

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

February 20, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Colstrip Energy Limited Partnership**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Colstrip Energy Limited Partnership's (CELP) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of CELP's 2024 USBC account activities.**
- **Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024. Please note we donated all of our 2024 remaining credits and all our 2023 carry over credits.**

If you have any questions, please contact me (208) 344-3570

Sincerely,



Jeremy Wonch  
CFO

---

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



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

## COLSTRIP ENERGY LTD PARTNERSHIP

### Account Summary

2023 Carryover Reservation:	\$465.80	YTD Elec Revenue:	\$190,542.34
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$0.00	Total Payment Requests:	\$1,784.00
Payment Requests Made YTD:	\$1,784.00	Current Request Balance:	\$264.75
2023 Carryover USBC Credit:	\$426.98	Total USBC Credit:	\$1,519.25
USBC Credit YTD:	\$1,092.27	Payments Issued YTD:	\$1,519.25
Average Monthly Credit Earned:	\$91.02	USBC Credit Balance:	\$0.00
		Payment Pending:	\$0.00

### Payment Requests Made

Submitted By	Date	Amount
Joel Zimmerman	11/24/2024	\$1,784.00

### Payments Issued

Date	Amount
12/17/2024	\$1,519.25

### Account Detail

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100629	1633	DS86354086	152,218	2,045	0	161,088	827,165	65,794	0	120	0	0	5,198	0	1,213,628
		KWH >	3,667	3,149	0	3,763	2,458	3,494	0	365	0	0	8,333	0	3,604
		KW >													
		Elec Revenue >	\$25,455.23	\$10,620.28	\$1,380.00	\$24,571.27	\$79,052.38	\$17,073.07	\$1,380.00	\$2,442.85	\$1,380.00	\$1,380.00	\$25,807.26	\$0.00	\$190,542.34
		Total KWH	152,218	2,045	0	161,088	827,165	65,794	0	120	0	0	5,198	0	1,213,628
		Combined Average KW	3,667	3,149	0	3,763	2,458	3,494	0	365	0	0	8,333	0	3,604
		USBC Charge	\$137.00	\$1.84	\$0.00	\$144.98	\$744.45	\$59.21	\$0.00	\$0.11	\$0.00	\$0.00	\$4.68	\$0.00	\$1,092.27
		Total Elec Revenue	\$25,455.23	\$10,620.28	\$1,380.00	\$24,571.27	\$79,052.38	\$17,073.07	\$1,380.00	\$2,442.85	\$1,380.00	\$1,380.00	\$25,807.26	\$0.00	\$190,542.34





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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/26/2024	CONTACT PERSON:	Joel Zimmerman
NAME OF BUSINESS:	Colstrip Energy LTD Partnership	PHONE NUMBER:	406-748-4729
PROJECT CITY LOCATION:	Colstrip	CELL PHONE:	
MAILING ADDRESS:	PO Box 189	FAX NUMBER:	
MAILING CITY, STATE, ZIP:	Colstrip MT 59323	E-MAIL ADDRESS:	jolez@rosi-colstrip.com

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b> \$	
DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S) (if more space is needed, please attach): Please donate remaining 2024 USB Credits in the amount of \$1,784	
ESTIMATED ANNUAL KWH SAVINGS:	
ESTIMATED KW DEMAND SAVINGS:	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	\$ \$1,784
NAME OF ORGANIZATION TO RECEIVE DONATION:	USB

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

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

LARGE CUSTOMER:

Signature: 

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



Delivering a Bright Future

BILLINGS GENERATION, INC.  
Suite 200  
1087 West River Street  
Boise, Idaho 83702  
Telephone (208) 344-3570  
Telecopier (208) 344-3984

February 20, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Yellowstone Energy Limited Partnership**

Dear Mr. Schafer:

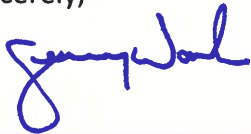
Please accept this letter and the attached documents as Yellowstone Energy Limited Partnership's (YELP) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of YELP's 2024 USBC account activities.
- Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024. Please note we donated all our 2024 remaining credits and all our 2023 carry over credits.

If you have any questions, please contact me at (208) 344-3570

Sincerely,



Jeremy Wonch  
CFO

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



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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/26/2024
NAME OF BUSINESS:	Yellowstone Energy LTD Partnership
PROJECT CITY LOCATION:	Billings
MAILING ADDRESS:	2215 n Frontage Rd
MAILING CITY, STATE, ZIP:	Billings MT 59101

CONTACT PERSON:	Dan Grey
PHONE NUMBER:	406-256-5296
CELL PHONE:	
FAX NUMBER:	
E-MAIL ADDRESS:	dgrey@rosi-colstrip.com

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b> \$	
DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S) (if more space is needed, please attach): Please donate remaining 2024 USB Credits to Energy Share	
ESTIMATED ANNUAL KWH SAVINGS:	
ESTIMATED KW DEMAND SAVINGS:	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	\$650
NAME OF ORGANIZATION TO RECEIVE DONATION:	USB

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

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

LARGE CUSTOMER:

Signature: 

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



## Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

### YELLOWSTONE ENERGY

#### Account Summary

2023 Carryover Reservation:	\$155.00	YTD Elec Revenue:	\$212,327.02
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$0.00	Total Payment Requests:	\$1,675.00
Payment Requests Made YTD:	\$1,675.00	Current Request Balance:	\$4.40
2023 Carryover USBC Credit:	\$152.61	Total USBC Credit:	\$2,502.26
USBC Credit YTD:	\$2,349.65	Payments Issued YTD:	\$1,670.60
Average Monthly Credit Earned:	\$195.80	USBC Credit Balance:	\$831.66
		Payment Pending:	\$4.40

#### Payment Requests Made

Submitted By	Date	Amount
Owen Omdorff	11/24/2024	\$1,675.00

#### Payments Issued

Date	Amount
12/17/2024	\$1,670.60

#### Account Detail

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100593	1597	DP18070342	KWH >	0	0	0	0	364,514	21,704	0	0	0	1,125,660	792,008	2,303,886
			KW >	0	0	0	0	5,453	5,378	0	0	0	6,284	6,051	5,792
		Elec Revenue >	\$1,380.00	\$1,380.00	\$1,380.00	\$1,380.00	\$48,213.82	\$18,745.50	\$1,380.00	\$1,380.00	\$1,380.00	\$1,380.00	\$103,902.17	\$18,168.48	\$200,069.97
634159	277826	2000483656	KWH >	3,300	3,000	3,300	2,700	3,300	3,000	3,300	3,300	3,000	0	3,000	34,200
			KW >	4	4	4	4	4	4	4	4	4	0	4	4
		Elec Revenue >	\$348.58	\$315.68	\$341.38	\$304.83	\$372.80	\$342.24	\$337.75	\$367.25	\$367.25	\$322.21	\$0.00	\$33.79	\$3,453.76
712192	322631	2000523016	KWH >	0	0	0	0	0	0	0	15,840	0	0	18,360	34,200
			KW >	0	0	0	0	0	0	0	194	0	0	227	211
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,923.01	\$0.00	\$0.00	\$1,703.02	\$4,626.03
928230	357965	2000483654	KWH >	1,800	1,800	1,800	1,800	1,800	1,800	1,800	1,800	900	0	110,700	126,900
			KW >	1	1	1	1	1	1	1	1	1	0	297	28
		Elec Revenue >	\$198.89	\$195.17	\$195.17	\$205.06	\$211.10	\$126.05	\$208.40	\$206.86	\$206.86	\$119.37	\$0.00	\$2,304.33	\$4,177.26
		Total KWH	5,100	4,800	5,100	4,500	369,614	25,604	4,800	5,100	20,940	3,900	1,125,660	924,068	2,499,186
		Combined Average KW	5	5	5	5	5,458	5,383	5	5	199	5	6,284	6,579	6,034
		USBC Charge	\$4.59	\$4.32	\$4.59	\$4.05	\$332.65	\$23.04	\$4.32	\$4.59	\$18.85	\$3.51	\$1,013.09	\$831.66	\$2,249.26
		Total Elec Revenue	\$1,927.47	\$1,890.85	\$1,916.55	\$1,889.89	\$48,797.72	\$19,213.79	\$1,926.15	\$1,954.11	\$4,877.12	\$1,821.58	\$103,902.17	\$22,209.62	\$212,327.02





Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/13/2025

AMERICAN CHEMET

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$1,953,097.83
Reservations Made YTD:	\$7,246.99		
2023 Carryover Payment Request:	\$3,716.04	Total Payment Requests:	\$9,884.94
Payment Requests Made YTD:	\$6,168.90	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$1,188.22	Total USBC Credit:	\$17,682.84
USBC Credit YTD:	\$16,494.62	Payments Issued YTD:	\$9,884.94
Average Monthly Credit Earned:	\$1,374.55	USBC Credit Balance:	\$7,797.90
		Payment Pending:	\$0.00

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
Tom Bischoff	11/20/2024	\$6,168.90	04/18/2024	\$3,716.04
			12/17/2024	\$6,168.90

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
133450	20125		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$30.92	\$28.31	\$28.31	\$28.39	\$29.03	\$29.03	\$28.97	\$28.84	\$28.84	\$0.00	\$0.00	\$0.00	\$260.64
133450	20125	DA31446914	KWH >	1,407,384	1,538,635	1,418,660	1,505,036	1,495,738	1,573,799	1,427,829	1,569,690	1,690,338	1,588,526	1,628,072	1,483,670	18,327,377
			KW >	2,520	2,647	2,640	2,586	2,693	2,740	2,690	2,715	2,902	2,719	2,760	2,926	2,712
			Elec Revenue >	163,432.88	166,944.84	156,454.99	163,258.94	177,222.20	185,283.92	170,685.48	180,784.83	194,406.69	182,585.49	173,360.12	\$38,416.81	\$1,952,837.19
			Total KWH	1,407,384	1,538,635	1,418,660	1,505,036	1,495,738	1,573,799	1,427,829	1,569,690	1,690,338	1,588,526	1,628,072	1,483,670	18,327,377
			Combined Average KW	2,520	2,647	2,640	2,586	2,693	2,740	2,690	2,715	2,902	2,719	2,760	2,926	2,712
			USBC Charge	\$1,266.65	\$1,384.77	\$1,276.79	\$1,354.53	\$1,346.16	\$1,416.42	\$1,285.05	\$1,412.72	\$1,521.30	\$1,429.67	\$1,465.26	\$1,335.30	\$16,494.62
			Total Elec Revenue	163,463.80	166,973.15	156,483.30	163,287.33	177,251.23	185,312.95	170,714.45	180,813.67	194,435.53	182,585.49	173,360.12	\$38,416.81	\$1,953,097.83





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

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

Date: February 18, 2025

Mr. Jon Schafer  
UCP/CGR Lead Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: Self-Directed USBC Progress Report for 2024 – American Chemet**

Dear Mr. Schafer:

Per the Montana Code Annotated (MCA) 69-8-402 & 69-8-214 and administrative rules, a NorthWestern Energy Large Customer claiming Universal Systems Benefit Program (USB) credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the DOR and to NorthWestern Energy by March 1<sup>st</sup> for the previous calendar year. **This letter and attachments are our official USB Annual Report for 2024.**

Along with our Large Customer 2024 USB Annual Report Summary below, I am attaching the following two documents:

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.
- Below is a summary of the USB credit reimbursement payments we received in 2024 and listing of historical USB projects requested.
- At year-end 2024, we had a 2024 USB credit balance of \$7,797.90 carried over into 2025, because we have a Request Balance.
- Attached is the USBC Large Customer Form B Credit Request form that we submitted to NorthWestern Energy in 2024.

