Commitments

	Revenue Allocation		Spent in 2016	Spent in 2017	Spent in 2018	Contracted - Complete in 2019	Allocation & Expenses
	per Order 7458	Reallocation [a]					
Local Conservation	**600,969**	**116,827**	561,247	156,549	-	-	**717,796**
E+ Residential Audit/Sm. Comm Audit			361,703	156,549	-	-	518,252
E+ Business Partners / Irrigation Projects			83,945	-	-	-	83,945
Promotion			83,195	-	-	-	83,195
Labor			32,193	-	-	-	32,193
Admin. Non-labor			283	-	-	-	283
Interest Income			(72)	-	-	-	(72)
Local Conservation Summary			561,247	156,549	-	-	717,796
Market Transformation	**383,751**	**(116,827)**	256,924	10,000	-	-	**266,924**
E+ Commercial Lighting			-	-	-	-	-
Motor Management Training			-	-	-	-	-
Energy Star Homes			137,520	-	-	-	137,520
Building Operator Certification			33,272	10,000	-	-	43,272
Commercial Industrial Training & Conference			39,060	-	-	-	39,060
Promotion			24,190	-	-	-	24,190
Labor			19,983	-	-	-	19,983
Admin. Non-labor			2,944	-	-	-	2,944
Interest Income			(46)	-	-	-	(46)
Market Transformation Summary			256,924	10,000	-	-	266,924
Renewable Resources	**574,269**	**0**	45,928	284,575	190,582	53,184	**574,269**
Generation/Education			-	284,575	190,582	53,184	528,341
Green Power Product			(12,683)	-	-	-	(12,683)
Promotion			1,969	-	-	-	1,969
Labor			55,857	-	-	-	55,857
Admin. Non-labor			854	-	-	-	854
Interest Income			(69)	-	-	-	(69)
Renewable Resources Summary		-	45,928	284,575	190,582	53,184	574,269
Research & Development	**271,766**	**0**	49,335	106,614	94,509	21,309	**271,766**
R&D/ Infrastructure			29,200	106,614	94,509	21,309	251,632
Battery Storage			1,131	-	-	-	1,131
Promotion			9,665	-	-	-	9,665
Labor			9,157	-	-	-	9,157
Admin. Non-labor			214	-	-	-	214
Interest Income			(33)	-	-	-	(33)
Research & Development Summary			49,335	106,614	94,509	21,309	271,766
Low Income	**4,723,779**	**0**	4,132,324	591,454	-	-	**4,723,779**
Bill Assistance			2,243,563	-	-	-	2,243,563
Free Weatherization			1,526,000	434,059	-	-	1,960,059
Elec Wx Incentives			27,971	-	-	-	27,971
Fuel Switch Analyses			3,600	-	-	-	3,600
Energy Share			289,000	157,395	-	-	446,395
Promotion			8,738	-	-	-	8,738
Labor			33,153	-	-	-	33,153
Admin. Non-labor			864	-	-	-	864
Interest Income			(566)	-	-	-	(566)
Low Income Summary			4,132,324	591,454	-	-	4,723,779
Large Customer	**2,893,024**	**0**	2,083,328	807,193	2,504	-	**2,893,024**
Self-Directed Energy Reduction			2,012,507	555,353	-	-	2,567,860
Self-Directed to Low Income			67,000	104,247	-	-	171,247
Self-Directed to Renewable Energy				135,709	-		135,709
Labor			12,931	-	-	-	12,931
Interest Income			(346)	-	-	-	(346)
NWE Reallocated to Free Weatherization			-	-	1,753	-	1,753
NWE Reallocated to Energy Share			-	-	751	-	751
NWE Allocated from 2015 to cover LC Expense [b]			(8,764)	-	-	-	(8,764)
NWE Allocated from 2016 to cover LC Expense [b]			-	11,884	-	-	11,884
Large Customer Summary			2,083,328	807,193	2,504	-	2,893,025
Unallocated	**-**	**-**	**-**	**-**	**-**	**-**	**-**
Totals	**9,447,558**	**0**	**7,129,086**	**1,956,385**	**287,595**	**74,493**	**9,447,558**
2016 USB Revenues less Expenses and Contractual Commitments							**-**

(a) Allocations have been adjusted between Market Transformation and Local Conservation consistent with past practice.
(b) The 2016 Large Customer Admin Costs of $12,931 less the interest income of $346 exceeded the amount of unclaimed 2016 Large Customer funds of $3,821. NWE has committed unclaimed 2015 Large Customer funds in the amount of $8,764 to cover the deficit.

PROJECTS COMPLETED IN 2018 WITH 2016 FUNDS

Energy Savings & Renewable Resource Estimates

	Projects Completed in 2018 with 2016 USB $		
USB Category	**aMW**	**MWH**	**MW**
Local Conservation	-	-	-
Market Transformation	-	-	-
Renewables	0.013	110	0.084
Research & Development	NA	NA	NA
Low Income	0.000	0	0.000
Large Customer	NA	NA	NA
	0.013	**110**	**0.084**

Program Participation Summary

USB Category / Program Segment	Quantity	Units
Conservation		
Residential Onsite Audits	-	homes
Residential Mail out Audits	-	homes
Business Appraisals	-	businesses
Business Partners/Irrigation	-	projects
Business Partners/Small Choice	-	projects
Market Transformation		
Commercial Lighting	-	projects
NWE Building Operator Certification	-	people
Motor Training	-	people
Renewables		
Generation / Education	6	projects
Research & Development		
Renewable Energy Seminars/Workshops	588	attendees
Low-Income		
Bill Assistance	-	households
Free Weatherization	0	homes
Energy Share	-	households

TOTAL OF PROJECTS COMPLETED WITH 2016 FUNDS

Energy Savings & Renewable Resource Estimates

	Total Projects Completed with 2016 USB $		
USB Category	**aMW**	**MWH**	**MW**
Local Conservation	0.154	1,347	0.317
Market Transformation	0.088	774	-
Renewables	0.033	285	0.217
Research & Development	NA	NA	NA
Low Income	0.028	248	0.019
Large Customer	NA	NA	NA
	0.303	**2,654**	**0.553**

Program Participation Summary

USB Category / Program Segment	Quantity	Units
Conservation		
Residential Onsite Audits	2,104	homes
Residential Mail out Audits	2,952	homes
Business Appraisals	125	businesses
Business Partners/Irrigation	18	projects
Business Partners/Small Choice	-	projects
Market Transformation		
Commercial Lighting	-	projects
NWE Building Operator Certification	26	people
Motor Training	-	people
Market Transformation Training	38	people
Renewables		
Generation / Education	25	projects
Research & Development		
Renewable Energy Seminars/Workshops	1,978	attendees
Low-Income		
Bill Assistance	11,220	households
Free Weatherization	436	homes
Energy Share	1,612	households

Addendum
2015 Report

Universal System Benefits Activities
2018 Annual Report

ADDENDUM
to the
2015 Report

The 2015 NorthWestern Energy USBC revenues totaled $9,531,040. Of this, $5,980,704 was spent on projects completed in 2015, and $3,173,729 was spent on projects completed in 2016, and $309,708 was completed in 2017, leaving a balance of $66,899 to complete in 2018.

NorthWestern Energy requested and was granted extensions from the Department of Revenue as allowed per ARM 49.29.111 for renewable generation and research and development projects totaling $309,708 for completion in 2018.

Renewable generation projects associated with $66,899 were completed in 2018.

Updated results are provided in the 2015 Addendum in Appendices 2 and 3 (p. 2015-2 and p. 2015-3).

NorthWestern Energy | Efficiency Plus

Appendix 2
2015 Electric USB Program Expenditures and Contractual Commitments

	Revenue Allocation		Spent in 2015	Spent in 2016	Spent in 2017	Spent in 2018	Allocation & Expenses
	per Order 7458	Reallocation [a]					
Local Conservation	**595,752**	**75,903**	425,692	245,963	-	-	**671,655**
E+ Residential Audit/Sm. Comm Audit			218,793	245,963	-	-	464,756
E+ Business Partners / Irrigation Projects			80,660	-	-	-	80,660
Promotion			91,923	-	-	-	91,923
Labor			34,141	-	-	-	34,141
Admin. Non-labor			369	-	-	-	369
Interest Income			(194)	-	-	-	(194)
Local Conservation Summary			425,692	245,963	-	-	671,655
Market Transformation	**380,420**	**(75,903)**	304,518	-	-	-	**304,518**
E+ Commercial Lighting			18,813	-	-	-	18,813
Motor Management Training			13,122	-	-	-	13,122
Energy Star Homes			131,478	-	-	-	131,478
Building Operator Certification			55,306	-	-	-	55,306
Commercial Industrial Training & Conference			44,101	-	-	-	44,101
Promotion			16,541	-	-	-	16,541
Labor			19,472	-	-	-	19,472
Admin. Non-labor			5,809	-	-	-	5,809
Interest Income			(124)	-	-	-	(124)
Market Transformation Summary			304,518	-	-	-	304,518
Renewable Resources	**681,333**	**47,793**	41,805	335,893	284,528	66,899	**729,125**
Generation/Education			1,000	335,893	284,528	66,899	688,320
Green Power Product			(19,490)	-	-	-	(19,490)
Promotion			5,730	-	-	-	5,730
Labor			53,102	-	-	-	53,102
Admin. Non-labor			1,685	-	-	-	1,685
Interest Income			(222)	-	-	-	(222)
Renewable Resources Summary		-	41,805	335,893	284,528	66,899	729,125
Research & Development	**157,358**	**(47,793)**	73,210	14,811	21,545	-	**109,566**
R&D/ Infrastructure			56,490	14,811	21,545	-	92,846
Battery Storage			1,708	-	-	-	1,708
Energy Corps			0	-	-	-	0
Promotion			5,869	-	-	-	5,869
Labor			9,057	-	-	-	9,057
Admin. Non-labor			137	-	-	-	137
Interest Income			(51)	-	-	-	(51)
Research & Development Summary			73,210	14,811	21,545	-	109,566
Low Income	**4,765,520**	**0**	3,114,827	1,650,693	-	-	**4,765,520**
Bill Assistance			2,340,963	-	-	-	2,340,963
Free Weatherization			418,950	1,469,844	-	-	1,888,794
Elec Wx Incentives			17,465	-	-	-	17,465
Fuel Switch Analyses			2,500	-	-	-	2,500
Energy Share			289,000	180,849	-	-	469,849
Promotion			9,789	-	-	-	9,789
Labor			35,727	-	-	-	35,727
Admin. Non-labor			1,983	-	-	-	1,983
Interest Income			(1,551)	-	-	-	(1,551)
Low Income Summary			3,114,827	1,650,693	-	-	4,765,520
Large Customer	**2,950,657**	**0**	2,020,653	926,368	3,635	-	**2,950,657**
Self-Directed Energy Reduction			1,998,831	880,819	-	-	2,879,650
Self-Directed to Low Income			20,000	36,785	-	-	56,785
Labor			14,054	-	-	-	14,054
Interest Income			(960)	-	-	-	(960)
NWE Reallocate to Energy Share			-	-	1,090	-	1,090
NWE Reallocate to Free Weatherization			-	-	2,545	-	2,545
NWE Allocated from 2014 to cover LC Expense [b]			(11,272)	-	-	-	(11,272)
NWE Allocated from 2015 to cover LC Expense [b]			-	8,764	-	-	8,764
Large Customer Summary			2,020,653	926,368	3,635	-	2,950,656
Unallocated	**-**	**-**	**-**	**-**			**-**
Totals	**9,531,040**	**0**	**5,980,704**	**3,173,729**	**309,708**	**66,899**	**9,531,040**
2015 USB Revenues less Expenses and Contractual Commitments							**-**

(a) Allocations have been adjusted between Market Transformation and Local Conservation; and, between Research and Development and Renewable Generation consistent with past practice.

(b) The 2015 Large Customer Admin Costs of $14,054 less the interest income of $960 exceeded the amount of unclaimed 2015 Large Customer funds of $1,822. NWE has committed unclaimed 2014 Large Customer funds in the amount of $11,272 to cover the deficit.

PROJECTS COMPLETED IN 2018 WITH 2015 FUNDS

Energy Savings & Renewable Resource Estimates

	Projects Completed in 2018 with 2015 USB $		
USB Category	**aMW**	**MWH**	**MW**
Local Conservation	-	-	-
Market Transformation	-	-	-
Renewables	0.004	37	0.028
Research & Development	NA	NA	NA
Low Income	-	-	-
Large Customer	NA	NA	NA
	0.004	**37**	**0.028**

Program Participation Summary

USB Category / Program Segment	Quantity	Units
Conservation		
Residential Onsite Audits	-	homes
Residential Mail out Audits	-	homes
Business Appraisals	-	businesses
Business Partners/Irrigation	-	projects
Business Partners/Small Choice	-	projects
Market Transformation		
Commercial Lighting	-	projects
NWE Building Operator Certification	-	people
Motor Training	-	people
Renewables		
Generation / Education	2	projects
Research & Development		
Renewable Energy Seminars/Workshops	-	attendees
Low-Income		
Bill Assistance	-	households
Free Weatherization	-	homes
Energy Share	-	households

TOTAL OF PROJECTS COMPLETED WITH 2015 FUNDS

Energy Savings & Renewable Resource Estimates

	Total Projects Completed with 2015 USB $		
USB Category	**aMW**	**MWH**	**MW**
Local Conservation	0.155	1,355	0.236
Market Transformation	0.337	2,953	-
Renewables	0.043	376	0.287
Research & Development	NA	NA	NA
Low Income	0.037	325	0.077
Large Customer	NA	NA	NA
	0.572	**5,009**	**0.600**

Program Participation Summary

USB Category / Program Segment	Quantity	Units
Conservation		
Residential Onsite Audits	2,094	homes
Residential Mail out Audits	2,112	homes
Business Appraisals	149	businesses
Business Partners/Irrigation	21	projects
Business Partners/Small Choice	-	projects
Market Transformation		
Commercial Lighting	3	projects
NWE Building Operator Certification	35	people
Motor Training	55	people
Market Transformation Training	48	people
Renewables		
Generation / Education	16	projects
Research & Development		
Renewable Energy Seminars/Workshops	1,348	attendees
Low-Income		
Bill Assistance	11,629	households
Free Weatherization	501	homes
Energy Share	1,322	households

MONTANA-DAKOTA
UTILITIES CO.
A Division of MDU Resources Group, Inc.
400 North Fourth Street
Bismarck, ND 58501

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: 2/5/19

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 74102

PHONE NUMBER: 918.595.1574

FAX NUMBER: n/a

E-MAIL ADDRESS: jennifer.koch@oneok.com

AMOUNT OF CREDIT REQUESTED: 14,407.20

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 tranformer installed in 1940's from overhead to pad mounted. Changed 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:

Pasta Montana, L.L.C.
One Pasta Place
Great Falls, MT 59401
(406) 761-1516
Fax: (406) 761-1403

Ms. Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805

02/28/2019

Re: Large Customer Universal System Benefits Program (USBP) Annual Summary Report for Pasta Montana, LLC.

Ms. Hensley,

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 2018 year summary report is from:
Pasta Montana LLC, One Pasta Place, Great Falls, MT 59404

A copy of our USBC Progress Report for 2018 from NorthWestern Energy is attached for your reference. In 2018, Pasta Montana LLC had carryover credits of $541.46 from 2017 and received new credits for $6,508.39. We had 2017 Carryover claims for $6,459.41 for installation of variable speed fans on our production line 3. Pasta Montana has a USBC Credit Balance of $590.44.

Attached are several supporting documents outlining our 2018 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 are strategically replacing older T8 lighting in our warehouse and production areas with more efficient LED lights. The lighting project is ongoing, so we requested to reserve our remaining 2018 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 2018.

Sincerely,

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
FAX: (406) 497-4008

DATE:	11/28/2018
NAME OF BUSINESS:	Pasta Montana, LLC
CITY/TOWN LOCATION:	Great Falls
CONTACT PERSON:	Dan Bateman
MAILING ADDDRESS:	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.)

Reserve all remaining 2018 USB credits at year-end for use in 2019.

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 Bater

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

PASTA MONTANA

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$671,369.33
Reservations Made YTD:	$1,000.00		
2017 Carryover Payment Request:	$6,459.41	Total Payment Requests:	$6,459.41
Payment Requests Made YTD:	$0.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$541.46	Total USBC Credit:	$7,049.85
USBC Credit YTD:	$6,508.39	Payments Issued YTD:	$6,459.41
Average Monthly Credit Earned:	$542.37	USBC Credit Balance:	$590.44
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$2,123.74
07/11/2018	$1,425.94
10/03/2018	$1,840.74
12/10/2018	$1,068.99

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100630	1634	DA06183419	KWH >	561,137	601,730	595,217	583,113	518,110	483,150	637,528	744,855	662,883	562,253	661,576	619,977	7,231,529
			KW >	1,290	1,082	1,244	1,264	1,115	1,134	1,199	1,464	1,322	1,128	1,140	1,257	1,220
			Elec Revenue >	$53,867.75	$55,133.35	$56,182.22	$55,442.69	$49,123.16	$46,524.34	$57,971.25	$67,808.90	$60,851.20	$51,717.52	$59,384.91	$57,362.04	$671,369.33
			Total KWH	561,137	601,730	595,217	583,113	518,110	483,150	637,528	744,855	662,883	562,253	661,576	619,977	7,231,529
			Combined Average KW	1,290	1,082	1,244	1,264	1,115	1,134	1,199	1,464	1,322	1,128	1,140	1,257	1,220
			USBC Charge	$505.02	$541.56	$535.70	$524.80	$466.30	$434.84	$573.78	$670.37	$596.59	$506.03	$595.42	$557.98	$6,508.39
			Total Elec Revenue	$53,867.75	$55,133.35	$56,182.22	$55,442.69	$49,123.16	$46,524.34	$57,971.25	$67,808.90	$60,851.20	$51,717.52	$59,384.91	$57,362.04	$671,369.33

PHILLIPS 66
411 S. Keeler Ave,
Bartlesville, OK 74003

February 27, 2019

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

Re: Self-Directed USBC Progress Report for 2018 – Phillips 66 Pipeline

Dear Mr. Schoenfeld,

Please find enclosed a copy of our 2018 self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018. All the USB payments we received in 2018 were self-directed for energy efficiency projects we submitted in previous years. During 2018, we received payments totaling $129,723.02 composed of $8,360.50 in 2017 credits and $121,362.52 in 2018 credits.

At year-end 2018, we also had a Request Balance to carry over all remaining 2018 USB credits of $10,776.92 into 2019.

Sincerely,

Penny Morgan

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

PHILLIPS66 PIPELINE

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$1,544,298.11
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$7,397,731.22	Total Payment Requests:	$7,397,731.22
Payment Requests Made YTD:	$0.00	Current Request Balance:	$7,268,008.20
2017 Carryover USBC Credit:	$8,360.50	Total USBC Credit:	$140,499.94
USBC Credit YTD:	$132,139.44	Payments Issued YTD:	$129,723.02
Average Monthly Credit Earned:	$11,011.62	USBC Credit Balance:	$10,776.92
		Payment Pending:	$10,776.92

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$40,231.30
07/11/2018	$35,178.71
10/03/2018	$32,093.60
12/10/2018	$22,219.41

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100012	1017	DG54713481	KWH >	2,836	2,380	2,370	1,705	1,097	1,109	1,125	1,163	1,117	1,549	1,733	2,519	20,703
			KW >	8	6	6	5	3	3	3	2	3	5	5	6	5
			Elec Revenue >	$89.21	$76.32	$76.22	$62.24	$42.86	$42.96	$39.75	$38.31	$40.20	$58.51	$62.80	$74.18	$703.56
100013	1019	DG57847005	KWH >	81,275	83,473	79,869	77,496	66,064	74,743	70,438	76,717	77,582	81,192	76,840	67,816	913,505
			KW >	171	170	170	167	140	142	142	143	154	152	160	145	155
			Elec Revenue >	$766.88	$773.80	$755.50	$741.13	$651.66	$689.81	$672.48	$696.59	$717.83	$728.93	$724.63	$664.50	$8,583.74
100015	1021	DA06212503	KWH >	508,179	774,845	582,821	710,132	673,968	611,287	661,575	624,512	653,214	600,285	623,550	675,836	7,700,204
			KW >	1,642	2,111	2,028	2,053	2,177	1,858	2,151	2,056	2,085	2,203	2,097	1,849	2,026
			Elec Revenue >	$4,887.42	$6,722.81	$5,769.35	$6,321.99	$6,375.95	$5,610.39	$6,284.23	$5,969.50	$6,130.37	$6,111.52	$6,032.12	$5,837.78	$72,053.43
100016	1023	DA17677698	KWH >	4,342	4,084	3,962	3,812	3,086	2,297	1,772	1,850	1,764	1,610	1,604	1,537	31,720
			KW >	9	9	9	9	9	6	6	5	5	4	3	3	6
			Elec Revenue >	$192.68	$191.62	$190.93	$190.32	$187.40	$179.40	$177.28	$175.95	$175.60	$173.37	$171.72	$171.46	$2,177.73
100017	1022	DA21551134	KWH >	318,264	661,442	629,041	580,583	402,488	374,965	556,954	398,260	626,266	547,117	549,422	536,863	6,181,665
			KW >	1,229	1,179	1,183	1,133	1,194	1,098	1,179	1,164	1,190	1,187	1,117	1,213	1,172
			Elec Revenue >	$3,448.57	$4,746.04	$4,595.80	$4,320.30	$3,701.63	$3,436.38	$4,299.21	$3,626.59	$4,573.44	$4,254.52	$4,150.27	$4,255.97	$49,408.72
100018	1025	DG15089803	KWH >	448,923	753,267	622,172	717,104	542,430	485,903	469,088	419,695	413,556	410,532	471,692	513,126	6,267,488
			KW >	1,308	1,461	1,362	1,435	1,340	1,255	1,306	1,225	1,217	1,446	1,283	1,260	1,325
			Elec Revenue >	$4,103.47	$5,575.65	$4,856.15	$5,355.71	$4,499.80	$4,135.52	$4,149.89	$3,810.48	$3,773.16	$4,132.16	$4,110.77	$4,237.91	$52,740.67
100020	1026	DA19066006	KWH >	869,702	964,785	946,748	872,989	1,032,275	1,247,859	1,028,681	853,407	880,322	892,586	1,005,839	1,071,708	11,666,901
			KW >	3,136	3,165	3,196	3,185	3,211	3,231	3,139	2,975	3,145	3,145	3,162	3,093	3,149
			Elec Revenue >	$8,782.85	$9,206.81	$9,114.70	$8,799.32	$9,482.12	$10,382.34	$9,351.80	$8,366.64	$8,748.85	$8,797.51	$9,274.76	$9,424.19	$109,731.89

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100022	1028	DA06183417	KWH >	557,251	676,328	726,100	610,744	832,757	1,028,891	810,403	636,623	569,491	623,221	786,279	638,050	8,496,138
			KW >	2,562	2,540	2,566	2,553	2,557	2,532	2,523	2,540	2,519	2,544	2,540	2,575	2,546
			Elec Revenue >	$6,587.37	$7,026.09	$7,211.66	$6,726.44	$7,626.48	$8,375.69	$7,481.80	$6,801.69	$6,501.29	$6,754.99	$7,395.52	$6,864.07	$85,353.09
100023	1029	DA19272290	KWH >	618,129	823,531	678,818	813,303	777,306	728,270	799,565	800,484	667,952	674,629	731,080	790,611	8,903,678
			KW >	1,348	2,095	1,404	1,374	1,413	1,369	1,352	1,369	1,348	1,365	1,356	1,404	1,433
			Elec Revenue >	$4,849.85	$6,892.66	$5,151.74	$5,644.76	$5,562.63	$5,294.46	$5,554.08	$5,554.75	$4,994.84	$5,048.87	$5,258.28	$5,572.27	$65,379.19
100024	1031	DA18683621	KWH >	567,067	544,511	583,614	540,644	629,001	785,670	665,995	592,100	499,497	580,995	618,774	624,164	7,232,032
			KW >	1,842	1,832	1,842	1,832	1,832	1,830	1,832	1,847	1,834	1,851	1,834	1,849	1,838
			Elec Revenue >	$5,451.06	$5,340.60	$5,473.26	$5,284.22	$5,639.86	$6,267.23	$5,788.76	$5,502.29	$5,113.78	$5,464.70	$5,587.07	$5,632.76	$66,545.59
100026	1033	DA21551135	KWH >	799,448	1,099,536	941,215	1,166,826	1,096,075	1,089,709	1,196,361	1,196,753	1,209,322	1,131,270	1,050,460	1,141,909	13,118,884
			KW >	2,584	2,431	2,412	2,419	2,630	2,435	2,588	2,458	2,415	2,554	2,316	2,557	2,483
			Elec Revenue >	$7,598.13	$8,551.69	$7,829.71	$8,749.06	$8,803.78	$8,464.41	$9,139.86	$8,891.44	$8,871.64	$8,787.13	$8,080.89	$8,834.21	$102,601.95
100028	1034	DA06183418	KWH >	629,449	845,691	852,466	703,075	935,348	1,251,273	977,483	708,430	816,255	762,371	940,074	856,755	10,278,670
			KW >	2,894	2,955	3,249	3,223	3,184	3,275	3,244	3,110	3,270	3,326	3,292	3,270	3,191
			Elec Revenue >	$7,420.14	$8,384.73	$8,819.21	$8,176.08	$9,048.22	$10,466.25	$9,314.35	$8,010.08	$8,697.15	$8,574.05	$9,224.11	$8,857.85	$104,992.22
100029	1035	DA06212509	KWH >	97,823	105,288	95,228	95,830	85,936	79,057	78,094	77,955	77,694	73,099	86,223	91,394	1,043,621
			KW >	435	440	453	450	367	382	392	364	358	426	393	440	408
			Elec Revenue >	$3,083.85	$3,190.62	$3,092.19	$3,086.21	$2,611.36	$2,596.12	$2,628.19	$2,515.91	$2,486.69	$2,729.70	$2,738.75	$3,003.99	$33,763.58
100030	1038	DA06183392	KWH >	1,299,870	1,626,875	1,538,771	1,447,457	1,639,466	0	0	0	0	0	0	0	7,552,439
			KW >	2,847	2,817	2,717	2,756	2,709	0	0	0	0	0	0	0	2,769
			Elec Revenue >	$10,041.83	$11,303.88	$10,725.61	$10,420.82	$11,118.04	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$53,610.18
100030	1038	DA19065999	KWH >	0	0	0	0	0	1,692,596	1,567,417	1,325,034	1,311,327	1,450,518	1,723,957	1,277,653	10,348,502
			KW >	0	0	0	0	0	2,713	2,752	2,769	2,726	2,765	2,756	2,743	2,746
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$11,338.32	$10,897.24	$9,904.31	$9,780.25	$10,395.75	$11,466.17	$9,674.18	$73,456.22
100031	1037	DA13299772	KWH >	456,174	429,801	468,922	459,045	519,304	624,103	530,353	468,047	423,908	477,583	498,166	522,939	5,878,345
			KW >	1,460	1,466	1,472	1,466	1,477	1,463	1,449	1,440	1,446	1,460	1,454	1,472	1,460
			Elec Revenue >	$4,380.88	$4,281.85	$4,416.31	$4,366.91	$4,627.14	$5,026.43	$4,626.56	$4,350.66	$4,185.24	$4,420.89	$4,492.85	$4,620.33	$53,796.05
100033	1040	DA06212513	KWH >	87,892	152,613	194,594	0	0	0	0	0	0	0	0	0	435,099
			KW >	978	997	908	0	0	0	0	0	0	0	0	0	961
			Elec Revenue >	$2,111.40	$2,401.12	$2,404.68	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$6,917.20
100033	1040	DA21551136	KWH >	0	0	0	179,525	180,719	293,205	196,523	207,460	247,301	288,171	115,291	115,126	1,823,321
			KW >	0	0	0	926	943	953	986	922	966	870	860	875	922
			Elec Revenue >	$0.00	$0.00	$0.00	$2,373.00	$2,405.16	$2,873.99	$2,537.95	$2,477.44	$2,706.82	$2,713.45	$2,011.27	$2,034.91	$22,133.99
100034	1041	DA18683631	KWH >	635,369	720,075	756,056	638,690	852,273	1,054,572	847,716	662,681	576,792	661,964	803,153	730,061	8,939,402
			KW >	2,562	2,549	2,557	2,544	2,566	2,540	2,527	2,540	2,523	2,549	2,536	2,579	2,548
			Elec Revenue >	$6,901.79	$7,216.84	$7,317.76	$6,824.44	$7,719.51	$8,491.93	$7,638.41	$6,905.09	$6,536.74	$6,916.83	$7,456.00	$7,235.63	$87,160.97
100036	1044	DA18683634	KWH >	1,310,616	1,687,989	1,595,410	1,427,717	1,716,850	1,716,165	1,645,332	1,357,855	1,317,066	1,490,771	1,841,341	1,389,813	18,496,925
			KW >	2,987	3,024	3,027	2,997	2,994	2,995	2,987	3,010	2,976	3,018	3,023	3,005	3,004
			Elec Revenue >	$10,313.72	$11,887.54	$11,452.38	$10,729.14	$11,888.08	$11,886.93	$11,588.95	$10,424.99	$10,208.05	$10,965.36	$12,364.52	$10,543.69	$134,253.35
100594	1598	DA21629733	KWH >	6,183	86,101	77,671	84,132	67,999	53,872	82,024	66,984	75,938	57,676	47,273	61,192	767,045
			KW >	340	342	340	336	338	332	334	332	330	338	337	337	336
			Elec Revenue >	$3,348.91	$9,496.75	$8,780.11	$9,303.52	$8,052.09	$6,912.76	$9,079.41	$7,770.51	$8,447.73	$7,184.36	$6,379.99	$7,449.34	$92,205.48
710047	321077	DD56126244	KWH >	49,300	36,700	36,800	36,100	27,500	24,600	22,800	24,900	22,800	27,900	33,700	26,200	369,300
			KW >	145	129	134	131	122	90	79	93	89	114	120	119	114
			Elec Revenue >	$5,306.51	$4,148.46	$4,220.35	$4,135.82	$3,367.22	$2,820.25	$2,536.89	$2,823.45	$2,637.07	$3,278.37	$3,790.95	$2,971.86	$42,037.20

