



# Universal System Benefits Activities **2022 Annual Report**

**March 2023**





March 1, 2023

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

Dear Mr. Christenson:

Enclosed with this letter is the 2022 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 \$10,428,134 in electric USB revenues was collected from NorthWestern Energy's electric distribution customers in 2022.

As required by statute and Montana Public Service Commission Order No. 7458, 50% of the 2022 USB funds, or \$5,214,066 was directed to Low Income activities by NorthWestern Energy. Large Customers funds accounted for 31% of the total 2022 electric USB revenues, or \$3,217,812 with \$45,466 self-directed to Low Income activities and \$1,866,496 self-directed to energy reduction activities. Allocations by NorthWestern Energy to the other public purpose categories are as follows: \$305,296 to Local Conservation, \$768,422 to Market Transformation, and \$922,516 to Renewable Resources and Research and Development.

In addition to usual delays in completion of work, the continuation of conditions related to the COVID-19 Pandemic and an influx of federal funds to low income programs have impacted the ability for work to be completed. Additionally, supply chain issues continue, various products were not easily accessible, increased prices, and shipping disruptions, along with employment challenges and subcontractor availability, are all contributing factors which have slowed down the ability for work to be completed in 2022. While in-person interactions are slowly returning to normalcy, energy audits, weatherization, trainings, and other direct customer interactions were still limited. Funds are being carried forward to 2023 as allowed by statute and with extensions of time granted by the Department of Revenue as allowed by Administrative Rules (ARM) of Montana, 42.29.111.

Included with the 2022 report are updates for the 2019, 2020, and 2021 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,

Shawn Fredrickson  
Regulatory Affairs - DSM

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 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 slightly more than \$223 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 \$10,428,134 was collected from NorthWestern Energy's electric distribution customers in 2022. This is about \$354,000 more than 2021 revenues with Large Customer revenues up by nearly \$137,000 and non-Large Customer revenues increased by about \$216,868 when compared to 2021 revenues.

The 2022 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 E+ Energy Audit program, 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 Universal System Benefits Charge (USBC) revenues to Low Income activities, consistent with statute and proportionally reduces allocations between the Local Conservation and the Market Transformation categories, and the Renewable Generation and the Research and Development categories. Consistent with past practice, NorthWestern Energy may reallocate between Local Conservation and Market Transformation, and Renewables and Research and Development.

In addition to usual delays in completion of work, the continuation of conditions related to the COVID-19 Pandemic and an influx of federal funds to low income programs have impacted the ability for work to be completed. Additionally, supply chain issues continued, various products were not easily accessible, increased prices, and shipping disruptions,

**NorthWestern Energy**  
**Electric**  
**Universal System Benefits Activities**  
**2022 Annual Report**

along with employment challenges and subcontractor availability, are all contributing factors which interrupted the ability for work to be completed in 2022. While in-person interactions are slowly returning to normalcy, energy audits, weatherization, trainings, and other direct customer interactions were still limited. Funds are being carried forward to 2023 as allowed by statute and with extensions of time granted by the Department of Revenue as allowed by Administrative Rules (ARM) of Montana, 42.29.111.

Separate of the USB funded activities referenced above, NorthWestern Energy customers fund additional 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 2022 electric USBC revenues, \$5,214,067 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 \$45,466 of their 2022 electric USB funds to Low Income activities, bringing the 2022 Low Income electric USB funds total to \$5,259,533 or more than 50% of the 2022 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 2022 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 2022 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 2022 electric USB funds by category and activity, and a summary of the energy and demand savings and new renewable resources resulting from the 2022 allocations. The report also includes updates on previous years' activities, and a summary by public purpose category of electric USB funding from 1999-2022.

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

**UNIVERSAL SYSTEM BENEFITS CHARGE REVENUES**

NorthWestern Energy's 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 \$10,428,134 in 2022. 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 2022.

	<b>Tariffed Customer Class</b>	<b>Rate/kWh</b>	<b>% USBC Revenue by Class</b>
Residential	Residential	\$0.001334	36%
Commercial/Small Industrial	GS-1 & GS-2 under 1000 kW	\$0.001143	31%
Large Customer per USB	GS-1 & GS-2 over 1000 kW	\$0.000900	31%
Irrigation	Irrigation	\$0.001144	1%
Lighting	Lighting	\$0.003404	1%

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 55 customers and their 544 accounts, make up slightly more than \$3.21M 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 2022, the net gain in interest to USB was \$785 of which \$251 was credited to the electric USB categories on a pro rata basis and the balance was credited to natural gas USB activities.

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

## **UNIVERSAL SYSTEM BENEFITS EXPENDITURES**

All electric USB funds collected from NorthWestern Energy customers in 2022 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 2022 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 2022 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 Development Councils (HRDCs) 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 2022 and has financial commitments to implement additional activities/projects for completion in 2023. These programs and activities are described in this report. The breakdown between qualifying expenditures in the current year and financial commitments for completion in 2023 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 2020 and 2021 reports.

## **UNIVERSAL SYSTEM BENEFITS RESULTS**

From 1999 through 2022, NorthWestern Energy has delivered USB activities to various customer classes and across all public purpose categories. General descriptions of the activities or programs for 2022, along with the funding total for each category, follow.

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

***Large Customers– \$3,217,812***

*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 E+ programs.

In 2022, \$3,217,812 was collected from 55 Large Customers to meet their 2022 obligations. All but one of these customers self-directed their 2022 USB funds. Large Customers self-directed \$1,866,496 of 2022 funds toward energy reduction projects within their facilities, and have carried over \$1,305,827 for additional projects in 2023. Large Customers self-directed \$45,466 to Low Income activities in 2022.

The 2022 Large Customer administrative costs of \$14,155 less the interest income of \$165 were covered with unclaimed 2021 Large Customer funds in the amount of \$13,967 leaving a balance of \$24,902 that is being reallocated by NorthWestern Energy to the Low Income category for expenditure in 2023, consistent with historic MPSC direction. A total of \$3,231,779 of the total 2022 electric USB funds are 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 Energy 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. The list of the 54 Large Customers on NorthWestern Energy's system that self-directed 2022 funds follows.