<b>AMERICAN CHEMET</b>		
<b>LARGE CUSTOMER 2024 USB ANNUAL REPORT SUMMARY</b>		
<b>HISTORICAL SELF-DIRECT USB CREDIT REQUEST</b>		
<b>TOTAL USB CREDIT PAYMENTS RECEIVED IN 2024 REPORTING YEAR</b>		
2024 USB CREDIT PAYMENTS		<b>\$8,696.72</b>
2023 USB CREDIT PAYMENTS		<b>\$1,188.22</b>
<b>TOTAL USB PAYMENTS ISSUED IN 2024</b>		<b>\$9,884.94</b>
<b>PROJECT(S) RESULTING IN USB CREDIT REIMBURSEMENT IN 2024</b>		
<b>REQUEST BALANCE REMAINING AT YEAR-END 2024</b>		<b>\$0</b>

<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT</b>	<b>DATE CLAIM SUBMITTED</b>	<b>INDIVIDUAL CLAIM AMOUNT</b>
Lighting upgrades.	11/30/2009	\$18,897.53
Lighting upgrades	11/20/2024	\$6,168.90
<b>TOTAL AMOUNT OF ORIGINAL REQUESTS</b>		<b>\$25,066.43</b>

If you have any questions, please contact me at (406) 441-2037



Tom Bischoff  
Manager of Safety, Quality Assurance, and Global Regulatory Affairs  
American Chemet Corporation

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



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

Complete and mail or scan as a PDF and email to:

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

<b>DATE:</b>	<b>11/15/2024</b>	<b>CONTACT PERSON:</b>	<b>Tom Bischoff</b>
<b>NAME OF BUSINESS:</b>	<b>American Chemet</b>	<b>PHONE NUMBER:</b>	<b>406.441.2037</b>
<b>PROJECT CITY LOCATION:</b>	<b>East Helena, MT</b>	<b>CELL PHONE:</b>	<b>406.417.5715</b>
<b>MAILING ADDRESS:</b>	<b>PO Box 1160</b>	<b>FAX NUMBER:</b>	
<b>MAILING CITY, STATE, ZIP:</b>	<b>East Helena, MT 59635</b>	<b>E-MAIL ADDRESS:</b>	<b>tbischoff@chemet.com</b>

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>	<b>\$ 6,168.90</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach):  Lighting upgrades to LED lighting. 46 total lights	
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	183,000
<b>ESTIMATED KW DEMAND SAVINGS:</b>	16.008

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	<b>\$</b>
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	

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

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

**LARGE CUSTOMER:**

Signature:

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



February 14th, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached documents as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.**
- **Attached is the USBC Large Customer Form B Credit Request form that we submitted to NorthWestern Energy in 2024.**

If you have any questions, please contact me at (406)-444-7149.

Sincerely,

Levi Doherty  
Ash Grove Cement  
Electrical Planner

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100043	1050	DA31423622	KWH >	3,590,767	3,161,134	1,403,439	2,120,669	3,568,374	3,676,059	3,592,151	3,637,770	3,691,712	3,606,405	3,726,952	3,488,936	39,264,368
			KW >	5,823	5,780	3,102	5,633	5,909	5,857	5,659	5,745	5,711	5,953	5,780	5,719	5,556
			Elec Revenue >	\$26,167.36	\$23,020.78	\$11,331.59	\$18,656.60	\$24,857.50	\$25,190.01	\$24,506.15	\$25,236.04	\$25,393.22	\$25,477.31	\$25,658.96	\$13,299.75	\$268,795.27
			<b>Total KWH</b>	3,590,767	3,161,134	1,403,439	2,120,669	3,568,374	3,676,059	3,592,151	3,637,770	3,691,712	3,606,405	3,726,952	3,488,936	39,264,368
			<b>Combined Average KW</b>	5,823	5,780	3,102	5,633	5,909	5,857	5,659	5,745	5,711	5,953	5,780	5,719	5,556
			<b>USBC Charge</b>	\$3,231.69	\$2,845.02	\$1,263.10	\$1,908.60	\$3,211.54	\$3,308.45	\$3,232.94	\$3,273.99	\$3,322.54	\$3,245.76	\$3,354.26	\$3,140.04	\$35,337.93
			<b>Total Elec Revenue</b>	\$26,167.36	\$23,020.78	\$11,331.59	\$18,656.60	\$24,857.50	\$25,190.01	\$24,506.15	\$25,236.04	\$25,393.22	\$25,477.31	\$25,658.96	\$13,299.75	\$268,795.27





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

Complete and mail or scan as a PDF and email to:

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

<b>DATE:</b>	<b>11/19/2024</b>
<b>NAME OF BUSINESS:</b>	<b>Ash Grove</b>
<b>PROJECT CITY LOCATION:</b>	<b>Montana City, MT</b>
<b>MAILING ADDRESS:</b>	<b>100 Montana Highway 518</b>
<b>MAILING CITY, STATE, ZIP:</b>	<b>Montana City, MT 59635</b>

<b>CONTACT PERSON:</b>	<b>Levi Doherty</b>
<b>PHONE NUMBER:</b>	<b>406-444-7149</b>
<b>CELL PHONE:</b>	<b>406-521-0851</b>
<b>FAX NUMBER:</b>	
<b>E-MAIL ADDRESS:</b>	<b>Levi.Doherty@ashgrove.com</b>

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>	<b>\$ 117,652</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach): AC Cooler Vent Upgrades/New AC unit - \$8,540 Upgraded heaters and lights on new silo's/silo tops - \$10,511 Power monitoring upgrades for 2025 - \$14,000 Upgraded DA-12 Fan Motor and transition base - \$3,771 Upgrade Finish Mill Compressor Motor and West Kiln Drive Motor - \$80,830	
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	44,243 KWH Annually
<b>ESTIMATED KW DEMAND SAVINGS:</b>	5.5 KW

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	<b>\$</b>
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	

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

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

**LARGE CUSTOMER:**

Signature:

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



February 27, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Aspen Air**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Aspen Air's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Aspen Air's 2024 USBC account activities.
- At year-end 2024, Atlas Power had a credit balance of \$3,906.66. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.
- Attached is our Form B – USB Large USB Customer Credit Request forms that we submitted to NorthWestern Energy in 2024.

If you have any questions, please contact me at (406)318-8221

Sincerely,

Brad Cowen  
Plant Manager  
Aspen Air

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

## Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

## ASPEN AIR

## Account Summary

2023 Carryover Reservation:	\$359.00	YTD Elec Revenue:	\$156,987.41
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$4,054.00	Total Payment Requests:	\$48,054.00
Payment Requests Made YTD:	\$44,000.00	Current Request Balance:	\$2,007.81
2023 Carryover USBC Credit:	\$4,412.09	Total USBC Credit:	\$49,952.85
USBC Credit YTD:	\$45,540.76	Payments Issued YTD:	\$46,046.19
Average Monthly Credit Earned:	\$3,795.06	USBC Credit Balance:	\$3,906.66
		Payment Pending:	\$2,007.81

## Payment Requests Made

Submitted By	Date	Amount
Brad Cowan	11/25/2024	\$44,000.00

## Payments Issued

Date	Amount
04/19/2024	\$4,054.00
12/17/2024	\$41,992.19

## Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
3620321	415891	DA30277404	KWH >	3,239,194	3,954,888	3,471,955	3,410,554	4,939,920	4,013,586	3,758,436	4,667,882	4,821,388	4,658,229	5,278,466	4,336,929	50,551,427	
			KW >	8,361	8,091	8,739	8,190	8,127	8,361	8,190	7,830	7,929	8,127	8,262	7,992		8,183
			Elec Revenue >	\$13,287.75	\$12,619.92	\$12,800.41	\$12,223.99	\$13,540.62	\$12,929.05	\$12,537.08	\$13,013.85	\$13,245.99	\$13,287.10	\$13,973.47	\$11,489.78		\$154,949.01
3620322	94951	2000315528	KWH >	4,840	4,520	3,920	3,680	4,040	3,480	4,480	5,160	4,120	3,440	3,920	3,800	49,400	
			KW >	13	14	11	8	11	16	14	18	15	12	10	11		13
			Elec Revenue >	\$189.66	\$184.48	\$155.70	\$121.24	\$150.60	\$200.31	\$189.32	\$234.72	\$194.68	\$156.70	\$143.26	\$117.73		\$2,038.40
Total KWH				3,244,034	3,959,408	3,475,875	3,414,234	4,943,960	4,017,066	3,762,916	4,673,042	4,825,508	4,661,669	5,282,386	4,340,729	50,600,827	
Combined Average KW				8,374	8,105	8,750	8,198	8,138	8,377	8,204	7,848	7,944	8,139	8,272	8,003		8,196
USBC Charge				\$2,919.63	\$3,563.47	\$3,128.29	\$3,072.81	\$4,449.57	\$3,615.36	\$3,386.62	\$4,205.73	\$4,342.96	\$4,195.51	\$4,754.15	\$3,906.66		\$45,540.76
Total Elec Revenue				\$13,477.41	\$12,804.40	\$12,956.11	\$12,345.23	\$13,691.22	\$13,129.36	\$12,726.40	\$13,248.57	\$13,440.67	\$13,443.80	\$14,116.73	\$11,607.51		\$156,987.41

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

Complete and mail to:

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

DATE:	November 25th, 2024
NAME OF BUSINESS:	Aspen Air US LLC
CITY/TOWN LOCATION:	Lockwood, Montana
CONTACT PERSON:	Bradley R. Cowan
MAILING ADDRESS:	1524 Lockwood Road
CITY, STATE AND ZIP:	Billings, MT 59101
PHONE NUMBER:	(406) 259 – 9014 ext. 8221
FAX NUMBER:	(406) 259 – 9024
E-MAIL ADDRESS	bcowan@aspennaircorp.com

AMOUNT OF CREDIT REQUESTED:	\$44,000
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*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

<b>DESCRIPTION OF PROJECT(S)</b> (if more space is needed, please attach):
Piping to connect the waist nitrogen that is getting vented off and not used from one plant to the other that has more capacity to liquify nitrogen. Approximately 40,000 SCFH of nitrogen gas is now be liquefied by the expansion plant that would normally be vented. This results in 1-2 less starts of the expansion plant each year resulting in less wasted energy while running and not making product. Startup time is approximately 12 hours of running compressors until nitrogen purity is achieved.

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

ESTIMATED kWh SAVINGS:	
ESTIMATED KW SAVINGS:	31,000 kw annually

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

LARGE CUSTOMER:

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

FOR NORTHWESTERN ENERGY USE ONLY:

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

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

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



February 12, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Atlas Power**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Atlas Power's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Atlas Power's 2024 USBC account activities.
- At year-end 2024, Atlas Power had a credit balance of \$374,161.55. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.
- Attached are the two Form B – USB Large USB Customer Credit Request forms that we submitted to NorthWestern Energy in 2024.

If you have any questions, please contact me at 310.933.2157.

