



February 28, 2025

Griffin Burns, Research Analyst  
Energy and Telecommunications Interim Committee  
Legislative Services Division  
PO Box 201706  
Helena, MT 59620-1706

Dear Mr. Burns:

Enclosed with this letter is the 2024 Electric Universal System Benefits (USB) report for NorthWestern Energy as filed with the Montana Department of Revenue. This report is provided for distribution to members of the Energy and Telecommunications Interim Committee of the Montana Legislature as required by law. Please distribute to the committee members.

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 \$10,467,790 in electric USB revenues was collected from NorthWestern Energy's electric distribution customers in 2024.

As required by statute and Montana Public Service Commission Order No. 7458, 50% of the 2024 USB funds, or \$5,233,895 was directed to Low Income by NorthWestern Energy. Large Customers funds accounted for 32% of the total 2024 electric USB revenues, or \$3,309,398 with \$65,224 self-directed to Low Income activities and \$2,114,299 self-directed to energy reduction activities. Allocations by NorthWestern Energy to the other public purpose categories are as follows: \$631,235 to Local Conservation, \$404,144 to Market Transformation, and \$889,117 to Renewable Resources and Research and Development.

Funds are being carried forward to 2025 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 2024 report are updates for the 2020, 2021, 2022, and 2023 reports.

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

If there are any questions, I can be reached at (406) 497-3516.

Sincerely,

Danie Williams  
Manager, Energy Efficiency/DSM Services



Universal System Benefits  
**2024 Annual Report**

**March 2025**

**NorthWestern<sup>®</sup>**  
**Energy**

*Delivering a Bright Future*

**NorthWestern Energy**  
**Electric Universal System Benefits**  
**2024 Annual Report**



**Executive Summary**

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

Since 1999, electric customers in NorthWestern Energy's Montana service territory have funded close to \$244.5 million to USB programs that includes \$76.8 million of Large Customer credits. Through USB, opportunities have been initiated for NorthWestern Energy's customers, funding of Low Income programs has been increased, Local Conservation and Market Transformation programs have continued, and support of Renewable Energy and Research and Development programs continues.

A total of \$10,467,790 was collected from NorthWestern Energy's electric distribution customers in 2024.

The 2024 electric USB funds have been allocated to the categories consistent with guidelines provided in Montana Public Service Commission (MPSC) Order Nos. 6679e and 7458. MPSC Order No. 6679e recognizes and allows for the pooling of electric and natural gas USB funds for the Energy Audit program, 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 the Low Income category. Consistent with past practice, NorthWestern Energy may reallocate between Local Conservation and Market Transformation, and Renewables and Research and Development.

Of the 2024 electric USBC revenues collected, \$5,233,895 or 50% were allocated to Low Income by NorthWestern Energy. Four Large Customers self-directed a total of \$65,224 to Low Income activities, bringing the 2024 Low Income electric USB funds total to \$5,299,119.

NorthWestern Energy implements USB programs and activities within the requirements of legislation for USB, the Department of Revenue (DOR) Administrative Rules of Montana (ARM) for USB programs, and tariffs and orders of the MPSC. NorthWestern

**NorthWestern Energy**  
**Electric Universal System Benefits**  
**2024 Annual Report**

Energy's allocations for 2024 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 2024 are summarized and the qualifying expenditures and credits claimed by NorthWestern Energy are documented within the 2024 Annual 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 DOR. 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.

Funds are being carried forward to 2025 as allowed by statute and with extensions of time granted by the DOR as allowed by ARM 42.29.111.

Separate from the electric USB-funded activities referenced herein, NorthWestern Energy customers also fund Local Conservation and Low Income programs and activities 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.

The 2024 Annual Report includes USBC Revenues, USB Expenditures, and USB Results highlighting key aspects of each USB category, along with a Conclusion. This report also includes the 2024 USB Appendices and Addendums for 2020, 2021, 2022, and 2023.

**NorthWestern Energy  
Electric Universal System Benefits  
2024 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 \$10,467,790 of revenue in 2024. The table below shows that the 2024 electric USBC revenues are based upon electrical usage (kilowatt-hours or kWh), lists the electric USBC tariff rates by customer class, and shows the percentage of electric USBC revenues each sector contributed.

<b>Customer Class</b>	<b>USBC Tariffs</b>	<b>Rate/kWh</b>	<b>% USBC Revenue by Class</b>
Residential	Residential	\$0.001334	35.8%
General Service	GS-1 & GS-2 < 1000 kW	\$0.001143	30.6%
Large Customer	GS-1 & GS-2 ≥ 1000 kW	\$0.000900	31.6%
Irrigation	Irrigation	\$0.001144	1.1%
Lighting	Lighting	\$0.003404	0.9%

A typical NorthWestern Energy residential customer using 750 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 classified as 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 54 customers, make up approximately \$3.31 million of the electric USBC revenues.

Appendix 1, 2024 Electric USBC Revenues, provides additional information regarding electric USBC revenues by customer class.

**Segregated USB Account**

NorthWestern Energy segregates the 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. The net gain in 2024 interest to USB was \$451,837, where \$307,300 was credited on a pro rata basis to electric USB categories and the balance was credited to natural gas USB categories.

**NorthWestern Energy  
Electric Universal System Benefits  
2024 Annual Report**

**UNIVERSAL SYSTEM BENEFITS EXPENDITURES**

All 2024 electric USB funds collected from NorthWestern Energy customers have been spent and/or committed to qualifying public purposes. No funds are being released to the statewide USB fund(s).

The 2024 Annual Report includes information about the 2024 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, 2024 Electric USB Program Expenditures and Commitments, for a summary of the 2024 revenue allocations and expenditures and Appendix 3, 2024 Electric USB Funding Savings and Participation Summary, for detailed information.

NorthWestern Energy's mix of programs and activities has been guided by the MPSC through Order Nos. 5986 f, g, and i; Order No. 6514; Order No. 6504a; Order No. 6574c; Order Nos. 6679a, b, c, and e; and 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 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 ARM and Montana Statute, NorthWestern Energy implemented qualifying utility programs and activities in 2024, as described in this report and has financial commitments to execute additional activities/projects for completion in 2025. The breakdown between qualifying expenditures in the current year and financial commitments for completion in 2025 is documented in Appendix 2, 2024 Electric USB Program Expenditures and Commitments.

NorthWestern Energy requested, and was granted by the DOR, time extensions for projects with modified timelines that require more time for completion as reported in the Addendums for the 2021, 2022, and 2023 Annual Reports.

**NorthWestern Energy  
Electric Universal System Benefits  
2024 Annual Report**

**UNIVERSAL SYSTEM BENEFITS RESULTS**

From 1999 through 2024, NorthWestern Energy has delivered USB activities to various customer classes and across all public purpose categories. General descriptions of the programs or activities for 2024, along with the funding total per Order No. 7458 for each category, follow.

***Local Conservation – \$631,235***

*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.*

**Energy Audit and Education**

Energy Audit and Education provides services to eligible NorthWestern Energy residential and commercial customers. Residential customers can schedule a Home EnergyCheck or take part in the Home EnergySurvey. Residential and commercial customers can contact a certified energy specialist via the Energy Efficiency hotline to discuss energy conservation and receive tips on saving energy, specific to their situation.

The Home EnergyCheck is offered as either an on-site or virtual home energy assessment for residential customers whose space and/or water heating fuels are delivered by NorthWestern Energy.