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
710048	321078	DG89606254	KWH >	4,981	3,587	3,462	3,443	4,562	3,749	5,081	2,080	3,588	13,425	-4,404	3,053	46,607
			KW >	31	26	28	32	31	26	31	25	33	33	40	31	31
			Elec Revenue >	$713.26	$547.68	$556.45	$594.41	$670.82	$565.05	$709.66	$414.66	$609.79	$1,364.33	$73.99	$492.34	$7,312.44
712192	322631	DG68838851	KWH >	25,200	18,000	2,520	15,840	9,000	43,200	19,440	-17,280	16,200	24,480	32,040	27,720	216,360
			KW >	223	230	201	219	226	216	216	219	212	219	216	226	219
			Elec Revenue >	$3,824.40	$3,327.64	$1,881.58	$3,060.14	$2,589.50	$5,129.85	$3,292.77	$484.56	$3,003.09	$3,693.41	$4,230.55	$4,004.19	$38,521.68
712364	322728	DG68838859	KWH >	8,720	24,160	15,520	21,840	16,960	25,280	14,400	20,280	25,480	13,400	11,920	7,600	205,560
			KW >	102	102	101	98	96	99	102	100	100	100	100	100	100
			Elec Revenue >	$1,712.18	$2,905.36	$2,226.49	$2,694.86	$2,288.18	$2,969.02	$2,124.65	$2,540.87	$2,950.48	$2,031.96	$1,919.95	$1,590.08	$27,954.08
713779	323922	DS00971838	KWH >	5,334	4,523	5,688	3,477	1,312	415	376	489	480	1,715	2,458	4,345	30,612
			KW >	12	11	11	8	7	4	5	3	4	8	11	11	8
			Elec Revenue >	$543.53	$475.08	$560.83	$364.83	$184.23	$84.25	$90.79	$74.24	$83.70	$218.44	$305.17	$451.44	$3,436.53
713818	323958	DS01496798	KWH >	217	142	142	278	129	121	509	163	133	108	139	102	2,183
			KW >	1	1	1	1	1	1	1	1	1	1	1	1	1
			Elec Revenue >	$34.30	$28.34	$28.39	$43.98	$32.26	$31.60	$61.11	$29.68	$27.48	$25.56	$27.98	$25.14	$395.82
715059	325070	DA14613585	KWH >	21,480	19,120	20,000	19,000	15,480	15,960	15,160	17,840	16,000	16,040	15,920	18,040	210,040
			KW >	84	84	81	80	71	79	79	77	75	71	77	80	78
			Elec Revenue >	$2,527.89	$2,338.60	$2,379.54	$2,294.63	$1,927.60	$2,038.31	$1,960.11	$2,128.54	$1,981.41	$1,945.06	$1,996.56	$2,200.27	$25,718.52
717588	223503	DG82831546	KWH >	7,320	6,560	7,280	6,480	4,200	3,400	3,880	3,000	3,040	2,880	5,120	6,560	59,720
			KW >	48	67	36	44	31	39	38	8	8	10	27	52	34
			Elec Revenue >	$1,058.64	$1,189.16	$939.56	$951.25	$648.40	$664.25	$691.23	$322.39	$326.96	$327.74	$674.31	$1,033.20	$8,827.09
719434	328497	DA18524884	KWH >	2,934	2,402	2,764	2,593	2,232	2,830	3,167	3,914	3,609	2,518	2,506	2,762	34,231
			KW >	8	7	7	6	7	7	8	9	8	7	6	7	7
			Elec Revenue >	$323.49	$270.07	$292.84	$279.75	$260.54	$307.88	$335.19	$400.88	$366.64	$278.71	$265.20	$297.30	$3,678.49
720100	280106	DG28659896	KWH >	7,885	6,858	7,804	6,564	4,141	2,254	1,983	1,812	1,806	1,912	6,500	7,548	57,067
			KW >	20	21	19	17	15	11	10	8	6	9	19	17	14
			Elec Revenue >	$823.70	$756.37	$811.74	$700.62	$481.90	$301.21	$267.92	$232.03	$212.84	$248.27	$695.63	$762.34	$6,294.57
797092	321910	DG50526221	KWH >	5,120	4,160	3,840	4,800	3,680	2,720	2,880	3,360	3,200	3,680	3,680	4,320	45,440
			KW >	14	14	14	14	14	12	14	12	12	12	14	14	13
			Elec Revenue >	$550.78	$475.73	$449.58	$527.29	$438.03	$346.74	$373.34	$389.29	$378.70	$417.01	$432.61	$483.25	$5,262.35
797094	321909	DS84910816	KWH >	17,920	15,040	13,760	17,280	14,240	10,080	10,400	11,680	22,400	14,080	14,720	16,160	177,760
			KW >	81	83	83	94	78	70	73	73	81	76	76	80	79
			Elec Revenue >	$2,221.58	$2,010.99	$1,903.57	$2,298.78	$1,897.54	$1,491.51	$1,542.25	$1,624.07	$2,527.35	$1,851.05	$1,899.10	$2,046.96	$23,314.75
906878	356475	DA05479669	KWH >	3,800	3,240	2,920	2,560	1,320	680	400	160	760	2,240	3,240	2,600	23,920
			KW >	5	5	5	5	5	5	5	3	5	5	5	5	5
			Elec Revenue >	$360.04	$315.62	$292.02	$259.79	$162.15	$111.85	$89.50	$55.25	$117.16	$230.73	$308.20	$247.71	$2,550.02
933571	358346	DA13299761	KWH >	700,713	804,685	735,888	0	0	0	0	0	0	0	0	0	2,241,286
			KW >	2,269	2,667	2,733	0	0	0	0	0	0	0	0	0	2,556
			Elec Revenue >	$4,496.44	$5,233.32	$5,220.10	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$14,949.86
933571	358346	DA21629778	KWH >	0	0	0	831,795	751,445	726,221	700,346	773,004	766,880	788,222	857,051	730,262	6,925,226
			KW >	0	0	0	2,647	2,678	2,696	2,727	2,750	2,474	2,756	2,733	2,713	2,686
			Elec Revenue >	$0.00	$0.00	$0.00	$5,168.05	$5,145.62	$5,151.87	$5,179.48	$5,311.49	$4,858.83	$5,334.91	$5,359.60	$5,213.08	$46,722.93
1213184	380450	DG35779927	KWH >	1,537	1,183	91	729	936	332	404	495	379	488	707	996	8,277
			KW >	3	3	3	2	5	2	1	1	1	4	2	3	3
			Elec Revenue >	$164.59	$136.80	$52.43	$92.61	$130.57	$57.90	$53.10	$63.03	$50.04	$85.78	$90.23	$116.60	$1,093.68

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1319986	388952	DA05023395	KWH >	5,680	4,380	4,760	3,960	2,240	3,020	3,140	4,660	3,200	2,820	3,460	5,260	46,580
			KW >	14	13	14	12	8	17	18	18	17	9	12	13	14
			Elec Revenue >	$590.74	$480.27	$526.63	$441.00	$267.84	$413.45	$427.07	$542.07	$429.00	$313.01	$394.26	$547.89	$5,373.23
			Total KWH	10,166,933	12,997,355	12,239,087	12,107,548	12,913,819	14,060,408	12,991,265	11,326,567	11,336,319	11,723,047	12,961,508	11,972,600	146,796,456
			Combined Average KW	33,402	35,052	34,372	34,273	34,479	33,786	34,299	33,671	33,636	34,642	33,983	34,147	40,445
			USBC Charge	$9,150.23	$11,697.63	$11,015.17	$10,896.79	$11,622.47	$12,654.35	$11,692.11	$10,193.92	$10,202.68	$10,550.75	$11,665.39	$10,775.34	$132,116.83
			Total Elec Revenue	119,612.08	137,906.91	130,375.37	131,383.42	130,536.17	134,956.31	130,985.26	119,229.72	123,250.21	125,856.94	129,446.78	127,472.87	$1,541,012.04

Rec'd MT DOR

FEB 25 2019

Ray Rigdon
Phillips 66
Billings Refinery Manager

P.O. Box 30198
Billings, MT 59107
406-255-2551

February 22nd, 2019

Nicole Hensley
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.

USBP Annual Report
2018 Phillips 66

USB Claim	Qualifying Project or Expenditure	Credit Request		USBP Payment made		USBP Credit Receipt	
		Date Submitted	Amount	Date	Amount	Date	Amount
1	Air Leakage Survey	6/1/2018	$7,200	2017 Carryover USBC Credit	$24,817.10		
2	C-34 Controls Upgrade	6/1/2018	$110,000				
3	LED Lighting	10/1/2018	$29,400				
4	Energy Share	3/1/2018	$20,000				
5							
6							
7							
	All request forms attached			January	$26,005.85	04/15/18	$20,000.00
				February	$26,205.83	04/05/18	$13,824.92
				March	$24,119.59	07/11/18	$117,200.00
				April	$25,441.48	12/10/18	$29,400.00
				May	$24,909.73		
				June	$26,513.25		
				July	$25,919.79		
				August	$27,035.43		
				September	$27,223.88		
				October	$26,199.01		
				November	$26,299.42		
				December	$26,090.56		
Total			$166,600		$336,780.92		$180,424.92
USBP Credit Balance Carryover to 2018			$156,356.00				
Carryover Balance includes $24817.10 in pending payments							

2017	Carryover Payment Request	$24,817.10
2018	USBP Credits	$180,424.92
2018	Request Balance	$10,992.18

We submitted four Form B's in 2018, we have provided an end of year request balance for the showing the USB carry over credits.

- We had $24,817.10 in 2017 credits brought forward into 2018. We earned $180,424.92 in 2018 credits.
- In 2018, we submitted four requests for USB credits totaling $166,600.
- In 2018, we received $180,424.92 total in USB payments. These payments were composed of numerous energy efficiency projects.
- At year end we had $24.817.10 in 2017 USB credits that were carried over for payment in 2018 because we have a request balance of $10,992.18 remaining for energy efficiency projects submitted in 2018.

If you have any questions, please direct them to:

Pete Larson
Phillips 66
P.O. Box 30198
Billings, MT 59107-0198

Sincerely,

D. of A. for Ray Rigdon

Ray Rigdon
Phillips 66
Billings Refinery Manager

Encls: (8 sheets)
Cc: Pete Larson
Andres Rodriguez
Blake Holiday

FORM B

NorthWestern Energy

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
FAX: (406) 497-4033

DATE:	October, 201
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: Peter Larson

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: _____

DISTRIBUTION: _____

FORM B

NorthWestern Energy

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
FAX: (406) 497-4033

DATE:	June, 2018
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:	$7200

*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)

3rd Party Air Leak survey.
To help better manage our air demand we will employ a 3rd party company to come in and perform at air survey. Ultrasonic equipment is used to help us decrease the air demand load. This is a demand side load management project and is considered an energy audit.

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: _____

FORM B

NorthWestern Energy

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
FAX: (406) 497-4033

DATE:	October, 2018
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:	$29,400

*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)

3 building were converted from old metal halide and fluorescent to LED

ESTIMATED kWh SAVINGS:	49655
ESTIMATED KW SAVINGS	5.7

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: _____

FORM B

NorthWestern Energy

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
FAX: (406) 497-4033

DATE:	June, 2018
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:	$110,000

*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)

C34 Air Compressor Control Panel Upgrade.
Project replaces a 20 year old control panel with analog controls and replaces it with new digital controls. The new panel will smooth the old step style of loading control with continuous digital control. We expect a 3-4% efficiency gain.

ESTIMATED kWh SAVINGS:	209,118
ESTIMATED KW SAVINGS	24

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: _____

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

PHILLIPS66 REFINERY

Account Summary

2017 Carryover Reservation:	$11,000.00	YTD Elec Revenue:	$2,297,322.50
Reservations Made YTD:	$160,000.00		
2017 Carryover Payment Request:	$13,824.92	Total Payment Requests:	$180,424.92
Payment Requests Made YTD:	$166,600.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$24,817.10	Total USBC Credit:	$336,780.92
USBC Credit YTD:	$311,963.82	Payments Issued YTD:	$180,424.92
Average Monthly Credit Earned:	$25,996.99	USBC Credit Balance:	$156,356.00
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Pete Larson	03/01/2018	$20,000.00
Pete Larson	06/01/2018	$7,200.00
Pete Larson	06/01/2018	$110,000.00
Pete Larson	10/31/2018	$29,400.00

Payments Issued

Date	Amount
04/05/2018	$20,000.00
04/05/2018	$13,824.92
07/11/2018	$117,200.00
12/10/2018	$29,400.00

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1867843	428078	DA11830935	KWH >	3,757	3,182	3,343	2,770	3,331	3,772	4,336	4,798	3,860	4,173	2,355	3,474	43,151
			KW >	9	9	10	9	12	14	15	15	15	15	12	9	12
			Elec Revenue >	$398.77	$352.90	$370.90	$321.10	$393.01	$444.32	$496.18	$524.28	$456.92	$482.64	$315.67	$368.30	$4,924.99
2077210	1018	DA15843411	KWH >	28,803,958	29,036,946	26,716,717	28,204,720	27,624,403	29,403,098	28,740,065	29,969,159	30,191,099	29,048,578	29,160,277	28,909,873	345,808,893
			KW >	41,990	42,379	43,156	41,277	41,731	42,055	42,249	43,286	43,351	43,286	43,092	43,221	42,589
			Elec Revenue >	184,669.78	186,165.03	177,133.15	180,098.80	178,492.84	186,173.40	183,817.47	189,206.68	190,192.31	185,553.82	185,682.09	184,898.46	$2,212,083.83
2077216	80379	DG35882442	KWH >	14,320	12,400	13,120	11,600	7,920	9,520	11,200	12,400	9,680	11,440	13,360	21,200	148,160
			KW >	29	32	30	28	24	26	32	32	29	36	41	44	32
			Elec Revenue >	$1,420.59	$1,294.59	$1,333.46	$1,204.25	$865.32	$1,013.64	$1,198.74	$1,274.03	$1,040.23	$1,243.18	$1,445.17	$2,077.97	$15,411.17
2077221	80382	DG28611525	KWH >	34,400	30,320	31,360	25,600	22,240	22,800	23,520	27,760	22,720	25,440	24,400	27,760	318,320
			KW >	80	88	78	63	63	69	73	75	75	58	60	63	70
			Elec Revenue >	$3,491.23	$3,260.04	$3,233.62	$2,645.23	$2,375.19	$2,480.19	$2,555.91	$2,860.63	$2,488.48	$2,540.55	$2,482.66	$2,774.13	$33,187.86
2077222	80405	DA16854166	KWH >	4,974	4,831	5,035	5,336	5,083	5,540	5,808	6,997	5,680	5,379	4,892	5,298	64,853
			KW >	13	13	13	13	17	18	19	19	19	17	17	17	16
			Elec Revenue >	$529.64	$522.45	$536.42	$564.53	$575.20	$624.28	$651.00	$733.05	$629.70	$597.01	$559.24	$592.27	$7,114.79
2077224	422548	DA08154404	KWH >	1,251	2,593	1,294	-920	453	751	-211	210	273	585	776	824	7,879
			KW >	2	3	3	2	2	2	1	0	1	2	2	2	2
			Elec Revenue >	$125.81	$245.76	$145.62	($42.77)	$63.48	$86.27	$9.84	$31.74	$44.43	$72.88	$87.93	$91.62	$962.61
2077225	80406	DG35882441	KWH >	32,720	27,320	28,680	19,200	14,040	13,680	15,040	18,040	15,440	14,400	15,520	21,080	235,160
			KW >	56	56	56	51	33	39	38	42	39	31	38	53	44
			Elec Revenue >	$3,120.07	$2,698.94	$2,807.07	$2,023.24	$1,440.05	$1,465.81	$1,551.45	$1,793.36	$1,575.28	$1,422.80	$1,579.11	$2,160.07	$23,637.25

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
		Total KWH	28,895,380	29,117,592	26,799,549	28,268,306	27,677,470	29,459,161	28,799,758	30,039,364	30,248,752	29,109,995	29,221,580	28,989,509	346,626,416
		Combined Average KW	42,179	42,580	43,346	41,443	41,882	42,223	42,427	43,469	43,529	43,445	43,262	43,409	42,766
		USBC Charge	$26,005.85	$26,205.83	$24,119.59	$25,441.48	$24,909.73	$26,513.25	$25,919.79	$27,035.43	$27,223.88	$26,199.01	$26,299.42	$26,090.56	$311,963.82
		Total Elec Revenue	193,755.89	194,539.71	185,560.24	186,814.38	184,205.09	192,287.91	190,280.59	196,423.77	196,427.35	191,912.88	192,151.87	192,962.82	$2,297,322.50

HyperBlock

Rec'd MT DOR
R FEB 27 2019

Feb 21, 2019

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

Re: Project Spokane LLC now known as Hyperblock LLC & 2018 USB Program

To Whom it May Concern:

Project Spokane LLC which is now registered as Hyperblock LLC as of July 10, 2018. Please update your corporate name for your records. Hyperblock LLC became a new participant in the self directed USBC program at Northwestern Energy in 2017. In 2017 we made a request for $497,498.24 for the upgrade of power supply units in our datacenter to increase power efficiency with an estimated 500 KW in savings.

Hyperblock LLC manages a facility in Missoula, Montana (physical address of 9088A Bonner Mill Rd Bonner, MT 59823) that purchases electricity for commercial use from Northwestern Energy. The summary of our Self-Direct USBC progress report for 2018 is attached. We had no changes in our usage in the year and had no expansion of usage at this time. We received $141,432.37 from the Self directed USB program.

If you have any further questions, please reach out to me at:

inder@hyperblock.co or 416-356-9611

Regards

Inder Saini, CPA, CA
Interim CFO of Hyperblock

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

HYPERBLOCK, LLC

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$513,233.36
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$429,146.74	Total Payment Requests:	$429,146.74
Payment Requests Made YTD:	$0.00	Current Request Balance:	$287,714.37
2017 Carryover USBC Credit:	$11,387.80	Total USBC Credit:	$153,143.36
USBC Credit YTD:	$141,755.56	Payments Issued YTD:	$141,432.37
Average Monthly Credit Earned:	$11,812.96	USBC Credit Balance:	$11,710.99
		Payment Pending:	$11,710.99

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$46,842.78
07/11/2018	$36,392.71
10/03/2018	$34,890.66
12/10/2018	$23,306.22

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3312323	612016	DA19312275	KWH >	13,229,007	13,787,561	12,377,855	13,817,741	13,256,655	13,361,946	16,820,500	0	0	0	0	0	96,651,265
			KW >	18,472	19,336	19,475	19,440	19,008	19,060	18,801	0	0	0	0	0	19,085
			Elec Revenue >	$42,232.72	$44,111.03	$42,635.20	$43,874.79	$42,674.74	$42,853.16	$55,532.20	$0.00	$0.00	$0.00	$0.00	$0.00	$313,913.84
3569722	612016	DA19312275	KWH >	0	0	0	0	0	0	0	8,784,561	13,162,341	12,626,052	13,269,745	13,012,212	60,854,911
			KW >	0	0	0	0	0	0	0	18,870	18,783	18,040	19,475	19,250	18,884
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$29,418.43	$42,437.06	$40,750.67	$43,654.83	$43,058.53	$199,319.52
			Total KWH	13,229,007	13,787,561	12,377,855	13,817,741	13,256,655	13,361,946	16,820,500	8,784,561	13,162,341	12,626,052	13,269,745	13,012,212	157,506,176
			Combined Average KW	18,472	19,336	19,475	19,440	19,008	19,060	18,801	18,870	18,783	18,040	19,475	19,250	37,968
			USBC Charge	$11,906.11	$12,408.80	$11,140.07	$12,435.97	$11,930.99	$12,025.75	$15,138.45	$7,906.10	$11,846.11	$11,363.45	$11,942.77	$11,710.99	$141,755.56
			Total Elec Revenue	$42,232.72	$44,111.03	$42,635.20	$43,874.79	$42,674.74	$42,853.16	$55,532.20	$29,418.43	$42,437.06	$40,750.67	$43,654.83	$43,058.53	$513,233.36

FEB 28 2019

RECEIVED
FEB 27 2019 N
MT DOR

Montana Department of Revenue

Gene Walborn
Director

Steve Bullock
Governor

Project Spokane, LLC
Jason Vaughan
PO Box 1019
Bonner, MT 59823

2/10/2019

Universal System Benefits Programs Utility & Large Customer Annual Report

USB Program Summary Reports are due by March 1, 2019
Public Utilities and large customers claiming universal system benefit (USB) credits for calendar year 2018 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

PYRAMID MOUNTAIN LUMBER INC.
379 Boy Scout Road
P.O. Box 549
Seeley Lake, Montana 59868
(406) 677-2201

Rec'd MT DOR
FEB 21 2019

February 19, 2019

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

Mark:

Last February Pyramid Mountain Lumber filed its' second USB report, a copy of which is included. That report indicated we had total credits to carry forward of $1,255,173.01.

Pyramid Mountain Lumber's USB charge for 2018 purchased energy is $10,782.08 (0.9 mills per kilowatt hour times 11,980,089 Kwh). Applying the 2018 USB charges to the carry forward leaves a balance of $1,244,390.93 to carry forward.

Mark, please let me know if there is anything else required.

Respectfully,

Loren Rose

Loren Rose
Chief Operating Officer
Pyramid Mountain Lumber, Inc.

Cc: Mark Hayden, General Manager, MEC

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.

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

RECSiLICON

Memorandum

To: Nicole Hensley
Department of Revenue
PO Box 5805
Helena, MT 59604-5805

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

From: Cody Carpenter
REC Silicon
119140 Rick Jones Way
Silver Bow, MT 59750

Date: 2/6/2019

Re: 2018 USBC REPORT

Dear Ms. Hensley:

The 2018 USB charges to REC Silicon total $500,000. REC Silicon submitted 8 projects for credit in 2018. 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 2018, the current request balance from NorthWestern Energy as of 1/1/18 is $429,485.20.

REC Silicon continues to evaluate other potential projects that should qualify for USB funds soon. 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,

Cody D. Carpenter
Electrical Engineer, P.E.
REC Silicon

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

REC SILICON

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$500,000.00
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$440,280.93	Total Payment Requests:	$929,485.20
Payment Requests Made YTD:	$489,204.27	Current Request Balance:	$429,485.20
2017 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

Submitted By	Date	Amount
Cody Carpenter	11/27/2018	$489,204.27

Payments Issued

Date	Amount
04/05/2018	$120,595.21
07/11/2018	$145,965.35
10/03/2018	$162,726.05
12/10/2018	$70,713.39

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 FAX: (406) 497-4008

DATE:	November 27, 2018
NAME OF BUSINESS:	**REC Silicon**
CITY/TOWN LOCATION:	Butte Plant
CONTACT PERSON:	Cody Carpenter
MAILING ADDRESS:	119140 Rick Jones Way
CITY, STATE AND ZIP:	Silver Bow, MT 59750
PHONE NUMBER:	406-496-9729
FAX NUMBER:	406-496-9793
E-MAIL ADDRESS:	cody.carpenter@recsilicon.com

AMOUNT OF CREDIT REQUESTED:	$489,204.27

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):
In 2018, REC Silicon completed projects related to improving process equipment efficiency, insulation, 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

ESTIMATED kWh SAVINGS:	13,612,664 kWh/year
ESTIMATED KW SAVINGS:	1554 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.

NorthWestern Energy
Delivering a Bright Future

RECSiLICON

REC Silicon
119140 Rick Jones Way
Silver Bow, MT 59750
Phone: (406) 496-9898
Fax: (406) 496-9793

www.recsilicon.com

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. The following projects qualify for USB funds due to their resulting improvements in efficiency and savings of electricity:

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 2018, (3) reactors had their process equipment worked on to improve quality and reduce energy.

REACTOR POLISHING PROJECT JUSTIFICATION AND COSTS

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 (3 units * 3.5 runs per month * 12 months per year * 22 MWh each) = 2772 MWh per year.
The project will save an estimated 2,772,000 kWh in electricity annually. The following is a summary of the project cost where each polished tube bundle cost $10,000:

Tube Bundle Polish, Pattern, Related Supplies & Tasks =	$30,000.00
TOTAL =	**$30,000.00**

H2 PREHEATER INSULATION PROJECT DESCRIPTION

During the 2018 Silane outage, the H2 preheater line was re-insulated to replace damaged and missing insulation. This line exits the H2 preheater at approximately 300°F and runs down the Hydrogenation structure 4 stories. The heat losses from a poorly insulated line

running at 300°F were very large. Therefore, insulating the line saves energy on the downstream H2 superheaters.

H2 PREHEATER INSULATION PROJECT JUSTIFICATION AND COSTS

Insulating the preheater line saves an estimated 438,000 kWh (50kW*8760hrs) on the H2 superheater electrical load. The following is a summary of the project cost:

Project Materials =		$6704.14
Contractor Labor and Materials =		$57,632.00
	TOTAL =	**$64,336.14**

REFRIGERATION INSULATION PROJECT DESCRIPTION

During the Phase I outage in 2018, REC Silicon did an internal inspection and overhaul of the South Ammonia Chiller. The 7-year-old ammonia (likely contaminated with oil from years of use) was removed and replaced with fresh ammonia which increased the chiller's efficiency. A section of the old insulation for the inspection was removed and replaced with new insulation. Additionally, the chiller was removed from service, tuned, and returned to service with the new ammonia. These improvements have allowed REC Silicon to run with only three refrigeration compressors instead of four. The electricity savings of not running an 800 HP electric motor are significant.

REFRIGERATION INSULATION PROJECT JUSTIFICATION AND COSTS

The project will save an estimated 5,227,968 kWh (596.8kW*8760hrs) in electricity annually due to an 800 HP compressor motor now turned off. The following is a summary of the project cost:

Project Materials =		$19,204.00
Contractor Labor and Materials =		$56,464.78
Project Labor =		$12,372.78
	TOTAL =	**$88,041.56**

LARGE REACTOR MAKE HEAT EXCHANGER (LRMHX) PROJECT DESCRIPTION

In this project, the LRMHx was replaced during the 2018 outage. After replacement, a very large difference in efficiency resulted because the equipment had fouled. The efficiency can be seen in the downstream electrical STC superheaters' utilization change since the outage. As result of these findings, methodology on running the unit has been changed, in that now the STC feed is reduced to allow full vaporization in the heaters and exchangers upstream of the LRMHx to ensure fouling is reduced. The average power utilization dropped from 1789kW to 1260kW. This has shown to be successful so far, as STC superheater utilizations are still down from pre-outage 2018 values.

LRMHX PROJECT JUSTIFICATION AND COSTS

The project will save an estimated 4,634,040 kWh in electricity annually (529kW*8760hrs). The following is a summary of the project cost:

Project Materials and Labor =		$33,829.67
	TOTAL =	**$33,829.67**

SILANE STRIPPER COLUMN PROJECT DESCRIPTION

This project involved both repairing and adding insulation to the Silane Stripper Column. The original fiberglass insulation had degraded so much that it was not providing any insulating value. Therefore, it was replaced with a better product in mineral wool insulation. With the Stripper properly insulated, the load was reduced over an average of several months by 2.7%. This change corresponds to a 2.7% reduction of load on (3) 800 HP refrigeration compressors.

SILANE STRIPPER COLUMN PROJECT JUSTIFICATION AND COSTS

The project will save an estimated 423,465 kWh in electricity annually (3*596.8kW*8760hrs*0.027). The following is a summary of the project cost:

Project Materials =		$79,504.00
Contractor Labor =		$27,909.00
	TOTAL =	**$107,413.00**

DISILANE CHILLER PROJECT DESCRIPTION

This project involved installing a new chiller for the Disilane unit. The new chiller has a nameplate efficiency that is about 3.3% more efficient (capacity/power). The new chiller outperforms the original unit by closer to 28% at peak usage. The old unit was rated at 10,000 Btu/hr running at 6.33 HP. In ideal conditions, it produced between 12,000-14,000 Btu/hr. The new unit is rated at 20,000 Btu/hr running at 12.25 HP. In ideal conditions, it produces 34,899 Btu/hr. This additional capacity will also allow the demonstration plant to increase capacity beyond its current level. Insulation installed reduces energy loss by just over 2 times. On a hot summer day, the loss changes from 2500 Btu/hr to 900 Btu/hr due to the material of construction and thickness of the insulation. These values drop to 1400 and 500 Btu/hr on an average winter day. Therefore, the new unit saves an average of 4.75 HP (3.54 kW) over the old unit due to efficiency and insulation improvements.

DISILANE CHILLER PROJECT JUSTIFICATION AND COSTS

The project will save an estimated 31,010 kWh in electricity annually (3.54kW*8760hrs). The following is a summary of the project cost:

Project Materials =		$99,277.00
Project Labor =		$10,500.00
	TOTAL =	**$109,777.00**

DISILANE INSULATION PROJECT DESCRIPTION

This project replaced damaged insulation where an ice ball had formed representing heat loss. After incorporation of insulation, the ice ball went away and which immediately reduced the direct load on the chiller unit. In addition, the damaged and missing insulation from the last few years was replaced. Additional heat is now being retained and the plant reactors have less duty on them which reduced the direct load on reactors. A chiller unit has been taken offline as it is no longer needed due to this installation (5000 W unit). Insulation was added to nozzles that were heat sinks with shutdown support for inspections. Cooling and heating requirements on the distillation columns remain lower due to this installation.

DISILANE INSULATION PROJECT JUSTIFICATION AND COSTS

The project will save an estimated 43,800 kWh in electricity annually (5kW*8760hrs). The following is a summary of the project cost:

Project Materials and Labor =		$25,939.55
	TOTAL =	**$25,939.55**

PLANT LIGHTING UPGRADE PROJECT DESCRIPTION

This project involved replacing existing light bulbs with more energy efficient bulbs throughout the entire plant. In total, (815) T8 fluorescent tubes, high pressure sodium bulbs, and metal halide bulbs were replaced with light emitting diode (LED) equivalents. According to work order history, the labor to replace the bulbs took 352.5 man-hours to complete. Because these lights are located both interior and exterior, they are estimated to be turned on 75% of the time.

PLANT LIGHTING UPGRADE PROJECT JUSTIFICATION AND COSTS

815 existing light bulbs were replaced and saved an estimated 42,381 watts. Assuming an average operating time of 75%, this reduction will save 278,443 kWh annually (42.381kW*6570hrs).

Project Materials =		$11,537.35
Project Labor = $52/hr * 352.5		$18,330.00
	TOTAL =	**$29,867.35**

Rec'd MT DOR
FEB 26 2019

ROCKY MOUNTAIN POWER

Hardin Generating Station
Route 1 Box 1144A
Hardin, MT 59034

CERTIFIED MAIL RRR

February 18, 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

Dear Ms. Hensley:

Please find enclosed a copy of our 2018 Self-Directed USBC Progress Report that we received from NorthWestern Energy showing our USB activities during 2018. All the USB payments we received in 2018 were self-directed for energy efficiency projects. See attached Form B. During 2018, we received USB payments totaling $1,578.33 that was composed entirely of 2017 Carryover USB Credits.

We also had a Reservation for the balance of $4,033.17 for the remaining 2018 USB credits.

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 2/14/2019

ROCKY MOUNTAIN POWER

Account Summary

2017 Carryover Reservation:	$1,600.00	YTD Elec Revenue:	$449,578.67
Reservations Made YTD:	$4,040.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$1,578.33
Payment Requests Made YTD:	$1,578.33	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$1,578.33	Total USBC Credit:	$5,611.50
USBC Credit YTD:	$4,033.17	Payments Issued YTD:	$1,578.33
Average Monthly Credit Earned:	$336.10	USBC Credit Balance:	$4,033.17
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Ron Frank	11/28/2018	$1,578.33

Payments Issued

Date	Amount
12/10/2018	$1,578.33

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
2049844	395353	DD80693488	KWH >	0	648,500	577,800	550,000	217,300	175,900	159,300	312,200	494,400	472,900	416,700	456,300	4,481,300
			KW >	0	6,000	1,200	1,200	800	400	400	6,800	7,600	6,400	1,200	8,800	3,709
			Elec Revenue >	$983.70	$65,081.71	$43,685.30	$42,073.28	$18,291.06	$14,121.28	$12,880.32	$44,796.85	$59,563.60	$54,172.52	$32,361.07	$61,567.98	$449,578.67
			Total KWH	0	648,500	577,800	550,000	217,300	175,900	159,300	312,200	494,400	472,900	416,700	456,300	4,481,300
			Combined Average KW	0	6,000	1,200	1,200	800	400	400	6,800	7,600	6,400	1,200	8,800	3,709
			USBC Charge	$0.00	$583.65	$520.02	$495.00	$195.57	$158.31	$143.37	$280.98	$444.96	$425.61	$375.03	$410.67	$4,033.17
			Total Elec Revenue	$983.70	$65,081.71	$43,685.30	$42,073.28	$18,291.06	$14,121.28	$12,880.32	$44,796.85	$59,563.60	$54,172.52	$32,361.07	$61,567.98	$449,578.67

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 FAX: (406) 497-4008

DATE:	11/28/18
NAME OF BUSINESS:	**Rocky Mountain Power (Heorot Power)**
CITY/TOWN LOCATION:	Hardin, MT
CONTACT PERSON:	Ron Frank
MAILING ADDDRESS:	Route 1 Box 1144A
CITY, STATE AND ZIP:	Hardin, MT 59034
PHONE NUMBER:	406 679-0964
FAX NUMBER:	406 638-9156
E-MAIL ADDRESS	rfrank@heorotpower.com

AMOUNT OF CREDIT REQUESTED:	$1,578.33

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):

Switchyard and road lighting replacement project estimated at $7,963.78 for the lights. Completion is planned for March 2019. Requesting 2017 credits to cover part of this project until costs finalized in 2019.

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

ESTIMATED kWh SAVINGS:	19,640 KWH 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:

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 Energy

Roseburg
A Forest Products Company

Roseburg Forest Products
PO Box 4007
Missoula MT 59808

February 14, 2019

2018 Annual Report for USB Credits

In 2018, Roseburg earned $44,369.10 and used 41,276.24 USB credits as detailed below.

Sonic Aire Fans:

We used $40,289.00 USB credits to removed compressed air for cleanup and replaced with electric Sonicaire fans to keep dust down. As of 12/31/2018, we had installed seven Sonicaire Fans to keep dust down. We will continue to replace the remaining compressed air with electric Sonicaire fans throughout 2019.

Replaced old lights:

We used $987.24 USB credits to replace 18 old 4 bulb lights with 21 - 2x2 LED lights in our main conference room.