Sincerely,

Jared Rothman  
Chief of Staff

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

Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)





Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

ATLAS POWER

Account Summary			
2023 Carryover Reservation:	\$544,500.00	YTD Elec Revenue:	\$1,258,750.69
Reservations Made YTD:	\$375,000.00		
2023 Carryover Payment Request:	\$0.00	Total Payment Requests:	\$402,057.00
Payment Requests Made YTD:	\$402,057.00	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$291,047.66	Total USBC Credit:	\$776,218.55
USBC Credit YTD:	\$485,170.89	Payments Issued YTD:	\$402,057.00
Average Monthly Credit Earned:	\$40,430.91	USBC Credit Balance:	\$374,161.55
		Payment Pending:	\$0.00

Payment Requests Made		
Submitted By	Date	Amount
Lee Goodwyn	11/20/2024	\$398,657.00
Lee Goodwyn	11/25/2024	\$3,400.00

Payments Issued	
Date	Amount
12/17/2024	\$402,057.00

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3832125	1603	DA29174222	KWH >	46,810,412	36,764,280	44,087,096	48,278,648	47,685,600	47,464,300	44,628,896	43,754,284	45,229,248	40,567,520	47,496,268	46,312,212	539,078,764
			KW >	64,685	64,627	65,491	69,408	67,853	65,088	64,915	65,491	65,318	65,376	66,758	65,318	65,861
			Elec Revenue >	113,079.83	\$95,816.13	103,226.84	110,717.50	108,707.65	105,883.76	103,167.68	102,927.31	104,090.54	\$99,950.05	107,497.81	103,685.59	\$1,258,750.69
			Total KWH	46,810,412	36,764,280	44,087,096	48,278,648	47,685,600	47,464,300	44,628,896	43,754,284	45,229,248	40,567,520	47,496,268	46,312,212	539,078,764
			Combined Average KW	64,685	64,627	65,491	69,408	67,853	65,088	64,915	65,491	65,318	65,376	66,758	65,318	65,861
			USBC Charge	\$42,129.37	\$33,087.85	\$39,678.39	\$43,450.78	\$42,917.04	\$42,717.87	\$40,166.01	\$39,378.86	\$40,706.32	\$36,510.77	\$42,746.64	\$41,680.99	\$485,170.89
			Total Elec Revenue	113,079.83	\$95,816.13	103,226.84	110,717.50	108,707.65	105,883.76	103,167.68	102,927.31	104,090.54	\$99,950.05	107,497.81	103,685.59	\$1,258,750.69



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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	2/24/24	CONTACT PERSON:	Lee Goodwyn
NAME OF BUSINESS:	Atlas Power	PHONE NUMBER:	406-350-1621
PROJECT CITY LOCATION:	Butte	CELL PHONE:	406-350-1621
MAILING ADDRESS:	200 Technology Way	FAX NUMBER:	
MAILING CITY, STATE, ZIP:	Butte, MT 59701	E-MAIL ADDRESS:	Lee.goodwyn@atlaspower.io

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>		<b>\$ 3,400</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach): Replaced an older electric furnace that ran at 15KW with a newer unit that only consumed 10.4kW. The older unit was oversized for the small space that was heating.		
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	19872	
<b>ESTIMATED KW DEMAND SAVINGS:</b>	4.6	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	<b>\$ 0</b>
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	

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

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

**LARGE CUSTOMER:**

Signature:

Jared Rothman // Chief of Staff

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



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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/20/24	CONTACT PERSON:	Lee Goodwyn
NAME OF BUSINESS:	Atlas Power	PHONE NUMBER:	4063501621
PROJECT CITY LOCATION:	Butte	CELL PHONE:	4063501621
MAILING ADDRESS:	200 Technology Way	FAX NUMBER:	
MAILING CITY, STATE, ZIP:	Butte, MT 59701	E-MAIL ADDRESS:	Lee.Goodwyn@atlaspower.io

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>		<b>\$ 398,657.00</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach): Installation of power efficiency monitors and CTs on each switchgear for all 41 distribution transformers on our site. This will identify any inefficiency in the transformers and equipment operated by the transformer. This will eliminate less efficient equipment to be swapped for more energy-efficient equipment. We foresee a 100kW decrease in power consumption.  This will consume all of the 2023 USB credits.		
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	876,000 kWh	
<b>ESTIMATED KW DEMAND SAVINGS:</b>	100 kW	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	<b>\$ 0</b>
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	

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

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

**LARGE CUSTOMER:**

Signature:

Jared Rothman // Chief of Staff

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



## Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

### BARRETTS MINERALS

#### Account Summary

2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$108,343.44
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$366,352.71	Total Payment Requests:	\$366,352.71
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$350,260.52
2023 Carryover USBC Credit:	\$3,920.20	Total USBC Credit:	\$16,092.19
USBC Credit YTD:	\$12,171.99	Payments Issued YTD:	\$16,092.19
Average Monthly Credit Earned:	\$1,014.33	USBC Credit Balance:	\$0.00
		Payment Pending:	\$0.00

#### Payment Requests Made

Submitted By	Date	Amount

#### Payments Issued

Date	Amount
04/19/2024	\$9,778.10
07/09/2024	\$6,042.42
10/08/2024	\$271.67

#### Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
4131586	1624	DA29137686	KWH >	2,235,754	2,232,446	2,040,578	2,247,486	2,217,694	2,248,627	301,852	0	0	0	0	0	13,524,437
			KW >	4,380	4,255	4,445	4,476	4,506	4,091	3,192	0	0	0	0	0	4,192
			Elec Revenue >	\$17,752.22	\$16,649.23	\$16,229.99	\$17,101.11	\$17,036.88	\$16,421.73	\$7,152.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$108,343.44
			<b>Total KWH</b>	2,235,754	2,232,446	2,040,578	2,247,486	2,217,694	2,248,627	301,852	0	0	0	0	0	13,524,437
			<b>Combined Average KW</b>	4,380	4,255	4,445	4,476	4,506	4,091	3,192	0	0	0	0	0	4,192
			<b>USBC Charge</b>	\$2,012.18	\$2,009.20	\$1,836.52	\$2,022.74	\$1,995.92	\$2,023.76	\$271.67	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$12,171.99
			<b>Total Elec Revenue</b>	\$17,752.22	\$16,649.23	\$16,229.99	\$17,101.11	\$17,036.88	\$16,421.73	\$7,152.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$108,343.44

# H I G H   D I V I D E



## M I N E R A L S

February, 28<sup>th</sup>, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – High Divide Minerals (fna Barretts Minerals)**

Dear Mr. Schafer:

Please accept this letter and the attached document as High Divide Minerals' official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of High Divide Minerals' 2024 USBC account activities.**
- **High Divide Minerals did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.**
- **High Divide Minerals has a current request balance of \$350,260.52 (shown on the attached USBC Progress Report) for a past project that was submitted in 2007 to NorthWestern Energy, and to the DOR in our 2007 Annual Summary Report.**

**Please note that Barretts Minerals (High Divide Minerals) was sold in July of 2024, and is no longer participating the large customer USBC program.**

If you have any questions, please contact me at 406-660-1515

Sincerely,

Josh Regan  
General Manager

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





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

Feb 19<sup>th</sup>, 2025  
Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Billings Clinic**

Dear Mr. Schafer:

Please accept this letter and the attached document as Billings Clinic's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Billings Clinic's 2024 USBC account activities.
- Billing Clinic did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.
- Billings Clinic has a current request balance of \$1,896.79 (shown on the attached USBC Progress Report) for a past project that was submitted in 2022 to NorthWestern Energy, and to the DOR in our 2022 Annual Summary Report.

If you have any questions, please contact me at (406) 657-4035

Sincerely,

A handwritten signature in black ink, appearing to read "Justin Robison", written over a horizontal line.

Justin Robison  
Facilities Director

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





Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

BILLINGS CLINIC

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$2,779,857.90
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$72,921.02	Total Payment Requests:	\$72,921.02
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$47,115.22
2023 Carryover USBC Credit:	\$2,189.85	Total USBC Credit:	\$27,702.59
USBC Credit YTD:	\$25,512.74	Payments Issued YTD:	\$25,805.80
Average Monthly Credit Earned:	\$2,126.06	USBC Credit Balance:	\$1,896.79
		Payment Pending:	\$1,896.79

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$8,133.84
			07/09/2024	\$6,150.83
			10/08/2024	\$7,302.88
			12/17/2024	\$4,218.25

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100604	1608	KWH >		0	0	0	0	0	0	0	0	0	0	0	0	0
		KW >		0	0	0	0	0	0	0	0	0	0	0	0	0
		Elec Revenue >		\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$0.00	\$0.00	\$0.00	\$180.00
100604	1608	DA06613312	KWH >	1,252,664	1,262,699	1,159,870	1,278,945	1,276,474	1,466,914	1,613,693	1,848,563	1,733,875	1,541,244	1,374,812	1,199,608	17,009,361
			KW >	2,514	2,333	2,272	2,877	2,782	2,877	3,033	3,180	3,084	2,964	2,704	2,479	2,758
			Elec Revenue >	132,126.93	125,421.18	116,164.29	132,664.19	141,221.82	159,918.22	174,306.67	193,861.10	182,584.98	161,857.99	135,493.39	\$19,431.25	\$1,675,052.01
130466	18358	DA21629765	KWH >	480	400	400	440	400	400	440	440	440	360	400	440	5,040
			KW >	1	1	2	1	1	1	2	2	2	1	2	1	1
			Elec Revenue >	\$74.78	\$63.65	\$68.72	\$67.26	\$67.24	\$67.24	\$81.17	\$75.08	\$75.08	\$62.44	\$73.10	\$20.68	\$796.44
130466	18358	DG78821409	KWH >	55,360	48,880	49,840	51,840	52,880	50,800	63,360	78,880	72,240	58,240	52,320	56,560	691,200
			KW >	113	84	100	99	121	121	130	164	151	138	136	99	121
			Elec Revenue >	\$6,620.83	\$5,320.98	\$5,596.85	\$5,775.08	\$6,608.25	\$6,409.29	\$7,717.35	\$9,442.02	\$8,660.68	\$7,175.90	\$6,189.06	\$1,308.08	\$76,824.37
296460	100777	DA14206431	KWH >	3,380	4,460	4,140	2,800	0	0	0	0	0	0	0	0	14,780
			KW >	9	11	12	12	0	0	0	0	0	0	0	0	11
			Elec Revenue >	\$448.31	\$537.28	\$527.30	\$414.47	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,927.36
721115	303183	2000483721	KWH >	23,760	19,360	19,560	18,640	16,440	17,520	21,560	24,760	23,920	0	0	17,880	203,400
			KW >	38	41	41	42	46	57	74	85	73	0	0	38	54
			Elec Revenue >	\$2,643.01	\$2,208.20	\$2,234.16	\$2,242.88	\$2,174.46	\$2,414.63	\$2,990.47	\$3,399.66	\$3,175.85	\$0.00	\$0.00	\$509.83	\$23,993.15
722288	330974	2000296738	KWH >	0	0	0	0	0	0	945	951	1,092	1,135	1,561	2,001	7,685
			KW >	0	0	0	0	0	0	4	11	10	6	7	7	8
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$159.73	\$240.20	\$249.54	\$190.62	\$230.59	\$98.63	\$1,169.31