The Home EnergyCheck program launched in late 2020 with a virtual option and reintroduced the on-site offering in mid-2023. The home energy assessment is a flagship of energy efficiency for NorthWestern Energy’s non-low income customers. The Home EnergyCheck provides water-related energy efficiency measures, pipe insulation, switch plate/outlet gasket covers, and energy efficiency education materials to the customer. Customer education about where their energy dollar is going, and specific suggestions are provided to the customer to help them better manage their home or change behaviors to achieve greater energy-efficiency. Customers receive a report specific to their home and energy use habits. The customer-specific report breaks out historical energy usage by end-use, provides recommendations on cost-effective weatherization measures, and offers tips on energy efficient practices. When applicable, customers may receive a water heater insulation blanket and/or a blower door test. In 2024, 902 customers participated in the Home EnergyCheck; 155 were virtual and 747 were on-site.

## NorthWestern Energy Electric Universal System Benefits 2024 Annual Report

Customers who received a Home EnergyCheck have the opportunity to provide comments about their experience:

- “We had a virtual energy audit yesterday and it was EXCELLENT! The energy specialist taught us a few pointers to save money on our energy bill. Thank you so much for helping us - virtually, it was all we needed.”
- “Thank you for the high priority on customer service and attention to detail when it came to scheduling an EnergyCheck on our home. The flexibility in scheduling allowed us to select the best day/time for the Home EnergyCheck. Thank you for the information that was provided prior to the appointment to help prepare us. Outstanding Customer Service!
- “I highly recommend the energy efficiency audit program at NWE. My experience with the program was outstanding. From scheduling to the actual audit to the report, my customer experience was stellar. The auditor was professional and built rapport quickly, making the process comfortable and informative. They educated me kindly on energy-saving measures and provided a detailed, comprehensive report that highlighted key areas for improvement and practical solutions. The insights and recommendations in the report were invaluable and easy to implement, promising significant energy savings. I have already been highly recommending this program to friends and would recommend it to anyone looking to improve energy efficiencies. As a first time homeowner, the value this audit provided for me has been extremely helpful in planning the priority of my home improvement projects.” – *Bright Magazine Vol 04 November 2024*

NorthWestern Energy electric baseload-only customers (no space heat or water heat fuels delivered by NorthWestern Energy) offered a separate audit service. This offering went into a redesign phase in 2023 and was introduced as the Home EnergySurvey to customers in early 2024 and 46 customers participated. The Home EnergySurvey report is a high-level energy assessment that includes energy efficiency recommendations based on the information the customer provides, along with a variety of behavioral energy efficiency suggestions.

NorthWestern Energy customers can utilize the Energy Efficiency Hotline to ask questions about home energy usage, appliance and equipment efficiencies, and strategies to reduce their utility bill. In 2024, more than 2,700 customers were provided technical assistance and energy efficiency education.

### **Irrigation**

NorthWestern Energy offers Irrigation customers a rebate for new or retrofit improvements to irrigation systems. Incentives are offered for energy conservation and load management projects. In 2024, there were four irrigation efficiency improvement projects completed.

**NorthWestern Energy**  
**Electric Universal System Benefits**  
**2024 Annual Report**

***Market Transformation – \$404,144***

*Market Transformation is the strategic 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.*

**ENERGY STAR® Homes**

USB funds were used to provide research, scope, and develop training and education materials for builders, code officials, trade allies, and the public regarding updates to the 2021 International Energy Conservation Code (IECC) that was adopted in June 2022 with amendments.

**Building Operator Certification Training**

Building Operator Certification (BOC) training specifically targets public schools, government facilities, and non-profit hospitals. Tuition scholarships to attend the BOC training are offered to employees of the facilities. The training teaches facilities personnel to understand the complex and interdependent building systems that can bring a facility 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.

In 2024, a BOC Level I training took place in Billings, accommodating 24 trainees, while a BOC Level II training was conducted virtually, with 7 trainees participating. In addition to the training, NorthWestern Energy offered six instructional webinars throughout the year to keep Operators informed on the latest best practices, trends, and technologies to help save energy and operate facilities at optimal efficiency. An average of 8 certified Building Operators attended each webinar. These activities help promote NorthWestern Energy efficiency programs.

**Regional Market Transformation**

The Regional Technical Forum (RTF) is a technical advisory committee working to develop standards to verify and evaluate energy efficiency savings. NorthWestern Energy directed 2023 USB funds to this regional collaboration for technical work that provides the region with consistent and reliable quantification of energy savings estimates for specific efficient technologies or actions. The energy savings estimates generated through the public processes of the RTF enable accurate estimates of the region's efficiency potential vital to power system planning, as well as a better understanding of the region's efficiency accomplishments.

**NorthWestern Energy**  
**Electric Universal System Benefits**  
**2024 Annual Report**

**Cold Climate Ductless Heat Pump**

The Cold Climate Ductless Heat Pump (CCDHP) pilot sets forth to determine the viability of CCDHPs as an energy conservation measure by determining potential energy savings and applicability to NorthWestern Energy's Montana electric customers. The CCDHP Market Research identified and studied applicable cold climate units and identified Montana installers including their qualifications and experiences. The Participant Outreach and Assessment accomplished contact to both installers and potential customers. The CCDHP pilot completed 4 residential installations, totaling 5 CCDHP units, in 2024 that included site assessments, customer agreements, verified correct installations, customer education on proper use, and payment to the qualified installer.

**Heat Pump Water Heater**

The Heat Pump Water Heater (HPWH) pilot's objective is to further market adoption and knowledge of residential HPWHs by engaging distributors, licensed installers, and customers. The HPWH pilot provides best practice installation trainings, incentives to qualifying customers, and a sales performance incentive to participating installers. HPWH training was offered to installers and homeowners throughout 2024 with 115 people in attendance. At the end of 2024, twenty installers met the HPWH pilot participation requirements and 16 HPWH projects were completed.

**Lighting Controls**

NorthWestern Energy implemented a Lighting Controls pilot to understand viability as an energy conservation measure. The primary objective is to increase market knowledge and adoption of lighting controls. Through education, market outreach, and lighting control projects, the intent is to generate lighting control interest to inform streamlined program offerings. In 2024, five trade ally trainings were given to 46 attendees in four cities. Additionally, sustained market communication and continued education of staff and lighting supply chain market actors documented 333 points of contact (via email, web meetings, and phone calls) resulting in further evaluation and consideration of market needs.

**NorthWestern Energy  
Electric Universal System Benefits  
2024 Annual Report**

***Renewable Resources and Research and Development***

*Renewable energy development as a public purpose category was initiated with the Universal System Benefits programs in NorthWestern Energy’s service territory in 1999. Projects and services that maximize the partnering of funding and educational value, and that increase geographic representation on NorthWestern Energy’s electric system are encouraged.*

**Renewable Resources – \$721,686**

**Generation/Education**

NorthWestern Energy has provided incentives for solar photovoltaic (PV) and small-scale wind projects through USB funds for over 21 years. Currently, proposals are considered for small-scale renewable energy systems for non-profit and government/public buildings, such as libraries, non-profit community centers, and schools. 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, 6 solar PV projects were installed on public buildings, and non-profit facilities.

The table below summarizes projects that have received USB funding.

<b>USB Renewable Projects 1999-2024</b>		
<b>Facility Type</b>	<b>Number of Projects</b>	<b>Nameplate Capacity (kW)</b>
Biodiesel	2	15.0
Biomass	1	750.0
Commercial	68	639.6
Fire Stations	43	159.7
Irrigation	6	103.5
Low Income	61	340.3
Non-Profit Organizations	92	1,169
Other Public Buildings	70	1,628
Private Residences	831	2,654
Schools	119	1,624
Solar Thermal	19	NA

## **NorthWestern Energy Electric Universal System Benefits 2024 Annual Report**

### **Green Power**

NorthWestern Energy initiated the 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. Customer participation in the program is stable with a few customers enrolling or leaving each year. Most participating customers are homeowners, but a handful of commercial accounts purchase a substantial number of the Green blocks of environmental benefits associated with renewable generation.