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

<b>NorthWestern Energy Listing of Large Customers Self-Directing 2022 Funds</b>	
AMERICAN CHEMET	MONTANA STATE UNIVERSITY - BILLINGS
ASH GROVE CEMENT	MONTANA STATE UNIVERSITY - BOZEMAN
ASPEN AIR	PASTA MONTANA
ATLAS POWER	PHILLIPS66 PIPELINE
BARRETTS MINERALS	PHILLIPS66 REFINERY
BILLINGS CLINIC	R Y TIMBER
BOEING OF HELENA	REC SILICON
CALUMET MONTANA REFINING, LLC	ROCKY MOUNTAIN POWER
CHS	ROSEBURG FOREST PRODUCTS
CITY OF BILLINGS	SAINT JAMES HOSPITAL
CITY OF GREAT FALLS	SAINT PATRICK HOSPITAL
COLSTRIP ENERGY LTD PARTNERSHIP	SAINT VINCENT HEALTHCARE
COMMUNITY MEDICAL CENTER	STILLWATER MINING COMPANY
EXPRESS PIPELINE LLC	SUN MOUNTAIN LUMBER
EXXONMOBIL	TALEN MONTANA, LLC
GCC TRIDENT LLC	THOMPSON RIVER LUMBER
GENERAL MILLS	UNITED MATERIALS INCORPORATED
GRAIN CRAFT	UNITED PROPERTIES, INC.
GRAYMONT WESTERN US INC.	UNIVERSITY OF MONTANA
IDAHO FOREST GROUP LLC	US AIR FORCE
JUDITH GAP ENERGY LLC	US DEPT VETERANS AFFAIRS
MAGRIS TALC USA	US PUBLIC HEALTH- (NATIONAL INSTITUTE OF HEALTH)
MALTEUROP NORTH AMERICA, INC.	VISTA OUTDOOR SALES, LLC
METRA PARK	WESTERN SUGAR COOPERATIVE
MONTANA DEPARTMENT OF CORRECTIONS	WESTMORELAND ABSALOKA MINING, LLC
MONTANA PRECISION PRODUCTS, LLC	WESTMORELAND ROSEBUD MINING, LLC
MONTANA RESOURCES	YELLOWSTONE DEVELOPMENT



**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

***Low Income Activities– \$5,214,067***

*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 \$5,214,067 in 2022 electric USB funds to Low Income activities, or 50% of electric USBC revenues. Large Customers reported self-directing an additional \$45,466 to Low Income activities bringing the total 2022 funds committed to Low Income to \$5,259,533, which is slightly more than 50% of the total funds collected.

Appendix 4 to the 2022 report provides a summary of NorthWestern Energy's Electric USB allocations for 1999-2022 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 Home Energy Assistance Program (LIHEAP) eligibility requirements receive bill assistance in the form of a discount on their utility bill. LIHEAP eligibility guidelines are set by MDPHHS each heating season, which is defined as November through April.

*LIHEAP qualified customers may also qualify for the Free Weatherization Program and households with energy emergencies may receive assistance through Energy Share of Montana. An average of 10,370 low income households were served in 2022 with electric USB funds. The financial impact of electricity costs on low income households was reduced through bill assistance, weatherization, and emergency energy assistance.*

**NorthWestern Energy**  
**Electric**  
**Universal System Benefits Activities**  
**2022 Annual Report**

**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 LIHEAP, the federally funded heating assistance program, also receive the NorthWestern Energy bill discount. Customers may apply for LIHEAP assistance through their local HRDC. Average participation in the bill discount in 2022 was similar, yet slightly decreased as compared to the 2021 participation level. The funding of the electric Low Income bill discount totaled \$2,354,251 in 2022 for the average of 10,370 low income customers served. The amount of money required to fund the bill discount fluctuates annually based upon the number of customers enrolled, rates, and weather.

**Free Weatherization Program**

NorthWestern Energy partners with MDPHHS and local HRDCs 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. During 2022 NorthWestern Energy executed two modifications to the contract with MDPHHS. These modification included:

- **Weatherization Readiness:** Contractors were deferring low-income weatherization assistance in residences because the dwelling was not “weatherization ready”. Funding was allowed to address issues that were stopping weatherization work. These funds were designated for use in addressing structural and health and safety issues of NorthWestern Energy customer homes that are currently in the queue to be weatherized, but at risk of deferral.
- **Buy Down:** Contractors utilized Buy Down funding when the total material and labor costs to perform a weatherization measure brought the individual Savings-to-Investment Ratio (SIR) below 1.0. After applying Buy Down funds to the measure cost, the SIR must have been at a 1.0 or greater cost-effectiveness for the measure to be installed. The weatherization measures allowed for Buy Down funding were: insulation, doors, and windows.

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

Contract changes to streamline the program and better mirror federal program requirements prior to 2022 have been noted in previous reports. As also 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 Energy as the primary heating vendor.

A combination of contributing factors have impacted the ability for work to be completed for the Free Weatherization and Fuel Switch program in 2022: an influx of federal funds; supply chain issues; accessibility of various products; increased prices; and shipping disruptions; along with employment challenges and subcontractor availability. The HRDCs performed low income weatherization work for 159 low income customers in 2022. NorthWestern Energy applied 2019 and 2020 electric USB funds and no natural gas USB funds to the E+ Free Weatherization program in 2022. The remaining 2020 and 2021 electric USB funds will be carried forward for 2023 Free Weatherization program activities. Additionally, unspent 2022 Low Income electric funds of \$2,535,554 have been committed to weatherization for completion in 2023.

The Free Weatherization program helps customers to improve the heating efficiency of their homes and thus reduce their energy consumption. The services provided include a comprehensive energy audit, installation of air-sealing, hot water conservation, insulation measures and 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 HRDCs.

- “This is a very good program and we appreciate the efforts that everyone provides.”
- “I am very pleased with the work that was done.”
- “I couldn’t be happier with everything that was done on our home and everyone who was a part of making our home warmer.”

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

- “Very happy with the overall experience. Everyone was friendly and knowledgeable.”
- “Everyone in weatherization works very hard! I feel like they put a brand new blanket on our family home. Thanks everyone!”
- “The people were great answering all of my questions. Happy to have had the opportunity to participate in the program. Thank you for the new heater.”

**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. In addition to the 2022 pooled electric and natural gas funds there was an additional \$628,389 of 2021 Low Income electric USB funds spent in 2022 for a total of \$1,253,389.

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

***Local Conservation Activities— \$305,296***

*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.*

**E+ Energy Audit Program**

NorthWestern Energy applied 2019 and 2020 electric USB funds and \$612,090 of natural gas USB funds were used to support the 2022 E+ Energy Audit Program. The activities under the E+ Energy Audit Program umbrella include the E+ Home EnergyCheck virtual assessment and the E+ Electric Usage Survey.

The E+ Home EnergyCheck is a virtual energy assessment for residential customers whose space- and water-heating fuels are delivered by NorthWestern Energy. The E+ Home EnergyCheck kicked off in late 2020 in an effort to provide non-low income space- and water-heat customers with information to improve energy efficiency of their homes, as in-person interactions were limited due to the COVID-19 Pandemic.

The E+ Home EnergyCheck provides water-related energy efficiency measures, pipe insulation, and an LED light bulb to the customer. During the energy assessment, customers are educated about their energy usage and specific suggestions are provided so they can better understand their home’s energy use and consider changing behaviors to achieve greater energy efficiency. The E+ Home EnergyCheck also provides the customer with a comprehensive report specific to their home and energy use habits. The report breaks out historical energy usage by end-use, provides recommendations on energy efficiency measures, and offers tips on energy efficient behavior and natural gas appliance maintenance. The pool of 2019 and 2020 electric USB funds, along with 2022 natural gas funds allowed for the completion of 532 E+ Home EnergyChecks in 2022.

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+ Electric Usage Survey is a mail-out audit for baseload customers consisting of a survey mailed to residential electric customers with specific consumption profiles. After completion of the survey, customers receive a report similar to the E+ Home EnergyCheck 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

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

provided. In 2022, 176 residential electric customers participated in the E+ Electric Usage Survey program.

Customers who received an E+ Home EnergyCheck receive a survey and have the opportunity to provide comments back to NorthWestern Energy about their experiences.