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
722288	330974	DA17754351	KWH >	1,928	1,789	1,808	1,639	1,717	1,252	0	0	0	0	0	0	10,133
			KW >	10	7	9	9	6	6	0	0	0	0	0	0	8
			Elec Revenue >	\$325.70	\$255.93	\$283.19	\$274.49	\$255.69	\$208.57	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,603.57
722289	330975	2000296739	KWH >	0	0	0	0	0	0	2,268	2,248	2,123	1,705	1,950	2,265	12,559
			KW >	0	0	0	0	0	0	8	6	7	7	11	12	9
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$326.17	\$305.48	\$302.60	\$257.26	\$322.97	\$165.15	\$1,679.63
722289	330975	DS84042718	KWH >	2,581	2,932	2,392	1,993	1,897	1,585	0	0	0	0	0	0	13,380
			KW >	11	16	11	10	10	9	0	0	0	0	0	0	11
			Elec Revenue >	\$395.34	\$465.78	\$363.58	\$318.62	\$323.47	\$275.64	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,142.43
723405	331995	2000484739	KWH >	0	1,680	1,800	1,700	1,640	1,380	1,400	3,100	2,740	1,720	1,500	1,360	20,020
			KW >	0	5	4	5	5	5	3	8	7	7	5	5	5
			Elec Revenue >	\$0.00	\$220.24	\$225.06	\$229.55	\$237.29	\$205.85	\$190.47	\$406.49	\$356.18	\$251.61	\$204.87	\$67.12	\$2,594.73
723405	331995	DA22274896	KWH >	2,420	0	0	0	0	0	0	0	0	0	0	0	2,420
			KW >	6	0	0	0	0	0	0	0	0	0	0	0	6
			Elec Revenue >	\$310.08	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$310.08
723634	332212	2000261996	KWH >	837	704	671	551	505	479	425	430	585	575	646	781	7,189
			KW >	1	1	1	1	1	1	1	1	1	1	1	1	1
			Elec Revenue >	\$104.11	\$89.11	\$86.01	\$78.21	\$75.76	\$73.03	\$67.39	\$67.03	\$81.48	\$78.07	\$81.84	\$19.45	\$901.49
723640	332218	2000315788	KWH >	126,300	115,980	125,340	115,560	118,800	123,120	120,000	111,180	134,820	0	0	125,640	1,216,740
			KW >	184	183	182	184	181	181	185	186	182	0	0	182	183
			Elec Revenue >	\$12,556.17	\$11,320.30	\$12,108.95	\$11,850.42	\$12,597.75	\$13,000.14	\$12,581.42	\$11,647.59	\$13,799.22	\$0.00	\$0.00	\$1,464.76	\$112,926.72
724461	333005		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$0.00	\$0.00	\$0.00	\$180.00
724461	333005	DG21203269	KWH >	379,832	392,087	357,667	375,793	351,620	365,850	355,736	377,389	390,003	374,528	376,507	370,493	4,467,505
			KW >	693	766	703	677	670	659	663	694	706	712	685	692	693
			Elec Revenue >	\$39,512.71	\$39,271.89	\$35,858.21	\$37,754.42	\$38,208.33	\$39,471.43	\$38,405.61	\$39,930.81	\$41,181.68	\$39,291.92	\$36,715.56	\$5,456.86	\$431,059.43
1064261	366753	2000315504	KWH >	24,480	21,360	22,560	21,200	22,560	27,520	31,200	30,640	34,640	0	0	22,560	258,720
			KW >	44	49	47	51	57	62	78	84	74	0	0	51	60
			Elec Revenue >	\$2,783.40	\$2,486.02	\$2,570.78	\$2,608.46	\$2,900.81	\$3,431.05	\$3,943.10	\$3,937.28	\$4,186.57	\$0.00	\$0.00	\$672.20	\$29,519.67
1658336	79097	2000289226	KWH >	0	0	773	708	689	569	573	586	632	749	851	994	7,124
			KW >	0	0	1	1	1	1	1	1	1	1	1	1	1
			Elec Revenue >	\$0.00	\$0.00	\$97.91	\$94.90	\$96.90	\$84.92	\$84.67	\$84.90	\$89.30	\$99.07	\$104.48	\$24.33	\$861.38
1658336	79097	DA14692134	KWH >	1,037	813	0	0	0	0	0	0	0	0	0	0	1,850
			KW >	1	1	0	0	0	0	0	0	0	0	0	0	1
			Elec Revenue >	\$124.40	\$101.37	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$225.77
1709487	420271	2000323902	KWH >	0	0	69,840	77,600	90,560	113,360	125,920	117,040	135,200	0	0	71,040	800,560
			KW >	0	0	193	218	236	253	267	263	254	0	0	167	231
			Elec Revenue >	\$0.00	\$0.00	\$8,391.62	\$9,883.78	\$11,664.55	\$14,064.59	\$15,271.99	\$14,258.33	\$15,838.03	\$0.00	\$0.00	\$2,183.90	\$91,556.79
1709487	420271	2000483915	KWH >	67,680	68,880	0	0	0	0	0	0	0	0	0	0	136,560
			KW >	144	148	0	0	0	0	0	0	0	0	0	0	146
			Elec Revenue >	\$7,966.48	\$7,865.94	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,832.42
1936593	322782	2000231750	KWH >	0	0	118,160	112,560	114,640	104,240	109,360	101,600	98,560	0	0	120,960	880,080
			KW >	0	0	206	209	205	207	204	244	213	0	0	205	212
			Elec Revenue >	\$0.00	\$0.00	\$12,868.20	\$12,837.81	\$13,576.70	\$12,611.24	\$12,938.52	\$12,582.44	\$11,907.64	\$0.00	\$0.00	\$2,715.47	\$92,038.02

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
1936593	322782	DG90055164	KWH >	136,880	109,120	0	0	0	0	0	0	0	0	0	0	246,000	
			KW >	280	245	0	0	0	0	0	0	0	0	0	0	0	263
			Elec Revenue >	\$15,942.93	\$12,581.26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$28,524.19
1959847	432808	DA13873456	KWH >	68,000	77,840	68,560	74,000	74,240	0	0	0	0	0	0	0	362,640	
			KW >	152	152	146	196	196	0	0	0	0	0	0	0	0	168
			Elec Revenue >	\$8,271.19	\$8,683.28	\$7,807.79	\$8,996.45	\$9,594.43	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$43,353.14
3125069	388205	2000483733	KWH >	0	0	10,920	10,760	11,960	11,760	15,280	18,680	17,000	0	0	11,040	107,400	
			KW >	0	0	28	34	39	40	53	58	51	0	0	31	42	
			Elec Revenue >	\$0.00	\$0.00	\$1,311.77	\$1,412.85	\$1,650.09	\$1,644.13	\$2,127.28	\$2,495.63	\$2,240.15	\$0.00	\$0.00	\$405.34	\$13,287.24	
3125069	388205	DA04895558	KWH >	12,240	11,760	0	0	0	0	0	0	0	0	0	0	24,000	
			KW >	32	32	0	0	0	0	0	0	0	0	0	0	0	32
			Elec Revenue >	\$1,541.48	\$1,438.82	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,980.30
3373216	64623	DD56118081	KWH >	45,480	43,440	40,720	46,400	42,800	48,760	34,360	48,480	39,600	41,800	33,520	50,000	515,360	
			KW >	82	91	90	90	104	122	122	135	141	132	135	132	115	
			Elec Revenue >	\$5,278.73	\$4,935.56	\$4,679.46	\$5,197.09	\$5,426.02	\$6,224.27	\$4,846.75	\$6,249.37	\$5,490.52	\$5,568.28	\$4,570.97	\$1,717.85	\$60,184.87	
3373218	257035	2000204417	KWH >	0	0	0	0	0	11,280	14,400	18,000	15,680	0	0	12,960	72,320	
			KW >	0	0	0	0	0	42	47	56	52	0	0	28	45	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,627.12	\$1,992.41	\$2,404.86	\$2,136.33	\$0.00	\$0.00	\$378.67	\$8,539.39	
3373218	257035	DA21973174	KWH >	11,240	11,040	12,680	12,160	11,000	0	0	0	0	0	0	0	58,120	
			KW >	25	28	31	32	33	0	0	0	0	0	0	0	0	30
			Elec Revenue >	\$1,387.18	\$1,320.64	\$1,503.37	\$1,475.06	\$1,481.71	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,167.96
3461984	370680	2000485252	KWH >	0	0	0	8,240	8,640	9,120	10,480	10,720	9,200	0	7,800	8,000	72,200	
			KW >	0	0	0	23	23	28	30	31	31	0	22	20	26	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$1,062.35	\$1,132.77	\$1,237.48	\$1,383.10	\$1,410.26	\$1,259.39	\$0.00	\$957.52	\$272.82	\$8,715.69	
3461984	370680	DD49232644	KWH >	8,520	9,080	8,040	0	0	0	0	0	0	0	0	0	25,640	
			KW >	20	20	20	0	0	0	0	0	0	0	0	0	0	20
			Elec Revenue >	\$1,038.91	\$1,059.47	\$969.31	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,067.69
3461985	380805	2000215717	KWH >	0	0	0	751	803	917	1,338	1,333	1,187	973	716	729	8,747	
			KW >	0	0	0	4	4	6	6	6	6	5	3	2	5	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$136.64	\$143.06	\$172.85	\$213.54	\$209.91	\$197.44	\$159.27	\$114.03	\$33.48	\$1,380.22	
3461985	380805	DA04732494	KWH >	751	808	711	0	0	0	0	0	0	0	0	0	2,270	
			KW >	2	2	2	0	0	0	0	0	0	0	0	0	0	2
			Elec Revenue >	\$114.98	\$113.60	\$101.02	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$329.60
3461986	370679	2000215718	KWH >	0	0	0	876	854	744	927	970	1,065	1,177	972	887	8,472	
			KW >	0	0	0	2	2	3	3	3	3	3	3	2	3	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$118.12	\$118.90	\$127.01	\$142.98	\$146.55	\$155.53	\$159.40	\$139.72	\$30.84	\$1,139.05	
3461986	370679	DG21490226	KWH >	1,092	1,096	918	0	0	0	0	0	0	0	0	0	3,106	
			KW >	2	2	2	0	0	0	0	0	0	0	0	0	0	2
			Elec Revenue >	\$135.84	\$132.75	\$116.80	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$385.39
3575583	628098	2000295525	KWH >	0	9,196	8,350	7,893	8,225	8,322	9,322	11,286	9,725	0	0	8,372	80,691	
			KW >	0	24	22	24	24	26	29	30	28	0	0	24	26	
			Elec Revenue >	\$0.00	\$1,118.59	\$1,018.64	\$1,012.48	\$1,100.79	\$1,142.50	\$1,265.72	\$1,443.12	\$1,282.49	\$0.00	\$0.00	\$313.84	\$9,698.17	
3575583	628098	DA22680445	KWH >	8,172	0	0	0	0	0	0	0	0	0	0	0	8,172	
			KW >	25	0	0	0	0	0	0	0	0	0	0	0	0	25
			Elec Revenue >	\$1,108.13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,108.13