### **Research and Development – \$167,431**

#### **R & D/Infrastructure**

NorthWestern Energy institutes safety and experience qualification requirements for solar PV and small-scale wind installers. Renewable generation projects must be installed by a Qualified Installer that meets safety and experience requirements for projects to receive USB renewable resource funds. At the end of 2024, 45 Qualified Installers met the solar PV requirements and seven met the small-scale wind requirements. Qualified Installers, as well as several program contractors, provide education and project development services.

USB funds are used in partnership with the Montana Electrical Joint Apprenticeship and Training Committee, and the Occupational Safety and Health Administration (OSHA) to provide safety training to installers of small renewable generation systems. In 2024, NorthWestern Energy sponsored 63 in-person and web-based training sessions with 890 participants. 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.

NorthWestern Energy provides recommended Renewable Resources and Research and Development proposal summaries to the USB Renewable Advisory Committee for their review and feedback prior to awarding incentives.

**NorthWestern Energy  
Electric Universal System Benefits  
2024 Annual Report**

**Low Income — \$5,233,895**

*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 Order Nos. 6574c, 6679a, and 6679b; these orders serve 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.*

**Bill Discount**

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 Bill Discount on their monthly utility bill. Consistent with MPSC Order No. 6679e the NorthWestern Energy electric Bill Discount is 25% from November through April and 15% from May through October.

The funding of the electric Bill Discount totaled \$2,826,777 and served an average of 11,177 low income customers. The funding for the Bill Discount fluctuates annually based upon the number of customers enrolled, timing of enrollment, rates, and weather.

**Weatherization and Fuel Switch**

NorthWestern Energy collaborates with MDPHHS, which in turn works with local HRDCs, to provide the Weatherization and Fuel Switch (Weatherization) program for households that qualify under LIHEAP.

NorthWestern Energy continues to make modifications to the Weatherization program to better maximize weatherization for NorthWestern Energy low income customers. In 2024, funding was provided for the following:

- Weatherization: Funding covers up to 100% of weatherization costs for homes that list NorthWestern Energy as the primary space/water heating vendor, and up to 50% for homes where NorthWestern Energy is not the primary space/water heating vendor.
- Weatherization Readiness: HRDCs were deferring low income weatherization assistance in residences because the dwelling was not “weatherization ready.” Funding was provided 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

**NorthWestern Energy**  
**Electric Universal System Benefits**  
**2024 Annual Report**

queue to be weatherized, but at risk of deferral. Weatherization Readiness funding was applied to 24 homes and totaled \$153,792.

- **Buy Down/Co-Funding:** HRDCs utilized Buy Down/Co-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 funding to the measure cost, the SIR had to be at a 1.0 or greater cost-effectiveness for the measure to be installed. The weatherization measures allowed for funding were insulation, doors, and windows. Buy Down/Co-Funding funds were applied to 16 homes and totaled \$34,532.

HRDCs utilize multiple funding sources to perform weatherization work for NorthWestern Energy customers. In 2024, they reported that 154 households were weatherized using funds supplied by NorthWestern Energy.

The 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 are provided with energy efficiency information to help them better manage their energy usage and to better understand their energy costs.

For customers awaiting weatherization or those who may not be eligible for weatherization, NorthWestern allows low income customers to participate in the Home EnergyCheck program and/or obtain low-cost/no-cost weatherization activities that are offered through the HRDCs.

Customers served through the program provide comments about their experience through letters and customer response cards handed out by the HRDCs:

- “I could never afford on my own all the home improvements that were done. Thankful it was all free to me.”
- “I am so grateful for all the work done on my home. They went above and beyond to help me.”
- “Everything done was explained and all my questions answered. The crew was polite and courteous. My heartfelt thanks.”
- “Excellent job, very professional, explained so much. Thank you so very much.”

**NorthWestern Energy  
Electric Universal System Benefits  
2024 Annual Report**

- “I learned a great deal about saving energy. I am very pleased with all the workers and work they did. They made a big difference.”

Customers whose homes are heated primarily with electricity from NorthWestern Energy are considered for a fuel switch conversion to natural gas. There were no electric customers converted to natural gas in 2024.

**Energy Share**

Energy Share of Montana aids those facing energy emergencies when the household source of heat is threatened and/or there are no resources to pay the utility bill. Energy Share takes into consideration the household income, but helps those based on the need, individual situation, and level of emergency. Energy Share provides situationally based, emergency-oriented assistance that complements LIHEAP. It is intended to be a one-time, last resort safety net, used after all other resources have been exhausted.

In 2024, NorthWestern identified USB funds had previously been provided to Energy Share but had not yet been distributed to NorthWestern’s customers for emergency energy assistance or assigned to an endowment. By the end of 2024, the full balance of these funds plus additional funding had been dispersed to 2,081 customers, with average assistance of \$603 per household.

**NorthWestern Energy  
Electric Universal System Benefits  
2024 Annual Report**

***Large Customers– \$3,309,398***

*Large Customers are allowed to self-direct their USB funds per 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 who then processes the payment request. NorthWestern Energy does not 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 Annual 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 energy efficiency programs.

In 2024, Large Customers self-directed \$2,114,299 to energy reduction projects within their facilities. Additionally, Large Customers self-directed \$65,224 to Low Income activities.

Claims to NorthWestern Energy for reimbursement are documented as received. Reimbursements are made to a Large Customer after the USBC has been collected. NorthWestern Energy collaborates closely with Large Customers and assists them with documentation needed for reporting requirements to the DOR.

Consistent with statute, NorthWestern is required and herein is providing a list of the 54 Large Customers that self-directed USB funds.

**NorthWestern Energy  
Electric Universal System Benefits  
2024 Annual Report**

<b>NorthWestern Energy Large Customers Self-Directing 2024 Funds</b>	
AMERICAN CHEMET	PAR PACIFIC
ASH GROVE CEMENT	PASTA MONTANA
ASPEN AIR	PHILLIPS66 PIPELINE
ATLAS POWER	PHILLIPS66 REFINERY
BARRETTS MINERALS	R Y TIMBER
BILLINGS CLINIC	REC SILICON
BOEING OF HELENA	ROCKY MOUNTAIN POWER
CALUMET MONTANA REFINING, LLC	ROSEBURG FOREST PRODUCTS
CHS	SAINT JAMES HOSPITAL
CITY OF BILLINGS	SAINT PATRICK HOSPITAL
CITY OF GREAT FALLS	SAINT VINCENT HEALTHCARE
COLSTRIP ENERGY LTD PARTNERSHIP	STILLWATER MINING COMPANY
EXPRESS PIPELINE LLC	SUN MOUNTAIN LUMBER
GCC TRIDENT LLC	TALEN MONTANA, LLC
GENERAL MILLS	THOMPSON RIVER LUMBER
GRAIN CRAFT	UNITED MATERIALS INCORPORATED
GRAYMONT WESTERN US INC.	UNITED PROPERTIES, INC.
IDAHO FOREST GROUP LLC	UNIVERSITY OF MONTANA
JUDITH GAP ENERGY LLC	US AIR FORCE
MAGRIS TALC USA	US DEPT VETERANS AFFAIRS
	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
MONTANA STATE UNIVERSITY - BILLINGS	YELLOWSTONE ENERGY
MONTANA STATE UNIVERSITY - BOZEMAN	

**NorthWestern Energy  
Electric Universal System Benefits  
2024 Annual Report**

**Conclusion**

In every year since the inception of USB, NorthWestern Energy's efforts have covered all public purpose categories—Local Conservation, Market Transformation, Renewable Resources, Research and Development, and Low Income. Efforts have included offerings for all NorthWestern Energy customers that include residential income and non-income qualified, Main Street businesses, schools, government entities, office buildings, irrigators, and small industrial companies (except for the Large Customers, who may self-direct USB funds). Funding programs and activities continue to be coordinated by NorthWestern Energy staff with much of the implementation work being performed by third-party implementers and partners.