- “The gentleman who performed my assessment was helpful and thorough. The stats on the LED bulb were persuasive and I went right out to buy more. The hot water pipe insulation was amazing – immediately I got noticeably hotter water out of all my faucets. I really appreciate the help!”
- “Loved the report! It was very helpful to see where I am using energy and what steps I need to become more efficient.”
- “We knew that we had some energy issues and they were identified and shared with us in a specific and helpful for our home and needs.”
- “This is a great program, thank you for providing it.”
- “Love receiving energy-saving (and free) advice from an expert! Very, very easy to do, and fun with practical recommendations.”

Through the E+ Home EnergyCheck, the Free Weatherization Program, or the E+ Electric Usage Survey, almost all NorthWestern Energy residential customers have an energy efficiency assessment tool available for their home.

The E+ Energy Appraisal Program for Businesses continued to be suspended in 2022.

**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 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 2022, 6 irrigation efficiency improvement projects were funded and completed with 2022 USB funds. NorthWestern completed targeted marketing to irrigation customers to promote rebates and incentive programs resulting in additional projects.

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

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

***Market Transformation– \$768,442***

*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.*

**Motor Management 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. This training targets anyone involved in Variable Frequency Drive (VFD) and electric motor maintenance, plant management, industrial and commercial electricians, maintenance, operations, purchasing and engineering staff, and motor service center managers and staff. Those in attendance are taught basic VFD installation best practices, how to estimate operating costs for electric motor systems, how to identify improvements in VFD, and motor practices that increase system reliability and reduce downtime. Motor Management training for electricians and facility operators commenced in Spring of 2022 with 73 students attending in person classes in multiple cities throughout Montana.

**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. Implementation of the 2021 International Energy Conservation Code (IECC) with Amendments was adopted in June 2022. USB funds have been carried into 2023 to provide training and education materials for builders, code officials, trade allies, and the general public.

**Building Operator Certification Training**

Building Operator Certification (BOC) training specifically targets public schools, government facilities, and non-profit hospitals. Scholarships are offered to employees of the aforementioned facilities. The training teaches facilities personnel to understand the complex and interdependent building systems and bring them collectively to peak efficiency. Facility personnel are instructed on how to find practical, low-cost and no-cost efficiency solutions by working with existing systems and how to create a preventive maintenance program that improves the building environment while prolonging the life of the equipment. BOC Level I training commenced in the Fall of 2021 with 12 students attending web-based trainings and concluded in early 2022. The funding used for BOC training was reported in the 2021 report. In addition to the BOC Level 1 training, using 2022 USB electric funds, NorthWestern provided 20 past BOC graduates the opportunity to attend 6 live instructional webinars throughout the year to keep them informed on the latest best practices, trends, and technologies to help save energy and operate facilities

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

at optimal efficiency. These activities help support other NorthWestern Energy electric energy efficiency programs.

**Regional Market Transformation**

NorthWestern Energy directed 2022 USB funds to regional collaboration for technical work.

**Cold Climate Ductless Heat Pump Pilot**

In 2022, a Cold Climate Ductless Heat Pump (CCDHP) Pilot was kicked off using 2020 USB funds with the intent to examine the viability of the technology as an energy conservation measure in Montana.

NorthWestern Energy plans to utilize 2020 USB funds for the CCDHP Pilot, and 2021 USB funds for a Heat Pump Water Heater Pilot and a Lighting Controls Pilot in 2023.



**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

***Renewable Resources, and Research and Development—\$922,516***

*Renewable energy development as a public purpose category was initiated with the Universal System Benefits programs in NorthWestern Energy's service territory in 1999. Revenue and expenses 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 Energy'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.

Currently, proposals are considered for incentives for small scale renewable energy 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, educational value, participant match, system maintenance plan, and the availability of funds.

With USB funding a portion of the projects, 10 solar PV projects were completed in 2022 with 2020 and 2021 funds. Projects completed in 2022 were installed on schools, public buildings, and non-profit facilities.

Projects completed in 2022 with funds from previous years are noted in the Addendums to the 2020 and 2021 reports. The following table summarizes renewable projects that have received USB funding since USB funding began in 1999.

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

<b>USB Renewable Projects 1999-2022</b>		
<b>Facility Type</b>	<b>#</b>	<b>kW</b>
Commercial Projects	68	639.57
Fire Stations	43	131.26
Irrigation Projects	6	103.52
Low Income	61	340.25
Non-Profit Projects	86	1,012.14
Private Residences	831	2,653.96
Schools	119	1,575.96
Other Public Buildings	56	1,180.35
Biomass	1	750.00
Solar Thermal	19	NA
Biodiesel	2	15.00

NorthWestern Energy continues to consult with its USB Renewable Advisory Committee 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 2022, 38 companies 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 Electrical Joint Apprenticeship and Training Committee (MEJATC) and Occupational Safety and Health Administration (OSHA) to provide safety training to installers of small renewable generation systems. In 2022, NorthWestern Energy sponsored 44 onsite and web-based training sessions with over 605 students in attendance. These sessions covered a variety of topics including, Solar in Schools, OSHA battery storage, Four Hazards Training, Fall Protection, NFPA 70E, Building Codes for Montana Installers, First Responder Training, utility worker and electrical inspector training, as well as COVID-19 Pandemic OSHA/CDC Workplace Recommendations for Electricians/Solar Installers. Additional training for installers, home inspectors and electrical inspectors has been committed to 2023. The Qualified Installers,

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

as well as several program contractors, provide education and project development services.

**E+ Green Power**

NorthWestern Energy initiated the E+ Green Power program in 2003. Through this program, customers may elect to pay a premium on their electric bill to purchase the environmental benefits associated with renewable energy generated in the Northwest and Wyoming. The current Green Tariff rate is \$1.25 per 100 kWh block as set in MPSC Order No. 7739. 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. In 2022, program revenue exceeded expenses and these funds totaling \$16,362, in addition to a total of \$61,268 of 2020 and 2021 electric USB fund to be spent in 2023 for the development and execution of promotional activities and program administration for the E+ Green Power program.

**NorthWestern Energy  
Electric  
Universal System Benefits Activities  
2022 Annual Report**

**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.

NorthWestern Energy collects the natural gas USBC from its customers and implements Low Income bill assistance, emergency energy assistance, weatherization, and residential conservation activities. MPSC Order No. 6679e recognizes and allows for the pooling of electric and natural gas USB funds for residential energy 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 2019, 2020, and 2021 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](http://www.NorthWesternEnergy.com/Eplus).