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
3656896	380804	2000230639	KWH >	0	0	0	692	729	762	1,041	984	899	737	750	812	7,406	
			KW >	0	0	0	4	4	5	6	5	4	4	4	4	4	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$130.90	\$133.70	\$147.88	\$183.97	\$167.37	\$153.10	\$126.26	\$125.93	\$59.03	\$1,228.14	
3656896	380804	DA04732493	KWH >	924	912	835	0	0	0	0	0	0	0	0	0	2,671	
			KW >	5	5	4	0	0	0	0	0	0	0	0	0	0	5
			Elec Revenue >	\$165.14	\$155.32	\$139.38	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$459.84
3734020	642102	2000483918	KWH >	18,940	13,960	13,120	12,440	9,420	6,640	5,920	5,680	7,340	0	0	15,500	108,960	
			KW >	120	106	85	85	86	17	16	12	15	0	0	95	64	
			Elec Revenue >	\$3,315.44	\$2,570.15	\$2,225.35	\$2,228.71	\$2,009.33	\$862.87	\$780.58	\$693.95	\$891.55	\$0.00	\$0.00	\$1,223.21	\$16,801.14	
3879912	655018	2000296258	KWH >	7,160	6,080	6,280	5,320	5,640	5,560	5,240	6,200	5,120	5,040	5,800	6,680	70,120	
			KW >	14	14	13	15	14	16	15	16	15	13	15	15	15	15
			Elec Revenue >	\$838.76	\$717.78	\$722.45	\$691.02	\$728.69	\$744.35	\$695.49	\$793.12	\$679.75	\$623.07	\$696.82	\$201.68	\$8,132.98	
Total KWH			2,262,138	2,236,356	2,105,955	2,241,501	2,225,133	2,378,854	2,545,188	2,820,140	2,737,686	2,029,983	1,860,105	2,107,562	27,550,601		
Combined Average KW			4,528	4,367	4,227	4,905	4,851	4,745	4,980	5,281	5,111	3,994	3,734	4,293	5,409		
USBC Charge			\$2,035.91	\$2,012.71	\$1,895.37	\$2,017.36	\$2,002.64	\$2,140.98	\$2,290.65	\$2,538.14	\$2,463.94	\$1,826.99	\$1,674.10	\$1,896.79	\$24,795.58		
Total Elec Revenue			245,170.96	230,495.09	218,080.17	239,596.21	253,568.51	266,206.30	282,736.55	306,292.55	297,015.08	215,901.16	186,020.85	\$38,774.47	\$2,779,857.90		



**Boeing Helena  
3200 Skyway Drive  
Helena, MT 59602**

February 18, 2025

Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached document as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.**
- **We did not submit any USBC Form B Large Customer Credit Request Forms (USBC Projects) for 2024.**
- **We had a current request balance of \$ 5,888.11 (shown on the attached USBC Progress Report) for a past project that was submitted in 2019 to NorthWestern Energy, and to the MDOR in our 2019 Annual Summary Report.**
- **At year-end 2024, we had a credit balance of \$703.96 (carried over into 2025).**

If you have any questions, please contact me at **(406) 417-5511**

Sincerely,

A handwritten signature in black ink that reads "Suzanne Eslick". The signature is written in a cursive, flowing style.

Suzanne Eslick  
Boeing Helena  
Project Manager

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
[rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)



Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

BOEING OF HELENA

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$687,070.91
Reservations Made YTD:	\$769.32		
2023 Carryover Payment Request:	\$5,888.11	Total Payment Requests:	\$5,888.11
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$496.44	Total USBC Credit:	\$6,592.07
USBC Credit YTD:	\$6,095.63	Payments Issued YTD:	\$5,888.11
Average Monthly Credit Earned:	\$507.97	USBC Credit Balance:	\$703.96
		Payment Pending:	\$0.00

Payment Requests Made		
Submitted By	Date	Amount

Payments Issued	
Date	Amount
04/19/2024	\$1,875.21
07/09/2024	\$1,644.94
10/08/2024	\$1,715.52
12/17/2024	\$652.44

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3161063	602478	DA31423670	KWH >	433,003	571,613	527,359	565,283	616,780	645,659	653,888	694,414	557,838	439,116	569,130	498,868	6,772,951
			KW >	1,205	1,158	1,175	1,283	1,387	1,590	1,676	1,473	1,378	1,456	1,318	1,209	1,359
			Elec Revenue >	\$47,519.55	\$57,546.18	\$53,882.43	\$60,350.18	\$68,567.84	\$72,798.75	\$73,441.81	\$74,901.96	\$61,616.82	\$49,468.08	\$57,576.33	\$9,400.98	\$687,070.91
			Total KWH	433,003	571,613	527,359	565,283	616,780	645,659	653,888	694,414	557,838	439,116	569,130	498,868	6,772,951
			Combined Average KW	1,205	1,158	1,175	1,283	1,387	1,590	1,676	1,473	1,378	1,456	1,318	1,209	1,359
			USBC Charge	\$389.70	\$514.45	\$474.62	\$508.75	\$555.10	\$581.09	\$588.50	\$624.97	\$502.05	\$395.20	\$512.22	\$448.98	\$6,095.63
			Total Elec Revenue	\$47,519.55	\$57,546.18	\$53,882.43	\$60,350.18	\$68,567.84	\$72,798.75	\$73,441.81	\$74,901.96	\$61,616.82	\$49,468.08	\$57,576.33	\$9,400.98	\$687,070.91





1900 10<sup>th</sup> Street NE Great Falls, MT 59404

Phone: 406-761-4100 Main Fax: 406-761-0174 Refinery Building Fax: 406-761-0777 [www.calumetspecialty.com](http://www.calumetspecialty.com)

February 26, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached documents as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.**
- **At year-end 2024, we had a credit balance of \$133,211.47. We submitted a Large Customer Form A USBC Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.**
- **Attached is the USBC Large Customer Form B Credit Request form that we submitted to NorthWestern Energy in 2024.**

If you have any questions, please contact me at 503-360-4986

Sincerely,

Emily Bertsch  
Calumet  
Executive Office Administrator

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
[rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)

## Self-Directed USBC Progress Report for 2024

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
2015680	135013	DG61355591	KWH >	21,840	16,720	17,600	14,400	14,560	10,960	11,200	9,040	9,600	10,720	12,160	16,400	165,200
			KW >	48	36	40	36	34	25	34	30	30	32	29	36	34
			Elec Revenue >	\$2,562.84	\$1,924.58	\$2,041.44	\$1,800.94	\$1,837.47	\$1,381.57	\$1,496.35	\$1,236.87	\$1,289.09	\$1,356.84	\$1,417.30	\$470.99	\$18,816.28
2119616	438712	DG55885198	KWH >	26,520	21,840	19,680	17,580	15,840	14,580	14,760	14,520	14,820	13,860	17,280	21,540	212,820
			KW >	71	64	65	60	57	55	51	51	49	52	60	64	58
			Elec Revenue >	\$3,285.64	\$2,723.31	\$2,543.66	\$2,412.64	\$2,246.33	\$2,102.98	\$2,041.01	\$2,008.91	\$2,014.06	\$1,875.80	\$2,237.73	\$840.61	\$26,332.68
3098480	598626	DG57846948	KWH >	23,760	16,560	15,480	15,480	17,640	15,480	19,080	16,920	17,280	15,480	15,840	17,640	206,640
			KW >	61	54	50	50	54	57	54	57	50	43	50	54	53
			Elec Revenue >	\$2,906.09	\$2,128.69	\$1,989.45	\$2,083.62	\$2,380.50	\$2,219.48	\$2,484.69	\$2,316.33	\$2,258.65	\$1,902.65	\$1,993.69	\$700.23	\$25,364.07
3399083	304987	DA04974716	KWH >	3,300	2,820	2,820	2,520	3,020	2,740	4,240	4,020	3,220	2,880	2,680	2,620	36,880
			KW >	11	8	8	7	10	10	18	17	13	11	10	11	11
			Elec Revenue >	\$452.09	\$362.16	\$359.64	\$331.23	\$426.85	\$400.07	\$637.48	\$606.59	\$483.84	\$403.68	\$370.81	\$141.77	\$4,976.21
Total KWH			13,109,769	13,195,174	11,827,918	12,262,731	12,873,036	13,099,047	12,676,243	12,932,169	12,826,601	12,543,116	10,060,426	10,606,475	148,012,705	
Combined Average KW			18,337	18,643	18,253	18,572	18,773	18,686	18,239	18,000	17,978	18,095	18,192	19,941	18,476	
USBC Charge			\$11,798.79	\$11,875.67	\$10,645.13	\$11,036.45	\$11,585.74	\$11,789.14	\$11,408.62	\$11,638.97	\$11,543.94	\$11,288.80	\$9,054.38	\$9,545.84	\$133,211.47	
Total Elec Revenue			\$84,036.99	\$79,818.05	\$73,952.17	\$75,545.07	\$78,169.00	\$77,891.84	\$76,778.34	\$78,433.19	\$77,725.68	\$76,185.54	\$66,847.99	\$31,152.95	\$876,536.81	



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

Complete and mail or scan as a PDF and email to:

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

<b>DATE REQUESTED:</b>		<b>CONTACT PERSON:</b>	Emily Bertsch
<b>NAME OF BUSINESS:</b>	Calumet Montana Refining LLC	<b>PHONE NUMBER:</b>	406.454.9817
<b>PROJECT CITY LOCATION:</b>	Great Falls	<b>CELL PHONE:</b>	503.360.4986
<b>MAILING ADDRESS:</b>	1900 10th St NE	<b>FAX NUMBER:</b>	406-761-0174
<b>MAILING CITY, STATE, ZIP:</b>	Great Falls, MT 59404	<b>E-MAIL ADDRESS:</b>	<a href="mailto:emily.bertsch@calumetspecialty.com">emily.bertsch@calumetspecialty.com</a>

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>	<b>\$ 82,550.00</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach): 15mm Fin Fan Motors, PTU hot oil motor, RDU heater motor, steam heater motor, Isom motor, manlift motor at FCC, utilities low pressure motor, pump motor, MRC tank farm lighting,	
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	112,635
<b>ESTIMATED KW DEMAND SAVINGS:</b>	23

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	<b>\$ 31,816.43</b>
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	Energy Share-per Emily Bertsch

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

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

**LARGE CUSTOMER:**

**Signature:**

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

**NorthWestern  
Energy**

*Delivering a Bright Future*



PO Number:4501344681  
Date :08/13/2024

VENDOR:10009817  
DYKMAN ELECTRICAL INC  
2323 FEDERAL WAY  
BOISE,ID,83705-4462  
888-284-3953  
509-536-7999  
salesspo@dykman.com



### Purchase Order

PO Number: 4501344681  
Date : 08/13/2024  
Buyer : Jeannie Blacker  
Tel.No : 406-761-4100  
Fax.No : 406-453-0318  
Email:jeannie.blacker@calumetspecialty.com  
For payment inquiries please contact  
vendoring@calumetspecialty.com

Please deliver to:  
MONTANA RENEWABLES, LLC  
1807 3RD ST NW  
GREAT FALLS, MT, 59404-1955

Please Invoice:  
CALUMET/ ACCOUNTS PAYABLE  
1060 N Capitol Ave Suite 6-401  
Indianapolis, IN 46204-1044  
Email:  
CALUMETREFAP@CALUMETSPECIALTY.COM

Currency:USD

Terms of Payment : CN45 Net 45

Dykman Inc.  
Quote Date: 8/1/24  
15 MM Fin Fan Motors 15mm fin fans FF-381518/381418  
Matthew Peterson

All services, equipment and materials to be provided by Contractor as specified within this Order shall be subject to and governed by the terms and conditions of Purchase Order between Company and Contractor. In the event that any terms and conditions contained or referenced in this Service Order conflict with those contained in the Purchase Order, the Purchase Order terms and conditions shall prevail to the extent of such conflict.