MPSC Order No. 6679e recognizes and allows for the pooling of electric and natural gas USB funds for the Energy Audit program and for income-qualified customers the Weatherization program along with emergency energy assistance.

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 2020, 2021, 2022, and 2023 Annual Reports are included to provide an update of funded USB activities that were completed in 2024 or committed to be completed in 2025.

NorthWestern Energy Efficiency Programs  
11 E Park Street  
Butte, MT 59701-1711  
[E+Programs@northwestern.com](mailto:E+Programs@northwestern.com)

# Appendices 1-4

Universal System Benefits  
**2024 Annual Report**

**Appendix 1**  
**2024 Electric USBC Revenues**

	USBC kWh (Load)	USBC Revenue By Class	% of USBC Revenue By Class
<b>Residential</b>			
Residential	2,808,617,907	\$ 3,745,784	35.78%
<b>General Service</b>			
GS-1/GS-2 < 1000 kW	2,804,513,928	\$ 3,205,500	30.62%
<b>Irrigation</b>	97,072,415	\$ 111,046	1.06%
<b>Lighting</b>	28,320,289	\$ 96,063	0.92%
<b>Total Non-Large Customer</b>	<b>5,738,524,539</b>	<b>\$ 7,158,392</b>	<b>68%</b>
<b>Large Customer</b>			
GS-1/GS-2 > 1000 kW	3,677,108,426	\$ 3,309,398	31.6%
<b>Totals</b>	<b>9,415,632,964</b>	<b>\$ 10,467,790</b>	<b>100%</b>

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

**Appendix 2**  
**2024 Electric USB Program**  
**Expenditures and Commitments**

	Revenue Allocation <sup>(a)</sup>		Spent in 2024	Committed - Complete in 2025	Allocation & Expenses
	per Order 7458	Reallocation			
<b>Local Conservation</b>	<b>631,235</b>	<b>237,514</b>	<b>70,882</b>	<b>797,867</b>	<b>868,749</b>
Energy Audit and Education			620	797,115	797,735
Irrigation			28,043	752	28,795
Promotion			43,501	-	43,501
Labor			14,880	-	14,880
Administration Non-labor			1,027	-	1,027
Interest Income			(17,189)	-	(17,189)
Local Conservation Summary			70,882	797,867	868,749
<b>Market Transformation</b>	<b>404,144</b>	<b>(237,514)</b>	<b>44,070</b>	<b>122,561</b>	<b>166,630</b>
Building Operator Certification			6,160	-	6,160
Lighting Controls			-	122,561	-
Promotion			100	-	100
Labor			45,601	-	45,601
Administration Non-labor			3,214	-	3,214
Interest Income			(11,005)	-	(11,005)
Market Transformation Summary			44,070	122,561	44,070
<b>Renewable Resources</b>	<b>721,686</b>	<b>71,883</b>	<b>(2,591)</b>	<b>796,160</b>	<b>793,570</b>
Generation/Education			-	791,847	791,847
Green Power Product			4,313	4,313	-
Labor			12,710	-	12,710
Administration Non-labor			39	-	39
Interest Income			(19,652)	-	(19,652)
Renewable Resources Summary			(2,591)	796,160	784,944
<b>Research &amp; Development</b>	<b>167,431</b>	<b>(71,883)</b>	<b>(519)</b>	<b>96,067</b>	<b>95,548</b>
R&D/ Infrastructure			-	96,067	96,067
Labor			4,032	-	4,032
Administration Non-labor			9	-	9
Interest Income			(4,559)	-	(4,559)
Research & Development Summary			(519)	96,067	95,548
<b>Low Income</b>	<b>5,233,895</b>	<b>-</b>	<b>3,010,282</b>	<b>2,223,613</b>	<b>5,233,895</b>
Bill Discount			2,826,777	-	2,826,777
Weatherization & Fuel Switch			-	168,052	168,052
Electric Weatherization Incentives			9,613	-	9,613
Energy Share			223,159	-	223,159
Low Income			-	2,055,561	2,055,561
Promotion			62,761	-	62,761
Labor			26,199	-	26,199
Administration Non-labor			26,551	-	26,551
Interest Income			(164,777)	-	(164,777)
Low Income Summary			3,010,282	2,223,613	5,233,895
<b>Large Customer <sup>(b)</sup></b>	<b>3,309,398</b>	<b>-</b>	<b>2,095,758</b>	<b>1,213,640</b>	<b>3,309,398</b>
Self-Directed Energy Reduction			2,114,299	1,105,978	3,220,277
Self-Directed to Low Income			65,224	-	65,224
Labor			6,352	-	6,352
Interest Income			(90,117)	-	(90,117)
NWE Reallocate to Low Income			-	107,662	107,662
Large Customer Summary			2,095,758	1,213,640	3,309,398
<b>Totals</b>	<b>10,467,790</b>	<b>0</b>	<b>5,217,883</b>	<b>5,249,908</b>	<b>10,467,790</b>
<b>2024 USB Revenues less Expenses and Commitments</b>					<b>-</b>

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

<sup>(b)</sup> *The 2024 Large Customer Admin costs of \$6,352 were covered by unclaimed 2024 Large Customer funds and interest income of \$90,117 leaving a balance of \$107,662 that is being reallocated to Low Income for expenditure in 2025, consistent with historic MPSC direction.*

**Appendix 3**  
**2024 Electric USB Funding**  
**Savings and Participation Summary**

**2024 USB FUNDING AND EXPENDITURE SUMMARY**

USB Category	Allocation of 2024 funds based on Order 7458	Percentage by Category	Total Electric USB Funds Spent in 2024	2024 Electric USB Funds Committed to Spend in 2025	Allocation w/Lrg Cust funds self-directed to LI <sup>(a)</sup>	Percentage by Category	Allocation & Expenses	Percentage by Category
Local Conservation	\$ 631,235	6%	\$ 70,882	\$ 797,867	\$ 868,749	8%	\$ 868,749	8%
Market Transformation	\$ 404,144	4%	\$ 44,070	\$ 122,561	\$ 166,630	2%	\$ 166,630	2%
Renewables	\$ 721,686	7%	\$ (2,591)	\$ 796,160	\$ 793,570	8%	\$ 793,570	8%
Research & Development	\$ 167,431	2%	\$ (519)	\$ 96,067	\$ 95,548	1%	\$ 95,548	1%
Low Income	\$ 5,233,895	50%	\$ 3,010,282	\$ 2,223,613	\$ 5,299,119	51%	\$ 5,233,895	50%
Large Customer	\$ 3,309,398	32%	\$ 2,095,758	\$ 1,213,640	\$ 3,244,174	31%	\$ 3,309,398	32%
	<b>\$ 10,467,790</b>	<b>100%</b>	<b>\$ 5,217,883</b>	<b>\$ 5,249,908</b>	<b>\$ 10,467,790</b>	<b>100.0%</b>	<b>\$ 10,467,790</b>	<b>100.00%</b>

**2024 LOW INCOME EXPENDITURES SUMMARY**

2024 Low Income Expenditures	Electric USB Activity by Category	Quantity	Units
Bill Discount	Local Conservation		
Electric Weatherization Incentives	Home Energy/Check	468	homes
Energy Share	Home Energy/Check	46	customers
Promotion	Home Energy/Survey	4	projects
Labor	Irrigation		
Admin. Non-labor	Market Transformation		
Interest Income	Building Operator Certification	2	people
Self-Directed Large Customer to Low Income	Renewables		
	Generation / Education	-	projects
	Research & Development		
	Renewable Energy Workshops/Trainings	-	attendees
	Low Income		
	Bill Discount	11,177	households
	Weatherization & Fuel Switch	1	homes
	Energy Share	2,081	households
	<b>Total Savings &amp; Resources</b>	<b>0.037</b>	<b>0.03</b>

**2024 ENERGY SAVINGS & RENEWABLE RESOURCES ESTIMATES**

Savings & Resources acquired in 2024 w/ 2024 Funds	aMWh	MWh	MW
Local Conservation	0.028	246.50	0.03
Market Transformation	0.008	73.17	-
Renewables	-	-	-
Research & Development	N/A	N/A	N/A
Low Income	0.000	0.59	-
Large Customer <sup>(b)</sup>	N/A	N/A	N/A
<b>Total Savings &amp; Resources</b>	<b>0.037</b>	<b>320.25</b>	<b>0.03</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 2024 with 2024 funds, Large Customers self-directed a total of \$65,244 to Low Income.