USB Credit Summary

2017 Carry over	$ 40,683.24
2018 Earned	$ 44,369.10
2018 Payments	($41,276.24)
Balance 12.31.2018	$ 43,776.1 (reserved to use in 2019)

Thank You,

Minta Johnson

Minta Johnson
406-829-4372
Plant Controller

USB Sent Email 9-26-18

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 FAX: (406) 497-4008

DATE:	9-5-18
NAME OF BUSINESS:	Roseburg Forest Products
CITY/TOWN LOCATION:	Missoula MT
CONTACT PERSON:	Minta Johnson
MAILING ADDDRESS:	3300 Raser Dr
CITY, STATE AND ZIP:	Missoula MT
PHONE NUMBER:	406 728 3910
FAX NUMBER:	XX
E-MAIL ADDRESS	MintaJ@RFPCO.COM

AMOUNT OF CREDIT REQUESTED:	~~$39,865~~ 17,509.00

pd 17,509.00

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):
Remoding Compressed Air for Cleanup and Replacing with Electric fans to keep Dust Down.

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

ESTIMATED kWh SAVINGS:	
ESTIMATED KW SAVINGS:	48 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: Minta Johnson

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.

$17,509

NorthWestern Energy
Delivering a Bright Future

USB 2018 - Emailed 11-27-18

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 FAX: (406) 497-4008

DATE:	11-15-2018
NAME OF BUSINESS:	**Roseburg Forest Products**
CITY/TOWN LOCATION:	Missoula MT 59808
CONTACT PERSON:	Minta Johnson
MAILING ADDDRESS:	PO Box 4007
CITY, STATE AND ZIP:	Missoula, MT 59809
PHONE NUMBER:	406-829-4372
FAX NUMBER:	
E-MAIL ADDRESS	mintaj@rfpco.com

AMOUNT OF CREDIT REQUESTED:	22,780.00

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):
Removing Compressed Air for Cleanup and Replacing with Electric Fans to keep Dust Down

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

ESTIMATED kWh SAVINGS:	
ESTIMATED KW SAVINGS:	48KW

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: Minta Johnson

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® Energy
Delivering a Bright Future

Emailed 11-29-18

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 FAX: (406) 497-4008

DATE:	11-29-2018
NAME OF BUSINESS:	**Roseburg Forest Products**
CITY/TOWN LOCATION:	Missoula MT 59808
CONTACT PERSON:	Minta Johnson
MAILING ADDDRESS:	PO Box 4007
CITY, STATE AND ZIP:	Missoula, MT 59809
PHONE NUMBER:	406-829-4372
FAX NUMBER:	
E-MAIL ADDRESS	mintaj@rfpco.com

AMOUNT OF CREDIT REQUESTED:	987.24

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):
Replace old lights with LED lights in main office conference room.

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: Minta Johnson

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.

Uses last of 2017 Credits
& little of 2018 Credits.

10/1/2016 Update

NorthWestern® Energy
Delivering a Bright Future

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

ROSEBURG FOREST PRODUCTS

Account Summary

2017 Carryover Reservation:	$43,000.00	YTD Elec Revenue:	$948,377.17
Reservations Made YTD:	$45,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$41,276.24
Payment Requests Made YTD:	$41,276.24	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$40,683.24	Total USBC Credit:	$85,052.34
USBC Credit YTD:	$44,369.10	Payments Issued YTD:	$41,276.24
Average Monthly Credit Earned:	$3,697.43	USBC Credit Balance:	$43,776.10
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Minta Johnson	09/05/2018	$17,509.00
Minta Johnson	11/15/2018	$22,780.00
Minta Johnson	11/29/2018	$987.24

Payments Issued

Date	Amount
10/03/2018	$17,509.00
12/10/2018	$23,767.24

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1120533	223500	DG16558725	KWH >	7,764	7,273	6,608	4,293	2,294	472	473	456	706	760	1,340	3,975	36,414
			KW >	12	12	12	6	6	3	1	1	3	3	7	13	7
			Elec Revenue >	$167.67	$158.53	$154.44	$88.87	$69.25	$35.54	$19.24	$18.96	$38.28	$37.11	$69.30	$136.46	$993.65
1120571	223498	DG64556859	KWH >	8,560	9,560	9,680	10,400	10,800	9,480	11,720	9,680	12,600	12,000	14,800	11,040	130,320
			KW >	76	82	83	83	86	93	88	82	97	87	92	86	86
			Elec Revenue >	$605.44	$650.16	$653.05	$659.95	$682.30	$714.65	$708.18	$651.34	$777.81	$705.47	$764.19	$688.31	$8,260.85
1120644	1686	DA21629764	KWH >	3,736,007	4,669,101	3,878,985	4,107,876	3,957,686	4,192,944	4,169,418	4,208,524	4,320,472	3,846,888	4,363,647	3,680,708	49,132,256
			KW >	7,374	7,290	7,096	7,089	6,953	7,115	6,869	6,726	6,836	6,791	6,817	6,817	6,981
			Elec Revenue >	$76,423.25	$86,962.37	$75,981.98	$78,620.53	$76,280.30	$79,725.03	$78,385.28	$78,406.73	$80,191.32	$74,474.99	$80,611.71	$72,651.38	$938,714.87
			Total KWH	3,752,331	4,685,934	3,895,273	4,122,569	3,970,780	4,202,896	4,181,611	4,218,660	4,333,778	3,859,648	4,379,787	3,695,723	49,298,990
			Combined Average KW	7,462	7,384	7,191	7,178	7,045	7,211	6,958	6,809	6,936	6,881	6,916	6,916	7,074
			USBC Charge	$3,377.10	$4,217.34	$3,505.75	$3,710.31	$3,573.70	$3,782.60	$3,763.46	$3,796.79	$3,900.40	$3,473.68	$3,941.81	$3,326.16	$44,369.10
			Total Elec Revenue	$77,196.36	$87,771.06	$76,789.47	$79,369.35	$77,031.85	$80,475.22	$79,112.70	$79,077.03	$81,007.41	$75,217.57	$81,445.20	$73,476.15	$947,969.37

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
FAX: (406) 497-4008

DATE:	10/30/2018
NAME OF BUSINESS:	**Roseburg Forest Products**
CITY/TOWN LOCATION:	Missoula MT
CONTACT PERSON:	Minta Johnson
MAILING ADDDRESS:	PO Box 4007
CITY, STATE AND ZIP:	Missoula MT 59808
PHONE NUMBER:	406-829-4372
FAX NUMBER:	
E-MAIL ADDRESS	Mintaj@rfpco.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.)

Continue removing compressed air for cleanup and replacing with Electric Sonicaire fans to keep dust down as well as replace old lights with LED Fixtures in high bays and offices. Completed by End of 2019

Reserve all remaining 2018 USB credits at year-end for use in 2019 APPROX $44,000

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: Minta Johnson

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

R-Y Timber, Livingston Mt. "USB" Report for 2018. 2-20-2019

To: Nichole Hensley

Dept. of Revenue

P.O. Box 5805

Helena, Mt. 59604-5805

Rec'd MT DOR
FEB 26 2019

Hi Nichole, In 2018, we at R-Y Timber participated in the Universal Systems Benefits Large Customer Program, and upgraded all lighting in our Livingston Plant to LED.

This is our first year of active participation in the program, in years past, we donated our USB dollars back to assistance programs.

Please find enclosed a copy of Form B – Universal systems benefits request form, and Self Directed USBC Progress Report for 2018.

If you have any questions, please call me at 406-220-6140, or e-mail at dansrichards@aol.com.

Thanks, Dan Richards

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

Complete and mail to:

North Western Energy
Attn: Rick Edwards
Customer Services Department
11 E. Park Street
Butte, MT 59701
Email: rick.edwards@northwestern.com FAX: (406) 497-4008

DATE:	10-30-2018
NAME OF BUSINESS:	**R-Y Timber**
CITY/TOWN LOCATION:	Livingston
CONTACT PERSON:	Dan Richards 406-220-6140
MAILING ADDDRESS:	P.O. Box 1372
CITY, STATE AND ZIP:	Livingston, Mt. 59047
PHONE NUMBER:	406-222-3360 / (Dan /Richards) 406-220-6140
FAX NUMBER:	
E-MAIL ADDRESS	dansrichards@aol.com

AMOUNT OF CREDIT REQUESTED:	$28,188.00

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):
Replace all Fluorescent, Metal Halide, Quartz and Mercury Vapor Lamps in the Livingston Plant with LED Lamps And Fixtures.

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

ESTIMATED kWh SAVINGS:	
ESTIMATED KW SAVINGS:	431 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: Scott J Stevens for RY Timber

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 Energy
Delivering a Bright Future

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/20/2019

R Y TIMBER

Account Summary

2017 Carryover Reservation:	$13,100.00	YTD Elec Revenue:	$1,357,629.29
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$28,188.00
Payment Requests Made YTD:	$28,188.00	Current Request Balance:	$3,353.44
2017 Carryover USBC Credit:	$13,065.33	Total USBC Credit:	$25,867.95
USBC Credit YTD:	$12,802.62	Payments Issued YTD:	$24,834.56
Average Monthly Credit Earned:	$1,066.89	USBC Credit Balance:	$1,033.39
		Payment Pending:	$1,033.39

Payment Requests Made

Submitted By	Date	Amount
Dan Richards	10/30/2018	$28,188.00

Payments Issued

Date	Amount
12/10/2018	$24,834.56

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100587	1591	DA18683742	KWH >	616,995	591,834	575,891	599,694	538,937	437,647	462,338	519,633	370,169	410,479	421,223	490,269	6,035,109
			KW >	1,803	1,765	1,752	1,709	1,672	1,568	1,627	1,607	1,555	1,679	1,655	1,737	1,677
			Elec Revenue >	$53,689.23	$51,708.38	$50,568.38	$52,225.09	$47,599.80	$39,831.28	$41,458.50	$44,646.64	$34,375.26	$37,978.54	$38,570.74	$43,940.67	$536,612.51
100598	1602	DA19428671	KWH >	911,156	892,303	827,375	838,084	709,770	543,346	484,207	424,513	490,839	571,314	713,118	645,591	8,051,616
			KW >	2,196	2,188	2,172	1,999	2,060	1,764	1,697	1,587	1,679	1,820	1,944	2,019	1,927
			Elec Revenue >	$83,220.29	$86,827.56	$81,382.82	$81,327.00	$71,709.74	$56,421.65	$51,158.24	$44,841.29	$50,731.31	$58,245.97	$69,819.11	$65,605.37	$800,290.35
703823	320884	DG51083805	KWH >	26,280	13,760	15,760	14,840	13,480	7,680	6,120	5,280	5,040	6,560	11,280	12,360	138,440
			KW >	38	38	37	34	35	28	26	16	16	22	30	28	29
			Elec Revenue >	$2,444.78	$1,470.17	$1,607.53	$1,515.74	$1,416.01	$865.69	$741.47	$574.26	$554.11	$737.67	$1,177.80	$1,245.49	$14,370.72
			Total KWH	1,554,431	1,497,897	1,419,026	1,452,618	1,262,187	988,673	952,665	949,426	866,048	988,353	1,145,621	1,148,220	14,225,165
			Combined Average KW	4,037	3,991	3,961	3,742	3,767	3,360	3,350	3,210	3,250	3,521	3,629	3,784	3,634
			USBC Charge	$1,398.99	$1,348.10	$1,277.12	$1,307.36	$1,135.96	$889.80	$857.40	$854.48	$779.45	$889.51	$1,031.06	$1,033.39	$12,802.62
			Total Elec Revenue	144,354.30	140,006.11	133,578.73	135,067.83	120,725.55	97,138.62	93,358.21	90,062.19	85,660.68	96,962.18	109,567.65	110,791.53	1,357,273.58

Flathead Elec
Large Custor
January 1, 201

FEC Customer	2018 kWh Purchases through Dec 31, 2018	Conservation investments made through power purchases pursuant to 69-8-402(2)(b)
Semitool, Inc.	8,157,000	$18,777

:tric Cooperative, Inc.
ner USB Information
.8 - December 31, 2018

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
$759	$5,269		$0

MONTANA-DAKOTA
UTILITIES CO.
A Division of MDU Resources Group, Inc.
400 North Fourth Street
Bismarck, ND 58501

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: February 12, 2019

NAME OF BUSINESS: Sidney Sugars Incorporated

CITY/TOWN LOCATION: Sidney, Montana

CONTACT PERSON: Ken Barnhart

MAILING ADDRESS: 35140 County Road 125

CITY, STATE AND ZIP Sidney, Montana 59270

PHONE NUMBER: 406-433-9306

FAX NUMBER: 406-433-5892

E-MAIL ADDRESS: kbarnhar@crystalsugar.com

AMOUNT OF CREDIT REQUESTED: $ 32,050.28

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):
See Attached.

ESTIMATED kWh and KW SAVINGS:

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: Ken Barnhart

Sidney Sugars 2018 Light Upgrades

List of Lights Installed

Qty.	UOM	Description	Watts	Total Cost	Replaced Qty.	UOM	Description	Watts	Watts Reduced
10	ea	Neptune 31320-M4-480 LED	113	$ 6,846.56	14	ea	Metal Halide	400	4470
4	ea	Hubble Low Bay SQ NRG LED	40	$ 3,779.80	4	ea	Metal Halide	150	440
6	ea	Hubble Wall Pack PGM3/PVL3 LED	71	$ 3,272.60	6	ea	Metal Halide	250	1074
9	ea	Hubble LWL P30 LED	71	$ 4,733.30	9	ea	Metal Halide	250	1611
3	ea	Compass Hi-Bay LH-2405	240	$ 1,024.76	3	ea	Metal Halide	250	30
1	ea	Dursite Dialight STW9C2N	40	$ 2,694.05	1	ea	Metal Halide	250	210
5	ea	Champ Pro PLL4 LED	32	$ 2,694.05	10	ea	Fluorescents	150	1340

2018 Total	$ 25,045.12	9.175 kW
2017 Carry-Forward Credit	$ 7,005.16	60,115 kWh / year
USB Total	**$ 32,050.28**	

SIGNAL PEAK ENERGY POWER EFFICIENCY, VOLTAGE CORRECTION AND POWER SAVINGS PROJECTS - UPDATED THRU 2018

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

PROJECTS 2018

1) INSTALL HEAVY DUTY CAPACITORS AT 100 KVA SUBSTATION $60,000
2) INSTALL 880 VFD, UPGRADE 2 EAST BELT DRIVE $241,000
3) INSTALL 21,600 VOLT TRANSFORMER, 20 MVA, UNDERGROUND POWER SUPPLY $1,200,000

TOTAL YEAR EXPENDIUTRES

1) 2012 – 2013 : $485,928
2) 2013 – 2014 : $174,259
3) 2014 – 2015 : $1,010,811
4) 2016: $274,504
5) 2017: $92,000
6) 2018: $1,501,000

Signal Peak Energy LLC

USB Program liability requirements for large power users with loads >= 1 MW passed legislation in 2015: MCA 69-8-414.		
Year	Expenditures	Large Power Users USB Program Annual Liability (based on total annual kWh usage x.9 mills)
2012-2013	$ 485,928.00	
2013-2014	$ 174,259.00	
2014-2015	$ 1,010,811.00	$ 82,823.27
2016	$ 274,504.00	$ 75,592.67
2017	$ 92,000.00	$ 84,390.13
2018	$ 1,501,000.00	$ 90,321.36
2019		
2020		
2021		
2022		
2023		
2024		
2025		
	$ 3,538,502.00	$ 333,127.43

January 22, 2019

Montana Department of Revenue
Attn: Mark Schoenfeld

Via e-mail to: mschoenfeld@mt.gov

Report on 2018 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 2018. Below is a summary report of Spring Creek Coal LLC's universal system benefits programs activities and expenditures in calendar year 2018.

As set forth in our previous letter dated January 22, 2018, 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 2018 in the amount of **$178,760.76** pursuant to § 69-8-402(7)(b) of the Montana Code Annotated.

In 2018, 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 **$57,410.64**. A summary of the qualifying expenditures is contained below.

January through December 2018 – Transition to high efficiency, low consumption LED lights on the BE Dragline boom. Total expenditure in 2018 of $57,410.64

The $57,410.64 in qualifying expenditures in 2018, plus the carry forward credit of $178,760.76 exceeded the **$56,239.65** 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 **$179,931.75** for use with respect to universal system benefits in 2019.

SPRING CREEK COAL LLC | 67 Lakeshore Drive | PO Box 67 | Decker, Montana 59025
T +1 406 757 2581 | F +1 406 757 2405 | www.cloudpeakenergy.com

SCL Health

St. James Healthcare

Rec'd MT DOR
FEB 19 2019

Rec'd MT DOR
FEB 20 2019

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

To whom it may concern,

Please see enclosed USB Program Summary Report for St. James Healthcare for calendar year 2018, provided to us by Northwestern Energy.

For future mailings, please remove Mike Wilson and replace the attention to Tom McKenna, or myself.

Do not hesitate to contact me if I can be of further assistance.

Sincerely,

Barbara West

Barbara West
Facilities Coordinator
St. James Healthcare/CBRE
400 S. Clark St.
Butte, MT 59701
Ph: 406 723 2643
Fax: 406 204 4652

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

SAINT JAMES HOSPITAL

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$635,121.55
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$43,767.01	Total Payment Requests:	$43,767.01
Payment Requests Made YTD:	$0.00	Current Request Balance:	$37,966.78
2017 Carryover USBC Credit:	$442.19	Total USBC Credit:	$6,220.61
USBC Credit YTD:	$5,778.42	Payments Issued YTD:	$5,800.23
Average Monthly Credit Earned:	$481.54	USBC Credit Balance:	$420.38
		Payment Pending:	$420.38

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$1,748.76
07/11/2018	$1,407.64
10/03/2018	$1,697.05
12/10/2018	$946.78

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100059	1060	DA06183568	KWH >	505,597	497,624	447,568	498,607	497,482	564,890	550,571	689,772	642,414	548,392	501,674	466,134	6,410,725
			KW >	981	978	923	970	1,114	1,250	1,346	1,627	1,402	1,277	1,042	924	1,153
			Elec Revenue >	$49,258.07	$48,634.21	$44,078.90	$48,839.16	$50,028.99	$56,616.86	$56,129.47	$68,470.29	$62,937.86	$54,820.28	$48,813.15	$45,094.55	$633,721.79
1711946	286258	DD56126322	KWH >	0	0	960	960	960	1,152	960	960	960	960	960	960	9,792
			KW >	0	0	1	1	1	1	1	1	1	1	1	1	1
			Elec Revenue >	$101.58	$101.74	$101.25	$101.74	$101.68	$116.63	$101.40	$99.33	$99.52	$100.12	$99.93	$100.35	$1,225.27
			Total KWH	505,597	497,624	448,528	499,567	498,442	566,042	551,531	690,732	643,374	549,352	502,634	467,094	6,420,517
			Combined Average KW	981	978	924	971	1,115	1,251	1,347	1,628	1,403	1,278	1,043	925	1,154
			USBC Charge	$455.04	$447.86	$403.67	$449.61	$448.59	$509.44	$496.37	$621.65	$579.03	$494.41	$452.37	$420.38	$5,778.42
			Total Elec Revenue	$49,359.65	$48,735.95	$44,180.15	$48,940.90	$50,130.67	$56,733.49	$56,230.87	$68,569.62	$63,037.38	$54,920.40	$48,913.08	$45,194.90	$634,947.06

Montana Department of Revenue

Gene Walborn
Director

Steve Bullock
Governor

Saint James Healthcare
Michael Wilson
400 S Clark St
Butte, MT 59701

2/10/2019

Universal System Benefits Programs Utility & Large Customer Annual Report

USB Program Summary Reports are due by March 1, 2019
Public Utilities and large customers claiming universal system benefit (USB) credits for calendar year 2018 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

PROVIDENCE
St. Patrick Hospital

Rec'd MT DOR
FEB 11 2019

Nicole Hensley,

Attached you will find the 2018 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

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
FAX: (406) 497-4008

DATE:	OCT 24 2018
NAME OF BUSINESS:	ST Patrick Hospital
CITY/TOWN LOCATION:	Missoula
CONTACT PERSON:	Tim Chopp
MAILING ADDDRESS:	500 W Broadway
CITY, STATE AND ZIP:	Missoula, MT 59803
PHONE NUMBER:	406-329-2605
FAX NUMBER:	406-329-5855
E-MAIL ADDRESS	tchopp@saintpatrick.org

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.)

NCAT is in the process of doing an Energy Audit. We would like to carry over to 2019 to address Findings. Anticipated Amount is $13,000.00

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: Tim Chopp Facilities 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 A. NorthWestern Energy has no financial responsibility for any subsequent disallowances by the Department of Revenue.

NorthWestern® Energy
Delivering a Bright Future

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/4/2019

SAINT PATRICK HOSPITAL

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$1,314,339.26
Reservations Made YTD:	$13,000.00		
2017 Carryover Payment Request:	$1,051.98	Total Payment Requests:	$1,051.98
Payment Requests Made YTD:	$0.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$1,044.47	Total USBC Credit:	$13,941.58
USBC Credit YTD:	$12,897.11	Payments Issued YTD:	$1,051.98
Average Monthly Credit Earned:	$1,074.76	USBC Credit Balance:	$12,889.60
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$1,051.98

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100027	1036	DA19428668	KWH >	146,138	150,310	137,597	160,969	158,868	174,371	169,303	181,373	179,961	164,791	161,304	147,270	1,932,255
			KW >	268	284	290	290	285	283	288	298	288	283	281	294	286
			Elec Revenue >	$14,081.25	$14,591.66	$13,596.64	$15,552.47	$15,282.49	$16,471.65	$16,085.76	$16,707.79	$16,575.31	$15,484.30	$15,151.24	$14,269.22	$183,849.78
100621	1625	DA19428670	KWH >	908,837	923,495	814,592	918,771	908,057	946,661	934,266	994,349	980,203	922,561	930,904	845,692	11,028,388
			KW >	1,458	1,489	1,539	1,494	1,515	1,570	1,544	1,567	1,552	1,526	1,507	1,458	1,518
			Elec Revenue >	$81,844.49	$83,361.57	$75,165.16	$83,383.20	$82,465.09	$85,846.57	$84,364.61	$87,088.95	$86,283.69	$82,270.14	$82,547.37	$76,044.54	$990,665.38
512426	214091	DG36066757	KWH >	29,760	30,960	29,920	38,160	44,480	47,600	55,600	52,480	54,880	52,240	45,680	29,200	510,960
			KW >	68	88	70	90	99	104	108	108	107	99	91	63	91
			Elec Revenue >	$3,009.36	$3,301.60	$3,042.39	$3,901.90	$4,474.85	$4,770.57	$5,385.23	$5,062.46	$5,264.07	$5,002.65	$4,418.78	$2,885.36	$50,519.22
697838	311978	DA19272482	KWH >	38,720	37,120	37,360	40,000	43,040	51,120	56,640	60,320	61,280	47,040	43,760	34,480	550,880
			KW >	122	122	122	118	152	156	170	176	159	144	124	120	140
			Elec Revenue >	$4,252.58	$4,125.27	$4,137.17	$4,322.78	$4,890.41	$5,551.24	$6,074.55	$6,332.61	$6,269.24	$5,056.21	$4,605.03	$3,864.21	$59,481.30
1505900	404330	DA05771291	KWH >	20,400	20,480	21,680	21,200	20,640	22,640	20,480	21,520	24,240	23,520	24,480	22,880	264,160
			KW >	32	32	32	32	32	32	32	34	33	34	34	34	33
			Elec Revenue >	$1,919.15	$1,925.18	$2,020.43	$1,990.93	$1,949.91	$2,096.54	$1,906.86	$1,982.31	$2,193.21	$2,154.28	$2,228.10	$2,112.42	$24,479.32
3363139	395466	DA04750358	KWH >	3,467	3,854	3,687	3,690	3,309	3,490	3,323	3,504	3,546	4,031	3,845	3,790	43,536
			KW >	12	12	15	13	12	11	11	12	11	13	13	13	12
			Elec Revenue >	$400.22	$435.70	$444.34	$432.30	$392.14	$391.27	$380.20	$394.26	$396.68	$451.23	$438.72	$431.66	$4,988.72
			Total KWH	1,147,322	1,166,219	1,044,836	1,182,790	1,178,394	1,245,882	1,239,612	1,313,546	1,304,110	1,214,183	1,209,973	1,083,312	14,330,179
			Combined Average KW	1,960	2,027	2,068	2,037	2,095	2,156	2,153	2,195	2,150	2,099	2,050	1,982	2,081
			USBC Charge	$1,032.58	$1,049.60	$940.35	$1,064.50	$1,060.56	$1,121.29	$1,115.65	$1,182.19	$1,173.69	$1,092.77	$1,088.96	$974.97	$12,897.11
			Total Elec Revenue	105,507.05	107,740.98	$98,406.13	109,583.58	109,454.89	115,127.84	114,197.21	117,568.38	116,982.20	110,418.81	109,389.24	$99,607.41	$1,313,983.72

--- SAMPLE COVER LETTER TO USE FOR DOR REPORTING ---

February 15, 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

RE: Self-Directed USBC Progress Report for 2018 – St. Vincent Healthcare

Dear Ms. Hensley:

Large customers of NorthWestern Energy that participate in the Universal Systems Benefit Program are required to submit an Annual Summary Report, pursuant to 69-9-402, MCA,(Montana Code Annotated), of its Universal Systems Benefit Program (USB) activities and expenditures for the previous calendar year to the Montana Department of Revenue and to the large customer's electric utility. This 2018 summary report is for St. Vincent Healthcare.

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018. In 2018, we received a total of $16,666.43 in USB credit reimbursement payments; composed of $1,435.17 in 2017 USB credits (carried over into 2018) and $15,231.26 in 2018 credits. These USB payments were for energy efficient projects submitted in previous years.

At year-end 2018, we had a 2018 USB credit balance of $3,543.96 carried over into 2019, because we submitted a Reservation to use the credits for a potential project in 2019.

Sincerely,

Tony Janskovitch
St. Vincent Healthcare

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/27/2019

SAINT VINCENT HEALTHCARE

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$1,985,531.33
Reservations Made YTD:	$4,000.00		
2017 Carryover Payment Request:	$16,666.43	Total Payment Requests:	$16,666.43
Payment Requests Made YTD:	$0.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$1,435.17	Total USBC Credit:	$20,210.39
USBC Credit YTD:	$18,775.22	Payments Issued YTD:	$16,666.43
Average Monthly Credit Earned:	$1,564.60	USBC Credit Balance:	$3,543.96
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$5,938.55
07/11/2018	$4,640.28
10/03/2018	$5,326.29
12/10/2018	$761.31

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100603	1607	DA21480965	KWH >	1,152,940	1,151,900	1,030,859	1,114,102	1,136,407	1,239,878	1,208,695	1,364,112	1,235,528	1,095,985	1,083,558	1,000,787	13,814,751
			KW >	1,918	1,908	1,899	1,976	2,006	2,223	2,738	2,547	2,164	2,262	1,938	1,889	2,122
			Elec Revenue >	104,422.94	104,344.48	$94,821.70	102,422.25	104,102.38	113,778.27	114,913.43	122,841.39	110,582.87	101,437.80	$97,666.47	$91,365.84	$1,262,699.82
252463	79349	DG52501009	KWH >	101,760	98,240	88,640	90,240	117,920	124,320	139,840	165,600	129,120	111,840	93,760	95,680	1,356,960
			KW >	200	203	200	251	288	320	321	324	345	280	296	260	274
			Elec Revenue >	$9,949.03	$9,694.15	$8,930.89	$9,581.86	$12,096.88	$12,899.70	$13,979.92	$15,808.54	$13,313.17	$11,368.60	$10,146.65	$9,971.70	$137,741.09
252580	79411	DG90038870	KWH >	27,120	25,120	22,800	20,800	21,360	20,080	22,560	26,160	22,560	23,920	17,920	21,760	272,160
			KW >	53	51	53	50	55	71	64	64	64	52	52	47	56
			Elec Revenue >	$2,659.90	$2,476.73	$2,323.92	$2,140.27	$2,227.12	$2,282.11	$2,381.32	$2,629.47	$2,368.07	$2,358.97	$1,899.83	$2,153.24	$27,900.95
252582	79412	DG21353939	KWH >	10,000	9,440	8,640	7,600	7,520	6,640	4,160	3,680	3,920	5,680	8,800	10,240	86,320
			KW >	14	16	26	14	56	28	34	28	32	17	24	30	27
			Elec Revenue >	$931.76	$903.18	$945.25	$747.10	$1,157.29	$803.52	$668.58	$564.82	$624.85	$617.89	$921.43	$1,098.47	$9,984.14
667692	295892	DA18484098	KWH >	239,400	214,600	269,000	170,000	267,000	282,600	334,800	362,000	292,000	267,200	210,000	231,000	3,139,600
			KW >	184	498	328	550	674	788	910	876	876	624	624	526	622
			Elec Revenue >	$20,530.09	$21,708.75	$24,329.53	$18,813.75	$27,596.91	$29,911.18	$34,844.79	$36,196.63	$31,035.55	$26,704.51	$22,330.04	$23,035.19	$317,036.92
693280	309227	DD55409441	KWH >	8,080	6,360	7,280	7,680	7,240	7,080	7,200	8,840	7,520	8,320	6,760	6,560	88,920
			KW >	19	18	35	18	20	21	23	24	24	24	19	19	22
			Elec Revenue >	$833.48	$684.25	$756.60	$797.96	$776.66	$775.53	$803.12	$924.57	$822.45	$888.67	$719.78	$707.28	$9,490.35
712447	322799	DA02824846	KWH >	5,320	4,960	4,440	4,400	4,880	5,040	6,240	7,680	5,560	5,360	3,760	4,680	62,320
			KW >	13	12	12	13	17	22	26	25	25	14	12	13	17
			Elec Revenue >	$558.54	$513.71	$477.81	$483.59	$559.74	$619.03	$750.01	$840.82	$682.76	$565.55	$419.21	$503.12	$6,973.89