NorthWestern Energy  
Regulatory Affairs– DSM

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# Appendices 1- 4

Universal System  
Benefits Activities  
**2022 Annual Report**



	USBC kWh (Load)	USBC Revenue By Class	% of USBC Revenue By Class
<b>Residential</b>			
Residential	2,840,620,604	\$ 3,788,279	36%
<b>General Service</b>			
GS-1/GS-2 < 1000 kW	2,797,242,172	\$ 3,197,194	31%
Irrigation	103,139,972	\$ 117,988	1%
Lighting	31,489,912	\$ 106,860	1%
<b>Total Non-Large Customer</b>	<b>5,772,492,660</b>	<b>\$ 7,210,322</b>	<b>69%</b>
<b>Large Customer</b>			
GS-1/GS-2 > 1000 kW and Special Contracts	0	\$ 3,217,812	31%
<b>Total USBC</b>	<b>5,772,492,660</b>	<b>\$ 10,428,134</b>	<b>100%</b>

*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.*

	Revenue Allocation <sup>(b)</sup>		Spent in 2022	Committed - Complete in 2023	Allocation & Expenses
	per Order 7458	Reallocation			
<b>Local Conservation</b>	<b>305,296</b>	<b>(24,375)</b>	<b>55,922</b>	<b>225,000</b>	<b>280,922</b>
E+ Energy Audit Program			-	200,000	200,000
E+ Business Partners/ Irrigation Promotion			9,142	25,000	34,142
Labor			24,509	-	24,509
Administration Non-labor			19,600	-	19,600
Interest Income			2,686	-	2,686
			(16)	-	(16)
Local Conservation Summary			55,922	225,000	280,922
<b>Market Transformation</b>	<b>768,442</b>	<b>24,375</b>	<b>117,130</b>	<b>675,687</b>	<b>792,817</b>
Motor Management Training			3,228	-	3,228
Energy Star Homes			-	46,520	46,520
Building Operator Certification			-	50,000	50,000
Regional Market Transformation			32,200	579,167	611,367
Cold Climate Ductless Heat Pump			-	-	-
Heat Pump Water Heater			-	-	-
Lighting Controls			-	-	-
Promotion			13,947	-	13,947
Labor			63,666	-	63,666
Administration Non-labor			4,129	-	4,129
Interest Income			(39)	-	(39)
Market Transformation Summary			117,130	675,687	792,817
<b>Renewable Resources</b>	<b>753,031</b>	<b>33,257</b>	<b>42,172</b>	<b>744,115</b>	<b>786,287</b>
Generation/Education			-	727,753	727,753
Green Power Product			(16,362)	16,362	-
Promotion			83	-	83
Labor			58,294	-	58,294
Administration Non-labor			195	-	195
Interest Income			(39)	-	(39)
Renewable Resources Summary			42,172	744,115	786,287
<b>Research &amp; Development</b>	<b>169,486</b>	<b>(33,256)</b>	<b>19,830</b>	<b>116,400</b>	<b>136,230</b>
R&D/ Infrastructure			-	116,400	116,400
Promotion			760	-	760
Labor			19,063	-	19,063
Administration Non-labor			15	-	15
Interest Income			(9)	-	(9)
Research & Development Summary			19,830	116,400	136,230
<b>Low Income</b>	<b>5,214,067</b>	<b>-</b>	<b>2,678,513</b>	<b>2,535,554</b>	<b>5,214,067</b>
Bill Assistance			2,354,251	-	2,354,251
Free Weatherization & Fuel Switch			-	2,535,554	2,535,554
Elec Weatherization Incentives			7,777	-	7,777
Fuel Switch Analyses			605	-	605
Energy Share			289,000	-	289,000
Promotion			307	-	307
Labor			24,281	-	24,281
Administration Non-labor			2,559	-	2,559
Interest Income			(267)	-	(267)
Low Income Summary			2,678,513	2,535,554	5,214,067
<b>Large Customer <sup>(a)</sup></b>	<b>3,217,812</b>	<b>-</b>	<b>1,911,985</b>	<b>1,305,827</b>	<b>3,217,812</b>
Self-Directed Energy Reduction			1,866,496	1,305,827	3,172,323
Self-Directed to Low Income			45,466	-	45,466
2021 LC Funds to Cover 2022 LC Expenses			(13,967)	-	(13,967)
Labor			14,155	-	14,155
Administration Non-labor			-	-	-
Interest Income			(165)	-	(165)
Large Customer Summary		-	1,911,985	1,305,827	3,217,811
<b>Totals</b>	<b>10,428,134</b>	<b>0</b>	<b>4,825,552</b>	<b>5,602,583</b>	<b>10,428,134</b>
<b>2022 USB Revenues less Expenses and Contractual Commitments</b>					<b>-</b>

<sup>(a)</sup> The 2022 Large Customer Admin costs of \$14,155 less the interest income of \$165 exceeded the amount of unclaimed 2022 Large Customer funds. NWE has committed unclaimed 2021 Large Customer funds in the amount of \$13,967 to cover the Large Customer Admin costs.

<sup>(b)</sup> Reallocations between Local Conservation and Market Transformation, and Renewables and Research & Development are consistent with past practice.

**2022 USB FUNDING AND EXPENDITURE SUMMARY**

USB Category	Allocation of 2022 funds based on Order 7458	Percentage by Category	Total Electric USB Funds Spent in 2022	2022 Electric USB Funds Committed to Spend in 2023	Allocation w/Lrg Cust funds self-directed to LI <sup>(a)</sup>	Percentage by Category	Allocation & Expenses	Percentage by Category
Local Conservation	\$ 305,296	3%	\$ 55,922	\$ 225,000	\$ 280,922	3%	\$ 280,922	3%
Market Transformation	\$ 768,442	7%	\$ 117,130	\$ 675,687	\$ 792,817	8%	\$ 792,817	8%
Renewables	\$ 753,031	7%	\$ 42,172	\$ 744,115	\$ 786,287	8%	\$ 786,287	8%
Research & Development	\$ 169,486	2%	\$ 19,830	\$ 116,400	\$ 136,230	1%	\$ 136,230	1%
Low Income	\$ 5,214,067	50%	\$ 2,678,513	\$ 2,535,554	\$ 5,259,533	50%	\$ 5,214,067	50%
Large Customer	\$ 3,217,812	31%	\$ 1,911,985	\$ 1,305,827	\$ 3,172,346	30%	\$ 3,217,812	31%
	<b>\$ 10,428,134</b>	<b>100%</b>	<b>\$ 4,825,552</b>	<b>\$ 5,602,583</b>	<b>\$ 10,428,134</b>	<b>100%</b>	<b>\$ 10,428,134</b>	<b>100%</b>

**2022 LOW INCOME FUNDING SUMMARY**

2022 Low Income Expenditures	
Bill Assistance	\$ 2,354,251
Free Weatherization	\$ -
Elec Weatherization Incentives	\$ 7,777
Fuel Switch Analysis	\$ 605
Energy Share	\$ 289,000
*Promotion	\$ 307
*Labor	\$ 24,281
*Admin. Non-labor	\$ 2,559
USB Interest Income	\$ (267)
Self-Directed Large Customer	\$ 45,466
<b>Total:</b>	<b>\$ 2,723,979</b>
Low Income Expenditure share of 2022 Electric USB revenues :	
	<b>26.1%</b>

**2022 ENERGY SAVINGS & RENEWABLE RESOURCES ESTIMATES**

Savings & Resources acquired in 2022 w/ 2022 \$			
	aMW	MWH	MW
Local Conservation	0.0205	179.18	0.0035
Market Transformation	-	-	-
Renewables	-	-	-
Research & Development	N/A	N/A	N/A
Low Income	0.000	0.35	0.0001
Large Customer <sup>(b)</sup>	-	-	-
	<b>0.020</b>	<b>180</b>	<b>0.0036</b>

Projected Savings & Resources to acquire in 2023 w/ 2022 \$ (c)			
	aMW	MWH	MW
Local Conservation	0.019	168.18	0.027
Market Transformation	N/A	N/A	N/A
Building Operator Certification	-	1,624	-
Renewables	0.0469	411	0.3130
Research & Development	N/A	N/A	N/A
Low Income	0.012	107.15	0.021
Large Customer <sup>(b)</sup>	-	-	-
	<b>0.0784</b>	<b>2,310.40</b>	<b>0.36</b>
<b>Total Savings &amp; Resources</b>	<b>0.099</b>	<b>2,489.94</b>	<b>0.365</b>

<sup>(a)</sup> Large Customers may self-direct their USB dollars to energy saving and renewable activities in their own facilities, or to Low Income activities. In 2022 with 2022 funds, Large Customers self-directed a total of \$45,466 to Low-Income.