<sup>(b)</sup> Large Customer energy savings estimates are reported by individual large customers to the Department of Revenue.

<sup>(c)</sup> Refer to 2023, 2022, 2021 and 2020 addendums for the total participation in 2024

**PARTICIPATION SUMMARY WITH 2024 FUNDS <sup>(c)</sup>**

Electric USB Activity by Category	Quantity	Units
Local Conservation		
Home Energy/Check	468	homes
Home Energy/Survey	46	customers
Irrigation	4	projects
Market Transformation		
Building Operator Certification	2	people
Renewables		
Generation / Education	-	projects
Research & Development		
Renewable Energy Workshops/Trainings	-	attendees
Low Income		
Bill Discount	11,177	households
Weatherization & Fuel Switch	1	homes
Energy Share	2,081	households

**Appendix 4  
Summary of Electric USB Funding  
1999 - 2024**

**Annual Electric USB Allocation**

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

	% by Category	\$ by Category
Local Conservation	6%	631,235
Market Transformation	4%	404,144
Renewables	7%	721,686
Research & Development	2%	167,431
Low Income	50%	5,233,895
Large Customers	32%	3,309,398
	100%	10,467,790

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

Year	USB Categories						
	Total Electric USB Funds	Local Conservation	Market Transformation	Renewables	Research Development	Low Income <sup>(c)</sup>	Large Customers
1999 - 2014	143,974,148	23,582,661	8,376,209	15,685,495	4,212,500	46,865,764	45,251,514
2015	9,531,041	671,655	304,518	729,125	109,566	4,765,520	2,950,657
2016	9,447,558	717,796	266,924	574,269	271,766	4,723,779	2,893,024
2017	9,838,601	758,514	268,707	743,991	138,559	4,919,301	3,009,528
2018	10,063,092	614,558	399,090	707,490	163,399	5,031,546	3,147,008
2019	10,367,307	448,845	415,034	656,782	85,430	5,183,653	3,577,562
2020	9,917,706	331,587	640,965	678,806	156,775	4,958,853	3,150,720
2021	10,074,524	140,755	909,827	801,538	101,082	5,037,262	3,084,060
2022	10,428,134	280,922	792,817	786,287	136,230	5,214,067	3,217,812
2023	10,385,408	648,051	409,795	715,806	193,056	5,192,704	3,225,997
2024	10,467,790	868,749	166,630	793,570	95,548	5,233,895	3,309,398
	244,495,309	29,064,092	12,950,517	22,873,159	5,663,911	97,126,344	76,817,281

Allocation as % of Revenues by Category	100%	11.9%	5.3%	9.4%	2.3%	39.7%	31.4%
---	------	-------	------	------	------	-------	-------

Allocation as % of Revenues, excluding Large Customer Revenues	100%	17.3%	7.7%	13.6%	3.4%	57.9%	N/A
--	------	-------	------	-------	------	-------	-----

<sup>(a)</sup> SB390 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 2024.

<sup>(c)</sup> This column summarizes all funds allocated to low-income activities by NorthWestern Energy. In addition to funds allocated by NorthWestern Energy, Large Customers have self-directed \$5,386,062 to low-income activities since 1999.

# Addendum

# **2023 Annual Report**

# Universal System Benefits

# **2024 Annual Report**

**ADDENDUM  
to the  
2023 Annual Report**

In 2023, NorthWestern Energy USBC generated revenues totaling \$10,385,409. Of this, \$5,804,080 was spent on projects completed in 2023 and \$1,665,162 was spent on projects completed in 2024. This leaves a balance of \$2,916,168 for projects to be completed in 2025.

The \$1,665,162 of 2023 USB funds spent in 2024 include the following: \$399,939 for Local Conservation, \$33,800 for Market Transformation, \$115,750 for Research & Development, \$1,049,832 for Large Customer; and consistent with historical practice, NorthWestern allocated \$65,841 of unclaimed Large Customer funds to Energy Share.

NorthWestern Energy requested and was granted extensions from the Department of Revenue as allowed per ARM 49.29.111.

Updated results are provided in the Addendum to the 2023 Annual Report in Appendix 2, 2023 Electric USB Program Expenditures and Commitments, and Appendix 3, Update to Savings and Participation Summary.

**Appendix 2**  
**2023 Electric USB Program**  
**Expenditures and Commitments**

	Revenue Allocation <sup>(a)</sup>		Spent in 2023	Spent in 2024	Committed - Complete in 2025	Allocation & Expenses
	per Order 7458	Reallocation				
<b>Local Conservation</b>	<b>645,597</b>	<b>2,453</b>	<b>248,112</b>	<b>399,939</b>	<b>85,429</b>	<b>733,480</b>
Energy Audit and Education			235,865	395,979	67,929	699,773
Irrigation			1,637	3,960	17,500	23,097
Promotion			2,383	-	-	2,383
Labor			17,957	-	-	17,957
Administration Non-labor			1,408	-	-	1,408
Interest Income			(11,140)	-	-	(11,140)
Local Conservation Summary			248,112	399,939	85,429	733,480
<b>Market Transformation</b>	<b>412,249</b>	<b>(2,453)</b>	<b>122,585</b>	<b>33,800</b>	<b>167,981</b>	<b>324,366</b>
Building Operator Certification			21,912	-	-	21,912
Regional Market Transformation			33,000	33,800	-	66,800
Cold Climate Ductless Heat Pump			-	-	90,542	90,542
Lighting Controls			-	-	77,439	77,439
Promotion			7,528	-	-	7,528
Labor			63,338	-	-	63,338
Administration Non-labor			3,919	-	-	3,919
Interest Income			(7,113)	-	-	(7,113)
Market Transformation Summary			122,585	33,800	167,981	324,366
<b>Renewable Resources</b>	<b>700,868</b>	<b>14,938</b>	<b>31,411</b>	<b>-</b>	<b>708,192</b>	<b>739,603</b>
Generation/Education			-	-	691,803	691,803
Green Power Product			(16,389)	-	16,389	-
Labor			59,706	-	-	59,706
Administration Non-labor			55	-	-	55
Interest Income			(11,961)	-	-	(11,961)
Renewable Resources Summary			31,411	-	708,192	739,603
<b>Research &amp; Development</b>	<b>207,994</b>	<b>(14,938)</b>	<b>38,586</b>	<b>115,750</b>	<b>14,923</b>	<b>169,259</b>
R&D/ Infrastructure			23,797	115,750	14,923	154,470
Promotion			250	-	-	250
Labor			18,243	-	-	18,243
Administration Non-labor			17	-	-	17
Interest Income			(3,721)	-	-	(3,721)
Research & Development Summary			38,586	115,750	14,923	169,259
<b>Low Income</b>	<b>5,192,704</b>	<b>-</b>	<b>3,253,756</b>	<b>-</b>	<b>1,938,948</b>	<b>5,192,704</b>
Bill Discount			2,974,391	-	-	2,974,391
Weatherization & Fuel Switch			-	-	1,938,948	1,938,948
Electric Weatherization Incentives			18,196	-	-	18,196
Energy Share			289,000	-	-	289,000
Promotion			54,939	-	-	54,939
Labor			23,965	-	-	23,965
Administration Non-labor			1,130	-	-	1,130
Interest Income			(107,865)	-	-	(107,865)
Low Income Summary			3,253,756	-	1,938,948	5,192,704
<b>Large Customer <sup>(b)</sup></b>	<b>3,225,997</b>	<b>-</b>	<b>2,109,630</b>	<b>1,115,673</b>	<b>695</b>	<b>3,225,998</b>
Self-Directed Energy Reduction			2,133,392	683,593	-	2,816,985
Self-Directed to Low Income			41,929	366,239	-	408,168
Labor			8,240	-	-	8,240
Interest Income			(73,931)	-	-	(73,931)
NWE Reallocate to Weatherization			-	-	695	695
NWE Reallocate to Energy Share			-	65,841	-	65,841
Large Customer Summary			2,109,630	1,115,673	695	3,225,998
<b>Totals</b>	<b>10,385,409</b>	<b>-</b>	<b>5,804,080</b>	<b>1,665,162</b>	<b>2,916,168</b>	<b>10,385,409</b>
<b>2023 USB Revenues less Expenses and Commitments</b>						<b>-</b>