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/27/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
712464	322814	DD38419013	KWH >	2,015	2,086	1,875	1,661	1,833	1,661	2,267	2,166	1,738	1,732	1,565	1,848	22,447
			KW >	10	9	8	7	8	10	10	10	10	10	9	8	9
			Elec Revenue >	$266.22	$264.84	$238.90	$214.90	$234.16	$237.53	$289.41	$275.89	$244.31	$244.40	$217.40	$234.68	$2,962.64
775396	347607	DG93142125	KWH >	2,778	2,448	1,957	1,949	1,966	1,648	1,722	1,858	2,041	2,624	2,249	2,724	25,964
			KW >	5	5	5	5	5	5	5	5	5	5	5	5	5
			Elec Revenue >	$277.55	$251.59	$213.46	$213.30	$214.21	$189.18	$192.96	$201.17	$216.26	$261.72	$233.09	$270.34	$2,734.83
874310	354140	DA19955857	KWH >	2,493	2,250	1,700	1,595	1,627	1,301	1,341	2,087	2,059	2,563	2,370	2,064	23,450
			KW >	6	5	5	5	6	8	6	9	12	9	10	5	7
			Elec Revenue >	$263.91	$241.18	$196.49	$191.29	$196.89	$194.35	$171.18	$255.71	$289.89	$302.99	$290.13	$219.18	$2,813.19
922450	356361	DA19166590	KWH >	16,640	14,240	14,680	14,200	14,160	15,680	15,640	16,080	17,560	17,840	14,000	15,240	185,960
			KW >	35	33	67	31	32	34	38	43	43	39	33	32	38
			Elec Revenue >	$1,660.94	$1,455.96	$1,487.83	$1,437.60	$1,438.31	$1,580.14	$1,609.19	$1,661.02	$1,773.01	$1,766.53	$1,413.19	$1,503.01	$18,786.73
1342725	379742	DA04686576	KWH >	5,356	5,069	6,459	5,240	5,649	4,892	4,393	4,500	4,277	4,989	4,833	5,669	61,326
			KW >	16	17	18	18	17	17	15	20	18	16	16	17	17
			Elec Revenue >	$592.45	$581.86	$692.08	$599.58	$618.78	$563.59	$500.69	$547.37	$514.35	$554.76	$538.44	$613.69	$6,917.64
1363028	388931	DA05050654	KWH >	7,680	6,400	6,560	6,680	6,800	8,520	7,440	9,840	8,120	8,200	6,880	7,000	90,120
			KW >	24	21	22	20	24	27	29	26	25	27	25	23	24
			Elec Revenue >	$851.00	$716.70	$739.56	$729.50	$777.34	$942.54	$867.06	$1,021.44	$883.81	$910.09	$790.58	$781.43	$10,011.05
1454739	67484	DW68083374	KWH >	1,601	1,380	1,479	1,482	1,151	1,539	1,853	2,188	2,003	1,551	1,357	1,479	19,063
			KW >	8	8	8	7	10	11	10	12	14	10	7	7	9
			Elec Revenue >	$212.55	$199.76	$201.86	$202.41	$204.17	$237.00	$255.94	$299.23	$305.67	$230.27	$184.20	$200.12	$2,733.18
1454749	67471	DA05050666	KWH >	1,920	1,598	1,608	1,835	1,558	1,708	1,855	1,691	1,809	1,911	1,777	1,779	21,049
			KW >	5	5	5	6	5	5	5	5	5	5	5	6	5
			Elec Revenue >	$209.20	$188.19	$186.19	$212.37	$181.16	$195.13	$205.61	$191.07	$202.65	$208.86	$199.59	$208.94	$2,388.96
1454755	67466	DG36036981	KWH >	933	779	803	884	724	1,038	1,336	1,889	1,774	1,205	776	842	12,983
			KW >	3	3	3	3	2	10	9	12	11	8	3	3	6
			Elec Revenue >	$114.70	$100.09	$100.72	$110.83	$91.18	$195.04	$202.56	$273.19	$259.25	$188.28	$101.95	$104.27	$1,842.06
1490119	403086	DG28375357	KWH >	57,000	46,600	40,040	42,560	35,560	28,320	33,160	38,160	31,320	28,120	24,920	38,440	444,200
			KW >	123	105	118	114	87	76	84	84	78	60	93	85	92
			Elec Revenue >	$5,687.85	$4,693.75	$4,310.94	$4,482.80	$3,660.47	$2,982.72	$3,405.08	$3,747.34	$3,176.98	$2,760.65	$2,846.49	$3,816.21	$45,571.28
1504283	402163	DG28550506	KWH >	10,680	11,040	10,280	9,800	11,120	11,960	13,120	16,360	15,480	14,040	10,800	11,560	146,240
			KW >	32	30	58	29	41	48	48	60	57	49	49	38	45
			Elec Revenue >	$1,160.05	$1,173.80	$1,101.27	$1,067.03	$1,286.58	$1,418.60	$1,507.12	$1,855.12	$1,757.60	$1,577.81	$1,326.95	$1,282.62	$16,514.55
1517321	264299	DG75983234	KWH >	5,940	5,840	5,220	5,300	5,620	6,720	6,840	9,020	6,760	6,100	4,720	5,180	73,260
			KW >	15	14	13	15	19	24	26	26	26	26	26	26	21
			Elec Revenue >	$624.88	$604.49	$548.61	$572.20	$637.52	$770.41	$792.65	$950.39	$782.21	$733.63	$627.86	$664.75	$8,309.60
1570057	400440	DA05495611	KWH >	4,026	4,054	3,800	4,274	3,458	4,074	4,270	5,162	3,486	3,538	4,081	3,173	47,396
			KW >	9	9	17	11	8	11	12	13	13	11	11	11	11
			Elec Revenue >	$419.91	$422.75	$399.58	$460.16	$363.14	$442.52	$460.53	$531.87	$405.22	$396.32	$437.70	$369.31	$5,109.01
1863850	427923	DG36289846	KWH >	10,200	9,240	9,080	8,600	9,360	8,760	8,280	8,560	7,720	9,520	7,520	7,720	104,560
			KW >	20	19	19	18	20	25	25	26	24	22	21	19	22
			Elec Revenue >	$1,007.08	$924.32	$910.75	$861.96	$942.80	$942.38	$899.62	$922.73	$842.58	$964.80	$794.57	$792.82	$10,806.41
1890966	258385	DG93700243	KWH >	3,840	3,240	3,040	3,040	2,600	3,080	4,040	3,840	3,040	3,400	3,000	3,320	39,480
			KW >	16	14	13	13	14	16	27	27	27	27	12	13	18
			Elec Revenue >	$475.19	$402.80	$376.32	$380.36	$357.20	$414.12	$590.49	$573.31	$514.36	$542.07	$365.14	$394.40	$5,385.76

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/27/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1914958	79345	DG21141070	KWH >	57,520	52,480	48,880	52,160	63,680	64,080	72,400	80,640	67,120	64,400	48,320	51,120	722,800
			KW >	115	91	112	122	144	144	151	154	149	59	129	115	124
			Elec Revenue >	$5,648.41	$5,009.75	$4,945.07	$5,316.76	$6,430.24	$6,454.02	$7,090.11	$7,664.48	$6,625.70	$5,536.41	$5,004.90	$5,091.43	$70,817.28
			Total KWH	1,735,242	1,679,364	1,589,120	1,576,082	1,729,193	1,850,619	1,903,452	2,142,113	1,872,515	1,690,038	1,563,726	1,529,865	20,861,329
			Combined Average KW	2,843	3,094	3,044	3,296	3,558	3,944	4,616	4,420	4,047	3,656	3,419	3,197	3,595
			USBC Charge	$1,561.72	$1,511.45	$1,430.21	$1,418.47	$1,556.26	$1,665.55	$1,713.12	$1,927.90	$1,685.27	$1,521.05	$1,407.34	$1,376.88	$18,775.22
			Total Elec Revenue	159,357.63	157,557.08	149,235.33	152,039.83	166,151.13	178,828.61	187,381.37	200,777.57	178,223.57	161,121.58	149,475.59	145,382.04	$1,985,531.33

February 28, 2019

Nicole Hensley
Department of Revenue (DOR)
PO Box 5805
Helena, MT 59604-5805

Dear Nicole:

Please find attached a summary of the projects related to expenditure for cost-effective energy savings and conservation for 2018. Total USB earned credits for 2018 are $214,235.61 and a credit of $208,049.71 was carried over from 2017.

The qualifying projects for 2018 are shown in the table below and the corresponding forms are attached.

DESCRIPTION	CREDIT	REQUESTS
2017 Carryover Credit	$208,049.71	
2018 USB Credits	$214,235.61	
Replace various lights at the BMR with LED		$23,329.90
BMR Pump Upgrade		$6,000.00
Replace various lights at the Stillwater Mine with LED		$19,087.10
Stillwater Mine Sav-Air System Upgrade		$45,500.00
Replace various lights at the Smelter with LED		$44,751.08
Donation to Energy Share of Montana		$70,000.00
TOTALS	$422,285.32	$208,668.08
Carry over credit to 2019	$213,617.24	

The self-directed USB is an excellent program and has provided significant positive benefits to Stillwater Mining Company in 2018.

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@SibanyeStillwater.com (e-mail)

Sincerely,

Phil Ault 2/28/19

Phil Ault
Electrical Engineer

Cc: Rick Edwards – Northwestern Energy
Deborah Singer – Northwestern Energy

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

STILLWATER MINING COMPANY

Account Summary

2017 Carryover Reservation:	$210,000.00	YTD Elec Revenue:	$1,508,485.90
Reservations Made YTD:	$215,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$208,668.08
Payment Requests Made YTD:	$208,668.08	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$208,049.71	Total USBC Credit:	$422,285.32
USBC Credit YTD:	$214,235.61	Payments Issued YTD:	$208,668.08
Average Monthly Credit Earned:	$17,852.97	USBC Credit Balance:	$213,617.24
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Phil Ault	11/30/2018	$6,000.00
Phil Ault	11/30/2018	$23,329.90
Phil Ault	11/30/2018	$44,751.08
Phil Ault	11/30/2018	$19,087.10
Phil Ault	11/30/2018	$70,000.00
Phil Ault	11/30/2018	$45,500.00

Payments Issued

Date	Amount
12/10/2018	$70,000.00
12/10/2018	$138,668.08

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100723	1685	DA06183397	KWH >	11,604,961	11,716,942	10,942,491	11,944,241	11,121,125	11,609,549	11,207,879	11,122,486	11,474,395	11,467,040	11,880,685	11,568,420	137,660,214
			KW >	18,300	18,740	18,740	18,688	18,585	18,222	18,533	18,300	18,196	18,766	18,688	18,636	18,533
			Elec Revenue >	$76,755.68	$77,890.70	$74,356.06	$78,304.44	$74,825.68	$76,207.53	$75,091.19	$73,942.47	$75,170.35	$76,064.63	$77,579.60	$76,256.28	$912,444.61
101562	2275	DG63426880	KWH >	19,040	6,080	25,920	2,240	14,720	1,920	11,520	9,440	8,160	6,560	10,400	15,040	131,040
			KW >	59	25	59	11	36	14	27	38	36	35	48	44	36
			Elec Revenue >	$2,085.16	$736.92	$2,620.64	$294.02	$1,524.94	$299.76	$1,166.77	$1,105.13	$996.37	$860.35	$1,282.27	$1,611.40	$14,583.73
659040	291432	DG15154407	KWH >	4,661	4,809	6,219	4,827	3,837	4,639	3,355	3,545	3,125	3,327	3,471	4,002	49,817
			KW >	12	13	15	15	13	15	15	14	15	12	16	12	14
			Elec Revenue >	$495.78	$518.79	$648.92	$541.05	$443.30	$523.05	$419.32	$423.86	$397.38	$390.72	$434.41	$444.53	$5,681.11
659040	291432	DS83181525	KWH >	11,685	10,523	11,987	10,725	9,379	11,091	10,923	12,228	11,265	13,257	10,819	12,014	135,896
			KW >	20	20	18	18	17	20	22	23	26	24	20	22	21
			Elec Revenue >	$1,126.33	$1,037.08	$1,127.35	$1,033.19	$917.95	$1,077.85	$1,085.18	$1,166.47	$1,124.42	$1,265.65	$1,035.44	$1,160.43	$13,157.34
772124	347321	DG16689002	KWH >	6,936,938	6,505,548	5,467,274	5,773,130	5,075,898	5,355,186	5,074,164	5,351,751	5,498,993	5,458,542	6,109,685	5,339,229	67,946,338
			KW >	10,757	12,442	11,664	9,785	9,396	9,850	9,850	10,109	10,044	10,109	11,146	10,174	10,444
			Elec Revenue >	$41,564.54	$41,823.52	$36,550.89	$35,574.76	$32,325.90	$33,976.62	$32,850.84	$34,048.60	$34,553.51	$34,470.42	$38,265.78	$34,075.82	$430,081.20
779337	347946	DA04604091	KWH >	2,360	1,800	2,360	1,680	2,440	2,120	2,800	2,320	2,200	1,760	2,000	2,040	25,880
			KW >	20	11	17	19	24	18	23	18	16	13	16	20	18
			Elec Revenue >	$399.56	$263.35	$365.68	$328.84	$443.29	$358.81	$457.10	$366.13	$342.29	$277.48	$319.75	$371.09	$4,293.37
803025	349056	DA03451116	KWH >	8,460	8,140	7,980	8,220	7,300	8,800	8,040	8,880	8,100	9,180	7,880	7,540	98,520
			KW >	32	32	39	34	39	36	35	38	37	34	33	34	35
			Elec Revenue >	$991.28	$967.08	$1,018.56	$994.02	$964.67	$1,056.09	$983.32	$1,065.52	$993.69	$1,050.28	$944.98	$927.82	$11,957.31

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
2075059	436535	DA05748542	KWH >	2,471,999	2,563,634	2,345,864	2,674,082	2,718,803	2,706,845	2,564,206	2,710,764	2,730,452	2,740,106	2,865,850	2,899,208	31,991,813
			KW >	5,040	5,103	4,905	5,364	5,589	5,238	4,905	5,292	5,859	5,184	5,355	5,886	5,310
			Elec Revenue >	$9,201.72	$9,352.31	$8,841.57	$9,674.71	$9,978.57	$9,556.59	$9,038.08	$9,666.30	$10,352.91	$9,565.31	$9,880.20	$10,536.64	$115,644.91
			Total KWH	21,060,104	20,817,476	18,810,095	20,419,145	18,953,502	19,700,150	18,882,887	19,221,414	19,736,690	19,699,772	20,890,790	19,847,493	238,039,518
			Combined Average KW	34,240	36,386	35,457	33,934	33,699	33,413	33,410	33,832	34,229	34,177	35,322	34,828	34,411
			USBC Charge	$18,954.08	$18,735.73	$16,929.09	$18,377.23	$17,058.15	$17,730.14	$16,994.61	$17,299.29	$17,763.02	$17,729.79	$18,801.72	$17,862.76	$214,235.61
			Total Elec Revenue	132,620.05	132,589.75	125,529.67	126,745.03	121,424.30	123,056.30	121,091.80	121,784.48	123,930.92	123,944.84	129,742.43	125,384.01	$1,507,843.58

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 FAX: (406) 497-4008

DATE:	11/30/2018
NAME OF BUSINESS:	**Stillwater Mining Company**
CITY/TOWN LOCATION:	Columbus & Nye
CONTACT PERSON:	Phil Ault
MAILING ADDDRESS:	PO BOX 1209
CITY, STATE AND ZIP:	Columbus, MT 59019
PHONE NUMBER:	(406) 322-8985
FAX NUMBER:	xxxx
E-MAIL ADDRESS	pault@stillwatermining.com

AMOUNT OF CREDIT REQUESTED:	$45,500

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):
Upgrade the Sav-Air compressed air system at the Stillwater Mine Facility. The estimated savings is at least 25 kw but should be much higher.

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

ESTIMATED kWh SAVINGS:	219,000 kwh
ESTIMATED KW SAVINGS:	25 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: 11/28/2018
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 Energy
Delivering a Bright Future

FORM B - UNIVERSAL SYSTEMS BENEFITS (USB)
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PHONE NUMBER:	(406) 322-8985
FAX NUMBER:	xxxx
E-MAIL ADDRESS	pault@stillwatermining.com

AMOUNT OF CREDIT REQUESTED:	$70,000

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):
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: _____

FOR NORTHWESTERN ENERGY USE ONLY:
PROCESSED BY: 11/28/2018
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 Energy
Delivering a Bright Future

FORM B - UNIVERSAL SYSTEMS BENEFITS (USB)
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11 E. Park Street
Butte, MT 59701
Email: rick.edwards@northwestern.com FAX: (406) 497-4008

DATE:	11/30/2018
NAME OF BUSINESS:	**Stillwater Mining Company**
CITY/TOWN LOCATION:	Columbus & Nye
CONTACT PERSON:	Phil Ault
MAILING ADDDRESS:	PO BOX 1209
CITY, STATE AND ZIP:	Columbus, MT 59019
PHONE NUMBER:	(406) 322-8985
FAX NUMBER:	xxxx
E-MAIL ADDRESS	pault@stillwatermining.com

AMOUNT OF CREDIT REQUESTED:	$19,087.10

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):
Replaced (2) fixtures with energy efficient LED fixtures, (68) Fluorescent tubes with LED replacements, and (166) HPS lamps with LED lamps. All these fixtures were located at the Stillwater Mine near Nye. See the attached spreadsheet.

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

ESTIMATED kWh SAVINGS:	141,497 kWh/yr
ESTIMATED KW SAVINGS:	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: _____

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: 11/28/2018

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 Energy
Delivering a Bright Future

Stillwater Mine 2018 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
2	175W HPS WMPM17 Wallpack	210	420	12	1,840		2	WPFED20/PC wallpack	22	44	12	193	0.4	1,647	$ 205.00	$ 410.00
66	32W 4' T8 Tube (surface shop offices)	32	2,176	12	9,531		66	Lumera HN-T8--4ft-17W-840-G1	17	1,156	12	5,063	1.0	4,468	$ 8.93	$ 589.84
50	250W HPS (Warehouse/Maint)	250	12,500	24	109,500		50	60W Satco #59752	60	3,000	24	26,280	9.5	83,220	$ 87.45	$ 4,372.50
40	250W HPS (29 Shop)	250	10,000	24	87,600		40	60W Satco #59752	60	2,400	24	21,024	7.6	66,576	$ 87.45	$ 3,498.00
20	400W HPS (29 Shop)	400	8,000	24	70,080		20	100W Satco #59356	100	2,000	24	17,520	6.0	52,560	$ 131.16	$ 2,623.20
40	250W HPS (36 Shop)	250	10,000	24	87,600		40	60W Satco #59752	60	2,400	24	21,024	7.6	66,576	$ 87.45	$ 3,498.00
16	400W HPS (East & West Compl	400	6,400	24	56,064		16	100W Satco #59356	100	1,600	24	14,016	4.3	42,048	$ 131.16	$ 2,098.56
			-		-					-			-			$ -
																$ -
			-							-						$ -
			-		-					-		-				$ -
									-	-	-	-				$ -
-	-	-	-	-	-			TOTAL ESTIMATED LABOR	-	-	-	-			-	$ 2,000.00
			49,496		422,214					12,600		105,120				$ 19,087.10

Energy Cost 0.04 $/kwh
Kw Reduction 36.896 kw
Annual energy Saving 317,094 kwh
Annual Savings $ 12,683.78 $

Fixture Total Cost $ 19,087.10

Notes
-This is based on an Email from Rob Payne

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 FAX: (406) 497-4008

DATE:	11/30/2018
NAME OF BUSINESS:	**Stillwater Mining Company**
CITY/TOWN LOCATION:	Columbus & Nye
CONTACT PERSON:	Phil Ault
MAILING ADDDRESS:	PO BOX 1209
CITY, STATE AND ZIP:	Columbus, MT 59019
PHONE NUMBER:	(406) 322-8985
FAX NUMBER:	xxxx
E-MAIL ADDRESS	pault@stillwatermining.com

AMOUNT OF CREDIT REQUESTED:	$44,751.08

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 (336) 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

ESTIMATED kWh SAVINGS:	270,829 kWh/yr
ESTIMATED KW SAVINGS:	36.994 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: 11/28/2018
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 Energy
Delivering a Bright Future

Smelter 2018 light replacement (From 11-25-17 to 11-30-18) WO's Listed Below

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
8	250W MH L4MD25MOA5	295	2,360	24	20,674	8	LT03C4M2P LED 4-FT Linear	66	528	24	4,625	1.8	16,048	$ 407.00	$ 3,256.00
2	363 W 6-Lamp T5HO	363	726	24	6,360	2	LT03C4M2P LED 4-FT Linear	66	132	24	1,156	0.6	5,203	$ 407.00	$ 814.00
1	175W HPS WM7M17 Wallpack	210	210	24	1,840	1	WLD64LED wall pack	64	64	24	561	0.1	1,279	$ 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
4	250W MH L4MD25MOA5	295	1,180	24	10,337	4	WLD64LED wall pack	64	256	24	2,243	0.9	8,094	$ 441.18	$ 1,764.72
9	250W MH L4MD25MOA5	295	2,655	24	23,258	9	LT03C4D2P LED 2-FT Linear	33	297	24	2,602	2.4	20,656	$ 263.00	$ 2,367.00
1	175W HPS WM7M17 Wallpack	210	210	24	1,840	1	LT03C4D2P LED 2-FT Linear	33	33	24	289	0.2	1,551	$ 263.00	$ 263.00
3	175W HPS WM7M17 Wallpack	210	630	24	5,519	3	WLM43LED wall pack	43	129	24	1,130	0.5	4,389	$ 179.95	$ 539.85
11	250W MH L4MD25MOA5	295	3,245	24	28,426	11	WLM43LED wall pack	43	473	24	4,143	2.8	24,283	$ 179.95	$ 1,979.45
30	128W (4) lamp 32W 4' T8	128	3,840	24	33,638	30	44W Venture 41751 2x4 flat	44	1,320	24	11,563	2.5	22,075	$ 72.22	$ 2,166.60
100	128W (4) lamp 32W 4' T8	128	12,800	24	112,128	100	44W Venture 41751 2x4 flat	44	4,400	24	38,544	8.4	73,584	$ 72.22	$ 7,222.00
100	128W (4) lamp 32W 4' T8	128	12,800	12	56,064	100	44W Venture 41751 2x4 flat	44	4,400	12	19,272	8.4	36,792	$ 72.22	$ 7,222.00
4	128W (4) lamp 32W 4' T8	128	512	24	4,485	4	40W FP040UF4400LP 2X4 flat	40	160	24	1,402	0.4	3,083	$ 90.00	$ 360.00
41	128W (4) lamp 32W 4' T8	128	5,248	12	22,986	41	40W FP040UF4400LP 2X4 flat	40	1,640	12	7,183	3.6	15,803	$ 82.25	$ 3,372.25
21	363 W 6-Lamp T5HO	363	7,623	24	66,777	21	BL-160WLED-UNIV-50	160	3,360	24	29,434	4.3	37,344	$ 345.00	$ 7,245.00
						1	WO 36759814 Labor & Misc Cost							$ 1,988.19	$ 1,988.19
						1	WO 36838112 Labor & Misc Cost							$ 566.01	$ 566.01
						1	WO 36726090 Labor & Misc Cost							$ 2,155.19	$ 2,155.19
						1	WO 34760876 Labor & Misc Cost							$ 203.21	$ 203.21
						1	WO 36511187 Labor & Misc Cost							$ 645.48	$ 645.48
		-	-	-	-				-	-	-			-	$ -
			54,229		395,164				17,235		124,335				$ 44,751.08

Energy Cost	0.04 $/kwh	
Kw Reduction	36.994 kw	
Annual energy Saving	270,829 kwh	
Annual Savings	$ 10,833.14	$
Total Fixture & Labor Cost	$ 44,751.08	

Notes:

See WO's 36759814, 36838112, 36726090, 34760876 & 36511187

FORM B - UNIVERSAL SYSTEMS BENEFITS (USB)
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CITY/TOWN LOCATION:	Columbus & Nye
CONTACT PERSON:	Phil Ault
MAILING ADDDRESS:	PO BOX 1209
CITY, STATE AND ZIP:	Columbus, MT 59019
PHONE NUMBER:	(406) 322-8985
FAX NUMBER:	xxxx
E-MAIL ADDRESS	pault@stillwatermining.com

AMOUNT OF CREDIT REQUESTED:	$23,329.90

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):
Replaced (21) various fixtures with energy efficient LED fixtures. 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

ESTIMATED kWh SAVINGS:	35,793 kWh/yr
ESTIMATED KW SAVINGS:	5.346 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: 11/28/2018
DISTRIBUTION: _____

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NorthWestern Energy
Delivering a Bright Future

BMR 2018 light replacement. WO 36726090																
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	
18	363W 6-Lamp T5HO	363	6,534	24	57,238	18	HEU7MC2EMNWNGN 26K	186	3,348	24	29,328	3.2	27,909	$ 975.00	$ 17,550.00	
3	1000W Flood Light, MH	1000	3,000	10	10,950	3	Pitmaster LSG660	280	840	10	3,066	2.2	7,884	$ 1,536.30	$ 4,608.90	
			-		-				-	0	-	-	-	$ -	$ -	
			-		-				-		-	-	-	$ -	$ -	
			-		-				-		-	-	-	$ -	$ -	
			-		-				-		-	-	-	$ -	$ -	
			-		-				-		-	-	-	$ -	$ -	
			-		-				-		-	-	-	$ -	$ -	
			-		-	1	WO 36855342 Labor & Misc		-		-			$ 1,171.00	$ 1,171.00	
-	-	-	-	-	-			-	-	-	-			-	$ -	
			9,534		68,188				4,188		32,394				$ 23,329.90	

Energy Cost:	0.04 $/kwh	
Kw Reduction:	5.346 kw	
Annual energy Saving	35,793 kwh	
Annual Savings	$ 1,431.73	$
Total Fixture & Labor Cost	$ 23,329.90	

Notes:

(1) WO 36726090 total is $23,329 as of 12/30/2018

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LARGE CUSTOMER CREDIT REQUEST FORM

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PHONE NUMBER:	(406) 322-8985
FAX NUMBER:	xxxx
E-MAIL ADDRESS	pault@stillwatermining.com

AMOUNT OF CREDIT REQUESTED:	$6,000

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):

Replace an existing 7.5HP across the line pump with a 1HP VFD operated pump. KW reduction is at least 3kw but likely higher. This pump runs at least 4-days/wk or 4,992 hours a year.

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

ESTIMATED kWh SAVINGS:	14,976 kwh/yr
ESTIMATED KW SAVINGS:	3kw

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: _____ 1/18/2018

DISTRIBUTION: _____

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NorthWestern Energy
Delivering a Bright Future

February 28th, 2019

Nicole Hensley
Department of Revenue (DOR)
PO Box 5805
Helena, MT 59604-5805

Dear Nicole:

Please find below a summary of the projects related to expenditure for cost-effective energy savings and conservation for 2018. A total of 79,486,871 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 $71,538.18.

In the letter dated March 1, 2018, it was stated that the remaining 2017 USB credits of $1,986,832.02 would be carried over into 2018.

In 2018, the following qualifying energy saving projects were completed at the East Boulder mine site.

PROJECT	ANNUAL ENERGY SAVING	PROJECT COST
No new projects for 2018	0 kwh	$0
Totals	0 kwh	$0

Below is a summary of the 2018 USB funding:

DESCRIPTION	CREDITS	CHARGES
2018 USB Charges		$ 71,538.18
Carry over from 2017	$ 1,986,832.02	
Qualifying Projects for 2018	$ 0.00	
Totals	$ 1,986,832.02	$ 71,538.18
Carry over credits to 2019	$ 1,915,293.84	

The self-directed USB is an excellent program and has provided significant positive benefits to the Stillwater Mining Company in 2018. 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)
PAult@SibanyeStillwater.com (e-mail)

Sincerely,

Phil Ault

Phil Ault
Electrical Engineer

Cc: Tim Stephens – Park Electric Cooperative

February 13, 2019

Nicole Hensley
Department of Revenue
PO Box 5805
Helena, MT 59604-5805

RE: Annual USB Report

Dear Nicole,

Attached is a copy of our 2018 USB Progress Report and other information pertinent to our 2018 credit request. We completed a substantial lighting project during 2018 which resulted in more credits requested than were available. These credits will be paid out quarterly as they are earned and reported annually to the Department of Revenue.

Sincerely,

Anthony C. Colter
Vice President
Sun Mountain Lumber
406-846-1600

cc: Dale Mahugh, Northwest Energy
Rick Edwards, Northwest Energy

Sun Mountain Lumber, Inc.
P.O. Box 389
Deer Lodge, MT 59722
Phone: 406-846-1600
Fax: 406-846-3714

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 FAX: (406) 497-4008

DATE:	10/23/18	
NAME OF BUSINESS:	**Sun Mountain Lumber, Inc.**	
CITY/TOWN LOCATION:	Deer Lodge, MT	
CONTACT PERSON:	Tony Colter	
MAILING ADDDRESS:	PO Box 389	
CITY, STATE AND ZIP:	Deer Lodge, MT 59722	
PHONE NUMBER:	406-846-1600	
FAX NUMBER:	406-846-3714	
E-MAIL ADDRESS	Tony.colter@sunmtnlumber.com	

AMOUNT OF CREDIT REQUESTED:	$99,482

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):

Replace HID light fixtures with LED fixtures plant wide (see attached spreadsheet). There is a total remaining cost of $99,482 not covered by grants. We are requesting the unused 2017 and 2018 USB Funds in the amount of $19,296.16 at this time and the balance on the lighting project of $80,185.84 payable quarterly hereafter.

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

ESTIMATED kWh SAVINGS:	523,473
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.

NorthWestern® Energy
Delivering a Bright Future

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

SUN MOUNTAIN LUMBER

Account Summary

2017 Carryover Reservation:	$9,500.00	YTD Elec Revenue:	$1,201,855.07
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$99,482.00
Payment Requests Made YTD:	$99,482.00	Current Request Balance:	$81,033.10
2017 Carryover USBC Credit:	$9,261.16	Total USBC Credit:	$19,363.88
USBC Credit YTD:	$10,102.72	Payments Issued YTD:	$18,448.90
Average Monthly Credit Earned:	$841.89	USBC Credit Balance:	$914.98
		Payment Pending:	$914.98

Payment Requests Made

Submitted By	Date	Amount
Tony Colter	10/23/2018	$99,482.00

Payments Issued

Date	Amount
12/10/2018	$18,448.90

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1233818	245475	DA05571932	KWH >	10,585	9,280	9,430	7,856	5,623	5,398	4,933	5,555	4,900	4,690	6,257	7,770	82,277
			KW >	21	19	19	15	14	14	13	13	13	12	15	15	15
			Elec Revenue >	$1,049.74	$920.52	$939.48	$777.65	$589.60	$571.39	$524.35	$566.89	$520.82	$495.93	$644.84	$760.82	$8,362.03
1233841	263122	DA13299769	KWH >	934,841	1,063,680	902,322	962,711	882,007	821,055	809,832	890,816	1,031,724	913,629	921,462	1,008,878	11,142,957
			KW >	3,663	3,653	3,607	3,545	3,495	3,329	3,372	3,212	3,313	3,365	3,691	3,294	3,462
			Elec Revenue >	102,344.87	112,297.13	$98,952.58	103,770.60	$96,847.01	$90,749.47	$90,081.33	$93,068.98	104,770.94	$96,935.80	100,013.31	103,661.02	$1,193,493.04
			Total KWH	945,426	1,072,960	911,752	970,567	887,630	826,453	814,765	896,371	1,036,624	918,319	927,719	1,016,648	11,225,234
			Combined Average KW	3,684	3,672	3,626	3,560	3,509	3,343	3,385	3,225	3,326	3,377	3,706	3,309	3,477
			USBC Charge	$850.89	$965.66	$820.58	$873.51	$798.87	$743.81	$733.29	$806.73	$932.96	$826.49	$834.95	$914.98	$10,102.72
			Total Elec Revenue	103,394.61	113,217.65	$99,892.06	104,548.25	$97,436.61	$91,320.86	$90,605.68	$93,635.87	105,291.76	$97,431.73	100,658.15	104,421.84	$1,201,855.07

NorthWestern Energy

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

1494852

SUN MOUNTAIN LUMBER
ATTN TONY COLTER
PO Box 389
DEER LODGE, MT 59722-0389

Payment No.: **201839141**
Payment Date: **12/18/2018**
Company Code: **MTU**
Vendor No.: **258340**
Page: **1 of 1**

Invoice Number	Invoice Date	Document Number Text	Gross Amount	Discount	Net Amount
CKRDEC1844890	12/14/2018	Please accept this check as settlement for the items listed below subject to the goods and services supplied and the invoice therefore being correct. 190466662 *LARGE CUSTOMER USBC PYMT 12/10/18*	18,448.90	0.00	18,448.90
		Check Total.....			**$ 18,448.90**

DETACH FROM CHECK AND KEEP FOR YOUR RECORDS

NorthWestern Energy

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

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

1494852

12/18/2018

PAY TO THE ORDER OF SUN MOUNTAIN LUMBER $ ***18,448.90

***EIGHTEEN THOUSAND FOUR HUNDRED FORTY-EIGHT & 90/100 *** DOLLARS

SUN MOUNTAIN LUMBER
ATTN TONY COLTER
PO Box 389
DEER LODGE, MT 59722-0389

⑈1494852⑈ ⑆042205038⑆ 1301030123 52⑈

February 15, 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

RE: Self-Directed USBC Progress Report for 2018 – Talen Energy

Dear Ms. Hensley:

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018.

In 2018, we received USB payments totaling $46,992.71. These payments were composed of $4,880.02 in 2017 USB credits and $42,112.69 in 2018 USB credits.

These USB payments was self-directed low-income donation request for Energy Share submitted in 2017 and again in 2018. A copy of the Form B submitted to NorthWestern Energy is attached.

