

November 1, 2024

VIA ELECTRONIC FILING

Public Service Commission of Utah
Heber M. Wells Building, 4th Floor
160 East 300 South
Salt Lake City, UT 84114

Attention: Gary Widerburg
Commission Secretary

Re: Compliance Filing – Docket No. 24-035-37

Dear Mr. Widerburg,

On August 25, 2009, the Public Service Commission of Utah (“Commission”) issued an Order in Docket No. 09-035-T08 approving the Phase I Stipulation filed August 3, 2009 in the same (“Stipulation”). As agreed to in the Stipulation and modified in the Order, in the event that expenditures for the Company’s Demand-Side Management (“DSM”) programs reach 90 percent of the forecasted level prior to December 1st of the current year, the Company must notify the DSM Advisory Group¹ (“Steering Committee”) and the Commission that the 90 percent threshold has been reached. Upon notification, parties are free to take any action or seek any changes not inconsistent with the Stipulation that it deems appropriate.

In the DSM Forecast Report filed July 1, 2024 in the above referenced docket (“July Report”), the Company indicated that the Wattsmart Battery program was anticipated to exceed its original forecast for 2024 by approximately \$1.3m due to higher than expected participation, and would notify the Commission when the budget exceeded the 90 percent threshold in compliance with the Stipulation. Additionally, since filing the July Report, the Home Energy Reports (“HER”) and Wattsmart Homes (“WSH”) programs have also exceeded 90 percent of their originally forecast budgets as of September 2024. Explanations for these overages are included further below.

Accordingly, in compliance with the Stipulation, the Company provides notice to the Commission that as of September 2024, year-to-date expenditures for the Wattsmart Battery, HER, and WSH programs totaled \$4.9m, \$1.5m, and \$20.8m, respectively. These expenditures exceed 90 percent of the 2024 forecast of \$4.2m for the Wattsmart Battery program, \$1.3m for the HER program, and \$19.5m for the WSH program, filed with the Commission on November 1, 2023 in Docket No. 23-035-31. At current participation rates, the Company anticipates it will exceed the overall 2024 program budgets for Wattsmart Batteries, HER, and WSH with total anticipated spends of \$6.22m, \$1.88m, and \$24.56m, respectively. The table below summarizes these details.

¹ In context of this filing, DSM Advisory Group is redefined as the DSM Steering Committee.

2024 Program Spend (with Accruals)

Program	November 1, 2023 Forecast for 2024	YTD Spend as of Sept 2024	YTD Budget Percentage as of Sept 2024	Projected 2024 spend	Projected Budget Percentage
Wattsmart Batteries	\$4,200,000	\$4,896,253	117%	\$6,221,253	148%
Home Energy Reports	\$1,300,000	\$1,537,460	118%	\$1,672,460	129%
Wattsmart Homes	\$19,500,000	\$20,767,058	107%	\$24,560,645	126%

The Wattsmart Battery program continued to see higher than anticipated participation, as previously stated in the July Report, and caused the budget increase. The Home Energy Reports program upgraded its services in September 2024 to include Advanced Metering Infrastructure (AMI) capabilities, which increased the total 2024 HER budget by \$120,624. Additionally, the original forecast for the HER program inadvertently excluded taxes and internal labor. These items account for the HER program's 2024 budget overage. Lastly, the WSH program received higher adoption rates for heat pumps than anticipated, which caused its budget increase. The Company adjusted incentive levels for heat pump offerings mid-2024 to right-size them and stabilize participation rates. The Company has accounted for each of these items in its 2025 budget forecast, filed November 1, 2024 in Docket No. 24-035-37.

Informal inquiries concerning this compliance notice may be directed to me at (801) 220-4214.

Sincerely,



Michael S. Snow
Manager, Regulatory Affairs

cc: Division of Public Utilities
Office of Consumer Services

CERTIFICATE OF SERVICE

Docket No. 24-035-37

I hereby certify that on November 1, 2024, a true and correct copy of the foregoing was served by electronic mail to the following:

Utah Office of Consumer Services

Michele Beck mbeck@utah.gov
ocs@utah.gov

Division of Public Utilities

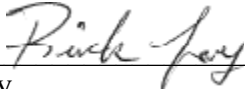
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