Changes affecting the cost of a Purchase Order (T&M, Lump Sum, NTE) must be authorized and issued in writing, in advance, by the authorized representative of Company named in the Purchase Order. Company will not compensate Contractor for such changes without an authorized and issued change to the Purchase Order pursuant to the process indicated herein.

\*\*Copies of signed service reports or timesheets, referencing Calumet work order number (if applicable), must be forwarded to Project Manager to be approved, and must be signed by both parties\*. Then they need to be submitted with a cover invoice to Accounts Payable for payment.

All Sub-Contractors must be disclosed to Calumet prior to being onsite and must be registered in ISN and be TWIC Compliant.

#

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
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PO Number:4501344681  
Date :08/13/2024

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
Your Reference CONFIRMED						
10	701051	2.000	EA	1,491.00000 0	2,982.00	09/30/2024
	Model# 0254SDSR41A-P					
	Model# 0254SDSR41A-P					
	25HP-1800RPM-TEFC-284T					
	3PHASE 230/460V					
	VFD RATED Toshiba					
	Class I Div II					

Terms of Delivery: DAP DELIVERED AT PLACE

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Total Order Value	USD	2,982.00
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By accepting this purchase order, you agree that the applicable Purchase Order Terms and Conditions at <http://www.calumetspecialty.com/customer-service/purchase-terms>, are incorporated into this order by reference, and shall govern all sales of goods and provision of services described in this order.



PO Number:4501331491  
Date :07/24/2024

VENDOR:10009817  
DYKMAN ELECTRICAL INC  
5711 E SHARP AVE STE B  
SPOKANE VALLEY,WA,99212-0900



### Change Order

Alteration Date: 12/03/2024  
PO Number: 4501331491  
Date : 07/24/2024  
Buyer : Brianne Smith  
Tel.No : 317-957-5336  
Fax.No :  
Email:brianne.smith@calumetspecialty.com  
For payment inquiries please contact  
vendoring@calumetspecialty.com

Please deliver to:  
Calumet Refining LLC  
MRO Items  
1807 3rd St NW  
Great Falls, MT, 59404

Please Invoice:  
CALUMET/ ACCOUNTS PAYABLE  
1060 N Capitol Ave Suite 6-401  
Indianapolis, IN 46204-1044  
Email:  
CALUMETREFAP@CALUMETSPECIALTY.COM

Currency:USD

Terms of Payment : CN30 Net 30

MRO ORDER 692853  
\* FEDEX 141309498 \*

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
Your Reference CONFIRMED						
10	571017	1.000	EA	5,674.00000 0	5,674.00	09/07/2024
	MOTOR,TEFC,I,60HP,3550RPM,364TSC,460V, 60 Vendor material number: 0602XDSB42B-P MOTOR,TEFC,INDUCTION,60HP,3550RPM,364TSC FRAME,460V,60HZ,2-POLE,69-AMP,3 PHASE,IP56,CAST IRON,CONTINUOUS DUTY,1.15SF,CLASS-F,FOOTED C-FACE,F1 ASSEMBLY,40*C,DRAWING:MDSL V086-07,TOSHIBA INTL CORP,0602XDSB42B-P					

Terms of Delivery: FCA FREE CARRIER

20	571018	1.000	EA	2,701.00000 0	2,701.00	09/07/2024
	MOTOR,TEFC,I,30HP,1770RPM,286TC,460V,6 0 Vendor material number: 0304XDSB42A-P MOTOR,TEFC,INDUCTION,30HP,1770RPM,286TC FRAME,460V,60HZ,4-POLE,36-AMP,3 PHASE,IP56,CAST IRON,CONTINUOUS DUTY,1.15SF,CLASS-F,FOOTED					





PO Number:4501331491  
Date :07/24/2024

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
	C-FACE, F1 ASSEMBLY,40*C,DRAWING:MDSLV085-05,TOSHIBA INTL CORP, 0304XDSB42A-P					

Terms of Delivery: FCA FREE CARRIER

Total Order Value	USD	8,375.00
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By accepting this purchase order, you agree that the applicable Purchase Order Terms and Conditions at <http://www.calumetspecialty.com/customer-service/purchase-terms>, are incorporated into this order by reference, and shall govern all sales of goods and provision of services described in this order.



PO Number:4501221678  
Date :02/20/2024

VENDOR:10009817  
DYKMAN ELECTRICAL INC  
5711 E SHARP AVE STE B  
SPOKANE VALLEY, WA, 99212-0900



### Purchase Order

PO Number: 4501221678  
Date : 02/20/2024  
Buyer : Kim Heagy  
Tel.No : 406-454-9833  
Fax.No : 406-453-0318  
Email:kimberly.heagy@calumetspecialty.com  
For payment inquiries please contact  
vendoring@calumetspecialty.com

Please deliver to:  
CALUMET REFINING, LLC  
MONTANA REFINING FUELS  
1807 3RD ST NW  
GREAT FALLS, MT, 59404-1955

Please Invoice:  
CALUMET/ ACCOUNTS PAYABLE  
1060 N Capitol Ave Suite 6-401  
Indianapolis, IN 46204-1044  
Email:  
CALUMETREFAP@CALUMETSPECIALTY.COM

Currency:USD

Terms of Payment : CN45 Net 45

Dykman  
Order #0677833  
Toshiba Pump Motor-Utilities  
50% CMR 50% MRL  
For Matt Peterson

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
Your Reference confirmed						
10	701065	1.000	EA	11,338.0000 00	11,338.00	04/06/2024
	2004SDSB41B-P Toshiba TEFC Motor - Utili					

Terms of Delivery: DAP DELIVERED AT PLACE

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Total Order Value USD 11,338.00

By accepting this purchase order, you agree that the applicable Purchase Order Terms and Conditions at <http://www.calumetspecialty.com/customer-service/purchase-terms>, are incorporated into this order by reference, and shall govern all sales of goods and provision of services described in this order.



PO Number:4501420313  
Date :12/03/2024

VENDOR:10009817  
DYKMAN ELECTRICAL INC  
5711 E SHARP AVE STE B  
SPOKANE VALLEY, WA, 99212-0900



### Purchase Order

PO Number: 4501420313  
Date : 12/03/2024  
Buyer : Kim Heagy  
Tel.No : 406-454-9833  
Fax.No : 406-453-0318  
Email:kimberly.heagy@calumetspecialty.com  
For payment inquiries please contact  
vendoring@calumetspecialty.com

Please deliver to:  
MONTANA RENEWABLES, LLC  
1807 3RD ST NW  
GREAT FALLS, MT, 59404-1955

Please Invoice:  
CALUMET/ ACCOUNTS PAYABLE  
1060 N Capitol Ave Suite 6-401  
Indianapolis, IN 46204-1044  
Email:  
CALUMETREFAP@CALUMETSPECIALTY.COM

Currency:USD

Terms of Payment : CN45 Net 45

Dykman, Inc.  
Quote in Email Attached to Req.  
RDU P411115/410815-Steam  
Heater Motor  
100% MRL  
For Matt Peterson

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
10	701065	1.000	EA	2,790.00000 0	2,790.00	01/05/2025
	RDU P411115/410815-Steam Heater Motor					

Terms of Delivery: DAP DELIVERED AT PLACE

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Total Order Value	USD	2,790.00
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By accepting this purchase order, you agree that the applicable Purchase Order Terms and Conditions at <http://www.calumetspecialty.com/customer-service/purchase-terms>, are incorporated into this order by reference, and shall govern all sales of goods and provision of services described in this order.



PO Number:4501215561  
Date :02/09/2024

VENDOR:10009817  
DYKMAN ELECTRICAL INC  
2323 FEDERAL WAY  
BOISE, ID, 83705-4462  
888-284-3953  
509-536-7999  
salesspo@dykman.com



### Purchase Order

PO Number: 4501215561  
Date : 02/09/2024  
Buyer : Wendy Fisher  
Tel.No :  
Fax.No :  
Email:wendy.fisher@calumetspecialty.com  
For payment inquiries please contact  
vendoring@calumetspecialty.com

Please deliver to:  
CALUMET REFINING, LLC  
MONTANA REFINING FUELS  
1807 3RD ST NW  
GREAT FALLS, MT, 59404-1955

Please Invoice:  
CALUMET/ ACCOUNTS PAYABLE  
1060 N Capitol Ave Suite 6-401  
Indianapolis, IN 46204-1044  
Email:  
CALUMETREFAP@CALUMETSPECIALTY.COM

Currency:USD

Terms of Payment : CN45 Net 45

Dykman  
Quote #0676944  
Pump Motor - Utilities  
50% CMR 50% MRL  
For Matt Peterson

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
Your Reference confirmed						
10	701065	1.000	EA	12,992.0000 00	12,992.00	03/25/2024
	2004SDSB42B-P Motor TSH-200HP-18-TEFC-44					

Terms of Delivery: DAP DELIVERED AT PLACE

-----  
Total Order Value USD 12,992.00

By accepting this purchase order, you agree that the applicable Purchase Order Terms and Conditions at <http://www.calumetspecialty.com/customer-service/purchase-terms>, are incorporated into this order by reference, and shall govern all sales of goods and provision of services described in this order.



PO Number:4501376465  
Date :09/27/2024

VENDOR:10009817  
DYKMAN ELECTRICAL INC  
5711 E SHARP AVE STE B  
SPOKANE VALLEY, WA, 99212-0900



### Change Order

Alteration Date: 12/03/2024  
PO Number: 4501376465  
Date : 09/27/2024  
Buyer : Brianne Smith  
Tel.No : 317-957-5336  
Fax.No :  
Email:brianne.smith@calumetspecialty.com  
For payment inquiries please contact  
vendoring@calumetspecialty.com

Please deliver to:  
Calumet Refining LLC  
MRO Items  
1807 3rd St NW  
Great Falls, MT, 59404

Please Invoice:  
CALUMET/ ACCOUNTS PAYABLE  
1060 N Capitol Ave Suite 6-401  
Indianapolis, IN 46204-1044  
Email:  
CALUMETREFAP@CALUMETSPECIALTY.COM

Currency:USD

Terms of Payment : CN30 Net 30

ORDER 0704172

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
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Your Reference CONFIRMED

10	571388	1.000	EA	3,381.000000	3,381.00	11/29/2024
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MOTOR,TEFC,CD,40HP,3600RPM,324TS,460V/  
60

Vendor material number: 0402XDSB41B-P

MOTOR,TEFC,CONTINUOUS DUTY,40HP,3600RPM,324TS,460V/60HZ,F1  
ASSEMBLY,3-

PHASE, 2-POLE, DESIGN-B, CAST IRON, CLASS-F

INSULATION,IP56,1.15SF,47A,40

\*C,DRAWING MDSL082-06,TOSHIBA INTL CORP,0402XDSB41B-P

Terms of Delivery: DAP DELIVERED AT PLACE

Total Order Value	USD	3,381.00
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By accepting this purchase order, you agree that the applicable Purchase Order Terms and Conditions at <http://www.calumetspecialty.com/customer-service/purchase-terms>, are incorporated into this order by reference, and shall govern all sales of goods and provision of services described in this order.