Sincerely,

Shaunna Borge
Senior Accountant
Talen Energy

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/24/2019

TALEN MONTANA, LLC

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$1,724,921.48
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$4,880.02	Total Payment Requests:	$51,832.45
Payment Requests Made YTD:	$46,952.43	Current Request Balance:	$4,839.74
2017 Carryover USBC Credit:	$4,880.02	Total USBC Credit:	$51,832.45
USBC Credit YTD:	$46,952.43	Payments Issued YTD:	$46,992.71
Average Monthly Credit Earned:	$3,912.70	USBC Credit Balance:	$4,839.74
		Payment Pending:	$4,839.74

Payment Requests Made

Submitted By	Date	Amount
Shaunna Borge	11/11/2018	$46,952.43

Payments Issued

Date	Amount
04/05/2018	$4,880.02
12/10/2018	$42,112.69

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3212922	346777	DG15024002	KWH >	19,968	16,128	15,360	12,000	6,336	5,472	4,896	5,568	4,416	5,664	7,008	7,872	110,688
			KW >	67	86	171	76	86	92	92	92	92	78	92	92	93
			Elec Revenue >	$2,236.62	$2,131.32	$2,057.52	$1,710.32	$1,356.47	$1,345.17	$1,298.92	$1,344.52	$1,258.75	$1,223.94	$1,459.19	$1,528.79	$18,951.53
3212929	316344	DG78206964	KWH >	3,709	3,561	3,847	1,285	20	31	27	25	30	66	33	32	12,666
			KW >	5	5	5	5	0	0	0	0	0	1	0	0	2
			Elec Revenue >	$348.47	$337.17	$361.55	$161.50	$11.39	$11.26	$11.11	$11.34	$11.14	$22.34	$11.78	$11.81	$1,310.86
3212930	316343	DG36207779	KWH >	1,104	1,056	1,376	6,358	2,479	2,443	1,432	2,352	1,790	1,710	1,306	3,614	27,020
			KW >	5	2	3	3	6	8	4	4	4	4	3	3	4
			Elec Revenue >	$149.03	$118.85	$149.46	$540.21	$265.47	$282.63	$161.49	$230.60	$187.60	$180.19	$143.08	$320.78	$2,729.39
3212934	316023	DA14206400	KWH >	3,310	2,558	3,819	3,155	3,059	3,546	2,875	3,004	3,817	3,719	3,966	3,731	40,559
			KW >	5	4	5	5	4	4	4	4	5	5	5	5	5
			Elec Revenue >	$319.84	$248.09	$360.44	$308.58	$292.14	$331.21	$269.34	$282.23	$354.71	$345.69	$368.17	$349.04	$3,829.48
3212935	333897	DA19955900	KWH >	1,105	901	2,011	2,262	824	263	238	330	1,385	-1,715	0	0	7,604
			KW >	2	3	3	3	3	0	0	1	2	0	0	0	2
			Elec Revenue >	$120.10	$108.14	$196.74	$219.47	$103.53	$31.29	$28.95	$49.11	$135.93	($131.12)	$0.00	$0.00	$862.14
3212936	333800	DD32261711	KWH >	3,520	4,160	4,720	4,000	3,200	3,520	4,080	3,600	3,760	3,440	3,760	3,280	45,040
			KW >	5	6	8	6	5	5	6	6	5	5	8	5	6
			Elec Revenue >	$338.14	$395.52	$456.69	$384.86	$313.58	$338.14	$383.48	$344.52	$350.83	$326.80	$375.78	$315.86	$4,324.20
3213037	333801	DG28727246	KWH >	8,680	8,080	8,200	5,400	4,320	4,120	4,200	3,440	3,880	4,000	5,160	4,880	64,360
			KW >	14	13	13	12	8	10	9	10	7	10	10	10	11
			Elec Revenue >	$828.94	$772.94	$785.05	$558.01	$425.08	$432.47	$424.37	$368.11	$375.92	$413.43	$507.23	$486.90	$6,378.45

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/24/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3213045	334214	DA05310580	KWH >	13,900	5,293	4,316	6,590	7,328	13,060	12,895	21,290	14,333	9,120	7,804	3,983	119,912
			KW >	40	40	10	22	31	45	36	42	28	49	21	8	31
			Elec Revenue >	$1,499.68	$817.82	$445.10	$743.02	$888.71	$1,476.79	$1,359.28	$2,044.08	$1,385.33	$1,201.86	$819.71	$394.19	$13,075.57
3213046	334250	DG36343045	KWH >	6,826	6,944	5,331	5,657	5,952	8,358	5,269	4,506	5,306	5,674	5,772	5,375	70,970
			KW >	31	23	31	29	31	54	28	27	22	27	27	28	30
			Elec Revenue >	$851.64	$783.28	$741.10	$745.93	$780.37	$1,201.25	$698.05	$626.84	$638.58	$715.94	$724.50	$701.79	$9,209.27
3213047	334355	DG57404411	KWH >	129,180	124,500	135,220	124,220	95,640	63,940	580	420	440	440	460	420	675,460
			KW >	204	194	192	197	197	171	171	0	0	0	0	1	111
			Elec Revenue >	$12,139.59	$11,649.55	$12,521.50	$11,717.46	$9,455.37	$6,701.28	$1,747.30	$45.24	$47.00	$47.06	$48.66	$49.67	$66,169.68
3213048	333689	DA14169293	KWH >	5,966	5,256	5,462	4,438	2,558	1,918	1,013	881	1,462	2,483	4,353	4,479	40,269
			KW >	14	13	12	12	8	8	4	4	4	10	13	12	10
			Elec Revenue >	$613.70	$550.93	$563.53	$480.72	$293.88	$238.57	$126.58	$119.36	$160.20	$305.30	$471.19	$476.12	$4,400.08
3213049	334439	DG96834699	KWH >	10,864	7,082	5,982	3,250	1,339	1,634	1,621	1,451	1,259	2,425	4,629	7,168	48,704
			KW >	22	18	15	12	6	5	5	4	3	8	14	16	11
			Elec Revenue >	$1,083.64	$739.80	$628.02	$389.60	$181.11	$186.34	$181.14	$163.91	$142.58	$277.64	$505.90	$719.21	$5,198.89
3213050	333370	DA04680717	KWH >	204,800	161,520	168,160	114,480	60,800	46,640	42,800	44,960	43,840	68,800	118,880	130,880	1,206,560
			KW >	425	425	425	268	179	117	88	132	94	270	299	314	253
			Elec Revenue >	$20,250.92	$16,836.85	$17,402.36	$11,655.92	$6,543.21	$4,818.37	$4,167.67	$4,743.05	$4,301.22	$7,968.73	$12,114.94	$13,220.74	$124,023.98
3213056	332006	DA07642869	KWH >	70,720	78,240	118,320	109,760	74,560	97,360	107,360	100,800	143,120	194,160	199,920	104,800	1,399,120
			KW >	173	259	267	265	247	261	272	267	310	308	318	272	268
			Elec Revenue >	$7,264.10	$8,685.77	$11,928.67	$11,253.36	$8,292.99	$10,209.07	$10,930.87	$10,321.60	$14,047.13	$17,964.66	$18,535.19	$10,796.92	$140,230.33
3213056	332006	DG36046609	KWH >	173,680	136,800	121,360	73,760	62,480	75,120	74,000	81,200	90,160	77,040	69,440	108,560	1,143,600
			KW >	291	275	320	160	260	264	279	314	310	241	125	264	259
			Elec Revenue >	$16,477.46	$13,415.21	$12,695.76	$7,390.41	$7,471.72	$8,499.48	$8,444.97	$9,300.54	$9,992.27	$8,314.78	$6,591.79	$10,999.47	$119,593.86
3213068	368680	DG45760153	KWH >	8,873	7,389	7,720	8,321	8,323	9,437	8,869	7,207	7,682	7,467	8,097	7,120	96,505
			KW >	13	12	12	12	12	13	13	12	11	11	11	11	12
			Elec Revenue >	$830.52	$706.42	$736.92	$787.70	$787.65	$875.93	$820.60	$681.23	$710.87	$694.91	$743.45	$674.52	$9,050.72
3213069	369050	DG86439721	KWH >	1,280	380	501	1,091	705	683	354	457	382	347	374	379	6,933
			KW >	4	4	2	3	1	1	1	1	1	1	1	1	2
			Elec Revenue >	$153.67	$83.35	$69.96	$122.79	$80.68	$79.25	$45.87	$56.87	$51.89	$51.63	$50.10	$52.07	$898.13
3213070	377960	DA18929139	KWH >	243,840	230,880	249,920	221,920	185,120	205,440	113,760	169,760	351,840	441,280	484,320	428,960	3,327,040
			KW >	393	406	417	401	401	401	401	563	563	712	728	672	505
			Elec Revenue >	$22,978.39	$22,060.03	$23,740.61	$21,410.12	$18,487.28	$20,051.07	$12,705.00	$18,501.80	$32,537.68	$40,921.06	$44,459.52	$39,755.44	$317,608.00
3213071	382029	DG23734694	KWH >	677	550	486	12,702	2,672	3,117	2,865	2,693	3,017	2,978	2,979	2,736	37,472
			KW >	3	3	4	3	3	4	5	3	3	5	5	4	4
			Elec Revenue >	$96.90	$86.71	$84.94	$1,040.52	$255.66	$291.91	$279.17	$251.44	$277.95	$288.18	$288.34	$261.21	$3,502.93
3213072	382027	DG23734707	KWH >	1,773	1,738	1,523	1,472	1,108	1,054	912	874	1,002	1,437	1,603	1,616	15,112
			KW >	2	3	2	2	2	2	2	2	2	2	2	2	2
			Elec Revenue >	$171.17	$173.16	$151.74	$147.70	$119.80	$115.41	$102.11	$98.69	$109.08	$142.79	$155.88	$157.57	$1,645.10
3213075	400631	DA05495613	KWH >	734	688	735	704	647	740	512	417	592	376	378	345	6,868
			KW >	1	1	1	1	1	12	0	1	1	1	1	1	2
			Elec Revenue >	$74.84	$71.46	$75.09	$73.91	$69.25	$192.60	$56.10	$53.05	$66.67	$47.21	$51.99	$44.87	$877.04
3213076	400630	DA05267609	KWH >	1,039	1,506	1,139	1,256	1,335	1,083	986	934	1,016	983	1,009	960	13,246
			KW >	2	3	1	2	2	2	1	1	1	1	1	1	2
			Elec Revenue >	$109.38	$155.55	$113.32	$126.39	$132.37	$113.03	$100.76	$95.80	$98.74	$100.62	$100.28	$99.63	$1,345.87

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/24/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3213077	400633	DA07641108	KWH >	943	877	922	889	895	1,040	849	728	776	859	810	549	10,137
			KW >	1	1	1	1	1	1	1	1	1	1	1	0	1
			Elec Revenue >	$94.47	$89.29	$92.93	$90.54	$91.26	$102.79	$85.88	$76.19	$79.68	$86.32	$82.82	$58.41	$1,030.58
3213078	401439	DA11042381	KWH >	960	880	960	800	640	880	1,040	109,360	92,160	5,520	800	400	214,400
			KW >	0	0	0	1	0	0	46	409	420	407	3	0	107
			Elec Revenue >	$90.30	$83.96	$90.58	$86.00	$65.46	$84.13	$546.59	$12,386.03	$11,241.50	$4,473.62	$100.61	$46.13	$29,294.91
3213080	413689	DG36058397	KWH >	2,386	2,929	1,645	757	0	0	318	1	0	1	0	0	8,037
			KW >	3	5	3	3	0	0	1	0	0	1	0	0	2
			Elec Revenue >	$226.51	$291.32	$168.00	$99.69	$8.82	$7.35	$48.46	$9.20	$7.65	$20.12	$9.14	$7.35	$903.61
3213083	422921	DG28936303	KWH >	275,400	249,000	257,400	225,300	224,100	240,900	127,500	15,900	0	-231,000	0	0	1,384,500
			KW >	432	429	408	414	393	393	375	168	0	372	0	0	376
			Elec Revenue >	$25,826.07	$23,698.57	$24,233.03	$21,798.06	$21,459.92	$22,742.42	$13,494.83	$2,883.83	$0.00	$13,996.75)	$0.00	$0.00	$142,139.98
3213084	424773	DG36058788	KWH >	210,900	194,100	203,400	155,700	72,000	42,300	80,400	86,400	96,300	109,800	163,800	134,400	1,549,500
			KW >	354	339	336	309	207	132	168	156	162	300	369	330	264
			Elec Revenue >	$20,010.98	$18,520.58	$19,284.78	$15,292.17	$7,695.81	$4,620.55	$7,834.27	$8,123.06	$8,988.98	$11,407.20	$16,261.24	$13,647.25	$151,686.87
3213085	426054	DA16783069	KWH >	2,353	1,385	2,576	1,752	1,689	1,861	1,626	1,516	2,932	3,020	2,932	2,514	26,156
			KW >	3	3	3	2	2	2	2	4	4	4	3	3	3
			Elec Revenue >	$223.74	$151.75	$239.84	$171.57	$165.18	$177.00	$155.67	$167.25	$275.93	$281.08	$272.21	$238.32	$2,519.54
3213086	429795	DA19955899	KWH >	8,589	4,479	11,479	6,884	5,145	4,338	4,670	5,724	6,516	6,437	6,864	6,392	77,517
			KW >	5	6	12	11	11	6	8	8	10	9	9	9	9
			Elec Revenue >	$731.92	$425.79	$1,028.11	$662.52	$524.98	$410.00	$451.72	$531.05	$608.90	$599.23	$628.54	$596.03	$7,198.79
3213087	431769	DA12994657	KWH >	113,920	107,040	114,160	104,000	25,040	14,000	96,400	101,360	106,480	105,440	120,160	106,480	1,114,480
			KW >	184	186	192	214	170	156	171	187	162	176	196	196	183
			Elec Revenue >	$10,748.38	$10,211.39	$10,868.54	$10,295.78	$3,651.59	$2,649.51	$9,092.47	$9,569.88	$9,772.38	$9,841.65	$11,189.27	$10,163.94	$108,054.78
3213088	434671	DA13873458	KWH >	640	560	640	560	640	3,040	5,360	71,040	52,000	5,440	640	880	141,440
			KW >	0	0	4	3	3	25	71	308	290	235	2	3	79
			Elec Revenue >	$65.33	$58.99	$97.03	$82.91	$89.12	$497.78	$1,123.35	$8,464.76	$6,871.96	$2,759.78	$80.37	$106.97	$20,298.35
3213090	437607	DA15527122	KWH >	86,400	81,600	100,800	121,200	37,200	32,400	81,600	7,200	1,200	1,200	2,400	1,200	554,400
			KW >	228	240	228	228	216	144	204	144	0	0	0	0	136
			Elec Revenue >	$8,557.04	$8,272.31	$9,669.48	$11,252.64	$4,670.48	$3,701.00	$7,857.34	$1,757.02	$109.99	$110.13	$200.76	$110.56	$56,268.75
3213093	1052	DA17677699	KWH >	3,525,170	3,727,078	2,660,633	3,171,683	2,035,156	2,078,729	2,093,899	2,818,225	3,559,195	3,645,893	4,403,342	4,280,020	37,999,023
			KW >	6,082	6,117	6,104	6,164	2,916	2,868	5,870	5,857	5,927	5,931	5,961	5,978	5,481
			Elec Revenue >	$24,282.63	$25,140.47	$20,691.01	$22,845.16	$13,043.74	$13,142.71	$18,034.52	$20,833.63	$23,885.76	$24,236.90	$27,291.39	$26,830.08	$260,258.00
3238432	614387	DG71214283	KWH >	3,520	3,080	4,720	3,160	1,200	520	320	160	840	4,040	4,400	4,400	30,360
			KW >	8	8	8	8	6	6	5	5	3	10	9	8	7
			Elec Revenue >	$362.14	$327.12	$460.64	$338.55	$160.64	$107.22	$83.39	$71.15	$107.41	$424.44	$440.84	$430.03	$3,313.57
3296948	618372	DG74371921	KWH >	8,160	6,880	6,880	4,480	1,760	1,440	1,760	351,680	82,080	26,240	3,920	4,720	500,000
			KW >	16	16	16	12	12	630	673	1,047	1,088	936	13	13	373
			Elec Revenue >	$785.90	$688.74	$690.69	$471.17	$265.91	$6,331.36	$6,807.63	$36,015.06	$16,832.89	$11,237.46	$431.20	$491.31	$81,049.32
3420372	619310	DA20957153	KWH >	8,160	7,280	5,920	4,000	1,360	800	400	400	560	2,720	3,520	4,240	39,360
			KW >	20	20	20	15	15	8	8	8	3	10	14	13	13
			Elec Revenue >	$852.36	$781.92	$677.09	$471.63	$263.89	$156.75	$125.17	$125.12	$82.00	$319.24	$420.85	$469.33	$4,745.35
			Total KWH	5,163,049	5,192,378	4,237,643	4,525,246	2,937,630	2,971,227	2,887,686	4,025,863	4,685,568	4,517,504	5,644,839	5,377,385	52,166,018
			Combined Average KW	9,057	9,168	9,254	8,884	5,445	5,850	9,024	9,792	9,538	10,141	8,264	8,275	8,653
			USBC Charge	$4,646.75	$4,673.13	$3,813.88	$4,072.71	$2,643.87	$2,674.12	$2,598.90	$3,623.27	$4,217.01	$4,065.76	$5,080.37	$4,839.61	$46,949.38
			Total Elec Revenue	181,794.51	169,670.12	174,557.82	155,926.89	108,764.51	112,553.09	110,084.42	150,747.16	146,107.10	133,224.06	145,935.91	134,612.31	$1,723,977.90

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 FAX: (406) 497-4008

DATE:	11/11/2018
NAME OF BUSINESS:	Talen Energy
CITY/TOWN LOCATION:	Colstrip, MT
CONTACT PERSON:	Shaunna Borge
MAILING ADDDRESS:	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:	$44,000

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):
We are requesting our year-end 2018 USB credit balance for a donation to Energy Share. The year-end balance is estimated to be about $44,000.

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:

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® Energy
Delivering a Bright Future

2/6/2019

Rec'd MT DOR

FEB 11 2019

Ms. Nicole Hensley
Department of Revenue (DOR)
PO Box 5805
Helena, MT 59604-5805

Dear Nicole,

Thompson River Lumber (TRL) did submit a request for Universal Systems Benefits refund in the amount of $8,174.37 for 2018. These funds went to new lighting in our planer project. TRL did request that the 2018 USB credits in the amount of $796.14 be carried over to 2019 for another upcoming planer project. This project is expected to result in another fairly significant energy savings. I have attached our Self Directed USBC Progress Report for 2018. If you need any information, please give me a call and I will be glad to help.

Thank you for your time.

Sincerely,

Daniel R. Claridge

Dan Claridge
Vice President
Thompson River Lumber Co.
406-827-3322 Direct

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

THOMPSON RIVER LUMBER

Account Summary

2017 Carryover Reservation:	$3,100.00	YTD Elec Revenue:	$707,103.44
Reservations Made YTD:	$1,500.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$8,174.37
Payment Requests Made YTD:	$8,174.37	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$3,055.81	Total USBC Credit:	$8,970.51
USBC Credit YTD:	$5,914.70	Payments Issued YTD:	$8,174.37
Average Monthly Credit Earned:	$492.89	USBC Credit Balance:	$796.14
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Dan Claridge	11/09/2018	$8,174.37

Payments Issued

Date	Amount
12/10/2018	$8,174.37

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1967744	432058	DA06613304	KWH >	582,661	613,142	592,036	583,418	531,322	534,815	491,829	562,178	513,154	500,523	522,494	544,324	6,571,896
			KW >	2,212	2,134	2,199	2,121	2,117	2,004	2,022	1,888	1,905	1,961	2,082	2,216	2,072
			Elec Revenue >	$63,229.63	$64,863.19	$63,709.86	$62,608.41	$58,437.97	$57,724.03	$54,156.27	$57,648.96	$54,365.36	$54,052.01	$56,692.76	$59,614.99	$707,103.44
			Total KWH	582,661	613,142	592,036	583,418	531,322	534,815	491,829	562,178	513,154	500,523	522,494	544,324	6,571,896
			Combined Average KW	2,212	2,134	2,199	2,121	2,117	2,004	2,022	1,888	1,905	1,961	2,082	2,216	2,072
			USBC Charge	$524.39	$551.83	$532.83	$525.08	$478.19	$481.33	$442.65	$505.96	$461.84	$450.47	$470.24	$489.89	$5,914.70
			Total Elec Revenue	$63,229.63	$64,863.19	$63,709.86	$62,608.41	$58,437.97	$57,724.03	$54,156.27	$57,648.96	$54,365.36	$54,052.01	$56,692.76	$59,614.99	$707,103.44

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
FAX: (406) 497-4008

DATE:	11/9/2018
NAME OF BUSINESS:	**Thompson River Lumber Co. of MT, Inc**
CITY/TOWN LOCATION:	Thompson Falls
CONTACT PERSON:	Dan Claridge
MAILING ADDDRESS:	PO Box 279
CITY, STATE AND ZIP:	Thompson Falls, MT 59873
PHONE NUMBER:	406-827-4311
FAX NUMBER:	406-827-5506
E-MAIL ADDRESS	dan@thompsonriver.net

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.)

I would like to reserve $1,500.00 in USB credits for power saving projects we have in scheduled in June of 2019.

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: V.P.

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 FAX: (406) 497-4008

DATE:	11/9/18
NAME OF BUSINESS:	**Thompson River Lumber Co. of MT, Inc**
CITY/TOWN LOCATION:	Thompson Falls
CONTACT PERSON:	Dan Claridge
MAILING ADDDRESS:	PO Box 279
CITY, STATE AND ZIP:	Thompson Falls, MT 59873
PHONE NUMBER:	406-827-4311
FAX NUMBER:	406-827-5506
E-MAIL ADDRESS	dan@thompsonriver.net

AMOUNT OF CREDIT REQUESTED:	$8,174.37

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 installed 32 NEW LED overhead lights (97w) instead of T-8 Fixtures (200w) in our planer building addition that was completed this year. We also installed 6 NEW LED wall packs (78w) instead of 6 Metal Halide (400w) on our new planer building.

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

ESTIMATED kWh SAVINGS:	34,082 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: V.P. 11-9-18

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 Energy
Delivering a Bright Future

UNIVERSITY OF MONTANA

February 21, 2019

Rec'd MT DOR
FEB 25 2019

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

Re: Universal System Benefits Programs (USB)
Large Customers Annual Report for 2018

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 USB payment requests (Form B's) in 2018.

UM has a USB credit balance of over $2.6 million and receives an average monthly credit of $3,908. At this recovery rate, it will require 55 years to payout UM's current request balance.

Sincerely,

Brian P. Kerns

Brian P. Kerns
Engineer, University of Montana

Cc: Dale Mahugh, NorthWestern Energy

Facilities Services
32 Campus Drive #9360 | Missoula, Montana 59812-9360 | t: 406.243.2788 | f: 406.243.6612

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

UNIVERSITY OF MONTANA

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$4,514,320.39
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$2,644,891.53	Total Payment Requests:	$2,644,891.53
Payment Requests Made YTD:	$0.00	Current Request Balance:	$2,601,576.15
2017 Carryover USBC Credit:	$3,789.67	Total USBC Credit:	$46,897.43
USBC Credit YTD:	$43,107.76	Payments Issued YTD:	$43,315.38
Average Monthly Credit Earned:	$3,592.31	USBC Credit Balance:	$3,582.05
		Payment Pending:	$3,582.05

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$14,149.29
07/11/2018	$10,809.39
10/03/2018	$10,569.32
12/10/2018	$7,787.38

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100610	1614	DA06183515	KWH >	603,286	661,985	589,120	669,477	579,382	539,761	552,813	634,723	596,689	619,427	663,027	620,206	7,329,896
			KW >	1,234	1,293	1,247	1,247	1,150	1,095	1,260	1,286	1,380	1,202	1,251	1,221	1,239
			Elec Revenue >	$56,629.11	$61,506.23	$55,737.22	$61,958.88	$54,127.61	$50,545.24	$52,075.17	$58,109.12	$56,367.51	$56,635.35	$60,422.28	$57,081.77	$681,195.49
100625	1629	DA19066015	KWH >	2,829,464	2,614,352	2,535,117	2,786,798	2,906,790	2,871,558	2,711,040	2,959,982	2,706,942	3,063,660	3,120,081	2,798,887	33,904,671
			KW >	5,797	5,244	5,296	5,391	5,754	5,746	5,279	5,478	5,867	5,962	5,676	5,400	5,574
			Elec Revenue >	265,327.10	244,578.05	238,072.77	259,987.96	271,419.64	268,502.52	251,382.33	265,984.78	251,420.97	280,611.31	281,832.90	256,418.03	$3,135,538.36
533793	222611	DG15155368	KWH >	7,440	7,040	7,320	8,480	8,320	9,520	10,840	11,920	8,760	8,120	7,560	6,760	102,080
			KW >	21	21	23	22	21	30	29	30	24	20	19	20	23
			Elec Revenue >	$804.32	$766.49	$811.52	$890.47	$868.93	$1,048.24	$1,126.68	$1,219.48	$924.98	$836.39	$779.52	$727.38	$10,804.40
534357	222713	DG62108610	KWH >	3,200	3,020	2,880	2,940	2,420	2,660	2,580	3,000	2,560	3,040	3,040	2,880	34,220
			KW >	14	13	14	13	13	12	11	11	11	13	13	13	13
			Elec Revenue >	$397.23	$375.61	$375.74	$368.49	$331.25	$333.85	$313.88	$346.66	$314.76	$375.45	$374.24	$358.57	$4,265.73
535331	222891	DD33105146	KWH >	22,720	21,960	20,320	18,880	15,880	14,280	16,800	22,160	20,000	18,400	19,720	16,880	228,000
			KW >	59	72	61	47	50	40	44	47	50	50	49	48	51
			Elec Revenue >	$2,373.50	$2,433.41	$2,208.14	$1,959,90	$1,753.68	$1,523.32	$1,729.65	$2,160.89	$2,044.61	$1,918.41	$2,012.73	$1,789.98	$23,908.22
535332	222892	DG93700122	KWH >	23,120	20,600	19,600	20,160	18,040	17,800	20,520	25,360	21,560	20,680	23,960	20,400	251,800
			KW >	49	57	52	47	53	45	54	48	62	50	56	53	52
			Elec Revenue >	$2,308.72	$2,180.80	$2,068.70	$2,056.49	$1,946.77	$1,846.14	$2,113.59	$2,420.08	$2,279.34	$2,089.24	$2,410.39	$2,113.13	$25,833.39
578371	244994	DS61323869	KWH >	57,024	56,640	61,824	62,976	67,200	45,696	38,208	44,928	41,856	66,624	58,944	64,896	666,816
			KW >	149	190	379	190	190	130	90	84	134	172	209	209	177
			Elec Revenue >	$5,951.83	$6,333.42	$6,703.87	$6,844.62	$7,154.82	$4,878.11	$3,884.83	$4,253.77	$4,530.13	$6,840.03	$6,600.49	$7,084.58	$71,060.50

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
650489	286796	DD38810358	KWH >	1,900	1,660	1,660	1,940	1,660	1,860	1,900	2,120	1,980	2,120	2,180	1,860	22,840
			KW >	4	8	4	5	5	5	6	5	5	6	5	4	5
			Elec Revenue >	$203.72	$221.98	$185.16	$213.01	$192.75	$206.18	$218.24	$218.21	$210.73	$237.42	$228.66	$198.50	$2,534.56
692547	308805	DA21811460	KWH >	0	0	0	0	0	0	0	0	0	0	864	1,056	1,920
			KW >	0	0	0	0	0	0	0	0	0	0	3	4	4
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$111.67	$136.35	$248.02
692547	308805	DD49232639	KWH >	1,152	1,248	1,248	1,056	1,056	864	864	768	864	864	0	0	9,984
			KW >	7	3	19	10	9	5	2	7	6	9	0	0	8
			Elec Revenue >	$173.94	$143.20	$209.23	$194.48	$184.95	$131.91	$103.36	$141.89	$139.89	$169.03	$0.00	$0.00	$1,591.88
701825	314718	DD39917823	KWH >	21,640	21,680	23,440	22,880	25,120	16,800	20,040	18,360	17,000	29,360	25,120	27,120	268,560
			KW >	54	52	113	51	49	48	38	37	52	58	63	58	56
			Elec Revenue >	$2,233.24	$2,224.28	$2,402.41	$2,310.91	$2,469.60	$1,798.23	$1,958.06	$1,770.28	$1,826.57	$2,842.14	$2,559.10	$2,680.39	$27,075.21
710201	321192	DG28611521	KWH >	18,320	27,200	32,560	30,880	31,360	21,840	24,560	25,280	26,320	35,760	35,120	33,600	342,800
			KW >	138	173	171	168	168	68	78	68	147	172	172	188	143
			Elec Revenue >	$2,821.76	$3,852.19	$4,251.31	$4,090.68	$4,131.45	$2,387.61	$2,666.45	$2,612.24	$3,485.32	$4,457.18	$4,423.43	$4,464.89	$43,644.51
710201	321192	DG28727355	KWH >	6,640	7,920	8,640	7,840	6,720	4,240	3,360	3,280	3,840	5,200	6,640	8,240	72,560
			KW >	31	40	38	35	53	18	20	22	26	28	30	30	31
			Elec Revenue >	$837.78	$1,022.26	$1,064.22	$970.56	$1,062.94	$520.71	$470.88	$479.09	$563.67	$692.03	$819.76	$944.58	$9,448.48
710214	321203	DG28727338	KWH >	59,520	61,200	67,440	71,400	66,080	65,400	67,760	90,800	86,800	88,480	64,160	66,600	855,640
			KW >	162	167	344	168	177	182	224	222	225	230	172	158	203
			Elec Revenue >	$6,268.42	$6,462.29	$6,979.67	$7,276.98	$6,949.14	$6,939.03	$7,519.24	$9,151.38	$8,846.65	$9,075.97	$6,635.91	$6,708.36	$88,813.04
716833	326576	DD55413464	KWH >	18,800	21,920	26,400	20,560	19,920	10,400	7,840	12,960	9,440	20,000	21,440	21,680	211,360
			KW >	67	94	100	89	73	45	53	48	91	82	80	83	75
			Elec Revenue >	$2,146.34	$2,659.35	$3,068.12	$2,508.67	$2,295.73	$1,271.73	$1,143.25	$1,475.55	$1,634.18	$2,360.77	$2,455.11	$2,504.40	$25,523.20
716834	326577	DG72754925	KWH >	10,160	12,640	14,720	13,840	12,320	7,200	4,800	4,800	9,520	12,560	12,320	12,720	127,600
			KW >	65	72	72	65	64	44	42	36	62	60	64	67	59
			Elec Revenue >	$1,456.28	$1,719.52	$1,869.72	$1,743.24	$1,612.76	$1,005.26	$797.55	$737.04	$1,354.35	$1,575.18	$1,596.29	$1,654.96	$17,122.15
717367	326932	DG90025395	KWH >	1,311	1,183	1,181	1,313	945	2,148	4,254	4,383	2,124	353	267	231	19,693
			KW >	1	1	1	13	22	23	26	24	17	1	0	0	11
			Elec Revenue >	$126.73	$116.48	$116.93	$241.63	$302.34	$402.25	$592.62	$579.90	$343.90	$52.30	$28.79	$29.14	$2,933.01
717372	326937	DG90038780	KWH >	480	320	320	480	1,600	6,560	11,680	18,400	12,320	3,360	320	320	56,160
			KW >	0	0	0	0	68	91	86	99	99	70	0	0	43
			Elec Revenue >	$44.83	$32.33	$32.52	$45.06	$800.34	$1,398.14	$1,724.39	$2,342.69	$1,900.87	$948.86	$23.87	$23.94	$9,317.84
717373	326938	DA02798274	KWH >	1,600	720	1,040	1,960	1,200	640	640	1,640	2,080	1,960	1,360	1,000	15,840
			KW >	4	3	6	8	12	4	4	14	14	14	8	4	8
			Elec Revenue >	$176.29	$99.18	$152.22	$240.20	$219.80	$104.78	$95.98	$271.06	$313.71	$304.56	$195.36	$128.18	$2,301.32
718301	327614	DA19688369	KWH >	248,726	264,905	248,849	259,051	257,740	234,042	216,332	227,701	239,284	242,072	259,590	230,970	2,929,262
			KW >	570	570	596	562	566	518	488	484	536	553	579	549	548
			Elec Revenue >	$23,846.43	$25,131.44	$24,004.33	$24,694.46	$24,546.84	$22,316.24	$20,662.35	$20,995.83	$22,378.13	$22,877.11	$24,349.77	$22,037.99	$277,840.92
719003	328127	DG16563216	KWH >	4,350	8,843	9,590	12,659	9,688	10,971	10,961	10,133	11,068	10,503	9,332	10,909	119,007
			KW >	15	15	15	17	17	0	52	16	16	14	14	14	17
			Elec Revenue >	$498.80	$850.48	$909.92	$1,177.09	$940.70	$867.09	$1,378.53	$940.66	$1,012.50	$957.25	$865.09	$991.21	$11,389.32
763520	315583	DA03986633	KWH >	26,112	26,112	27,264	27,648	29,184	20,352	23,424	23,040	25,728	35,712	29,376	32,832	326,784
			KW >	65	71	152	78	69	57	51	51	72	72	71	63	73
			Elec Revenue >	$2,694.42	$2,756.77	$2,894.76	$2,957.08	$2,981.33	$2,171.49	$2,351.44	$2,270.87	$2,691.57	$3,474.56	$2,962.96	$3,165.68	$33,372.93

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
		Total KWH	3,966,965	3,843,148	3,700,533	4,043,218	4,062,625	3,904,592	3,751,216	4,145,738	3,846,735	4,288,255	4,364,421	3,980,047	47,897,493
		Combined Average KW	8,506	8,159	8,703	8,226	8,583	8,206	7,937	8,117	8,896	8,838	8,534	8,186	8,412
		USBC Charge	$3,570.29	$3,458.84	$3,330.49	$3,638.89	$3,656.37	$3,514.13	$3,376.10	$3,731.15	$3,462.07	$3,859.40	$3,927.98	$3,582.05	$43,107.76
		Total Elec Revenue	377,320.79	365,465.76	354,118.48	382,730.86	386,293.37	370,198.07	354,308.47	378,481.47	364,584.34	399,330.54	401,688.32	371,242.01	$4,505,762.48

2100 9th Avenue North

February 5, 2019

Montana Department of Revenue
Attention: Nicole Hensley
P.O. Box 5805
Helena, MT 59604-5805

Re: Universal System Benefits Programs (USBP)
Large Customer Annual Report

Dear Ms. Hensley:

During the calendar year 2018, United Materials requested $6,772.05 of USB credit from Northwestern Energy. The qualifying project was upgrading lighting in our main office.