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

<sup>(b)</sup> *The 2023 Large Customer Admin costs of \$8,240 were covered by \$150 of unclaimed 2023 Large Customer funds and interest income of \$73,931 leaving a balance of \$65,841 that is being reallocated to Low Income for expenditure in 2024.*

**Addendum to the 2023 Report - Appendix 3  
Update to Savings and Participation Summary**

**PROJECTS COMPLETED IN 2024 WITH 2023 FUNDS**

Energy Savings & Renewable Resource Estimates				
USB Category	aMW	MWH	MW	
Local Conservation	0.008	69.72	0.015	
Market Transformation	0.002	15.03	-	
Renewables	-	-	-	
Research & Development	N/A	N/A	N/A	
Low Income	-	-	-	
	<b>0.010</b>	<b>84.75</b>	<b>0.015</b>	
<b>Program Participation Summary</b>				
USB Category / Program Segment				Quantity Units
<b>Local Conservation</b>				
Home EnergyCheck				233 homes
Irrigation				- projects
<b>Market Transformation</b>				
Building Operator Certification				- people
<b>Renewables</b>				
Generation / Education				- projects
<b>Research &amp; Development</b>				
Renewable Energy Workshops/Trainings				890 attendees
<b>Low Income</b>				
Bill Discount				- households
Weatherization & Fuel Switch				- homes
Energy Share				- households

**TOTAL OF PROJECTS COMPLETED WITH 2023 FUNDS**

Energy Savings & Renewable Resource Estimates				
USB Category	aMW	MWH	MW	
Local Conservation	0.009	82.17	0.035	
Market Transformation	0.029	256.96	-	
Renewables	-	-	-	
Research & Development	N/A	N/A	N/A	
Low Income	0.000	1.21	0.000	
	<b>0.039</b>	<b>340.34</b>	<b>0.035</b>	
<b>Program Participation Summary</b>				
USB Category / Program Segment				Quantity Units
<b>Local Conservation</b>				
Home EnergyCheck				925 homes
Irrigation				5 projects
<b>Market Transformation</b>				
Building Operator Certification				7 people
<b>Renewables</b>				
Generation / Education				- projects
<b>Research &amp; Development</b>				
Renewable Energy Workshops/Trainings				950 attendees
<b>Low Income</b>				
Bill Discount				11,364 households
Weatherization & Fuel Switch				2 homes
Energy Share				1,506 households

# Addendum

# **2022 Annual Report**

# Universal System Benefits

# **2024 Annual Report**

**ADDENDUM  
to the  
2022 Annual Report**

In 2022, NorthWestern Energy USBC generated revenues totaling \$10,428,134. Of this, \$4,825,551 was spent on projects completed in 2022, \$1,927,493 was spent on projects completed in 2023, and \$2,601,014 was spent on projects completed in 2024. This leaves a balance of \$1,074,077 for projects to be completed in 2025.

The \$2,601,014 of 2022 USB funds spent in 2024 include the following: \$340,234 for Local Conservation, \$48,290 for Market Transformation, \$230,307 for Renewable Resources, \$1,926,349 for Low Income; and consistent with historical practice, NorthWestern allocated \$41 of unclaimed Large Customer funds to Weatherization.

NorthWestern Energy requested and was granted extensions from the Department of Revenue as allowed per ARM 49.29.111.

Updated results are provided in the Addendum to the 2022 Annual Report in Appendix 2, 2022 Electric USB Program Expenditures and Commitments, and Appendix 3, Update to Savings and Participation Summary.

**Appendix 2**  
**2022 Electric USB Program**  
**Expenditures and Commitments**

	Revenue Allocation <sup>(a)</sup>		Spent in 2022	Spent in 2023	Spent in 2024	Spent in 2025	Committed - Complete in 2025	Allocation & Expenses
	per Order 7458	Reallocation						
<b>Local Conservation</b>	<b>305,296</b>	<b>315,859</b>	<b>55,922</b>	<b>225,000</b>	<b>340,234</b>	<b>-</b>	<b>17,500</b>	<b>638,656</b>
Energy Audit and Education			-	200,000	340,234	-	-	540,234
Irrigation			9,142	25,000	-	-	17,500	51,642
Promotion			24,509	-	-	-	-	24,509
Labor			19,600	-	-	-	-	19,600
Administration Non-labor			2,686	-	-	-	-	2,686
Interest Income			(16)	-	-	-	-	(16)
Local Conservation Summary			55,922	225,000	340,234	-	17,500	638,656
<b>Market Transformation</b>	<b>768,442</b>	<b>(315,859)</b>	<b>117,130</b>	<b>50,000</b>	<b>48,290</b>	<b>-</b>	<b>219,663</b>	<b>435,083</b>
Motor Management Training			3,228	-	-	-	-	3,228
Building Operator Certification			-	50,000	48,290	-	70,205	168,495
Regional Market Transformation			32,200	-	-	-	-	32,200
Cold Climate Ductless Heat Pump			-	-	-	-	149,458	149,458
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	50,000	48,290	-	219,663	435,083
<b>Renewable Resources</b>	<b>753,031</b>	<b>33,257</b>	<b>42,172</b>	<b>230,307</b>	<b>286,100</b>	<b>-</b>	<b>227,708</b>	<b>786,287</b>
Generation/Education			-	230,307	286,100	-	211,346	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	230,307	286,100	-	227,708	786,287
<b>Research &amp; Development</b>	<b>169,486</b>	<b>(33,257)</b>	<b>19,830</b>	<b>116,400</b>	<b>-</b>	<b>-</b>	<b>-</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 <sup>(b)</sup></b>	<b>5,214,067</b>	<b>-</b>	<b>2,678,513</b>	<b>-</b>	<b>979,936</b>	<b>946,412</b>	<b>609,206</b>	<b>5,214,068</b>
Bill Discount			2,354,251	-	-	-	-	2,354,251
Weatherization & Fuel Switch			-	-	979,936	946,412	315,206	2,241,555
Electric Weatherization Incentives			7,777	-	-	-	-	7,777
Fuel Switch Analyses			605	-	-	-	-	605
Energy Share			289,000	-	-	-	294,000	583,000
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	-	979,936	946,412	609,206	5,214,068
<b>Large Customer <sup>(c)</sup></b>	<b>3,217,812</b>	<b>-</b>	<b>1,911,985</b>	<b>1,305,786</b>	<b>41</b>	<b>-</b>	<b>-</b>	<b>3,217,812</b>
Self-Directed Energy Reduction			1,866,496	721,480	-	-	-	2,587,976
Self-Directed to Low Income			45,466	584,306	-	-	-	629,772
2021 LC Funds to Cover 2022 LC Expenses			(13,967)	-	-	-	-	(13,967)
Labor			14,155	-	-	-	-	14,155
Interest Income			(165)	-	-	-	-	(165)
NWE Reallocate to Weatherization			-	-	41	-	-	41
Large Customer Summary			1,911,985	1,305,786	41	-	-	3,217,811
<b>Totals</b>	<b>10,428,134</b>	<b>-</b>	<b>4,825,551</b>	<b>1,927,493</b>	<b>1,654,601</b>	<b>946,412</b>	<b>1,074,077</b>	<b>10,428,134</b>
<b>2022 USB Revenues less Expenses and Commitments</b>								<b>-</b>

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

<sup>(b)</sup> Weatherization includes a 2025 expenditure of \$946,412, designated for savings and projects completed in 2024.