<sup>(b)</sup> Large Customer energy savings estimates are reported by individual large customers and are not available in this report.

<sup>(c)</sup> Projected Savings & Resources are based on contracts that were in place at the end of 2022. Actual results will be reported in 2023.

**2022 PROGRAM PARTICIPATION SUMMARY WITH 2022 FUNDS**

Electric USB Activity by Category	Quantity	Units
<b>Conservation</b>		
Residential Home EnergyCheck	532	homes
Residential Electric Usage Survey	176	homes
Small Commercial Appraisals	-	businesses
Business Partners / Irrigation	6	projects
<b>Market Transformation</b>		
Building Operator Certification	-	people
Motor Training	13	attendees
Market Transformation Training	-	attendees
<b>Renewables</b>		
Generation / Education	-	projects
<b>Research &amp; Development</b>		
Renewable Energy Seminars/Workshops	-	attendees
<b>Low-Income</b>		
Bill Assistance	10,370	households
Free Weatherization & Fuel Switch	1	homes
Energy Share	647	households



**Annual Electric USB Allocation**

**Original Allocation per D97.7.90, Order 5986g <sup>(a)</sup>**

	% 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 <sup>(a)</sup>**

	% by Category	\$ by Category
Local Conservation	3%	305,296
Market Transformation	7%	768,442
Renewables	7%	753,031
Research & Development	2%	169,486
Low-Income	50%	5,214,067
Large Customers	31%	3,217,812
	100%	10,428,134

**Historic Allocation of Electric USB Funds <sup>(b)</sup>**

Year	USB Categories									
	Total Electric USB Funds	Large Customers	Low Income <sup>(c)</sup>	Supplemental Low Income <sup>(d)</sup>	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	-
2019	10,367,307	3,577,562	5,183,653	-	5,183,653	448,845	415,034	656,782	85,430	-
2020	9,917,706	3,150,720	4,958,853	-	4,958,853	331,587	640,965	678,806	156,775	-
2021	10,074,524	3,084,060	5,037,262	-	5,037,262	140,755	909,827	801,538	101,082	-
2022	10,428,134	3,217,812	5,214,067	-	5,214,067	280,922	792,817	786,287	136,230	-
	223,642,111	70,281,886	84,362,747	2,336,999	86,699,746	27,547,293	12,374,091	21,363,784	4,618,757	756,549
Allocation as % of Revenues by Category	100%	31.4%			38.8%	12.3%	5.5%	9.6%	2.1%	0.3%
Allocation as % of Revenues, excluding Large Customer Revenues	100%				56.5%	18.0%	8.1%	13.9%	3.0%	0.5%

<sup>(a)</sup> 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. Consistent with past practice, NorthWestern Energy may reallocate between Local Conservation and Market Transformation, and Renewables and Research and Development.

<sup>(b)</sup> The historic allocation table illustrates the expenditure or direction of electric USB by category from 1999 through 2022.

<sup>(c)</sup> 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 \$4,302,805 to low-income activities since 1999.

<sup>(d)</sup> 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 **2021 Report**

Universal System  
Benefits Activities  
**2022 Annual Report**

**ADDENDUM  
to the  
2021 Report**



The 2021 NorthWestern Energy USBC revenues totaled \$10,074,524. Of this, \$4,813,556 was spent on projects completed in 2021, and \$2,118,809 was spent on projects completed in 2022, leaving a balance of \$3,142,159 for projects to complete in 2023.

The projects associated with \$2,118,809 of 2021 USB funds including \$6,000 of Market Transformation activities; \$304,532 of combined Renewable Resources and Research & Development; \$628,389 directed to Energy Share; and \$1,165,921 of Large Customer self-directed activities were completed in 2022.

In 2022, NorthWestern committed unclaimed 2021 Large Customer funds in the amount of \$13,967 to cover the Large Customer administration costs and allocated the remaining balance of \$24,902 to Free Weatherization consistent with historic practice.

NorthWestern Energy requested and was granted extensions from the Department of Revenue as allowed per ARM 49.29.111 for Market Transformation activities totaling \$823,482; combined Renewable Resources and Research & Development activities totaling \$748,139; and Low Income activities totaling \$1,792,584 for completion in 2023.

Updated results are provided in the 2021 Addendum in Appendices 2 and 3 (p. 2021-2 and p. 2021-3).