If you need any additional information, you can contact me at (406) 453-7692.

Respectfully,

Rob Skawinski
United Materials of Great Falls, Inc.

United Materials of Great Falls, Inc.
Great Falls, Montana 59403-1690 • P. O. Box 1690 • Telephone: (406) 453-7692
Construction Fax: (406) 727-9040 • Business Fax: (406) 727-2439 • Dispatcher: (406) 453-7201
Equal Opportunity Employer

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 FAX: (406) 497-4008

DATE:	11/12/2018
NAME OF BUSINESS:	**United Materials of Great Falls, Inc.**
CITY/TOWN LOCATION:	Great Falls, MT
CONTACT PERSON:	Rob Skawinski
MAILING ADDDRESS:	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

AMOUNT OF CREDIT REQUESTED:	$6,772.05

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):
Main office lighting upgrades. Replace 54 fluorescent lights with LED lights.

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

ESTIMATED kWh SAVINGS:	
ESTIMATED KW SAVINGS:	3.564 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.

NorthWestern Energy
Delivering a Bright Future

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/4/2019

UNITED MATERIALS INCORPORATED

Account Summary

2017 Carryover Reservation:	$1,950.00	YTD Elec Revenue:	$288,734.09
Reservations Made YTD:	$3,500.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$6,772.05
Payment Requests Made YTD:	$6,772.05	Current Request Balance:	$2,496.01
2017 Carryover USBC Credit:	$1,948.97	Total USBC Credit:	$4,518.62
USBC Credit YTD:	$2,569.65	Payments Issued YTD:	$4,276.04
Average Monthly Credit Earned:	$214.14	USBC Credit Balance:	$242.58
		Payment Pending:	$242.58

Payment Requests Made

Submitted By	Date	Amount
Lonnie Anderson	11/12/2018	$6,772.05

Payments Issued

Date	Amount
12/10/2018	$4,276.04

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
357185	136156	DG89601511	KWH >	5,920	-1,040	2,400	7,760	3,560	1,520	1,400	1,720	1,640	1,360	1,240	2,240	29,720
			KW >	38	17	25	20	16	10	9	14	7	8	8	10	15
			Elec Revenue >	$849.09	$102.68	$328.75	$823.77	$448.47	$225.14	$211.51	$276.99	$207.67	$191.23	$185.73	$279.19	$4,130.22
366981	140606	DG83126377	KWH >	2,127	3,703	3,316	2,079	2,952	2,210	1,772	3,332	3,454	3,210	3,235	3,181	34,571
			KW >	15	16	16	14	13	15	15	16	15	13	13	14	15
			Elec Revenue >	$324.52	$455.31	$427.98	$312.91	$375.66	$332.93	$292.15	$423.51	$425.69	$384.83	$393.34	$400.14	$4,548.97
366982	140607	DD38292760	KWH >	5,320	6,600	6,640	6,400	6,200	5,400	6,040	5,680	6,200	6,640	6,280	5,480	72,880
			KW >	19	35	19	19	19	19	19	19	19	19	19	19	20
			Elec Revenue >	$618.66	$875.90	$721.45	$703.79	$686.92	$623.47	$665.82	$633.49	$676.45	$711.29	$684.54	$624.47	$8,226.25
366982	140607	DG99701036	KWH >	10,080	9,840	8,760	8,880	9,960	8,640	8,760	8,280	8,400	9,240	12,000	11,640	114,480
			KW >	123	123	116	97	105	110	104	103	104	110	109	126	111
			Elec Revenue >	$2,030.38	$2,002.30	$1,842.19	$1,663.97	$1,829.82	$1,772.50	$1,714.23	$1,661.07	$1,686.75	$1,812.23	$2,013.68	$2,155.85	$22,184.97
1362170	392751	DD80649094	KWH >	74,203	39,113	34,803	108,520	258,588	304,260	289,763	327,083	313,423	290,178	303,290	245,263	2,588,487
			KW >	1,420	130	70	1,000	1,800	1,670	760	1,890	1,850	2,040	1,830	1,900	1,363
			Elec Revenue >	$11,124.97	$4,162.39	$3,652.03	$12,072.82	$25,317.38	$28,044.95	$23,719.84	$29,635.93	$28,711.82	$27,943.64	$28,061.94	$24,434.98	$246,882.69
1699245	419608	DD37415238	KWH >	2,047	2,144	1,461	1,165	984	869	703	609	719	1,213	1,410	1,718	15,042
			KW >	16	15	15	13	10	10	10	12	10	12	10	13	12
			Elec Revenue >	$328.65	$330.05	$278.82	$231.59	$189.74	$182.77	$161.58	$175.04	$168.21	$220.62	$219.06	$274.86	$2,760.99
			Total KWH	99,697	60,360	57,380	134,804	282,244	322,899	308,438	346,704	333,836	311,841	327,455	269,522	2,855,180
			Combined Average KW	1,631	336	261	1,163	1,963	1,834	917	2,054	2,005	2,202	1,989	2,082	1,536
			USBC Charge	$89.72	$54.32	$51.63	$121.32	$254.02	$290.61	$277.59	$312.03	$300.46	$280.66	$294.71	$242.58	$2,569.65
			Total Elec Revenue	$15,276.27	$7,928.63	$7,251.22	$15,808.85	$28,847.99	$31,181.76	$26,765.13	$32,806.03	$31,876.59	$31,263.84	$31,558.29	$28,169.49	$288,734.09

UNITED PROPERTIES
INC

January 30, 2019

Nicole Hensley
Department of Revenue
P.O. Box 5805
Helena, MT 59604-5805

Ref: Universal System Benefit Program (USBP)
Large Customers Annual Reports for 2018

Dear Nicole,

In 2018 we did receive four checks for a total of $ 8,299.59 from NorthWestern Energy. See copy of Self-Directed USBC Progress Report for 2018 enclosed.

Some of the payments we received 2018 were for carryover projects that we had submitted from earlier years. The remainder went toward projects we had in 2018.

For 2018 we had the following projects:

$ 1,407.00 was used to; remove metal halite bulbs in eight can style light fixtures and replaced them with lay-in style LED's. We also remove one older can style LED and replaced it with a lay-in style LED. We also removed one older can style LED and replaced it with a directional can style LED. These fixtures were in the 1st floor lobby in Transwestern One.

$ 640.00 was used to remove four lay-in style fixtures with fluorescent bulbs and ballasts and replace them with four lay-in style LED fixture. These light fixtures are in an office on the 4th floor of Transwestern Two.

$ 23.98 was used to remove incandescent bulbs in two light fixtures and replace them with four LED bulbs. These fixtures were in the conference room on the 1st floor of Transwestern Three.

$ 12,779.00 was used to remove 80 light fixtures with fluorescent bulbs and ballasts and replace them with LED's. These fixtures were in the two stair wells of the First Interstate Center.

$ 10,761.00 was used to remove 16 high pressure sodium style light fixtures and replace them with LED style fixtures. These fixtures were in the parking lot to the east of First Interstate Center.

404 North 31st Street • Suite 100 • Billings, Montana • 59101
PO Box 7047 • Billings, Montana • 59103 • PH (406) 255-7100 • FX (406) 255-7125

$ 8,600.00 was used to remove 12 high pressure sodium style light fixtures and replace them with LED style fixtures. These fixtures were on the top level of the parking garage to the north of First Interstate Center.

The total for 2018 projects was $ 34,201.98. I understand the projects submitted for 2018 will need to be carried over to upcoming years and addressed once the existing carryover projects are satisfied.

See the enclosed description of work and invoices for the above-mentioned projects.

Sincerely,

Jerome L Ries

Jerome L. Ries
United Properties, Inc.
Billings, Montana
Enc.

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

UNITED PROPERTIES, INC.

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$943,567.27
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$6,256.28	Total Payment Requests:	$40,467.26
Payment Requests Made YTD:	$34,210.98	Current Request Balance:	$32,167.67
2017 Carryover USBC Credit:	$526.23	Total USBC Credit:	$9,037.89
USBC Credit YTD:	$8,511.66	Payments Issued YTD:	$8,299.59
Average Monthly Credit Earned:	$709.31	USBC Credit Balance:	$738.30
		Payment Pending:	$738.30

Payment Requests Made

Submitted By	Date	Amount
Jerome Ries	11/27/2018	$34,210.98

Payments Issued

Date	Amount
04/05/2018	$2,917.18
07/11/2018	$1,986.23
10/03/2018	$1,352.87
12/10/2018	$2,043.31

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100601	1605	DA19428659	KWH >	423,193	510,410	473,479	483,686	357,099	337,678	326,684	446,518	441,632	435,393	455,821	465,827	5,157,420
			KW >	932	958	965	918	873	858	865	915	864	879	864	899	899
			Elec Revenue >	$42,336.93	$49,426.63	$46,528.46	$47,144.96	$36,630.67	$34,932.95	$33,934.60	$42,957.86	$42,286.19	$42,177.95	$43,534.25	$44,823.70	$506,715.15
712486	322827	DG28214383	KWH >	137,120	144,960	132,000	129,600	135,040	117,760	132,160	134,720	118,720	130,240	104,000	130,560	1,546,880
			KW >	281	289	300	281	296	275	305	275	265	244	249	249	276
			Elec Revenue >	$13,524.69	$14,199.24	$13,325.25	$12,977.38	$13,518.67	$11,944.15	$13,228.98	$12,970.93	$11,723.52	$12,430.91	$10,472.36	$12,549.86	$152,865.94
712487	322828	DA05500116	KWH >	141,040	142,000	129,440	118,000	125,920	114,880	137,760	148,720	130,880	144,000	107,600	138,080	1,578,320
			KW >	466	386	386	269	259	259	288	280	280	267	237	260	303
			Elec Revenue >	$15,679.13	$14,929.48	$13,968.52	$11,946.67	$12,440.42	$11,560.83	$13,495.01	$14,081.80	$12,796.43	$13,709.09	$10,629.68	$13,232.81	$158,469.87
712488	322829	DA05500110	KWH >	121,400	137,160	122,760	100,840	90,720	66,400	66,880	75,320	64,480	71,920	56,560	73,080	1,047,520
			KW >	261	233	228	221	234	230	202	215	194	220	225	188	221
			Elec Revenue >	$12,097.88	$13,030.27	$11,890.66	$10,119.78	$9,430.82	$7,475.83	$7,174.36	$7,864.11	$6,864.63	$7,717.86	$6,590.83	$7,511.34	$107,768.37
2087487	1517	DG54443191	KWH >	14,760	13,220	13,680	11,320	9,440	8,520	8,200	8,540	7,580	10,220	0	0	105,480
			KW >	38	43	42	38	32	31	29	29	28	34	0	0	34
			Elec Revenue >	$1,543.33	$1,472.62	$1,497.84	$1,280.28	$1,071.27	$984.26	$934.64	$951.78	$866.91	$1,133.14	$0.00	$0.00	$11,736.07
2087487	1517	DG77889655	KWH >	0	0	0	0	0	0	0	0	0	0	8,980	12,800	21,780
			KW >	0	0	0	0	0	0	0	0	0	0	400	35	218
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,668.34	$1,343.53	$6,011.87
			Total KWH	837,513	947,750	871,359	843,446	718,219	645,238	671,684	813,818	763,292	791,773	732,961	820,347	9,457,400
			Combined Average KW	1,978	1,909	1,921	1,727	1,694	1,653	1,689	1,714	1,631	1,644	1,975	1,631	1,951
			USBC Charge	$753.76	$852.97	$784.22	$759.11	$646.41	$580.71	$604.51	$732.45	$686.96	$712.60	$659.66	$738.30	$8,511.66
			Total Elec Revenue	$85,181.96	$93,058.24	$87,210.73	$83,469.07	$73,091.85	$66,898.02	$68,767.59	$78,826.48	$74,537.68	$77,168.95	$75,895.46	$79,461.24	$943,567.27

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 FAX: (406) 497-4008

DATE:	November 27, 2018
NAME OF BUSINESS:	**United Properties, Inc**
CITY/TOWN LOCATION:	Billings, Montana
CONTACT PERSON:	Jerome Ries
MAILING ADDDRESS:	P. O. Box 7047
CITY, STATE AND ZIP:	Billings, MT 59103
PHONE NUMBER:	(406) 255-7103
FAX NUMBER:	(406) 255-7125
E-MAIL ADDRESS	jries@uprop.net

AMOUNT OF CREDIT REQUESTED:	$34,210.98 (see attached pages for details)

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):
Use the balance we may carry over from this year and credits we will earn in the future for these projects: We changed out existing light fixtures to LED's in - a building lobby, an office, a conference room, two stair wells, a parking lot and the roof of a parking garage. See attached pages for details.

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

ESTIMATED kWh SAVINGS:	54,593.06
ESTIMATED KW SAVINGS:	9.5406

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: Jerome L Ries

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® Energy
Delivering a Bright Future

2018

We had six projects this year. This is a recap of the work completed. See the following pages for the detailed calculations.

Location	Savings	Savings	Cost
Transwestern One LED's in 1st floor building lobby	0.5950 kW	2,165.80 kWh	$ 1,407.00
Transwestern Two LED's in 4th floor office	0.3200 kW	998.40 kWh	$ 640.00
Transwestern Three LED's in 1st floor tenant conference room	0.5296 kW	550.78 kWh	$ 23.98
First Interstate Center LED's in the stairwells	3.5200 kW	30,835.20 kWh	$ 12,779.00
First Interstate Bank LED's in the Parking Lot	2.8720 kW	12,579.36 kWh	$ 10,761.00
Transwestern Parking Garage – LED's on the top level	1.7040 kW	7,463.52 kWh	$ 8,600.00
Total	9.5406 kW	54,593.06 kWh	$ 34,210.98

Transwestern One **2018**
404 North 31st Street
Billings, Montana

Calculations for project funded by Universal System Benefits.

In the main building lobby on 1st floor we replaced eight recessed light fixtures that used metal halite bulbs with eight LED lay-in light fixtures. Wattage consumption for these fixtures went from 100 watts to 30 watts which is a savings of 70 watts. It was assumed these lights are on about 14 hours a day Monday through Friday.
8 fixtures x 70 watts (0.070 kW) = 0.56 kW savings

We also replaced one recessed light fixture that used an older style LED with one LED lay-in light fixture. Wattage consumption for this fixture went from 40 watts to 30 watts which is a savings of 10 watts. It was assumed these lights are on about 14 hours a day Monday through Friday.
1 fixture x 10 watts (0.010 kW) = 0.01 kW savings

We also replaced one recessed light fixture that used an older style LED with one LED directional can light fixture. Wattage consumption for this fixture went from 40 watts to 15 watts which is a savings of 25 watts. It was assumed these lights are on about 14 hours a day Monday through Friday.
1 fixture x 25 watts (0.025 kW) = 0.025 kW savings

Total savings is: 0.56 kW + 0.01 kW + 0.025 kW = 0.595 kW

0.595 kW x 14 hours/day = 8.33 kW / day. 8.33 kW / day x 260 days / year = 2,165.8 kW savings / year

The cost to supply and replace these light fixtures was $1,680.00
(See attached invoice)
We received $273.00 from NorthWestern Energy E+ Rebate.
(See copy of check)

Amount requesting for Universal System Benefits Program is:
$1,680.00 - $273 = $1,407.00

Yellowstone ELECTRIC CO. 80th ANNIVERSARY

1937 - 2017

1919 4th Ave North * PO Box 2018 * Billings MT 59103

SERVICE INVOICE

Invoice#:	6426	Scheduled:	05/04/2018
Invoice Date:	05/17/2018	Time:	12:00 PM
PO#		Employee:	249
Invoice Due:	06/01/2018	Paul May	

To: **United Properties**
unitedproperties@uprop.net
PO Box 7047
Billings MT 59103

Location: **TW 1**
401 N 31st Street
Billings MT 59101

Telephone:

Description	Quantity	Price	Ext Price
Electrician services	10.50		
Materials from Supply Shop	1.00		
WMC: CABLE 12/2 W/G..	20.00		
WMC:CONN 0.38" SNAP IN CONNECTOR	2.00		
VTY: 8" TY RAP	5.00		
RZ:0.50" KO SEAL 3 PC...	5.00		
Misc Shop Supplies	1.00		

Notes:

Replace lobby light with LED flat panel in TW1 as quoted
keep track of what and how many removed

Installed 6" can light above floor directory. Tied in with 120 volt emergency circuit, and installed LED directional can light.

RECEIVED MAY REC'D

We accept both VISA and Mastercard.

Telephone 406-869-9419

Please Pay This Amount **$1,680.00**

A service charge of 0.00 % per annum will be computed on all amounts overdue on regular statement dates.
Please make checks payable to Yellowstone Electric Co.
Thank you for your prompt payment.

DNV·GL

DNV GL Energy Services USA
1400 Ravello Drive
Katy, TX 77449
Tel: (281) 396-1000

BANK OF AMERICA 2-3/710 IL

190003062
02-Aug-18

Pay Two Hundred Seventy-Three Dollars And Zero Cents***** $273.00

TO THE ORDER OF
UNITED PROPERTIES INC
404 N 31ST ST SUITE 100
BILLINGS, MT 59101
United States

Void after 6 months

RUB RED IMAGE FADES WITH HEAT

Security Features Included Details on back

THE BACK OF THIS DOCUMENT CONTAINS CHECK SECURITY WATERMARK AND COIN REACTIVE INK

⑈190003062⑈ ⑆071000039⑆ 5801001149⑈

UNITED PROPERTIES INC / 164273 190003062

INVOICE NUMBER	DATE		DISCOUNT	NET AMOUNT
9733	30-Jul-18		.00	273.00
		TOTALS:	.00	273.00

NWE E+ Rebate for new LED's in TRD1

1.4510

Transwestern Two **2018**
490 North 31st Street
Billings, Montana

Calculations for project funded by Universal System Benefits.

On the 4th floor we replaced four lay-in light fixtures that used two T-5 fluorescent bulbs and ballast with four LED lay-in light fixtures. Wattage consumption for these fixtures went from 120 watts to 40 watts which is a savings of 80 watts. It was assumed these lights are on about 12 hours a day Monday through Friday.

4 fixtures x 80 watts (0.080 kW) = 0.32 kW savings

0.32 kW x 12 hours/day = 3.84 kW / day. 3.84 kW / day x 260 days / year = 998.4 kW savings / year

The cost to supply and replace these light fixtures was $640.00
(See attached invoice)

Yellowstone ELECTRIC CO. 80th ANNIVERSARY

1937 - 2017

1919 4th Ave North * PO Box 2018 * Billings MT 59103

SERVICE INVOICE

Invoice#:	6701	Scheduled:	06/19/2018
Invoice Date:		Time:	8:00 AM
PO#		Employee:	249
Invoice Due:		Paul May	

To: **United Properties**
unitedproperties@uprop.net
PO Box 7047
Billings MT 59103

Location:
PO Box 7047
jries@uprop.net
Billings MT 59103
Telephone: 406.255.7100

Description	Quantity	Price	Ext Price
Electrician services-Paul M.	2.00		
Material from Supply House	1.00		
Shop Supplies	1.00		

Notes:
4 flat panel 2'X4' fixtures in TW2 on the 4th floor

We accept both VISA and Mastercard.

Telephone 406-869-9419

Please Pay This Amount **$640.00**

A service charge of 0.00 % per annum will be computed on all amounts overdue on regular statement dates.
Please make checks payable to Yellowstone Electric Co.
Thank you for your prompt payment.

Transwestern Three **2018**
550 North 31st Street
Billings, Montana

Calculations for project funded by Universal System Benefits.

On the first floor one of our tenants has two pendant light fixtures in their conference room. Each light fixture had four incandescent light bulbs. We replaced the incandescent light bulbs with LED style bulbs. Wattage consumption for these fixtures went from 300 watts (4 x 75 watts) to 35.2 watts (4 x 8.8 watts) which is a 264.8 watts savings per fixture. It was assumed that these lights are on about four hours a day, Monday through Friday.

2 fixtures x 264.8 watts (0.2648 kW) = 0.5296 kW savings

0.5296 kW x 4 hour / day = 2.1184 kW / day. 2.1184 kW / day x 260 days / year = 550.784 kW savings / year

The cost to replace the incandescent bulbs in these fixtures was $ 23.98
(See attached invoice)
(We replaced these bulbs as routine maintenance so we had no additional labor cost)

KING'S ACE HARDWARE STATE
4170 STATE AVE
BILLINGS, MT 59101

PHONE: (406) 245-0070

UNITED PROPERTIES INC
P.O. BOX 7047

BILLINGS MT 59103-7047

CUST # 205640
TERMS: Due the 10th

INV # 716709/2
DATE : 9/06/18
CLERK: CD
TERM # 582

TIME :11:43

****
* INVOICE *
****

QUANTITY	UM	ITEM	DESCRIPTION	SUG.PRICE	PRICE/PER	EXTENSION
2	EA	3516416	LED FEIT A19 60W EQ DAY Instant Savings	16.99	13.99 /EA	27.98SN
- 1		IS156072	$2 INSTANT SAVINGS-3516416 CREDIT RETURN		2.00 /	-2.00SNR
- 1		IS156072	$2 INSTANT SAVINGS-3516416 CREDIT RETURN		2.00 /	-2.00SNR

** AMOUNT CHARGED TO ACCOUNT ** 23.98

TAXABLE	0.00
NON-TAXABLE	23.98
SUB-TOTAL	23.98
TAX AMOUNT	0.00
TOTAL INVOICE	23.98

ACE REWARDS ID # 1939346781

(BRAD ZIMMER)

X

Received By

First Interstate Center **2018**
401 North 31st Street
Billings, Montana

Calculations for projects funded by Universal System Benefits.

We had 80 fluorescent light fixtures in the two stairwells of First Interstate Center. We replaced the fluorescent fixtures with LED's.

The 80 fluorescent fixtures had T8 bulb and ballast and were replaced with LED's. The fluorescent bulb and ballast were 62 watts and the new LED's are 18 watts. That is a savings of 44 watts per fixture. These lights are on 24 hours a day seven days a week.

80 fixtures x 44 watts (0.044 kW) = 3.52 kW savings

3.52 kW x 24 hours/day = 84.48 kW / day. 84.48 kW / day x 365 days / year = 30,835.2 kW savings / year

The cost to supply and replace the fluorescent fixtures with LED's was
$15,299.00
(See attached invoice)
We received $2,520.00 from NorthWestern Energy E+ Rebate.
(See copy of check)

Amount requesting for Universal System Benefits Program is:
$15,299.00 - $2,520 = $12,779.00

Yellowstone ELECTRIC CO.

CONTRACT INVOICE

1919 4th Avenue North
PO Box 2018
Billings MT 59103

500 E. 9006

Invoice#:	32978
Invoice Date:	06/04/2018
Due Date:	07/04/2018
Cust Order#:	

TO: United Properties
unitedproperties@uprop.net
PO Box 7047
Billings MT 59103

Job#: 191104

Description			Amount
Northwestern Energy Billing for Rebate	1.0000	15,299.000000	15,299.00
Progress Billing			15,299.00

United Properties
First Interstate Center
Replace existing stairway lights with 18 watt LED
Quote of $25,074

5005.9006 - FIC - NEW LIGHTS IN STAIRWELLS

Please pay this amount: $15,299.00

A service charge of 0.00 % per annum will be charged on all amounts overdue on regular statement dates.
Please make checks payable to Yellowstone Electric Co.
Terms: All invoices are due and payable within 30 days of invoice date.

Telephone: 406-252-3407 Fax: 406-252-8965

Thank you for your prompt payment.

DNV·GL

DNV GL Energy Services USA
1400 Ravello Drive
Katy, TX 77449
Tel: (281) 396-1000

BANK OF AMERICA 2-3/710 IL

190003488
24-Oct-18

Pay Two Thousand Five Hundred Twenty Dollars And Zero Cents***** $2,520.00

TO THE ORDER OF
UNITED PROPERTIES INC
404 N 31ST ST SUITE 100
BILLINGS, MT 59101
United States

Void after 6 months

RUB RED IMAGE FADES WITH HEAT

Security Features Included Details on back.

THE BACK OF THIS DOCUMENT CONTAINS CHECK SECURITY WATERMARK AND COIN REACTIVE INK

⑈190003488⑈ ⑆071000039⑆ 5801001149⑈

UNITED PROPERTIES INC / 164273 190003488

INVOICE NUMBER	DATE		DISCOUNT	NET AMOUNT
9755	22-Oct-18		.00	2,520.00
		TOTALS:	.00	2,520.00

NW Energy E + Rebate

FIC Stairwell Lights - Yellowstone Electric

First Interstate Bank Parking Lot **2018**
East of 401 North 31st Street
Billings, Montana

Calculations for project funded by Universal System Benefits.

In the parking lot we replaced sixteen light fixtures that used High Pressure Sodium with sixteen LED light fixtures.

Wattage consumption for four of these fixtures went from 400 watts to 108 watts which is a savings of 292 watts. It was assumed these lights are on sunup to sundown seven days a week (assume average 12 hours/day)

4 fixtures x 292 watts (0.292 kW) = 1.168 kW savings

Wattage consumption for twelve of these fixtures went from 250 watts to 108 watts which is a savings of 142 watts. It was assumed these lights are on sunup to sundown seven days a week (assume average 12 hours/day)

12 fixtures x 142 watts (0.142 kW) = 1.704 kW savings

The total for these 16 fixtures is: 1.168 kW + 1.704 kW = 2.872 kW

2.872 kW x 12 hours/day = 34.464 kW / day. 34.464 kW / day x 365 days / year = 12,579.36 kW savings / year

The cost to supply and replace these light fixtures is $12,361.00
(See attached invoice)
We received $1,600.00 from NorthWestern Energy E+ Rebate.
(See copy of check)

Amount requesting for Universal System Benefits Program is:
$12,361.00 - $1,600 = $10,761.00

Yellowstone ELECTRIC CO. 80th ANNIVERSARY

1937 - 2017

1919 4th Ave North * PO Box 2018 * Billings MT 59103

SERVICE INVOICE

Invoice#:	6044	Scheduled:	01/24/2018
Invoice Date:	02/23/2018	Time:	1:15 PM
PO#		Employee:	642
Invoice Due:	03/10/2018	Logan McDonald	

To: United Properties
unitedproperties@uprop.net
PO Box 7047
Billings MT 59103

Location:
PO Box 7047
jries@uprop.net
Billings MT 59103
Telephone: 406.255.7100

Description	Quantity	Price	Ext Price
Material from Supply House	1.00		
Electrician services-Paul M.	26.50		
Misc Shop Supplies	1.00		

Notes:
New LED fixtures for FIC parking lot

We accept both VISA and Mastercard.

Telephone 406-869-9419

Please Pay This Amount **$12,361.00**

A service charge of 0.00 % per annum will be computed on all amounts overdue on regular statement dates.
Please make checks payable to Yellowstone Electric Co.
Thank you for your prompt payment.

DNV·GL

DNV GL Energy Services USA
1400 Ravello Drive
Katy, TX 77449
Tel: (281) 396-1000

BANK OF AMERICA 2-3/710 IL

190002173
09-May-18

Pay One Thousand Six Hundred Dollars And Zero Cents***** $1,600.00

TO THE ORDER OF
UNITED PROPERTIES INC
404 N 31ST ST SUITE 100
BILLINGS, MT 59101
United States

Void after 6 months

RUB RED IMAGE FADES WITH HEAT

THE BACK OF THIS DOCUMENT CONTAINS CHECK SECURITY WATERMARK AND COIN REACTIVE INK

⑈190002173⑈ ⑆071000039⑆ 5801001149⑈

UNITED PROPERTIES INC / 164273 190002173

INVOICE NUMBER	DATE		DISCOUNT	NET AMOUNT
9399	07-May-18		.00	1,600.00
		TOTALS:	.00	1,600.00

50 3660 9006
NW Energy Et Rebate (FIB Parking Lot)

Transwestern Parking Garage **2018**
515 North 31st Street
Billings, Montana

Calculations for project funded by Universal System Benefits.

On the top level of the parking garage we replaced twelve light fixtures that used High Pressure Sodium with twelve LED light fixtures. Wattage consumption for these fixtures went from 250 watts to 108 watts which is a savings of 142 watts. It was assumed these lights are on sunup to sundown seven days a week (assume average 12 hours/day)

12 fixtures x 142 watts (0.142 kW) = 1.704 kW savings

1.704 kW x 12 hours/day = 20.448 kW / day. 20.448 kW / day x 365 days / year = 7,463.52 kW savings / year

The cost to supply and replace these light fixtures is $9,800.00
(See attached invoice)
We received $1,200.00 from NorthWestern Energy E+ Rebate.
(See copy of check)

Amount requesting for Universal System Benefits Program is:
$9,800.00 - $1,200 = $8,600.00

Yellowstone ELECTRIC CO. 80th ANNIVERSARY

1937 - 2017

1919 4th Ave North * PO Box 2018 * Billings MT 59103

SERVICE INVOICE

Invoice#:	6058	Scheduled:	02/15/2018
Invoice Date:	03/05/2018	Time:	8:00 AM
PO#		Employee:	249
Invoice Due:	03/20/2018	Paul May	

To: United Properties
unitedproperties@uprop.net
PO Box 7047
Billings MT 59103

Location:
PO Box 7047
jries@uprop.net
Billings MT 59103
Telephone: 406.255.7100

Description	Quantity	Price	Ext Price
Electrician Services	26.00		
Material from Supply House	1.00		
Misc Shop Supplies	1.00		

Notes:
Replace fixtures on top of the parking garage with LED

50.5005.9006

RECEIVED
MAR 22 2018
By

PAID

We accept both VISA and Mastercard.

Telephone 406-869-9419

Please Pay This Amount **$9,800.00**

A service charge of 0.00 % per annum will be computed on all amounts overdue on regular statement dates.
Please make checks payable to Yellowstone Electric Co.
Thank you for your prompt payment.