PO Number:4501308717  
Date :06/17/2024

VENDOR:10009817  
DYKMAN ELECTRICAL INC  
5711 E SHARP AVE STE B  
SPOKANE VALLEY,WA, 99212-0900



### Change Order

Alteration Date: 12/03/2024  
PO Number: 4501308717  
Date : 06/17/2024  
Buyer : Brianne Smith  
Tel.No : 317-957-5336  
Fax.No :  
Email:brianne.smith@calumetspecialty.com  
For payment inquiries please contact  
vendoring@calumetspecialty.com

Please deliver to:  
Calumet Refining LLC  
MRO Items  
1807 3rd St NW  
Great Falls, MT, 59404

Please Invoice:  
CALUMET/ ACCOUNTS PAYABLE  
1060 N Capitol Ave Suite 6-401  
Indianapolis, IN 46204-1044  
Email:  
CALUMETREFAP@CALUMETSPECIALTY.COM

Currency:USD

Terms of Payment : CN30 Net 30

MRO ORDER 692110 NON EXPLOSIVE PROOF MOTOR  
\* FEDEX 141309498 / UPS 598944 \*

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
------	---------------------------------	-----	-----	------------	-------------	------------------

Your Reference CONFIRMED

10	568472	1.000	EA	11,331.0000 00	11,331.00	08/08/2024
----	--------	-------	----	-------------------	-----------	------------

MOTOR,TEFC,200HP,3572RPM,447TS,460/60C  
Y

Vendor material number: TECO:EP2002

"MOTOR,TEFC,200HP,3572RPM,447TS FRAME,460V/60CY,221A, CODE  
G,INSULATION F,DESIGN B,1.15SF,2POLE,3 PHASE,CLASS II DIV  
2,GROUP F&G,NEMA,TECO,WESTINGHOUSE ELECTRIC CO,AEHH8B-10,DYKMAN  
ELECTRICAL,TECO:EP2002,TECO-MAXE1-200HP-36-TEFC-447TS"

Terms of Delivery: FOB FREE ON BOARD

Total Order Value	USD	11,331.00
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By accepting this purchase order, you agree that the applicable Purchase Order Terms and Conditions at <http://www.calumetspecialty.com/customer-service/purchase-terms>, are incorporated into this order by reference, and shall govern all sales of goods and provision of services described in this order.



PO Number:4501210395  
Date :02/01/2024

VENDOR:10009817  
DYKMAN ELECTRICAL INC  
5711 E SHARP AVE STE B  
SPOKANE VALLEY, WA,99212-0900



### Purchase Order

PO Number: 4501210395  
Date : 02/01/2024  
Buyer : Kim Heagy  
Tel.No : 406-454-9833  
Fax.No : 406-453-0318  
Email:kimberly.heagy@calumetspecialty.com  
For payment inquiries please contact  
vendoring@calumetspecialty.com

Please deliver to:  
CALUMET REFINING, LLC  
MONTANA REFINING FUELS  
1807 3RD ST NW  
GREAT FALLS, MT, 59404-1955

Please Invoice:  
CALUMET/ ACCOUNTS PAYABLE  
1060 N Capitol Ave Suite 6-401  
Indianapolis, IN 46204-1044  
Email:  
CALUMETREFAP@CALUMETSPECIALTY.COM

Currency:USD

Terms of Payment : CN45 Net 45

Dykman, Inc.  
Email Attached to Req  
Manlift Motor-FCC-W/O #1075230  
Add Freight- \*\*Ship Direct From Toshiba\*\*  
100% CMR  
For Matt Peterson

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
Your Reference confirmed						
10	701065	1.000	EA	2,505.000000 0	2,505.00	03/18/2024
0036SDBA42A-P Motor 3HP -1200 RPM-TEFC						

Terms of Delivery: DAP DELIVERED AT PLACE

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Total Order Value	USD	2,505.00
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By accepting this purchase order, you agree that the applicable Purchase Order Terms and Conditions at <http://www.calumetspecialty.com/customer-service/purchase-terms>, are incorporated into this order by reference, and shall govern all sales of goods and provision of services described in this order.





PO Number:4501332899  
Date :07/26/2024

VENDOR:10009817  
DYKMAN ELECTRICAL INC  
2323 FEDERAL WAY  
BOISE,ID,83705-4462  
888-284-3953  
509-536-7999  
salesspo@dykman.com



### Purchase Order

PO Number: 4501332899  
Date : 07/26/2024  
Buyer : Wendy Fisher  
Tel.No :  
Fax.No :  
Email:wendy.fisher@calumetspecialty.com  
For payment inquiries please contact  
vendoring@calumetspecialty.com

Please deliver to:  
CALUMET REFINING, LLC  
MONTANA REFINING FUELS  
1807 3RD ST NW  
GREAT FALLS, MT, 59404-1955

Please Invoice:  
CALUMET/ ACCOUNTS PAYABLE  
1060 N Capitol Ave Suite 6-401  
Indianapolis, IN 46204-1044  
Email:  
CALUMETREFAP@CALUMETSPECIALTY.COM

Currency:USD

Terms of Payment : CN45 Net 45

Dykman  
Quote #0696384  
Utilities P-07216 Motor  
50% CMR 50% MRL  
For Matt Peterson

Item	Material/Service Description	Qty	U/M	Unit Price	Order Value	Delivery Date
Your Reference confirmed						
10	701065	1.000	EA	3,381.00000 0	3,381.00	09/09/2024
	0402XDSB41B-P TSH-GLOBAL-841-40HP-36-TEF					

Terms of Delivery: DAP DELIVERED AT PLACE

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Total Order Value USD 3,381.00

By accepting this purchase order, you agree that the applicable Purchase Order Terms and Conditions at <http://www.calumetspecialty.com/customer-service/purchase-terms>, are incorporated into this order by reference, and shall govern all sales of goods and provision of services described in this order.

Copy of Invoice

Vendor	Recipient
CONSOLIDATED ELECTRICAL	
901 RIVER DRS	1060 N Capitol Ave Suite 6-401 46204-104
GREAT FALLS 59405-4056	Indianapolis US
US	IND
MT	

Invoice			
Reference	1085123	Document Date	10/08/2024
		Supply Date	

Basic Data

Bank Name	IBAN/SWIFT	WFBIUS66
Bank Number		
Bank Account		
Vendor VAT Number		
Vendor Tax Number		
Net Amount	USD	16,500.00
Tax Amount	USD	0.00
Unplanned costs	USD	0.00
Gross Amount	USD	16,500.00

Item Data

Line	Reference	Details	Quantity	Unit	Tax Rate	Net Price	Amount
00001	4501336990		10.00	EA	0.000	8,000.00	8,000.00
					%		
00002	4501336990		10.00	EA	0.000	8,500.00	8,500.00
					%		

**CASCADE ELECTRIC CO., INC.**  
**903 10<sup>th</sup> AVENUE NORTH**  
**P.O. Box 2909**  
**GREAT FALLS, MT 59403**  
**(406) 453-3285**

**DATE:** October 1, 2024

**PROJECT:** MRC Tank Farm Lighting Upgrade 4501370427

**PAY REQUEST:** #1

**TO:** Calumet  
1900 10<sup>th</sup> St NE  
Great Falls, MT 59404

**REQUEST FOR PAYMENT**

**TOTAL AMOUNTS:**

Contract Amount: \$6,975.00

**VALUE OF WORK COMPLETED:**

Total Work Completed to Date: \$ 546.00

**TOTAL DEDUCTIONS:**

Total of Previous Pay Requests: \$ 0

**BALANCE DUE:**

**\$ 546.00**

**CASCADE ELECTRIC CO., INC.**  
**903 10<sup>th</sup> AVENUE NORTH**  
**P.O. Box 2909**  
**GREAT FALLS, MT 59403**  
**(406) 453-3285**

**DATE:** October 1, 2024

**PROJECT:** MRC Tank Farm Lighting 42501270983

**PAYREQUEST:** #3

**TO:** Calumet  
1900 10<sup>th</sup> St NE  
Great Falls, MT 59404

**REQUEST FOR PAYMENT**

**TOTAL AMOUNTS:**

Contract Amount: \$9,575.00

**VALUE OF WORK COMPLETED:**

Total Work Completed to Date: \$9,575.00

**TOTAL DEDUCTIONS:**

Total of Previous Pay Requests: \$6,191.79

**BALANCE DUE:** **\$ 3,383.21**

Doc 1001402978  
5002103588

**CASCADE ELECTRIC CO., INC.**  
**903 10<sup>th</sup> AVENUE NORTH**  
**P.O. Box 2909**  
**GREAT FALLS, MT 59403**  
**(406) 453-3285**

**DATE:** October 1, 2024

**PROJECT:** MRC Tank Farm Lighting 42501270983

**PAY REQUEST:** #3

4501370427

**TO:** Calumet

1900 10<sup>th</sup> St NE

Great Falls, MT 59404

**REQUEST FOR PAYMENT**

**TOTAL AMOUNTS:**

Contract Amount: \$9,575.00

**VALUE OF WORK COMPLETED:**

Total Work Completed to Date: \$9,575.00

**TOTAL DEDUCTIONS:**

Total of Previous Pay Requests: \$ 6,191.79

**BALANCE DUE:** \$3,383.21



February 11, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: Jon.Schafer@mt.gov

**RE: 2024 USB Annual Summary Report – CHS**

Dear Mr. Schafer:

Please accept this letter and the attached document as CHS's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of CHS's 2024 USBC account activities.**
- **CHS did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.**
- **CHS has a current request balance of \$2,276,954.93 (shown on the attached USBC Progress Report) for a past project that was submitted in 2006 to NorthWestern Energy, and to the DOR in our 2006 Annual Summary Report.**

If you have any questions, please contact me at 406-628-5575.