	Revenue Allocation <sup>(b)</sup>		Spent in 2021	Spent in 2022	Committed - Complete in 2023	Allocation & Expenses
	per Order 7458	Reallocation				
<b>Local Conservation</b>	<b>367,145</b>	<b>(226,390)</b>	<b>140,755</b>	<b>-</b>	<b>-</b>	<b>140,755</b>
E+ Energy Audit Program			-	-	-	-
E+ Business Partners/ Irrigation Promotion			21,785	-	-	21,785
Labor			83,041	-	-	83,041
Administration Non-labor			35,828	-	-	35,828
Interest Income			117	-	-	117
			(16)	-	-	(16)
Local Conservation Summary			140,755	-	-	140,755
<b>Market Transformation</b>	<b>685,044</b>	<b>224,782</b>	<b>80,345</b>	<b>6,000</b>	<b>823,482</b>	<b>909,827</b>
Motor Management Training			-	-	-	-
Energy Star Homes			-	-	-	-
Building Operator Certification			17,100	6,000	-	23,100
Regional Market Transformation			31,400	-	-	31,400
Cold Climate Ductless Heat Pump			-	-	-	-
Heat Pump Water Heater			-	-	480,000	480,000
Lighting Controls			-	-	343,482	343,482
Promotion			7,778	-	-	7,778
Labor			24,050	-	-	24,050
Administration Non-labor			47	-	-	47
Interest Income			(31)	-	-	(31)
Market Transformation Summary			80,345	6,000	823,482	909,827
<b>Renewable Resources</b>	<b>734,390</b>	<b>67,148</b>	<b>67,795</b>	<b>243,582</b>	<b>490,161</b>	<b>801,538</b>
Generation/Education			-	243,582	475,893	719,475
Green Power Product			(14,268)	-	14,268	1
Promotion			16	-	-	16
Labor			82,029	-	-	82,029
Administration Non-labor			51	-	-	51
Interest Income			(33)	-	-	(33)
Renewable Resources Summary			67,795	243,582	490,161	801,538
<b>Research &amp; Development</b>	<b>169,612</b>	<b>(68,530)</b>	<b>29,102</b>	<b>60,950</b>	<b>11,030</b>	<b>101,082</b>
R&D/ Infrastructure			-	60,950	11,030	71,980
Promotion			266	-	-	266
Labor			28,831	-	-	28,831
Administration Non-labor			12	-	-	12
Interest Income			(8)	-	-	(8)
Research & Development Summary			29,102	60,950	11,030	101,082
<b>Low Income</b>	<b>5,037,262</b>	<b>-</b>	<b>2,616,290</b>	<b>628,389</b>	<b>1,792,584</b>	<b>5,037,262</b>
Bill Assistance			2,283,036	-	-	2,283,036
Free Weatherization & Fuel Switch			-	-	1,792,584	1,792,584
Elec Weatherization Incentives			16,189	-	-	16,189
Fuel Switch Analyses			100	-	-	100
Energy Share			289,000	628,389	-	917,389
Promotion			803	-	-	803
Labor			27,040	-	-	27,040
Administration Non-labor			347	-	-	347
Interest Income			(225)	-	-	(225)
Low Income Summary			2,616,290	628,389	1,792,584	5,037,263
<b>Large Customer <sup>(a)</sup></b>	<b>3,081,071</b>	<b>2,989</b>	<b>1,879,270</b>	<b>1,179,888</b>	<b>24,902</b>	<b>3,084,060</b>
Self-Directed Energy Reduction			1,839,963	945,605	-	2,785,568
Self-Directed to Low Income			32,829	220,316	-	253,145
2021 LC Funds to Cover 2022 LC Expenses			-	13,967	-	13,967
Labor			6,616	-	-	6,616
Interest Income			(138)	-	-	(138)
NorthWestern Energy Reallocate to Free Weatherization			-	-	24,902	24,902
Large Customer Summary		-	1,879,270	1,179,888	24,902	3,084,059
<b>Totals</b>	<b>10,074,524</b>	<b>-</b>	<b>4,813,556</b>	<b>2,118,809</b>	<b>3,142,159</b>	<b>10,074,524</b>
<b>2021 USB Revenues less Expenses and Contractual Commitments</b>						<b>-</b>

<sup>(a)</sup> The 2021 Large Customer Admin costs of \$6,616 less the interest income of \$138 exceeded the amount of unclaimed 2021 Large Customer funds of \$3,489. NorthWestern Energy has reallocated Local Conservation, Market Transformation, Renewable Resources and Research & Development funds to cover the deficit. In 2022, NorthWestern Energy committed unclaimed 2021 Large Customer funds in the amount of \$13,967 to cover the Large Customer Admin costs and allocated the remaining balance of \$24,902 to Free Weatherization consistent with historic practice.

<sup>(b)</sup> Reallocations between Local Conservation and Market Transformation, Renewables and Research & Development are consistent with past practice.

**PROJECTS COMPLETED IN 2022 WITH 2021 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	Projects Completed in 2022 with 2021 USB \$		
	aMW	MWH	MW
Local Conservation	-	-	-
Market Transformation	0.022	195	-
Renewables	0.0245	215	0.1633
Research & Development	N/A	N/A	N/A
Low Income	-	-	-
	<b>0.0467</b>	<b>409</b>	<b>0.1633</b>
Program Participation Summary			
USB Category / Program Segment	Quantity	Units	
<b>Conservation</b>			
Residential Onsite Audits	-	homes	
Residential Mail out Audits	-	homes	
Residential Home EnergyCheck	-	homes	
Business Appraisals	-	businesses	
Business Partners/Irrigation	-	projects	
<b>Market Transformation</b>			
Building Operator Certification	12	people	
Motor Training	-	people	
Market Transformation Training	-	people	
<b>Renewables</b>			
Generation / Education	5	projects	
<b>Research &amp; Development</b>			
Renewable Energy Seminars/Workshops	279	attendees	
<b>Low-Income</b>			
Bill Assistance	-	households	
Free Weatherization	-	homes	
Energy Share	-	households	

**TOTAL OF PROJECTS COMPLETED WITH 2022 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	Total Projects Completed with 2021 USB \$		
	aMW	MWH	MW
Local Conservation	0.068	600	0.088
Market Transformation	0.038	334	-
Renewables	0.0245	215	0.1633
Research & Development	N/A	N/A	N/A
Low Income	0.012	106	-
	<b>0.143</b>	<b>1,254</b>	<b>0.25</b>
Program Participation Summary			
USB Category / Program Segment	Quantity	Units	
<b>Conservation</b>			
Residential Onsite Audits	-	homes	
Residential Mail out Audits	3,265	homes	
Residential Home EnergyCheck	848	homes	
Small Commercial Appraisals	-	businesses	
Business Partners/Irrigation	11	projects	
<b>Market Transformation</b>			
Building Operator Certification	20	people	
Motor Training	-	people	
Market Transformation Training	-	people	
<b>Renewables</b>			
Generation / Education	5	projects	
<b>Research &amp; Development</b>			
Renewable Energy Seminars/Workshops	279	attendees	
<b>Low-Income</b>			
Bill Assistance	-	households	
Free Weatherization	191	homes	
Energy Share	-	households	

# Addendum **2020 Report**

Universal System  
Benefits Activities  
**2022 Annual Report**

**ADDENDUM  
to the  
2020 Report**



The 2020 NorthWestern Energy USBC revenues totaled \$9,917,706. Of this, \$4,901,975 was spent on projects completed in 2020, and \$1,913,422 was spent on projects completed in 2021, \$1,902,895 was spent on projects completed in 2022, leaving a balance of \$1,199,415 for projects to complete in 2023.

The projects associated with \$1,902,895 of 2020 USB funds, including \$240,000 of Local Conservation activities; \$46,994 of Market Transformation activities; \$322,805 of combined Renewable Resources and Research & Development; \$1,293,096 directed to Low Income Bill Assistance were completed in 2022.

NorthWestern Energy requested and was granted extensions from the Department of Revenue as allowed per ARM 49.29.111 for Local Conservation activities totaling \$79,047; Market Transformation activities totaling \$470,457; combined Renewable Resources activities totaling \$47,000; and Low Income activities totaling \$1,870,827 for completion in 2023.

Updated results are provided in the 2020 Addendum in Appendices 2 and 3 (p. 2020-2 and p. 2020-3).