THE FACE OF THIS DOCUMENT HAS A COLORED BACKGROUND

DNV·GL

DNV GL Energy Services USA
1400 Ravello Drive
Katy, TX 77449
Tel: (281) 396-1000

BANK OF AMERICA

2-3/710 IL

190002597
06-Jun-18

Pay One Thousand Two Hundred Dollars And Zero Cents*****

$1,200.00

TO THE ORDER OF
UNITED PROPERTIES INC
404 N 31ST ST SUITE 100
BILLINGS, MT 59101
United States

Void after 6 months

RUB RED IMAGE FADES WITH HEAT

THE BACK OF THIS DOCUMENT CONTAINS CHECK SECURITY WATERMARK AND COIN REACTIVE INK

⑈190002597⑈ ⑆071000039⑆ 5801001149⑈

UNITED PROPERTIES INC / 164273

190002597

INVOICE NUMBER	DATE		DISCOUNT	NET AMOUNT
9535	04-Jun-18		.00	1,200.00
		TOTALS:	.00	1,200.00

50-3660.9006 PARKING GARAGE ROOF
NW Energy E+ Rebate ~~(T101 Lobby Lites)~~

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

US AIR FORCE

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$4,636,737.25
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$283,454.63	Total Payment Requests:	$283,454.63
Payment Requests Made YTD:	$0.00	Current Request Balance:	$231,864.29
2017 Carryover USBC Credit:	$4,286.39	Total USBC Credit:	$55,978.96
USBC Credit YTD:	$51,692.57	Payments Issued YTD:	$51,590.34
Average Monthly Credit Earned:	$4,307.71	USBC Credit Balance:	$4,388.62
		Payment Pending:	$4,388.62

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$17,713.72
07/11/2018	$12,363.07
10/03/2018	$13,099.32
12/10/2018	$8,414.23

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100634	1638	DA19688368	KWH >	4,069,650	4,011,159	3,510,022	3,639,285	3,421,842	3,533,637	3,776,808	4,194,735	3,582,069	3,409,746	3,803,944	3,766,245	44,719,142
			KW >	6,575	6,557	6,402	6,030	6,410	6,903	8,242	8,277	7,352	6,091	6,151	6,255	6,770
			Elec Revenue >	307,216.47	302,975.10	269,213.70	277,176.05	262,705.46	271,718.65	287,491.35	313,590.23	270,925.55	255,075.62	282,802.74	281,486.49	$3,382,377.41
714056	324164	DG15071063	KWH >	39,000	33,240	36,360	37,040	31,920	34,480	30,720	32,640	36,400	32,840	37,920	34,640	417,200
			KW >	74	73	76	69	68	63	64	66	70	66	70	71	69
			Elec Revenue >	$3,797.14	$3,339.92	$3,604.68	$3,610.96	$3,182.19	$3,337.35	$3,037.23	$3,140.48	$3,478.18	$3,185.76	$3,613.54	$3,383.18	$40,710.61
714057	324165	DD49249861	KWH >	12,043	10,358	11,043	12,795	10,476	10,998	9,704	10,576	10,507	10,109	10,949	11,493	131,051
			KW >	20	20	41	37	18	19	21	21	30	18	19	40	25
			Elec Revenue >	$1,155.92	$1,020.37	$1,284.47	$1,381.62	$1,013.83	$1,063.36	$966.09	$1,020.49	$1,116.12	$963.52	$1,039.02	$1,293.25	$13,318.06
714058	324166	DD56554467	KWH >	10,926	9,550	11,605	10,869	10,637	10,082	10,527	10,158	10,033	9,105	9,367	10,326	123,185
			KW >	18	18	62	18	20	18	18	28	19	20	23	23	24
			Elec Revenue >	$1,039.01	$933.42	$1,226.37	$1,048.17	$1,044.56	$977.97	$1,015.84	$1,062.88	$967.16	$904.85	$955.76	$1,030.88	$12,206.87
714059	324167	DG28771683	KWH >	10,503	9,436	9,592	9,224	9,235	9,247	9,703	9,812	9,943	9,979	10,217	9,435	116,326
			KW >	20	19	32	16	14	30	16	19	15	16	26	13	20
			Elec Revenue >	$1,028.57	$940.11	$921.11	$893.77	$879.69	$1,037.52	$924.42	$947.45	$914.25	$935.96	$1,049.15	$868.14	$11,340.14
714060	324168	DG99700454	KWH >	12,742	10,787	17,084	14,708	7,689	11,481	9,881	10,835	10,852	10,864	12,162	11,036	140,121
			KW >	32	21	38	38	33	29	19	30	18	21	20	19	27
			Elec Revenue >	$1,326.29	$1,058.24	$1,723.78	$1,538.66	$935.93	$1,199.97	$959.44	$1,132.61	$1,025.29	$1,050.81	$1,142.96	$1,050.42	$14,144.40
714061	324169	DG99700325	KWH >	12,242	10,714	12,101	13,092	11,232	11,959	10,655	10,783	11,700	10,683	12,175	11,087	138,423
			KW >	18	19	22	40	20	22	23	21	20	32	24	35	25
			Elec Revenue >	$1,142.21	$1,034.80	$1,171.04	$1,440.49	$1,092.86	$1,171.31	$1,066.06	$1,037.97	$1,099.64	$1,153.88	$1,184.51	$1,215.93	$13,810.70

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
714062	324170	DG67722726	KWH >	0	0	0	0	0	0	13,439	14,252	15,748	14,256	16,178	11,023	84,896
			KW >	0	0	0	0	0	0	25	26	24	28	23	33	27
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,305.38	$1,346.88	$1,452.62	$1,381.82	$1,481.97	$1,193.40	$8,162.07
714062	324170	DG99700322	KWH >	11,859	10,912	11,834	19,848	14,615	15,431	0	0	0	0	0	0	84,499
			KW >	20	21	19	36	25	36	0	0	0	0	0	0	26
			Elec Revenue >	$1,137.68	$1,072.18	$1,119.75	$1,932.10	$1,409.77	$1,574.72	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$8,246.20
714063	324171	DA02747874	KWH >	40,360	32,320	36,360	33,040	31,360	34,880	32,680	31,800	30,040	33,320	36,480	31,720	404,360
			KW >	74	68	63	71	66	64	67	62	57	84	66	62	67
			Elec Revenue >	$3,902.15	$3,204.65	$3,484.69	$3,310.05	$3,121.82	$3,373.20	$3,184.43	$3,047.58	$2,875.28	$3,404.94	$3,474.10	$3,068.73	$39,451.62
714064	324172	DG99700452	KWH >	11,214	10,123	15,286	9,983	10,894	10,842	9,120	12,462	11,361	11,020	12,652	11,342	136,299
			KW >	24	22	35	18	23	20	20	18	23	24	40	18	24
			Elec Revenue >	$1,128.18	$1,025.35	$1,555.24	$975.03	$1,090.49	$1,062.77	$905.31	$1,142.38	$1,107.54	$1,091.55	$1,381.48	$1,068.66	$13,533.98
714065	324173	DA12994709	KWH >	13,137	218	7,818	12,214	4,946	8,400	8,512	9,126	8,887	9,193	14,740	14,937	112,128
			KW >	18	12	17	18	13	13	13	24	22	20	40	40	21
			Elec Revenue >	$1,219.96	$146.72	$790.29	$1,149.60	$532.71	$800.80	$802.57	$942.04	$907.77	$914.77	$1,544.65	$1,564.93	$11,316.81
714066	324174	DG99700323	KWH >	12,464	10,664	12,721	10,959	11,470	11,183	9,857	10,853	10,578	8,539	10,795	11,215	131,298
			KW >	18	20	26	19	34	19	23	22	18	20	23	27	22
			Elec Revenue >	$1,163.99	$1,041.10	$1,266.82	$1,059.15	$1,251.42	$1,074.87	$993.65	$1,059.60	$999.14	$866.91	$1,069.58	$1,145.92	$12,992.15
714067	324175	DG99700324	KWH >	12,964	10,811	13,530	11,402	10,939	11,728	9,453	12,885	11,650	11,336	12,587	11,435	140,720
			KW >	19	18	28	34	19	18	26	22	20	18	24	17	22
			Elec Revenue >	$1,209.62	$1,035.40	$1,352.12	$1,247.09	$1,058.92	$1,108.29	$994.93	$1,209.88	$1,106.63	$1,059.71	$1,217.02	$1,063.12	$13,662.73
714068	324176	DG99700509	KWH >	12,157	10,602	12,607	10,921	10,326	10,963	10,300	9,517	10,075	10,576	9,285	8,882	126,211
			KW >	41	18	27	19	19	17	20	24	21	19	37	17	23
			Elec Revenue >	$1,367.23	$1,016.72	$1,267.04	$1,058.82	$1,006.30	$1,041.09	$1,005.37	$976.04	$991.41	$1,016.96	$1,092.31	$864.45	$12,703.74
714069	324177	DG99700510	KWH >	8,333	7,961	9,151	7,737	8,188	8,615	8,200	8,546	8,547	7,866	8,900	7,759	99,803
			KW >	20	30	16	20	15	14	17	19	13	13	25	27	19
			Elec Revenue >	$858.11	$934.18	$884.25	$813.43	$804.60	$820.48	$812.46	$853.29	$796.37	$745.28	$947.16	$880.63	$10,150.24
714070	324178	DD56554426	KWH >	10,951	10,257	10,958	10,477	10,355	9,569	10,551	10,228	9,731	10,281	10,651	10,378	124,387
			KW >	17	36	45	21	20	19	17	23	18	18	17	17	22
			Elec Revenue >	$1,038.47	$1,176.11	$1,089.43	$1,039.50	$1,019.86	$945.13	$1,005.39	$1,021.07	$931.75	$975.43	$997.03	$980.28	$12,219.45
714071	324179	DA07246466	KWH >	11,995	10,501	11,483	11,172	10,961	10,515	10,785	9,877	7,852	10,730	11,227	11,126	128,224
			KW >	36	18	58	18	19	18	18	19	22	18	18	18	23
			Elec Revenue >	$1,309.59	$1,017.31	$1,197.97	$1,072.34	$1,058.65	$1,009.56	$1,037.59	$948.14	$831.44	$1,018.55	$1,052.15	$1,042.93	$12,596.22
714072	324180	DG93799079	KWH >	37,400	31,400	31,800	35,040	28,120	28,680	32,760	29,840	29,320	34,880	31,120	34,720	385,080
			KW >	69	66	61	59	56	56	57	58	60	60	59	61	60
			Elec Revenue >	$3,618.33	$3,114.23	$3,103.28	$3,350.57	$2,769.19	$2,809.53	$3,094.03	$2,850.35	$2,849.59	$3,283.30	$2,985.50	$3,291.56	$37,119.46
714073	324181	DG99700328	KWH >	12,524	10,048	9,927	12,819	9,778	10,371	10,911	9,267	9,690	11,229	10,472	11,192	128,228
			KW >	18	17	17	18	17	29	18	18	35	19	20	23	21
			Elec Revenue >	$1,174.04	$967.12	$960.48	$1,201.04	$950.74	$1,112.57	$1,027.83	$896.57	$1,098.98	$1,060.44	$1,012.26	$1,105.55	$12,567.62
714074	324182	DG23524418	KWH >	13,194	12,312	11,276	11,184	10,673	11,158	12,760	10,712	10,860	12,357	11,279	11,940	139,705
			KW >	20	19	38	20	19	26	19	19	19	18	18	20	21
			Elec Revenue >	$1,238.14	$1,160.53	$1,274.46	$1,084.22	$1,033.66	$1,139.90	$1,184.58	$1,017.16	$1,035.14	$1,139.55	$1,061.84	$1,126.90	$13,496.08
714075	324183	DG99700428	KWH >	5,111	6,230	4,734	5,949	4,037	3,257	4,371	3,729	3,973	4,949	4,367	5,475	56,182
			KW >	9	11	9	10	8	7	9	7	7	9	10	10	9
			Elec Revenue >	$498.26	$605.35	$473.90	$583.41	$409.20	$340.64	$436.88	$367.07	$387.44	$476.94	$442.52	$530.09	$5,551.70

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
714076	324184	DG35598098	KWH >	11,694	8,826	8,711	17,730	10,603	10,554	11,046	9,913	9,784	10,972	10,058	10,977	130,868
			KW >	20	20	15	45	28	20	19	19	19	18	19	18	22
			Elec Revenue >	$1,122.05	$897.33	$844.37	$1,852.83	$1,121.25	$1,038.55	$1,052.47	$950.10	$947.40	$1,033.66	$974.20	$1,041.63	$12,875.84
714077	324185	DA03705240	KWH >	37,320	32,200	34,720	33,440	35,960	25,960	34,640	32,240	30,520	37,000	32,080	37,880	403,960
			KW >	73	66	67	61	64	61	62	60	61	62	69	68	65
			Elec Revenue >	$3,652.10	$3,176.42	$3,395.74	$3,244.47	$3,463.01	$2,647.78	$3,290.14	$3,056.53	$2,953.30	$3,469.80	$3,158.52	$3,602.65	$39,110.46
714078	324186	DG36058689	KWH >	13,764	11,357	11,140	11,685	10,467	10,090	13,887	10,255	10,145	12,101	10,745	12,275	137,911
			KW >	20	20	18	18	19	21	36	29	18	17	17	18	21
			Elec Revenue >	$1,282.80	$1,094.61	$1,065.99	$1,111.35	$1,016.58	$1,009.13	$1,438.22	$1,081.77	$967.27	$1,113.17	$1,010.50	$1,136.81	$13,328.20
714079	324187	DD56554463	KWH >	12,432	10,536	10,146	16,297	11,274	9,804	12,662	9,903	9,577	11,726	10,345	11,077	135,779
			KW >	18	22	20	18	41	19	25	33	18	17	18	17	22
			Elec Revenue >	$1,159.42	$1,055.05	$1,003.14	$1,466.85	$1,296.24	$967.71	$1,238.22	$1,095.23	$922.14	$1,085.48	$980.78	$1,038.71	$13,308.97
714080	324188	DA17931722	KWH >	0	0	0	0	0	0	0	0	0	0	34,480	36,000	70,480
			KW >	0	0	0	0	0	0	0	0	0	0	72	69	71
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$3,367.30	$3,468.76	$6,836.06
714080	324188	DD39780673	KWH >	37,800	36,040	33,840	38,440	31,880	30,320	32,960	32,000	31,400	10,720	0	0	315,400
			KW >	70	70	72	74	67	62	65	62	61	44	0	0	65
			Elec Revenue >	$3,660.41	$3,523.47	$3,371.03	$3,770.64	$3,170.91	$2,998.70	$3,206.28	$3,054.87	$3,011.95	$1,275.33	$0.00	$0.00	$31,043.59
714081	324189	DG99700459	KWH >	13,268	11,504	11,854	13,161	11,684	11,740	12,313	11,168	10,936	11,786	11,828	11,857	143,099
			KW >	20	20	21	19	35	26	23	20	20	18	22	20	22
			Elec Revenue >	$1,243.75	$1,111.92	$1,142.90	$1,237.20	$1,278.43	$1,190.66	$1,190.64	$1,058.45	$1,047.18	$1,097.26	$1,139.01	$1,122.17	$13,859.57
714082	324190	DG99700327	KWH >	12,059	10,604	11,499	10,980	11,120	11,585	10,173	10,602	11,448	10,591	12,191	10,743	133,595
			KW >	18	20	18	35	22	19	19	20	18	21	25	22	21
			Elec Revenue >	$1,134.35	$1,040.57	$1,085.14	$1,218.97	$1,102.92	$1,110.14	$988.13	$1,017.81	$1,066.52	$1,036.60	$1,195.48	$1,055.18	$13,051.81
714083	324191	DA05507200	KWH >	13,072	11,030	11,597	13,155	12,181	11,168	11,659	11,000	12,099	13,309	13,062	12,084	145,416
			KW >	18	21	20	31	20	29	21	33	21	21	20	18	23
			Elec Revenue >	$1,215.45	$1,078.21	$1,112.04	$1,349.74	$1,164.20	$1,176.77	$1,124.94	$1,172.09	$1,147.70	$1,245.68	$1,211.73	$1,125.77	$14,124.32
714084	324192	DA05102830	KWH >	12,108	10,108	15,395	10,631	7,454	9,767	13,084	10,702	10,077	12,076	10,466	11,894	133,762
			KW >	19	19	39	18	18	20	22	20	15	29	18	19	21
			Elec Revenue >	$1,142.35	$985.08	$1,604.93	$1,026.25	$718.16	$972.32	$1,238.81	$1,025.27	$936.07	$1,229.61	$993.86	$1,113.69	$12,986.40
714085	324193	DG99700426	KWH >	12,221	10,408	10,850	10,914	11,230	9,872	11,166	9,612	9,339	11,450	9,616	11,748	128,426
			KW >	20	22	21	20	18	20	20	18	17	17	18	40	21
			Elec Revenue >	$1,167.98	$1,045.94	$1,071.65	$1,065.28	$1,066.92	$979.40	$1,070.13	$921.59	$896.48	$1,058.10	$928.96	$1,318.88	$12,591.31
714086	324194	DG23689627	KWH >	9,566	10,324	10,591	11,660	10,040	4,738	9,887	9,827	9,916	11,084	9,836	11,130	118,599
			KW >	17	16	22	20	20	42	42	19	17	19	15	17	22
			Elec Revenue >	$930.17	$973.35	$1,056.02	$1,126.13	$992.47	$794.91	$1,186.08	$948.57	$938.76	$1,049.98	$913.00	$1,039.12	$11,948.56
714087	324195	DG99700458	KWH >	12,929	11,006	11,186	12,936	10,917	10,914	11,390	10,400	10,448	11,280	11,412	11,453	136,271
			KW >	27	18	18	17	18	33	27	18	18	18	18	17	21
			Elec Revenue >	$1,286.16	$1,053.24	$1,060.52	$1,202.68	$1,042.94	$1,190.11	$1,164.05	$981.81	$986.32	$1,059.89	$1,063.31	$1,067.61	$13,158.64
714088	324196	DG99700456	KWH >	11,774	9,956	10,269	10,000	14,526	9,322	12,596	10,165	10,010	9,408	10,983	10,921	129,930
			KW >	24	18	21	20	30	21	25	30	18	18	22	19	22
			Elec Revenue >	$1,173.55	$967.53	$1,026.43	$991.67	$1,444.78	$948.99	$1,237.30	$1,080.65	$954.16	$912.58	$1,077.05	$1,038.21	$12,852.90
715572	325488	DA03573682	KWH >	39,680	33,960	36,880	34,360	29,000	7,520	53,160	29,200	32,960	32,680	35,720	34,360	399,480
			KW >	79	83	78	82	74	66	44	64	46	77	80	83	71
			Elec Revenue >	$3,899.66	$3,487.32	$3,664.18	$3,527.25	$3,019.86	$1,247.26	$4,555.73	$2,866.77	$2,982.41	$3,282.34	$3,547.61	$3,481.69	$39,562.08

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
715573	325489	DA18997911	KWH >	11,836	10,687	11,024	12,270	10,101	11,680	10,242	9,729	11,046	10,556	11,470	10,839	131,480
			KW >	19	22	18	26	36	18	18	21	25	18	19	18	22
			Elec Revenue >	$1,121.81	$1,067.84	$1,054.53	$1,233.38	$1,155.59	$1,106.07	$985.25	$962.96	$1,105.19	$999.21	$1,076.69	$1,022.78	$12,891.30
715574	325490	DG28273066	KWH >	12,847	9,078	12,980	12,187	10,753	10,560	11,168	10,020	10,614	11,200	10,739	12,341	134,487
			KW >	18	24	17	29	23	17	22	22	18	17	17	16	20
			Elec Revenue >	$1,191.93	$956.34	$1,199.21	$1,257.58	$1,078.68	$1,011.88	$1,096.87	$995.17	$1,000.81	$1,042.57	$1,006.46	$1,122.89	$12,960.39
715575	325491	DG28273067	KWH >	12,047	11,124	12,231	11,062	12,771	10,482	8,763	10,387	11,056	11,990	11,439	11,712	135,064
			KW >	22	18	40	41	17	19	20	22	18	17	19	16	22
			Elec Revenue >	$1,172.22	$1,062.44	$1,361.30	$1,285.67	$1,185.52	$1,021.25	$890.18	$1,021.22	$1,030.88	$1,105.11	$1,080.33	$1,078.16	$13,294.28
715576	325492	DG28273068	KWH >	14,782	11,470	22,500	10,343	419	10,385	11,877	10,190	10,891	11,855	11,153	14,335	140,200
			KW >	19	21	42	39	29	22	19	26	23	18	18	19	25
			Elec Revenue >	$1,354.15	$1,115.66	$2,183.92	$1,208.18	$333.27	$1,046.19	$1,125.45	$1,040.72	$1,074.28	$1,099.91	$1,050.32	$1,304.30	$13,936.35
715577	325493	DG28273069	KWH >	12,804	12,788	9,354	12,093	10,845	10,630	11,161	9,979	10,657	11,357	10,872	12,713	135,253
			KW >	18	31	30	17	17	19	18	21	19	24	18	38	23
			Elec Revenue >	$1,188.87	$1,320.71	$1,037.68	$1,132.92	$1,033.36	$1,030.49	$1,052.77	$974.39	$1,009.66	$1,124.61	$1,021.91	$1,364.50	$13,291.87
715578	325494	DG28273062	KWH >	12,733	10,428	11,367	11,896	10,749	10,424	11,034	9,845	10,538	11,224	10,807	12,413	133,458
			KW >	23	18	25	17	26	17	17	19	17	17	19	17	19
			Elec Revenue >	$1,232.54	$1,008.38	$1,149.06	$1,117.71	$1,116.73	$996.30	$1,033.23	$943.37	$987.67	$1,042.39	$1,027.07	$1,142.42	$12,796.87
715579	325495	DG28273063	KWH >	12,093	10,999	11,299	11,967	10,536	10,333	11,296	9,969	11,248	10,665	11,533	11,471	133,409
			KW >	23	17	27	17	22	18	23	21	18	17	17	25	20
			Elec Revenue >	$1,188.43	$1,044.06	$1,158.77	$1,125.67	$1,057.72	$996.59	$1,119.13	$978.12	$1,052.18	$1,003.82	$1,069.36	$1,142.26	$12,936.11
715580	325496	DG28273185	KWH >	12,673	11,393	13,426	12,064	11,165	11,896	10,756	9,664	10,865	11,960	12,032	11,663	139,557
			KW >	18	20	36	20	36	38	17	24	31	30	22	37	27
			Elec Revenue >	$1,177.91	$1,097.37	$1,415.04	$1,155.34	$1,241.53	$1,321.77	$1,007.49	$988.29	$1,153.82	$1,224.95	$1,152.39	$1,277.04	$14,212.94
715581	325497	DG21490214	KWH >	12,432	11,132	12,641	11,929	11,385	11,835	11,031	10,547	11,782	11,089	11,834	11,446	139,083
			KW >	31	19	18	20	23	23	19	24	24	20	20	33	23
			Elec Revenue >	$1,296.67	$1,068.53	$1,176.72	$1,144.51	$1,129.81	$1,169.08	$1,049.19	$1,053.12	$1,152.90	$1,060.09	$1,115.65	$1,221.46	$13,637.73
715582	325498	DG15003070	KWH >	13,069	10,979	8,320	15,018	12,277	10,961	10,308	12,338	10,888	11,635	11,292	12,774	139,859
			KW >	26	19	43	19	18	21	20	21	19	18	22	18	22
			Elec Revenue >	$1,292.40	$1,059.23	$1,089.20	$1,386.55	$1,156.47	$1,077.88	$1,013.76	$1,156.38	$1,029.62	$1,084.90	$1,094.29	$1,180.02	$13,620.70
715583	325499	DG59962908	KWH >	39,480	34,200	36,640	36,960	31,760	30,920	31,960	31,440	31,760	35,720	35,400	35,480	411,720
			KW >	80	76	76	69	76	64	64	64	61	68	73	68	70
			Elec Revenue >	$3,886.39	$3,446.91	$3,616.03	$3,601.21	$3,256.46	$3,062.87	$3,132.80	$3,033.22	$3,034.31	$3,431.00	$3,451.70	$3,424.02	$40,376.92
715584	325500	DD80878884	KWH >	10,714	11,718	11,095	12,035	10,660	10,569	10,696	10,242	10,221	11,585	11,413	11,405	132,353
			KW >	39	28	19	19	19	19	17	17	18	17	23	24	22
			Elec Revenue >	$1,233.24	$1,205.70	$1,064.27	$1,145.81	$1,032.73	$1,030.31	$1,014.40	$961.40	$967.43	$1,069.46	$1,114.54	$1,134.08	$12,973.37
715585	325501	DG28273184	KWH >	10,734	11,371	11,081	12,811	10,724	10,853	10,784	10,702	10,759	11,945	11,644	11,458	134,866
			KW >	17	21	24	26	25	27	18	23	19	19	18	18	21
			Elec Revenue >	$1,016.24	$1,108.43	$1,114.54	$1,281.49	$1,099.58	$1,130.39	$1,033.21	$1,052.55	$1,024.20	$1,117.06	$1,080.43	$1,077.10	$13,135.22
715586	325502	DG28273182	KWH >	12,109	10,608	11,330	12,229	10,823	10,871	10,969	10,759	10,644	11,927	11,610	11,706	135,585
			KW >	25	19	21	23	18	20	19	19	19	19	18	25	20
			Elec Revenue >	$1,205.45	$1,035.45	$1,106.96	$1,203.70	$1,042.76	$1,062.87	$1,058.96	$1,013.97	$1,011.28	$1,117.37	$1,082.79	$1,163.82	$13,105.38
715587	325503	DG28273183	KWH >	11,135	11,071	12,208	10,732	9,003	9,658	11,560	10,313	10,186	11,646	11,625	11,433	130,570
			KW >	19	19	37	22	28	19	23	18	18	19	23	17	22
			Elec Revenue >	$1,068.25	$1,070.90	$1,330.09	$1,071.75	$999.18	$959.37	$1,138.02	$974.82	$969.23	$1,093.90	$1,131.51	$1,065.56	$12,872.58

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
715588	325504	DG21003269	KWH >	11,848	11,923	11,490	12,565	11,328	11,142	11,068	8,274	14,983	12,615	11,744	9,648	138,628
			KW >	20	28	20	18	20	25	21	19	21	20	18	18	21
			Elec Revenue >	$1,134.04	$1,221.31	$1,103.56	$1,183.62	$1,097.47	$1,136.19	$1,087.51	$830.05	$1,364.22	$1,179.75	$1,090.08	$934.76	$13,362.56
715589	325505	DA16314196	KWH >	12,348	12,350	15,143	9,852	11,632	11,453	11,466	10,985	10,919	12,416	12,373	12,609	143,546
			KW >	19	17	28	36	23	25	18	19	21	18	20	34	23
			Elec Revenue >	$1,164.73	$1,151.38	$1,466.13	$1,141.77	$1,150.71	$1,158.20	$1,088.46	$1,033.18	$1,053.17	$1,148.39	$1,160.84	$1,320.17	$14,037.13
715590	325506	DG21003319	KWH >	8,271	9,887	14,626	11,704	10,904	11,255	10,656	8,966	11,705	11,643	11,520	11,588	132,725
			KW >	18	18	40	19	23	24	26	29	19	18	18	19	23
			Elec Revenue >	$832.41	$959.71	$1,544.20	$1,120.64	$1,097.73	$1,135.77	$1,096.58	$976.52	$1,089.12	$1,085.24	$1,072.91	$1,093.19	$13,104.02
715591	325507	DG21003318	KWH >	9,958	13,102	11,530	11,977	10,740	10,940	10,928	716	10,448	21,989	11,786	11,266	135,380
			KW >	20	32	26	20	19	24	20	19	18	18	22	19	21
			Elec Revenue >	$985.68	$1,356.88	$1,165.65	$1,157.52	$1,041.20	$1,105.68	$1,063.76	$258.00	$988.99	$1,883.42	$1,137.59	$1,070.96	$13,215.33
715592	325508	DG57846955	KWH >	38,440	34,400	35,720	30,800	32,720	35,120	31,720	33,800	5,880	36,640	34,240	39,920	389,400
			KW >	75	69	74	70	64	76	66	66	67	65	70	72	70
			Elec Revenue >	$3,762.02	$3,384.05	$3,533.55	$3,126.96	$3,213.23	$3,513.14	$3,127.92	$3,230.15	$1,123.23	$3,472.34	$3,336.63	$3,798.63	$38,621.85
715593	325509	DG17829588	KWH >	9,614	11,297	12,100	6,284	10,869	8,580	7,652	8,774	7,974	9,698	9,953	10,327	113,122
			KW >	28	18	84	26	34	25	13	30	12	38	23	17	29
			Elec Revenue >	$1,036.98	$1,076.49	$1,372.43	$766.25	$1,203.36	$932.60	$740.41	$975.62	$738.21	$1,137.16	$1,006.11	$970.85	$11,956.47
715594	325510	DG28273065	KWH >	13,327	18,066	5,700	11,181	10,850	10,180	10,871	10,409	12,145	10,450	9,016	8,466	130,661
			KW >	9	40	29	21	24	23	21	30	26	29	30	30	26
			Elec Revenue >	$1,143.51	$1,821.88	$744.05	$1,098.13	$1,098.69	$1,040.22	$1,064.21	$1,095.45	$1,199.71	$1,103.49	$1,005.76	$966.28	$13,381.38
715595	325511	DA15269509	KWH >	11,223	11,440	11,256	10,336	10,680	10,985	9,784	8,599	10,259	11,473	10,306	12,040	128,381
			KW >	20	30	30	30	18	22	22	18	17	24	18	24	23
			Elec Revenue >	$1,083.32	$1,204.80	$1,187.49	$1,121.77	$1,032.81	$1,091.14	$991.45	$841.20	$968.00	$1,128.27	$978.61	$1,178.30	$12,807.16
715596	325512	DG16690580	KWH >	10,000	12,415	11,006	11,483	12,011	11,077	10,791	11,037	8,850	11,015	10,884	12,704	133,273
			KW >	17	20	22	22	19	22	25	19	21	31	19	18	21
			Elec Revenue >	$965.65	$1,179.38	$1,092.33	$1,128.53	$1,146.04	$1,101.30	$1,094.65	$1,034.36	$896.27	$1,162.08	$1,037.59	$1,169.65	$13,007.83
715597	325513	DA02748464	KWH >	42,320	44,760	42,960	42,440	37,160	39,680	31,440	32,400	34,520	38,640	36,960	44,920	468,200
			KW >	83	80	171	81	82	79	72	69	70	74	75	76	84
			Elec Revenue >	$4,142.96	$4,312.16	$4,206.62	$4,151.43	$3,736.36	$3,900.11	$3,184.12	$3,160.57	$3,330.16	$3,717.51	$3,588.65	$4,226.22	$45,656.87
715598	325514	DG28273160	KWH >	10,937	11,399	10,754	12,796	10,769	10,253	11,491	8,921	11,994	10,680	11,642	11,574	133,210
			KW >	18	28	25	25	26	29	27	20	25	17	19	17	23
			Elec Revenue >	$1,047.81	$1,183.74	$1,095.41	$1,263.17	$1,110.39	$1,104.02	$1,173.25	$887.59	$1,180.22	$1,002.68	$1,095.88	$1,076.86	$13,221.02
715599	325515	DA15828840	KWH >	8,454	9,900	10,273	7,674	7,047	11,578	9,968	10,834	7,373	10,436	9,216	10,059	112,812
			KW >	21	21	62	24	24	34	34	29	34	18	18	18	28
			Elec Revenue >	$882.22	$996.48	$1,122.41	$852.61	$801.13	$1,260.13	$1,131.76	$1,122.79	$916.09	$994.09	$898.45	$967.49	$11,945.65
715600	325516	DG28273161	KWH >	12,220	10,917	13,976	12,551	11,656	10,563	9,413	11,204	9,957	11,237	10,427	11,950	136,071
			KW >	18	18	48	34	39	23	18	18	20	17	18	17	24
			Elec Revenue >	$1,145.69	$1,049.95	$1,578.98	$1,340.40	$1,312.20	$1,071.43	$922.63	$1,039.42	$966.52	$1,047.58	$989.76	$1,106.15	$13,570.71
715601	325517	DA08581524	KWH >	11,993	10,558	9,684	13,045	11,492	10,565	8,965	10,836	9,703	11,155	10,425	11,755	130,176
			KW >	20	20	20	27	17	17	21	17	16	17	23	18	19
			Elec Revenue >	$1,151.21	$1,036.58	$963.95	$1,304.98	$1,085.45	$1,012.14	$919.75	$1,002.96	$914.91	$1,034.55	$1,038.65	$1,094.51	$12,559.64
715602	325518	DG28273174	KWH >	11,233	12,721	10,130	11,679	11,338	10,451	9,883	10,747	10,033	11,498	10,602	12,212	132,527
			KW >	13	22	43	29	19	18	23	18	18	21	20	18	22
			Elec Revenue >	$1,017.62	$1,230.20	$1,222.37	$1,214.68	$1,088.76	$1,013.94	$1,014.70	$1,003.05	$954.57	$1,100.92	$1,022.22	$1,128.02	$13,011.05