<sup>(c)</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.

**Addendum to the 2022 Report - Appendix 3  
Update to Savings and Participation Summary**

**PROJECTS COMPLETED IN 2024 WITH 2022 FUNDS**

Energy Savings & Renewable Resource Estimates				
USB Category	aMW	MWH	MW	
Local Conservation	0.007	59.90	0.013	
Market Transformation	0.065	573.57	-	
Renewables	0.023	201.96	N/A	
Research & Development	N/A	N/A	N/A	
Low Income	0.014	118.29	-	
	<b>0.109</b>	<b>953.72</b>	<b>0.013</b>	
<b>Program Participation Summary</b>				
USB Category / Program Segment				Quantity Units
<b>Local Conservation</b>				
Home EnergyCheck				200 homes
Electric Usage Survey				- homes
Business Partners/Irrigation				- projects
<b>Market Transformation</b>				
Building Operator Certification				18 people
Motor Training				- attendees
<b>Renewables</b>				
Generation / Education				6 projects
<b>Research &amp; Development</b>				
Renewable Energy Workshops/Trainings				- attendees
<b>Low Income</b>				
Bill Discount				- households
Weatherization & Fuel Switch				118 homes
Energy Share				- households

**TOTAL OF PROJECTS COMPLETED WITH 2022 FUNDS**

Energy Savings & Renewable Resource Estimates				
USB Category	aMW	MWH	MW	
Local Conservation	0.049	429.13	0.023	
Market Transformation	0.128	1,125.61	N/A	
Renewables	0.042	370.32	N/A	
Research & Development	N/A	N/A	N/A	
Low Income	0.014	118.64	0.000	
	<b>0.233</b>	<b>2,043.70</b>	<b>0.023</b>	
<b>Program Participation Summary</b>				
USB Category / Program Segment				Quantity Units
<b>Local Conservation</b>				
Home EnergyCheck				865 homes
Electric Usage Survey				176 homes
Business Partners/Irrigation				7 projects
<b>Market Transformation</b>				
Building Operator Certification				35 people
Motor Training				13 attendees
<b>Renewables</b>				
Generation / Education				11 projects
<b>Research &amp; Development</b>				
Renewable Energy Workshops/Trainings				739 attendees
<b>Low Income</b>				
Bill Discount				10,370 households
Weatherization & Fuel Switch				119 homes
Energy Share				647 households

# Addendum

# **2021 Annual Report**

## Universal System Benefits

## **2024 Annual Report**

**ADDENDUM  
to the  
2021 Annual Report**

In 2021, NorthWestern Energy USBC revenues totaled \$10,074,524. Of this, \$4,813,556 was spent on projects completed in 2021, \$2,118,809 was spent on projects completed in 2022, \$1,963,034 was spent on projects completed in 2023, and \$663,141 was spent on projects completed in 2024. This leaves a balance of \$515,985 for projects to be completed in 2025.

The \$663,141 of 2021 USB funds spent in 2024 include the following: \$133,087 for Market Transformation and \$577,054 for Low Income. Additionally, \$47,000 of Renewable Resources, specifically allocated to the Green Power Product, was transferred from 2020 to 2021. This reallocation ensured a zero balance for 2020.

NorthWestern Energy requested and was granted extensions from the Department of Revenue as allowed per ARM 49.29.111.

Updated results are provided in the Addendum to the 2021 Annual Report in Appendix 2, 2021 Electric USB Program Expenditures and Commitments, and Appendix 3, Update to Savings and Participation Summary.

**Addendum to the 2021 Report - Appendix 2**  
**2021 Electric USB Program**  
**Expenditures and Commitments**

	Revenue Allocation <sup>(a)</sup>		Spent in 2021	Spent in 2022	Spent in 2023	Spent in 2024	Committed - Complete in 2025	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>-</b>	<b>-</b>	<b>140,755</b>
Irrigation			21,785	-	-	-	-	21,785
Promotion			83,041	-	-	-	-	83,041
Labor			35,828	-	-	-	-	35,828
Administration Non-labor			117	-	-	-	-	117
Interest Income			(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>235,679</b>	<b>133,087</b>	<b>454,717</b>	<b>909,828</b>
Building Operator Certification			17,100	6,000	-	-	995	24,095
Regional Market Transformation			31,400	-	-	-	-	31,400
Cold Climate Ductless Heat Pump			-	-	-	52,336	-	52,336
Heat Pump Water Heater			-	-	85,390	23,911	453,722	563,023
Lighting Controls			-	-	150,289	56,840	-	207,129
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	235,679	133,087	454,717	909,828
<b>Renewable Resources</b>	<b>734,390</b>	<b>67,148</b>	<b>67,795</b>	<b>243,582</b>	<b>475,893</b>	<b>(47,000)</b>	<b>61,268</b>	<b>801,538</b>
Generation/Education			-	243,582	475,893	-	-	719,475
Green Power Product			(14,268)	-	-	(47,000)	61,268	-
Promotion			16	-	-	-	-	16
Labor			82,029	-	-	-	-	82,029
Administration Non-labor			51	-	-	-	-	51
Interest Income			(33)	-	-	-	-	(33)
Renewable Resources Summary			67,795	243,582	475,893	(47,000)	61,268	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>-</b>	<b>-</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>1,215,530</b>	<b>577,054</b>	<b>-</b>	<b>5,037,262</b>
Bill Discount			2,283,036	-	-	-	-	2,283,036
Weatherization & Fuel Switch			-	-	1,215,530	577,054	-	1,792,584
Electric 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	1,215,530	577,054	-	5,037,263
<b>Large Customer <sup>(b)</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>-</b>	<b>-</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)
NWE Reallocate to 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>1,963,034</b>	<b>663,141</b>	<b>515,985</b>	<b>10,074,524</b>
<b>2021 USB Revenues less Expenses and Commitments</b>								<b>-</b>

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

<sup>(b)</sup> 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 Weatherization consistent with historic practice.