	Revenue Allocation <sup>(b)</sup>		Spent in 2020	Spent in 2021	Spent in 2022	Committed - Complete in 2023	Allocation & Expenses
	per Order 7458	Reallocation					
<b>Local Conservation</b>	<b>593,543</b>	<b>(261,956)</b>	91,587	-	240,000	-	<b>331,587</b>
E+ Residential Audit/Home EnergyCheck and Sm. Comm Appraisal			-	-	240,000	-	240,000
E+ Business Partners/ Irrigation			16,761	-	-	-	16,761
Promotion			44,458	-	-	-	44,458
Labor			30,475	-	-	-	30,475
Admin. Non-labor			51	-	-	-	51
Interest Income			(158)	-	-	-	(158)
Local Conservation Summary			91,587	-	240,000	-	331,587
<b>Market Transformation</b>	<b>379,009</b>	<b>261,956</b>	60,614	74,100	46,994	459,258	<b>640,965</b>
Motor Management Training			-	-	15,000	-	15,000
Energy Star Homes			-	62,100	-	60,593	122,693
Building Operator Certification			2,000	12,000	-	-	14,000
Regional Market Transformation			24,389	-	-	-	24,389
Cold Climate Ductless Heat Pump			-	-	31,994	398,665	430,658
Promotion			10,170	-	-	-	10,170
Labor			23,629	-	-	-	23,629
Administration Non-labor			528	-	-	-	528
Interest Income			(101)	-	-	-	(101)
Market Transformation Summary			60,614	74,100	46,994	459,258	640,965
<b>Renewable Resources</b>	<b>678,806</b>	<b>-</b>	67,148	324,853	239,805	47,000	<b>678,806</b>
Generation/Education			-	286,853	239,805	-	526,658
Green Power Product			(19,304)	38,000	-	47,000	65,696
Promotion			31	-	-	-	31
Labor			86,544	-	-	-	86,544
Administration Non-labor			59	-	-	-	59
Interest Income			(181)	-	-	-	(181)
Renewable Resources Summary			67,148	324,853	239,805	47,000	678,806
<b>Research &amp; Development</b>	<b>156,775</b>	<b>-</b>	31,815	41,960	83,000	-	<b>156,775</b>
R&D/ Infrastructure			1,913	41,960	83,000	-	126,873
Promotion			266	-	-	-	266
Labor			29,525	-	-	-	29,525
Administration Non-labor			152	-	-	-	152
Interest Income			(42)	-	-	-	(42)
Research & Development Summary			31,815	41,960	83,000	-	156,775
<b>Low Income</b>	<b>4,958,853</b>	<b>-</b>	2,748,430	224,169	1,293,096	693,158	<b>4,958,853</b>
Bill Assistance			2,411,024	-	1,293,096	693,158	4,397,278
Free Weatherization & Fuel Switch			-	-	-	-	-
Elec Weatherization Incentives			16,541	-	-	-	16,541
Fuel Switch Analyses			300	-	-	-	300
Energy Share			289,000	224,169	-	-	513,169
Promotion			63	-	-	-	63
Labor			32,396	-	-	-	32,396
Administration Non-labor			430	-	-	-	430
Interest Income			(1,324)	-	-	-	(1,324)
Low Income Summary			2,748,430	224,169	1,293,096	693,158	4,958,853
<b>Large Customer <sup>(a)</sup></b>	<b>3,150,720</b>	<b>-</b>	1,902,381	1,248,340	-	-	<b>3,150,721</b>
Self-Directed Energy Reduction			1,844,110	867,249	-	-	2,711,358
Self-Directed to Low Income			51,754	144,864	-	-	196,618
Labor			7,358	-	-	-	7,358
Interest Income			(841)	-	-	-	(841)
NorthWestern Energy Reallocation to Free Weatherization			-	93,736	-	-	93,736
NorthWestern Energy Reallocation to Energy Share			-	142,491	-	-	142,491
Large Customer Summary			1,902,381	1,248,340	-	-	3,150,720
<b>Totals</b>	<b>9,917,706</b>	<b>-</b>	<b>4,901,975</b>	<b>1,913,422</b>	<b>1,902,895</b>	<b>1,199,415</b>	<b>9,917,706</b>
<b>2020 USB Revenues less Expenses and Contractual Commitments</b>							<b>-</b>

<sup>(a)</sup> The unclaimed 2020 Large Customer funds and the USB account interest covered Large Customer administrative costs leaving a balance of \$236,226 that is being reallocated to Free Weatherization and Energy Share for expenditure in 2021.

<sup>(b)</sup> Reallocations between Local Conservation and Market Transformation are consistent with past practice.



**PROJECTS COMPLETED IN 2022 WITH 2020 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	Projects Completed in 2022 with 2020 USB \$		
	aMW	MWH	MW
Local Conservation	0.0044	38	0.0014
Market Transformation	-	-	-
Renewables	0.0301	263	0.2004
Research & Development	N/A	N/A	N/A
Low Income	0.0062	55	0.0109
	<b>0.041</b>	<b>356</b>	<b>0.2127</b>
Program Participation Summary			
USB Category / Program Segment	Quantity	Units	
<b>Conservation</b>			
Residential Onsite Audits	-	homes	
Residential Mail out Audits	69	homes	
Residential Home EnergyCheck	209	homes	
Business Appraisals	-	businesses	
Business Partners/Irrigation	-	projects	
<b>Market Transformation</b>			
Building Operator Certification	-	people	
Motor Training	60	people	
Market Transformation Training	-	people	
<b>Renewables</b>			
Generation / Education	5	projects	
<b>Research &amp; Development</b>			
Renewable Energy Seminars/Workshops	326	attendees	
<b>Low-Income</b>			
Bill Assistance	-	households	
Free Weatherization	116	homes	
Energy Share	-	households	

**TOTAL OF PROJECTS COMPLETED WITH 2020 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	Total Projects Completed with 2020 USB \$		
	aMW	MWH	MW
Local Conservation	0.073	635	0.102
Market Transformation	-	-	-
Renewables	0.0669	586	0.4464
Research & Development	N/A	N/A	N/A
Low Income	0.020	173	92.65
	<b>0.159</b>	<b>1,394</b>	<b>93.20</b>
Program Participation Summary			
USB Category / Program Segment	Quantity	Units	
<b>Conservation</b>			
Residential Onsite Audits	408	homes	
Residential Mail out Audits	3,147	homes	
Residential Home EnergyCheck	230	homes	
Small Commercial Appraisals	23	businesses	
Business Partners/Irrigation	6	projects	
<b>Market Transformation</b>			
Building Operator Certification	-	people	
Motor Training	60	people	
Market Transformation Training	-	people	
<b>Renewables</b>			
Generation / Education	12	projects	
<b>Research &amp; Development</b>			
Renewable Energy Seminars/Workshops	572	attendees	
<b>Low-Income</b>			
Bill Assistance	11,324	households	
Free Weatherization	302	homes	
Energy Share	1,129	households	

# Addendum **2019 Report**

Universal System  
Benefits Activities  
**2022 Annual Report**

**ADDENDUM  
to the  
2019 Report**



The 2019 NorthWestern Energy USBC revenues totaled \$10,367,307. Of this, \$7,513,902 was spent on projects completed in 2019, \$1,420,794 was spent on projects completed in 2020, and \$825,002 was spent on projects completed in 2021, leaving a balance of \$607,608 for projects to complete in 2022.

The projects associated with \$607,608 of 2019 USB funds include \$126,187 of Local Conservation activities and \$481,421 of Low Income Free Weatherization that were completed in 2022.

Updated results are provided in the 2019 Addendum in Appendices 2 and 3 (p. 2019-2 and p. 2019-3).