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
715603	325519	DG28273175	KWH >	9,749	15,352	7,991	16,488	11,272	13,320	11,115	11,375	11,376	15,236	11,002	14,542	148,818
			KW >	32	24	55	31	18	35	25	19	20	22	19	21	27
			Elec Revenue >	$1,094.09	$1,456.42	$909.10	$1,616.29	$1,077.41	$1,404.74	$1,125.22	$1,067.11	$1,073.60	$1,396.47	$1,043.56	$1,336.75	$14,600.76
715604	325520	DG28273177	KWH >	9,988	14,403	9,830	10,673	11,294	10,080	9,493	10,348	9,503	10,733	9,847	11,219	127,411
			KW >	17	20	19	25	32	35	28	19	23	22	17	17	23
			Elec Revenue >	$965.38	$1,339.42	$964.98	$1,101.68	$1,213.68	$1,147.44	$1,029.16	$988.46	$961.25	$1,051.98	$935.10	$1,046.35	$12,744.88
715605	325521	DA14726090	KWH >	9,621	8,506	12,507	11,240	10,659	11,029	10,211	9,685	10,894	10,375	11,208	10,885	126,820
			KW >	22	22	22	17	20	21	21	18	18	18	18	17	20
			Elec Revenue >	$978.71	$891.14	$1,210.30	$1,065.63	$1,046.05	$1,084.95	$1,010.81	$927.93	$1,026.07	$987.89	$1,050.61	$1,017.51	$12,297.60
715606	325522	DG28273176	KWH >	9,480	14,509	11,127	13,041	10,179	12,357	10,354	10,743	11,336	11,944	11,032	12,521	138,623
			KW >	16	38	39	40	25	35	18	19	18	19	17	18	25
			Elec Revenue >	$909.69	$1,525.61	$1,075.60	$1,431.51	$1,053.54	$1,323.81	$995.91	$1,016.11	$1,057.84	$1,118.75	$1,030.27	$1,153.57	$13,692.21
715607	325523	DG21003317	KWH >	10,306	10,894	10,958	11,284	12,594	10,309	10,057	11,192	9,445	11,848	10,103	11,704	130,694
			KW >	30	21	50	19	33	29	20	20	18	28	17	32	26
			Elec Revenue >	$1,114.41	$1,073.46	$1,116.73	$1,083.61	$1,325.31	$1,111.49	$999.82	$1,068.05	$910.29	$1,194.25	$952.36	$1,226.55	$13,176.33
715608	325524	DD56554544	KWH >	13,755	13,392	10,983	11,513	10,231	10,170	10,266	11,512	9,456	10,654	12,239	12,030	136,201
			KW >	33	44	35	21	21	23	29	29	29	31	34	34	30
			Elec Revenue >	$1,416.70	$1,497.66	$1,042.49	$1,122.90	$1,020.85	$1,033.14	$1,098.31	$1,176.16	$1,019.76	$1,137.02	$1,287.02	$1,274.97	$14,126.98
715609	325525	DD81623852	KWH >	10,268	10,467	13,424	13,513	9,245	9,189	9,128	9,603	6,788	8,739	8,266	8,082	116,712
			KW >	18	18	42	34	23	34	17	18	34	43	34	34	29
			Elec Revenue >	$992.20	$1,005.95	$1,478.50	$1,409.51	$967.54	$1,066.27	$889.13	$918.23	$867.75	$1,108.79	$983.55	$971.76	$12,659.18
715610	325526	DG15003053	KWH >	10,936	12,036	9,109	11,359	11,221	9,273	10,489	29,697	-10,343	0	0	0	93,777
			KW >	23	36	19	19	20	18	27	23	22	0	0	0	23
			Elec Revenue >	$1,098.97	$1,304.83	$914.11	$1,094.27	$1,091.85	$919.50	$1,091.33	$2,495.18	($554.34)	$0.00	$0.00	$0.00	$9,455.70
715610	325526	DG80092782	KWH >	0	0	0	0	0	0	0	0	0	10,032	11,168	12,396	33,596
			KW >	0	0	0	0	0	0	0	0	0	23	40	36	33
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,010.95	$1,266.92	$1,321.75	$3,599.62
715611	325527	DD81623853	KWH >	10,374	13,096	10,257	12,138	10,882	10,042	9,775	10,152	11,858	11,439	10,802	11,099	131,914
			KW >	23	33	42	20	22	22	21	19	31	17	17	20	24
			Elec Revenue >	$1,047.70	$1,361.06	$1,231.10	$1,165.36	$1,082.70	$1,015.98	$978.94	$972.10	$1,229.44	$1,062.31	$1,015.45	$1,066.90	$13,229.04
715612	325528	DG62786214	KWH >	11,575	10,444	10,051	10,718	10,049	11,065	10,479	10,383	9,859	10,930	10,342	10,630	126,525
			KW >	18	18	18	17	26	28	20	18	21	33	22	22	22
			Elec Revenue >	$1,099.21	$1,004.62	$975.06	$1,025.74	$1,059.85	$1,150.16	$1,021.14	$977.50	$974.69	$1,173.68	$1,020.18	$1,045.33	$12,527.16
715613	325529	DG28273159	KWH >	11,125	12,695	10,115	10,424	11,901	11,132	10,283	9,964	10,917	11,330	10,806	11,207	131,899
			KW >	34	31	18	19	34	18	21	19	29	19	32	20	25
			Elec Revenue >	$1,219.93	$1,307.69	$982.51	$1,015.04	$1,279.67	$1,057.85	$1,010.17	$955.66	$1,135.68	$1,072.42	$1,157.15	$1,079.03	$13,272.80
715614	325530	DG28273158	KWH >	13,978	11,748	12,059	10,935	10,911	11,670	10,751	9,949	11,034	10,432	11,128	10,435	135,030
			KW >	35	33	22	22	24	26	22	30	22	29	17	21	25
			Elec Revenue >	$1,456.61	$1,256.98	$1,175.69	$1,089.04	$1,101.78	$1,181.10	$1,063.93	$1,067.40	$1,078.57	$1,097.43	$1,035.93	$1,029.48	$13,633.94
715615	325531	DG21003271	KWH >	11,132	10,708	11,319	12,310	10,461	10,979	10,184	11,464	10,527	11,651	10,263	11,713	132,711
			KW >	19	18	66	25	19	22	23	26	31	21	18	19	26
			Elec Revenue >	$1,072.18	$1,024.25	$1,223.06	$1,222.27	$1,025.79	$1,092.81	$1,032.38	$1,147.99	$1,122.98	$1,119.07	$972.49	$1,106.08	$13,161.35
715616	325532	DG21003316	KWH >	8,035	13,738	11,622	12,060	10,381	10,193	9,985	11,012	9,863	11,088	10,225	11,743	129,945
			KW >	13	24	69	17	19	21	18	20	31	20	19	17	24
			Elec Revenue >	$769.60	$1,330.33	$1,263.59	$1,130.03	$1,012.41	$1,015.02	$969.53	$1,054.40	$1,065.81	$1,061.59	$982.17	$1,087.57	$12,742.05

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 1/14/2019

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
		Total KWH	5,214,452	5,083,631	4,621,166	4,774,806	4,434,476	4,527,517	4,814,591	5,199,325	4,540,886	4,474,411	4,874,677	4,876,238	57,436,176
		Combined Average KW	8,732	8,751	9,293	8,319	8,610	9,093	10,273	10,347	9,349	8,136	8,264	8,423	9,092
		USBC Charge	$4,692.97	$4,575.27	$4,159.09	$4,297.35	$3,990.98	$4,074.74	$4,333.15	$4,679.40	$4,086.77	$4,026.99	$4,387.24	$4,388.62	$51,692.57
		Total Elec Revenue	418,997.29	409,521.31	381,488.22	390,054.19	364,763.87	372,195.69	388,999.62	411,394.56	364,911.19	358,062.45	386,856.49	389,492.37	$4,636,737.25

Hensley, Nicole

From: Delzer, Wayne <Wayne.Delzer@va.gov>
Sent: Wednesday, February 13, 2019 11:51 AM
To: Hensley, Nicole
Cc: Mahugh, Dale E; Edwards, Rick G
Subject: Self Directed USBC annual report for 2018
Attachments: cc1lcis5@northwestern.com_20190205_164817.pdf

Nicole:

This is the US Veterans Affairs Self Directed USBC annual report for 2018:

2018 funds in the amount of $5,454.89 were used for energy conservation projects identified as lighting.

2019 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 and HVAC controls .

Please find attached below, a copy of the 2018 Self Directed USBC Progress Report.

Thank you

Wayne Delzer

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/5/2019

US DEPT VETERANS AFFAIRS

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$622,997.62
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$598.21	Total Payment Requests:	$6,666.21
Payment Requests Made YTD:	$6,068.00	Current Request Balance:	$613.11
2017 Carryover USBC Credit:	$423.87	Total USBC Credit:	$6,472.57
USBC Credit YTD:	$6,048.70	Payments Issued YTD:	$6,053.10
Average Monthly Credit Earned:	$504.06	USBC Credit Balance:	$419.47
		Payment Pending:	$419.47

Payment Requests Made

Submitted By	Date	Amount
Wayne Detzer	10/26/2018	$6,068.00

Payments Issued

Date	Amount
04/05/2018	$598.21
12/10/2018	$5,454.89

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
710151	321147	DS55258634	KWH >	0	0	0	0	1,117	3,018	6,115	5,333	3,346	0	0	0	18,929
			KW >	0	0	0	0	38	38	21	38	38	0	0	0	35
			Elec Revenue >	$7.35	$7.35	$7.35	$7.35	$469.66	$618.32	$684.71	$789.85	$640.77	$7.35	$7.35	$7.35	$3,254.76
710210	321199	DA21629765	KWH >	556,706	549,379	519,410	514,363	532,096	602,514	598,914	685,274	624,572	525,970	526,565	466,077	6,701,840
			KW >	994	981	1,004	944	1,162	1,244	1,279	1,266	1,274	1,093	957	1,028	1,102
			Elec Revenue >	$51,017.81	$50,335.83	$48,253.33	$47,532.39	$50,593.92	$56,636.08	$56,084.57	$61,648.02	$57,473.04	$48,731.22	$47,631.50	$43,805.15	$619,742.86
			Total KWH	556,706	549,379	519,410	514,363	533,213	605,532	605,029	690,607	627,918	525,970	526,565	466,077	6,720,769
			Combined Average KW	994	981	1,004	944	1,200	1,282	1,300	1,304	1,312	1,093	957	1,028	1,137
			USBC Charge	$501.04	$494.44	$467.47	$462.93	$479.90	$544.98	$544.52	$621.55	$565.12	$473.37	$473.91	$419.47	$6,048.70
			Total Elec Revenue	$51,025.16	$50,343.18	$48,260.68	$47,539.74	$51,063.58	$57,254.40	$56,769.28	$62,437.87	$58,113.81	$48,738.57	$47,638.85	$43,812.50	$622,997.62

NorthWestern Energy
Delivering a Bright Future

February 4, 2019

Wayne Delzer
United States Department of Veterans Affairs
PO Box 112
Fort Harrison, MT 59636

Dear Wayne:

Your company has been paying and accumulating USB (Universal Systems Benefit) credits throughout 2018, and I am contacting you regarding your 2018 year-end USB figures and annual reporting requirements. Enclosed is a copy of your final year-end *"Self-Directed USBC Progress Report for 2018"* showing a summary of your USB activity during 2018 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 2018 USB credits into 2019. If your final progress report shows a "Payment Pending", it reflects your December 2018 USB credits that were carried over into 2019, 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 2018*" 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, 2019.** 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, including requests to donate USB credits to Energy Share. So, if any new Form B's were submitted to the utility during 2018 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 2018.**
- ✓ **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, 2019** to the address below.

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

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

Sincerely,

Dale Mahugh
Specialist, Key Accounts

Rec'd MT DOR
FEB 27 2019

VISTA
OUTDOOR
BRINGING THE WORLD OUTSIDE

BLACKHAWK

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

2/15/2019
Nicole Hensley

Department of Revenue

PO Box 5805

Helena, MT 59604

Dear Nicole Hensley:

This letter is to serve as the report of activities related to Self-Directed USB credits 2018. Included is Progress Report provided by NorthWestern Energy of the credit and how it was earned. Also included is a copy of a form B showing a request for payment of the credit. Payment was made by NorthWestern Energy in the amount of $10018.62 as shown on the report. This credit was used to purchase and install a high efficiency variable speed air compressor to replace a larger fixed speed air compressor. The cost of the project was $78614.08 less a $50000 rebate from NorthWestern Energy. With the $10018.62 mentioned above, the total cost of the project was $18595.46. This report is complete.

Sincerely,

Rivenbark, Chris

Facilities Manager

BLACKHAWK/ Vista Outdoor

4066001728

WESTERN ENERGY COMPANY - *Rosebud Mine*
A Subsidiary of WESTMORELAND COAL COMPANY

P.O. Box 99 • 138 ROSEBUD LANE • Colstrip, MT 59323 • Phone: (406) 748-5100

February 26, 2019

CERTIFIED MAIL RRR

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

RE: Self-Directed USBC Progress Report for 2018 – Western Energy

Dear Ms. Hensley:

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018.

- All the USB payments we received in 2018 were self-directed for an energy efficiency LED lighting project we submitted this year and a Form B for that project is attached.
- During 2018, we received USB payments totaling $47,687.06 composed of 2017 credits.

At year-end 2018, we also had a Reservation to carry over all remaining 2018 USB credits of $53,382.70 into 2019 for a potential project this year.

Sincerely,

Dustin Martens
Lands 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 2018

Prepared by Deborah Singer on 1/17/2019

WESTERN ENERGY

Account Summary

2017 Carryover Reservation:	$47,700.00	YTD Elec Revenue:	$5,046,192.20
Reservations Made YTD:	$54,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$47,687.06
Payment Requests Made YTD:	$47,687.06	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$47,687.06	Total USBC Credit:	$101,069.76
USBC Credit YTD:	$53,382.70	Payments Issued YTD:	$47,687.06
Average Monthly Credit Earned:	$4,448.56	USBC Credit Balance:	$53,382.70
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Gary Parry	11/02/2018	$47,687.06

Payments Issued

Date	Amount
12/10/2018	$47,687.06

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100592	1596	DA17677687	KWH >	3,009,996	0	0	0	0	0	0	0	0	0	0	0	3,009,996
			KW >	6,635	0	0	0	0	0	0	0	0	0	0	0	6,635
			Elec Revenue >	248,937.36	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$248,937.36
100592	1596	DA21705338	KWH >	0	2,913,321	2,929,284	2,514,081	2,621,789	2,645,635	2,400,513	1,882,784	1,847,999	2,108,508	0	0	21,863,914
			KW >	0	6,674	7,115	6,622	6,428	6,324	6,324	6,194	6,220	6,220	0	0	6,458
			Elec Revenue >	$0.00	242,286.67	246,760.72	215,257.49	221,254.42	222,016.33	201,787.31	163,568.36	162,324.79	173,555.42	$0.00	$0.00	$1,848,811.51
100726	1687	DA17677690	KWH >	3,018,365	2,454,459	2,648,554	2,530,813	1,886,914	1,774,888	1,374,619	1,615,354	2,429,559	2,010,329	0	0	21,743,854
			KW >	6,467	6,363	6,441	5,832	5,222	5,067	4,808	5,106	7,179	6,959	0	0	5,944
			Elec Revenue >	248,553.66	208,378.13	223,172.80	211,956.07	162,665.21	153,672.84	122,370.77	139,165.91	207,655.37	169,407.72	$0.00	$0.00	$1,846,998.48
298159	101781	DA17459013	KWH >	162,991	172,355	154,499	82,455	43,264	46,161	108,111	155,084	160,175	107,862	0	0	1,192,957
			KW >	728	704	654	647	89	664	686	663	661	697	0	0	619
			Elec Revenue >	$18,622.99	$19,099.18	$17,321.51	$11,735.24	$4,086.38	$9,062.37	$13,887.52	$17,111.34	$17,552.14	$12,783.58	$0.00	$0.00	$141,262.25
3604077	268994	DD38809259	KWH >	0	0	0	0	0	0	0	0	0	0	0	4,165	4,165
			KW >	0	0	0	0	0	0	0	0	0	0	0	7	7
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$399.50	$399.50
3604080	101781	DA17459013	KWH >	0	0	0	0	0	0	0	0	0	28,309	166,757	178,871	373,937
			KW >	0	0	0	0	0	0	0	0	0	697	748	722	722
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$3,224.32	$18,813.60	$19,555.25	$41,593.17
3604083	1687	DA17677690	KWH >	0	0	0	0	0	0	0	0	0	595,126	2,836,131	2,706,414	6,137,671
			KW >	0	0	0	0	0	0	0	0	0	6,959	5,922	5,870	6,250
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$48,808.59	229,124.95	220,656.66	$498,590.20

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3604084	1596	DA21705338	KWH >	0	0	0	0	0	0	0	0	0	253,831	2,451,938	2,281,832	4,987,601
			KW >	0	0	0	0	0	0	0	0	0	6,220	6,194	6,350	6,255
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$21,294.28	204,243.67	194,061.78	$419,599.73
			Total KWH	6,191,352	5,540,135	5,732,337	5,127,349	4,551,967	4,466,684	3,883,243	3,653,222	4,437,733	5,103,965	5,454,826	5,171,282	59,314,095
			Combined Average KW	13,830	13,741	14,210	13,101	11,739	12,055	11,818	11,963	14,060	27,752	12,864	12,949	32,891
			USBC Charge	$5,572.22	$4,986.12	$5,159.11	$4,614.61	$4,096.77	$4,020.01	$3,494.92	$3,287.91	$3,993.96	$4,593.58	$4,909.34	$4,654.15	$53,382.70
			Total Elec Revenue	516,114.01	469,763.98	487,255.03	438,948.80	388,006.01	384,751.54	338,045.60	319,845.61	387,532.30	429,073.91	452,182.22	434,673.19	$5,046,192.20

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 FAX: (406) 497-4008

DATE:	November 2, 2018
NAME OF BUSINESS:	Western Energy
CITY/TOWN LOCATION:	Colstrip, MT
CONTACT PERSON:	Gary Parry
MAILING ADDDRESS:	PO Box 99
CITY, STATE AND ZIP:	Colstrip, MT 59323
PHONE NUMBER:	406-748-5217
FAX NUMBER:	
E-MAIL ADDRESS	gparry@westmoreland.com

AMOUNT OF CREDIT REQUESTED:	$47,687.06

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 reimburse our 2017 carryover USB credits of $47,687.06 towards a light project. This project will involve replacement of estimated 250 Overland Conveyor walkway lights with 40 W LED lamps; 3-Dragline Boom Lights with 1800 watt equivalent 450 watt LED; 12 Low Bay lights in Weld Shop with LEDS; and 24 high bay lamps in weld shop with 1800 watt with 450 watt led. Lamp costs total $88,262, but only claiming portion until determine if project qualifies for rebates.

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

ESTIMATED kWh SAVINGS:	397,932
ESTIMATED KW SAVINGS:	73

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: Gary W. Parry

FOR NORTHWESTERN ENERGY USE ONLY:

PROCESSED BY: 11/20/2018

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 Energy
Delivering a Bright Future

February 05, 2019

CERTIFIED MAIL RRR

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

RE: Self-Directed USBC Progress Report for 2017 – Western Sugar Cooperative

Dear Mr. Schoenfeld:

Please find an enclosed copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy showing our USB activities during 2018. During 2018, we received USB payments totaling $17,209.75.

At year-end 2018, we also had request balance to carry over all remaining 2018 USB credits of $2,446.38 into 2019.

Sincerely,

Ray Bode
Western Sugar Cooperative

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

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

WESTERN SUGAR COOPERATIVE

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$1,772,577.35
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$91,120.83	Total Payment Requests:	$91,120.83
Payment Requests Made YTD:	$0.00	Current Request Balance:	$73,911.08
2017 Carryover USBC Credit:	$2,446.38	Total USBC Credit:	$19,638.19
USBC Credit YTD:	$17,191.81	Payments Issued YTD:	$17,209.75
Average Monthly Credit Earned:	$1,432.65	USBC Credit Balance:	$2,428.44
		Payment Pending:	$2,428.44

Payment Requests Made

Submitted By	Date	Amount

Payments Issued

Date	Amount
04/05/2018	$9,681.18
07/11/2018	$1,086.65
10/03/2018	$1,011.40
12/10/2018	$5,430.52

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100615	1619	DA21629732	KWH >	2,839,308	2,807,309	2,261,980	607,464	304,651	283,179	211,412	218,724	684,612	3,007,289	2,960,702	2,650,895	18,837,525
			KW >	4,400	4,147	4,186	3,720	635	564	538	538	4,322	4,964	4,743	4,692	3,121
			Elec Revenue >	254,464.06	249,966.68	208,376.53	$77,704.95	$28,726.00	$26,461.78	$20,559.06	$20,800.96	$87,346.19	267,871.88	262,335.73	239,412.34	$1,744,026.16
256632	81098	DG90055876	KWH >	39,800	38,760	39,400	6,880	240	240	960	-520	4,960	34,080	28,280	45,240	238,320
			KW >	61	61	68	68	0	0	39	0	126	78	63	69	53
			Elec Revenue >	$3,728.40	$3,648.61	$3,766.86	$1,227.27	$30.11	$30.10	$472.95	($25.54)	$1,636.88	$3,402.61	$2,804.12	$4,184.64	$24,907.01
256633	81099	DG28604727	KWH >	3,080	2,480	2,600	2,000	1,200	1,120	1,100	1,300	1,220	1,800	1,600	1,800	21,300
			KW >	13	10	12	10	7	7	7	5	6	7	9	11	9
			Elec Revenue >	$377.68	$304.71	$334.89	$271.26	$176.44	$170.06	$167.70	$155.64	$167.98	$219.03	$219.43	$257.26	$2,822.08
663805	293906	DG95164865	KWH >	1,051	946	1,951	398	0	0	0	0	7	25	139	324	4,841
			KW >	6	8	8	3	0	0	0	0	2	1	3	2	4
			Elec Revenue >	$158.78	$162.27	$242.84	$74.46	$7.35	$7.35	$7.35	$7.35	$27.84	$19.20	$48.70	$58.61	$822.10
			Total KWH	2,883,239	2,849,495	2,305,931	616,742	306,091	284,539	213,472	219,504	690,799	3,043,194	2,990,721	2,698,259	19,101,986
			Combined Average KW	4,480	4,226	4,274	3,801	642	571	584	543	4,456	5,050	4,818	4,774	3,186
			USBC Charge	$2,594.92	$2,564.54	$2,075.34	$555.07	$275.49	$256.09	$192.12	$197.56	$621.72	$2,738.87	$2,691.65	$2,428.44	$17,191.81
			Total Elec Revenue	258,728.92	254,082.27	212,721.12	$79,277.94	$28,939.90	$26,669.29	$21,207.06	$20,938.41	$89,178.89	271,512.72	265,407.98	243,912.85	$1,772,577.35

WESTMORELAND RESOURCES, INC. - *Absaloka Mine*
A Subsidiary of WESTMORELAND COAL COMPANY

February 26, 2019

Nicole Hensley
Department of Revenue (DOR)
P.O. Box 5805
Helena, MT 59604-5805
Phone: 406-444-6908 FAX: 406-444-7997 Email: nhensley@mt.gov

RE: 2018 Self-Directed USBC Progress Report – Westmoreland Resources, Inc.

Dear Ms. Hensley:

Please find an attached copy of our 2018 Self-Directed USBC Report that we receive from NorthWestern Energy showing our Large Customer USB activities during 2018. Also attached is a copy of the Form B we submitted in 2018 for a project.

The USB payments we received for 2018 were for self-directed energy efficiency projects.

We received USB payments for 2018 totaling $22,842.09, which was composed of $20,622.47 in 2018 USB credits and $2,219.62 in 2017 credits.

We also have a 2018 year end request balance of $1,673.89 USB credits to carry over into 2019.

Sincerely,

Connie McNaney

Connie McNaney
Westmoreland Resources, Inc.
Absaloka Mine

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

Self-Directed USBC Progress Report for 2018

Prepared by Deborah Singer on 1/17/2019

WESTMORELAND RESOURCES INC.

Account Summary

2017 Carryover Reservation:	$0.00	YTD Elec Revenue:	$1,991,752.42
Reservations Made YTD:	$0.00		
2017 Carryover Payment Request:	$21,554.42	Total Payment Requests:	$178,654.22
Payment Requests Made YTD:	$157,099.80	Current Request Balance:	$155,812.13
2017 Carryover USBC Credit:	$2,219.62	Total USBC Credit:	$24,515.98
USBC Credit YTD:	$22,296.36	Payments Issued YTD:	$22,842.09
Average Monthly Credit Earned:	$1,858.03	USBC Credit Balance:	$1,673.89
		Payment Pending:	$1,673.89

Payment Requests Made

Submitted By	Date	Amount
Connie McNaney	03/06/2018	$157,099.80

Payments Issued

Date	Amount
04/05/2018	$7,734.71
07/11/2018	$5,800.05
10/03/2018	$5,239.69
12/10/2018	$4,067.64

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1577826	1599	DA18484086	KWH >	2,078,877	2,495,638	1,553,369	1,806,812	2,386,793	2,250,896	1,853,803	1,919,676	2,048,401	2,693,773	0	0	21,088,038
			KW >	6,590	6,716	6,363	6,577	5,909	6,325	6,363	6,539	5,783	6,313	0	0	6,348
			Elec Revenue >	168,529.50	198,362.45	131,063.03	150,868.36	188,572.69	180,402.37	152,344.55	153,164.34	160,013.56	213,555.20	$0.00	$0.00	$1,696,876.05
3604086	1599	DA18484086	KWH >	0	0	0	0	0	0	0	0	0	0	1,825,825	1,859,874	3,685,699
			KW >	0	0	0	0	0	0	0	0	0	0	6,703	6,867	6,785
			Elec Revenue >	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	142,361.58	152,514.79	$294,876.37
			Total KWH	2,078,877	2,495,638	1,553,369	1,806,812	2,386,793	2,250,896	1,853,803	1,919,676	2,048,401	2,693,773	1,825,825	1,859,874	24,773,737
			Combined Average KW	6,590	6,716	6,363	6,577	5,909	6,325	6,363	6,539	5,783	6,313	6,703	6,867	13,133
			USBC Charge	$1,870.99	$2,246.07	$1,398.03	$1,626.13	$2,148.11	$2,025.81	$1,668.42	$1,727.71	$1,843.56	$2,424.40	$1,643.24	$1,673.89	$22,296.36
			Total Elec Revenue	168,529.50	198,362.45	131,063.03	150,868.36	188,572.69	180,402.37	152,344.55	153,164.34	160,013.56	213,555.20	142,361.58	152,514.79	$1,991,752.42

FORM B

NorthWestern Energy

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
FAX: (406) 497-4033

DATE:	3/6/2018
NAME OF BUSINESS:	Westmoreland Resources
CITY/TOWN LOCATION:	Hardin, MT
CONTACT PERSON:	Tony Egbert
MAILING ADDRESS:	P.O. Box 449
CITY, STATE AND ZIP:	Hardin, MT 59034
PHONE NUMBER:	406-342-4615
FAX NUMBER:	406-342-5885
E-MAIL ADDRESS	tegbert@westmoreland.com
*AMOUNT OF CREDIT REQUESTED:	$157,099.80

*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)

See attachment

ESTIMATED kWh SAVINGS:	
ESTIMATED KW SAVINGS	9.5 kw on lighting

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: _____

The 9.5 kw savings on lighting came from installing LED lighting throughout the mine replacing high pressure sodium and metal halide fixtures.

There were 2 VFD installations in 2017. The first was a 1000 HP VFD and 750 HP high efficiency motor on Belt 2 at our plant. This replaced an old wound rotor motor. The second VFD installation was a 75HP VFD on belt 3 at our plant.

Weyerhaeuser

SUSTAINABLE FORESTRY INITIATIVE

1/18/2019

Weyerhaeuser NR Company

Weyerhaeuser NR Co.
105 Mills Drive
Columbia Falls, MT 59912

Large Customer Team
Department of Revenue
P. O. Box 5805
Helena, MT 59604-5805

RE: USBP Progress Report for 2018

Weyerhaeuser NR Co. has recently completed the 2018 USBP program year. This letter will complete the requirement of reporting the USBP (year-end) figures on 2018 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.

Flathead Electric Cooperative, Inc.
Large Customer USB Information
January 1, 2018 - December 31, 2018

FEC Customer	2018 kWh Purchases through Dec 31, 2018	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
Weyerheauser Company	190,479,500	$438,484	$17,715	$123,050		$0

YELLOWSTONE CLUB

Rec'd MT DOR
FEB 21 2019

February 14, 2019

Nicole Hensley
Department of Revenue (DOR)
PO Box 5805
Helena, MT 59604-5805

Re: Self Directed USBC Progress Report 2014

Nicole,

Attached is the Northwestern Energy 2018 report and our internal analysis for the Self Directed USBC program for large customers.

We have been utilizing the program to pay for the replacement of a large hard start electric motors with a Variable Frequency Drive pump motors. The conversion was made in 2018 and it has resulted in substantially reduced energy consumption from the previous inefficient motors.

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

One Yellowstone Club Trail
P.O. Box 161097 ^ Big Sky, Montana ^ 59716 ^ *Tel* {888} 700-7748 ^ {406} 995-4900 ^ *Fax* {877} 443-5698
www.yellowstoneclub.com

NorthWestern Energy

Self-Directed USBC Progress Report for 2018

Prepared by Dale Mahugh on 2/4/2019

YELLOWSTONE DEVELOPMENT

Account Summary

2017 Carryover Reservation:	$6,500.00	YTD Elec Revenue:	$2,197,059.75
Reservations Made YTD:	$40,000.00		
2017 Carryover Payment Request:	$0.00	Total Payment Requests:	$14,743.00
Payment Requests Made YTD:	$14,743.00	Current Request Balance:	$0.00
2017 Carryover USBC Credit:	$6,511.96	Total USBC Credit:	$28,952.12
USBC Credit YTD:	$22,440.16	Payments Issued YTD:	$14,743.00
Average Monthly Credit Earned:	$1,870.01	USBC Credit Balance:	$14,209.12
		Payment Pending:	$0.00

Payment Requests Made

Submitted By	Date	Amount
Mike Ducuennois	11/30/2018	$14,743.00

Payments Issued

Date	Amount
12/10/2018	$14,743.00

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1746115	309876	DA19066008	KWH >	3,067,130	2,847,627	2,883,037	2,758,330	1,851,126	1,223,336	1,205,418	1,163,062	1,212,419	1,363,799	2,060,730	3,297,493	24,933,507
			KW >	9,564	8,173	9,227	8,113	7,128	3,844	4,475	4,406	4,345	4,898	7,231	9,002	6,701
			Elec Revenue >	269,618.14	246,529.35	254,661.46	241,255.58	170,972.77	108,049.84	109,699.42	104,264.37	107,801.42	122,003.21	182,968.09	279,236.10	$2,197,059.75
			Total KWH	3,067,130	2,847,627	2,883,037	2,758,330	1,851,126	1,223,336	1,205,418	1,163,062	1,212,419	1,363,799	2,060,730	3,297,493	24,933,507
			Combined Average KW	9,564	8,173	9,227	8,113	7,128	3,844	4,475	4,406	4,345	4,898	7,231	9,002	6,701
			USBC Charge	$2,760.42	$2,562.86	$2,594.73	$2,482.50	$1,666.01	$1,101.00	$1,084.88	$1,046.76	$1,091.18	$1,227.42	$1,854.66	$2,967.74	$22,440.16
			Total Elec Revenue	269,618.14	246,529.35	254,661.46	241,255.58	170,972.77	108,049.84	109,699.42	104,264.37	107,801.42	122,003.21	182,968.09	279,236.10	$2,197,059.75

Montana Department of Revenue

Gene Walborn
Director

Steve Bullock
Governor

Yellowstone Mountain Club
Mike DuCuennois
PO Box 161097
Big Sky, MT 59716

2/10/2019

Universal System Benefits Programs Utility & Large Customer Annual Report

USB Program Summary Reports are due by March 1, 2019
Public Utilities and large customers claiming universal system benefit (USB) credits for calendar year 2018 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