**Addendum to the 2021 Report - Appendix 3  
Update to Savings and Participation Summary**

**PROJECTS COMPLETED IN 2024 WITH 2021 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	aMW	MWH	MW
Local Conservation	-	-	-
Market Transformation	0.002	18.73	-
Renewables	-	-	-
Research & Development	N/A	N/A	N/A
Low Income	0.004	35.43	-
	<b>0.006</b>	<b>54.16</b>	<b>-</b>
<b>Program Participation Summary</b>			
USB Category / Program Segment	Quantity	Units	
<b>Local Conservation</b>			
Home EnergyCheck	-	homes	
Mail out Audits	-	homes	
Business Partners/Irrigation	-	projects	
<b>Market Transformation</b>			
Building Operator Certification	-	people	
Cold Climate Ductless Heat Pump	2	projects	
Heat Pump Water Heater	13	projects + attendees	
Lighting Controls	121	attendees	
<b>Renewables</b>			
Generation / Education	-	projects	
<b>Research &amp; Development</b>			
Renewable Energy Workshops/Trainings	-	attendees	
<b>Low Income</b>			
Bill Discount	-	households	
Weatherization & Fuel Switch	35	homes	
Energy Share	-	households	

**TOTAL OF PROJECTS COMPLETED WITH 2021 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	aMW	MWH	MW
Local Conservation	0.068	599.72	0.088
Market Transformation	0.040	354.51	N/A
Renewables	0.073	640.07	0.163
Research & Development	N/A	N/A	N/A
Low Income	0.025	216.94	-
	<b>0.207</b>	<b>1,811.24</b>	<b>0.251</b>
<b>Program Participation Summary</b>			
USB Category / Program Segment	Quantity	Units	
<b>Local Conservation</b>			
Home EnergyCheck	848	homes	
Mail Out Audits	3,265	homes	
Business Partners/Irrigation	11	projects	
<b>Market Transformation</b>			
Building Operator Certification	20	people	
Cold Climate Ductless Heat Pump	2	projects	
Heat Pump Water Heater	13	projects + attendees	
Lighting Controls	121	attendees	
<b>Renewables</b>			
Generation / Education	16	projects	
<b>Research &amp; Development</b>			
Renewable Energy Workshops/Trainings	433	attendees	
<b>Low Income</b>			
Bill Discount	10,458	households	
Weatherization & Fuel Switch	329	homes	
Energy Share	1,435	households	

# Addendum

# **2020 Annual Report**

## Universal System Benefits

## **2024 Annual Report**

**ADDENDUM  
to the  
2020 Annual Report**

In 2020, NorthWestern Energy USBC generated revenues totaling \$9,917,706. Of this, \$4,901,975 was spent on projects completed in 2020, \$1,913,422 was spent on projects completed in 2021, \$1,902,895 was spent on projects completed in 2022, \$762,801 was spent on projects completed in 2023, and \$436,615 was spent in 2024.

The \$436,615 of 2020 USB funds spent in 2024 include \$389,615 for Market Transformation. Additionally, \$47,000 of Renewable Resources, specifically allocated to the Green Power Product, was transferred from 2020 to 2021. This reallocation ensured a zero balance for 2020.

NorthWestern confirms that all 2020 USB funds have been fully exhausted.

Updated results are provided in the Addendum to the 2020 Annual Report in Appendix 2, 2020 Electric USB Program Expenditures and Commitments, and Appendix 3, Update to Savings and Participation Summary.

**Addendum to the 2020 Report - Appendix 2**  
**2020 Electric USB Program**  
**Expenditures and Commitments**

	Revenue Allocation <sup>(a)</sup>		Spent in 2020	Spent in 2021	Spent in 2022	Spent in 2023	Spent in 2024	Allocation & Expenses
	per Order 7458	Reallocation						
<b>Local Conservation</b>	<b>593,543</b>	<b>(261,956)</b>	<b>91,587</b>	<b>-</b>	<b>240,000</b>	<b>-</b>	<b>-</b>	<b>331,587</b>
Energy Audit and Education			-	-	240,000	-	-	240,000
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>	<b>60,614</b>	<b>74,100</b>	<b>46,994</b>	<b>69,643</b>	<b>389,615</b>	<b>640,966</b>
Motor Management Training			-	-	15,000	-	-	15,000
Energy Star Homes			-	62,100	-	45,465	40,543	148,108
Building Operator Certification			2,000	12,000	-	-	-	14,000
Regional Market Transformation			24,389	-	-	-	-	24,389
Cold Climate Ductless Heat Pump			-	-	31,994	24,178	44,892	101,064
Heat Pump Water Heater			-	-	-	-	183,137	183,137
Lighting Controls			-	-	-	-	121,043	121,043
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	69,643	389,615	640,966
<b>Renewable Resources</b>	<b>678,806</b>	<b>-</b>	<b>67,148</b>	<b>324,853</b>	<b>239,805</b>	<b>-</b>	<b>47,000</b>	<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>	<b>31,815</b>	<b>41,960</b>	<b>83,000</b>	<b>-</b>	<b>-</b>	<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>	<b>2,748,430</b>	<b>224,169</b>	<b>1,293,096</b>	<b>693,158</b>	<b>-</b>	<b>4,958,853</b>
Bill Discount			2,411,024	-	-	-	-	2,411,024
Weatherization & Fuel Switch			-	-	1,293,096	693,158	-	1,986,254
Electric 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>(b)</sup></b>	<b>3,150,720</b>	<b>-</b>	<b>1,902,381</b>	<b>1,248,340</b>	<b>-</b>	<b>-</b>	<b>-</b>	<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)
NWE Reallocation to Weatherization			-	93,736	-	-	-	93,736
NWE 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>762,801</b>	<b>436,615</b>	<b>9,917,706</b>
<b>2020 USB Revenues less Expenses and Commitments</b>								<b>(0)</b>

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

<sup>(b)</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 Weatherization and Energy Share for expenditure in 2021.

**Addendum to the 2020 Report - Appendix 3  
Update to Savings and Participation Summary**

**PROJECTS COMPLETED IN 2024 WITH 2020 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	aMW	MWH	MW
Local Conservation	-	-	-
Market Transformation	0.004	38.38	-
Renewables	-	-	-
Research & Development	N/A	N/A	N/A
Low Income	-	-	-
	<b>0.004</b>	<b>38.38</b>	-
<b>Program Participation Summary</b>			
USB Category / Program Segment	Quantity	Units	
<b>Local Conservation</b>			
Home EnergyCheck	-	homes	
Onsite Audits	-	homes	
Mail out Audits	-	homes	
Small Commercial Appraisals	-	businesses	
Business Partners/Irrigation	-	projects	
<b>Market Transformation</b>			
Building Operator Certification	-	people	
Motor Training	-	people	
Cold Climate Ductless Heat Pump	2	projects	
Heat Pump Water Heater	116	projects + attendees	
Lighting Controls	258	attendees	
<b>Renewables</b>			
Generation / Education	-	projects	
<b>Research &amp; Development</b>			
Renewable Energy Seminars/Workshops	-	attendees	
<b>Low Income</b>			
Bill Discount	-	households	
Weatherization & Fuel Switch	-	homes	
Energy Share	-	households	

**TOTAL OF PROJECTS COMPLETED WITH 2020 FUNDS**

Energy Savings & Renewable Resource Estimates			
USB Category	aMW	MWH	MW
Local Conservation	0.072	635.00	0.102
Market Transformation	0.009	76.76	N/A
Renewables	0.067	586.00	0.450
Research & Development	N/A	N/A	N/A
Low Income	0.020	173.00	92.643
	<b>0.168</b>	<b>1,470.76</b>	<b>93.195</b>
<b>Program Participation Summary</b>			
USB Category / Program Segment	Quantity	Units	
<b>Local Conservation</b>			
Home EnergyCheck	230	homes	
Onsite Audits	408	homes	
Mail Out Audits	3,147	homes	
Small Commercial Appraisals	23	businesses	
Business Partners/Irrigation	6	projects	
<b>Market Transformation</b>			
Building Operator Certification	-	people	
Motor Training	60	people	
Cold Climate Ductless Heat Pump	2	projects	
Heat Pump Water Heater	116	projects + attendees	
Lighting Controls	258	attendees	
<b>Renewables</b>			
Generation / Education	12	projects	
<b>Research &amp; Development</b>			
Renewable Energy Seminars/Workshops	572	attendees	
<b>Low Income</b>			
Bill Discount	11,324	households	
Weatherization & Fuel Switch	360	homes	
Energy Share	1,129	households	