	Revenue Allocation <sup>(b)</sup>		Spent in 2019	Spent in 2020	Spent in 2021	Spent in 2022	Allocation & Expenses
	per Order 7458	Reallocation					
<b>Local Conservation</b>	<b>527,220</b>	<b>(78,375)</b>	<b>322,658</b>	<b>-</b>	<b>-</b>	<b>126,187</b>	<b>448,845</b>
E+ Residential Audit/Sm. Comm Audit			141,239	-	-	126,187	267,426
E+ Business Partners / Irrigation Projects			13,156	-	-	-	13,156
Promotion			140,069	-	-	-	140,069
Labor			28,269	-	-	-	28,269
Administration Non-labor			274	-	-	-	274
Interest Income			(349)	-	-	-	(349)
Local Conservation Summary			322,658	-	-	126,187	448,845
<b>Market Transformation Summary</b>	<b>336,659</b>	<b>78,375</b>	<b>383,034</b>	<b>26,571</b>	<b>5,429</b>	<b>-</b>	<b>415,034</b>
E+ Commercial Lighting			142,929	-	-	-	142,929
Motor Management Training			14,375	-	-	-	14,375
Energy Star Homes			104,111	26,571	5,429	-	136,111
Building Operator Certification			32,105	-	-	-	32,105
Commercial Industrial Training & Conference			45,682	-	-	-	45,682
Promotion			15,346	-	-	-	15,346
Labor			19,034	-	-	-	19,034
Administration Non-labor			9,674	-	-	-	9,674
Interest Income			(223)	-	-	-	(223)
Market Transformation Summary			383,034	26,571	5,429	-	415,034
<b>Renewable Resources</b>	<b>602,956</b>	<b>53,826</b>	<b>50,091</b>	<b>310,787</b>	<b>295,904</b>	<b>-</b>	<b>656,782</b>
Generation/Education			-	310,787	295,904	-	606,691
Green Power Product			(23,388)	-	-	-	(23,388)
Promotion			42	-	-	-	42
Labor			73,471	-	-	-	73,471
Administration Non-labor			366	-	-	-	366
Interest Income			(399)	-	-	-	(399)
Renewable Resources Summary			50,091	310,787	295,904	-	656,782
<b>Research &amp; Development</b>	<b>139,256</b>	<b>(53,826)</b>	<b>23,930</b>	<b>-</b>	<b>61,500</b>	<b>-</b>	<b>85,430</b>
R&D/ Infrastructure			-	-	61,500	-	61,500
Battery Storage			1,146	-	-	-	1,146
Promotion			263	-	-	-	263
Labor			22,417	-	-	-	22,417
Administration Non-labor			196	-	-	-	196
Interest Income			(92)	-	-	-	(92)
Research & Development Summary			23,930	-	61,500	-	85,430
<b>Low Income</b>	<b>5,183,653</b>	<b>-</b>	<b>4,313,529</b>	<b>222,100</b>	<b>166,603</b>	<b>481,421</b>	<b>5,183,654</b>
Bill Assistance			2,450,189	-	-	-	2,450,189
Free Weatherization			1,520,210	-	166,603	481,421	2,168,235
Elec Wx Incentives			23,412	-	-	-	23,412
Fuel Switch Analyses			2,100	-	-	-	2,100
Energy Share			289,000	222,100	-	-	511,100
Promotion			(87)	-	-	-	(87)
Labor			31,147	-	-	-	31,147
Administration Non-labor			987	-	-	-	987
Interest Income			(3,429)	-	-	-	(3,429)
Low Income Summary			4,313,529	222,100	166,603	481,421	5,183,654
<b>Large Customer <sup>(a)</sup></b>	<b>3,577,562</b>	<b>-</b>	<b>2,420,659</b>	<b>861,336</b>	<b>295,566</b>	<b>-</b>	<b>3,577,562</b>
Self-Directed Energy Reduction			2,353,848	570,307	-	-	2,924,155
Self-Directed to Low Income			56,692	281,771	-	-	338,463
Labor			12,486	-	-	-	12,486
Interest Income			(2,366)	-	-	-	(2,366)
NorthWestern Energy Reallocation to Free Weatherization			-	-	185,981	-	185,981
NorthWestern Energy Reallocation to Energy Share			-	9,259	109,585	-	118,844
Large Customer Summary			2,420,659	861,336	295,566	-	3,577,562
<b>Totals</b>	<b>10,367,307</b>	<b>-</b>	<b>7,513,902</b>	<b>1,420,794</b>	<b>825,002</b>	<b>607,608</b>	<b>10,367,307</b>
<b>2019 USB Revenues less Expenses and Contractual Commitments</b>							
<b>-</b>							

(a) The unclaimed 2019 Large Customer funds and the USB account interest covered Large Customer administrative costs leaving a balance of \$30,863 that is being reallocated to Free Weatherization and Energy Share for expenditure in 2020. At the end of 2020, there were unclaimed 2019 Large Customer funds in the amount of \$273,963 that are being reallocated to Free Weatherization and Energy Share for expenditure in 2021.

(b) Reallocations between Local Conservation and Market Transformation, and Renewables and Research & Development are consistent with past practice.

**PROJECTS COMPLETED IN 2022 WITH 2019 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	Projects Completed in 2022 with 2019 USB \$		
	aMW	MWH	MW
Local Conservation	0.0023	20	0.0007
Market Transformation	-	-	-
Renewables	-	-	-
Research & Development	N/A	N/A	N/A
Low Income	0.0023	20	0.0041
	<b>0.0046</b>	<b>41</b>	<b>0.0048</b>
Program Participation Summary			
USB Category / Program Segment	Quantity	Units	
<b>Conservation</b>			
Residential Onsite Audits	-	homes	
Residential Mail out Audits	36	homes	
Residential Home EnergyCheck	110	homes	
Business Appraisals	-	businesses	
Business Partners/Irrigation	-	projects	
<b>Market Transformation</b>			
Commercial Lighting	-	projects	
Building Operator Certification	-	people	
Motor Training	-	people	
Market Transformation Training	-	people	
<b>Renewables</b>			
Generation / Education	-	projects	
<b>Research &amp; Development</b>			
Renewable Energy Seminars/Workshops	-	attendees	
<b>Low-Income</b>			
Bill Assistance	-	households	
Free Weatherization	43	homes	
Energy Share	-	households	

**TOTAL OF PROJECTS COMPLETED WITH 2019 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	Total Projects Completed with 2019 USB \$		
	aMW	MWH	MW
Local Conservation	0.084	737	0.135
Market Transformation	0.031	269	-
Renewables	0.080	698	0.531
Research & Development	N/A	N/A	N/A
Low Income	0.043	377	0.071
	<b>0.238</b>	<b>2,082</b>	<b>0.737</b>
Program Participation Summary			
USB Category / Program Segment	Quantity	Units	
<b>Conservation</b>			
Residential Onsite Audits	1,603	homes	
Residential Mail out Audits	1,246	homes	
Residential Home EnergyCheck	110	homes	
Business Appraisals	59	businesses	
Business Partners/Irrigation	5	projects	
<b>Market Transformation</b>			
Commercial Lighting	7	projects	
Building Operator Certification	17	people	
Motor Training	124	people	
Market Transformation Training	100	people	
<b>Renewables</b>			
Generation / Education	9	projects	
<b>Research &amp; Development</b>			
Renewable Energy Seminars/Workshops	460	attendees	
<b>Low-Income</b>			
Bill Assistance	11,533	households	
Free Weatherization	490	homes	
Energy Share	1,588	households	