Sincerely,

Bryant Beck  
Electrical Engineer, CHS Laurel Refinery

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





Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

CHS

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$4,275,518.38
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$2,615,721.25	Total Payment Requests:	\$2,615,721.25
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$2,276,954.93
2023 Carryover USBC Credit:	\$27,649.85	Total USBC Credit:	\$367,030.96
USBC Credit YTD:	\$339,381.11	Payments Issued YTD:	\$338,766.32
Average Monthly Credit Earned:	\$28,281.76	USBC Credit Balance:	\$28,264.64
		Payment Pending:	\$28,264.64

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$112,653.13
			07/09/2024	\$85,647.26
			10/08/2024	\$83,591.42
			12/17/2024	\$56,874.51

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100341	1341	DA31423644	KWH >	441,013	475,689	305,544	269,544	332,679	317,925	414,530	368,853	250,260	277,503	350,019	360,523	4,164,082
			KW >	1,108	1,218	1,227	959	1,171	1,132	1,078	963	957	1,028	968	1,071	1,073
			Elec Revenue >	\$11,518.77	\$11,294.03	\$9,295.60	\$7,639.76	\$9,365.05	\$9,010.04	\$9,921.35	\$8,882.76	\$7,422.74	\$8,076.19	\$8,678.09	\$5,218.81	\$106,323.19
100342	1342	DA28691739	KWH >	28,615,638	28,951,253	27,408,046	29,416,485	28,387,741	29,293,035	28,374,025	28,087,571	27,587,407	28,913,269	28,416,620	28,694,602	342,145,692
			KW >	41,234	42,660	42,314	42,076	41,817	42,184	42,595	42,422	43,048	43,653	41,817	42,703	42,377
			Elec Revenue >	196,130.94	190,245.69	183,544.70	191,044.66	186,526.89	190,749.60	187,854.00	189,478.84	188,564.33	195,012.33	189,738.20	101,677.38	\$2,190,567.56
100622	1626	DA31423609	KWH >	804,356	1,003,311	969,205	951,188	529,215	770,621	855,680	843,005	881,077	893,834	734,016	773,585	10,009,093
			KW >	2,246	2,255	2,255	2,220	1,875	2,246	2,255	2,255	2,255	2,419	2,255	2,246	2,232
			Elec Revenue >	\$7,978.96	\$8,248.99	\$8,114.47	\$7,981.25	\$5,704.17	\$7,315.28	\$7,666.73	\$7,708.62	\$7,862.94	\$8,205.95	\$7,266.89	\$4,686.44	\$88,740.69
239790	73973	DG16553126	KWH >	4,000	3,520	3,600	3,200	1,840	1,760	1,840	1,920	0	0	0	0	21,680
			KW >	6	8	8	8	7	2	3	3	0	0	0	0	6
			Elec Revenue >	\$453.94	\$415.25	\$422.18	\$396.41	\$275.95	\$207.47	\$223.69	\$228.30	\$0.00	\$0.00	\$0.00	\$0.00	\$2,623.19
341487	127435	DG85495630	KWH >	13,720	16,640	8,840	13,640	1,040	2,200	11,080	3,920	10,600	6,520	6,040	9,920	104,160
			KW >	153	174	76	122	116	72	124	161	161	161	84	145	129
			Elec Revenue >	\$3,411.88	\$3,656.41	\$1,738.24	\$2,763.49	\$1,583.34	\$1,131.61	\$2,643.73	\$2,417.11	\$3,039.96	\$2,652.12	\$1,586.58	\$1,854.14	\$28,478.61
341502	127449		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$11.76	\$10.88	\$10.88	\$10.93	\$11.02	\$11.02	\$11.01	\$10.98	\$10.98	\$0.00	\$0.00	\$0.00	\$99.46
341502	127449	DS61269094	KWH >	0	4,000	29,400	6,640	0	0	0	0	0	0	320	0	40,360
			KW >	0	36	109	52	0	0	0	0	0	0	7	0	51
			Elec Revenue >	\$8.70	\$816.78	\$3,946.48	\$1,256.93	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$132.22	\$0.00	\$6,213.31

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
650546	286830	2000232564	KWH >	0	0	0	0	0	667	198	952	799	1,079	450	1,153	5,298
			KW >	0	0	0	0	0	18	11	22	18	21	16	12	17
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$304.54	\$170.82	\$377.67	\$323.48	\$373.38	\$261.90	\$164.01	\$1,975.80
650546	286830	DG90659115	KWH >	1,833	2,587	3,599	1,212	1,781	0	0	0	0	0	0	0	11,012
			KW >	12	17	38	17	20	0	0	0	0	0	0	0	21
			Elec Revenue >	\$339.97	\$459.58	\$808.89	\$343.46	\$435.70	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,387.60
658370	291042	2000254272	KWH >	0	0	0	0	0	0	144,480	178,720	211,600	0	0	64,160	598,960
			KW >	0	0	0	0	0	0	393	408	412	0	0	192	351
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$18,572.27	\$21,855.70	\$24,963.07	\$0.00	\$0.00	\$2,500.09	\$67,891.13
658370	291042	DG57404409	KWH >	28,160	20,880	47,440	104,800	111,360	130,320	0	0	0	0	0	0	442,960
			KW >	86	93	172	352	413	443	0	0	0	0	0	0	260
			Elec Revenue >	\$3,628.39	\$3,005.08	\$6,311.39	\$14,232.15	\$15,902.99	\$18,091.83	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$61,171.83
717591	223533		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$161.97	\$154.06	\$154.06	\$156.95	\$159.67	\$159.67	\$158.85	\$158.15	\$158.15	\$0.00	\$0.00	\$0.00	\$1,421.53
717591	223533	2000091349	KWH >	27,840	29,520	27,280	25,680	28,240	27,840	30,240	35,760	30,560	0	0	26,400	289,360
			KW >	49	52	50	51	55	63	70	69	68	0	0	50	58
			Elec Revenue >	\$3,174.82	\$3,228.95	\$3,008.39	\$2,972.23	\$3,417.81	\$3,471.80	\$3,761.36	\$4,223.06	\$3,726.02	\$0.00	\$0.00	\$657.41	\$31,641.85
789497	348794	DG78971247	KWH >	13,505	9,209	8,279	6,558	5,045	3,020	3,459	2,756	2,366	2,878	6,231	10,278	73,584
			KW >	35	27	27	22	22	18	15	9	10	11	20	27	20
			Elec Revenue >	\$1,674.25	\$1,151.78	\$1,068.60	\$902.69	\$778.99	\$532.04	\$525.29	\$382.28	\$367.44	\$402.14	\$803.15	\$351.42	\$8,940.07
854961	352908	DA28691778	KWH >	493,176	554,164	523,038	471,428	476,038	424,716	520,382	522,357	479,520	439,951	482,799	527,927	5,915,496
			KW >	1,058	1,050	1,806	1,041	1,771	1,063	1,045	1,071	1,063	1,045	1,067	1,045	1,177
			Elec Revenue >	\$46,780.40	\$50,707.90	\$53,063.34	\$46,793.41	\$53,314.45	\$44,306.23	\$51,776.66	\$51,707.67	\$47,998.90	\$42,133.31	\$44,399.73	\$4,931.32	\$537,913.32
957338	360251	DA31423686	KWH >	1,020,557	1,099,580	1,082,068	1,032,766	760,730	898,193	863,087	1,056,775	773,350	1,101,519	979,511	838,744	11,506,880
			KW >	2,182	2,182	2,182	2,160	2,182	2,160	2,160	2,182	2,160	2,182	2,182	2,181	2,175
			Elec Revenue >	\$88,365.23	\$91,882.29	\$90,541.19	\$89,616.47	\$72,587.34	\$84,253.59	\$80,595.43	\$95,415.12	\$71,819.73	\$96,173.22	\$81,112.11	\$7,047.96	\$949,409.68
1576974	410164	2000177530	KWH >	16,320	17,760	15,680	15,200	14,720	13,440	12,960	14,720	12,480	0	0	16,000	149,280
			KW >	86	79	76	95	72	80	72	81	70	0	0	79	79
			Elec Revenue >	\$2,653.80	\$2,550.07	\$2,341.36	\$2,586.65	\$2,339.42	\$2,316.35	\$2,158.51	\$2,417.37	\$2,068.61	\$0.00	\$0.00	\$1,018.12	\$22,450.26
1579195	410404	2000354192	KWH >	878	749	731	586	579	491	466	552	587	626	726	917	7,888
			KW >	1	1	1	1	1	1	1	1	1	1	1	1	1
			Elec Revenue >	\$107.38	\$94.29	\$92.58	\$84.26	\$84.38	\$75.96	\$72.63	\$80.34	\$83.71	\$83.06	\$90.81	\$21.35	\$970.75
1640315	415307	2000254602	KWH >	0	0	0	0	0	0	0	40	0	40	0	0	80
			KW >	0	0	0	0	0	0	0	46	0	31	0	0	39
			Elec Revenue >	\$128.33	\$227.19	\$8.70	\$371.15	\$166.35	\$8.70	\$432.49	\$602.00	\$488.25	\$405.05	\$509.55	\$424.30	\$3,772.06
3087812	597892	DA31423685	KWH >	115,296	125,927	104,270	87,713	121,877	100,518	121,987	88,911	76,841	85,106	116,666	80,940	1,226,052
			KW >	1,054	1,068	1,048	562	867	723	1,066	818	1,045	994	550	1,045	903
			Elec Revenue >	\$16,937.66	\$16,640.10	\$14,869.43	\$10,544.41	\$16,124.42	\$13,399.36	\$17,390.53	\$12,804.99	\$13,257.29	\$13,589.41	\$12,437.98	\$4,530.91	\$162,526.49
Total KWH			31,596,292	32,314,789	30,537,020	32,406,640	30,772,885	31,984,746	31,354,414	31,206,812	30,317,447	31,722,325	31,093,398	31,405,149	376,711,917	
Combined Average KW			49,310	50,920	51,389	49,738	50,389	50,205	50,888	50,511	51,268	51,546	48,967	50,797	50,968	
USBC Charge			\$28,436.66	\$29,083.31	\$27,483.31	\$29,165.99	\$27,695.60	\$28,786.27	\$28,218.97	\$28,086.14	\$27,285.71	\$28,550.10	\$27,984.07	\$28,264.64	\$339,040.77	
Total Elec Revenue			383,467.15	384,789.32	379,340.48	379,697.26	368,786.64	375,353.79	383,944.05	398,759.66	372,164.30	367,114.86	347,017.21	135,083.66	\$4,275,518.38	



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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/26/2024	CONTACT PERSON:	John Caterino
NAME OF BUSINESS:	City of Billings	PHONE NUMBER:	
PROJECT CITY LOCATION:	Billings	CELL PHONE:	406-855-8454
MAILING ADDRESS:	PO Box 1178	FAX NUMBER:	
MAILING CITY, STATE, ZIP:	Billings, MT 59103	E-MAIL ADDRESS:	<a href="mailto:caterinoj@billingsmt.gov">caterinoj@billingsmt.gov</a>

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>		<b>\$ 1,213,241.05</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach): LED lighting fixtures for new construction. Costs are for materials and labor for floors 5, 4, and 2 and does not include rebates. Project address is 316 N 26 <sup>th</sup> St., Billings, MT 59101  Fifth floor: \$570,291.71 Fourth floor: \$322,094.67 Second floor: \$320,854.67		
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	323,030	
<b>ESTIMATED KW DEMAND SAVINGS:</b>		

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	\$
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	

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

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

**LARGE CUSTOMER:**

Signature:

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



Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
100482	1492	DA31846658	KWH >	360,424	346,887	301,339	298,547	278,570	304,283	326,515	374,249	343,964	311,974	340,602	391,242	3,978,596	
			KW >	764	760	745	666	649	684	771	857	681	734	815	905	753	
			Elec Revenue >	\$37,668.70	\$35,356.92	\$31,345.55	\$31,800.40	\$31,150.93	\$33,839.40	\$36,198.84	\$40,847.86	\$36,755.31	\$32,929.66	\$34,662.42	\$7,051.77	\$389,607.76	
100483	1493	2000204420	KWH >	0	0	0	0	0	17,720	17,680	18,200	18,600	0	0	24,720	96,920	
			KW >	0	0	0	0	0	89	50	63	63	0	0	71	67	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,834.23	\$2,327.49	\$2,510.70	\$2,547.49	\$0.00	\$0.00	\$927.11	\$11,147.02	
100483	1493	DG28586546	KWH >	25,560	27,960	24,720	22,880	20,600	0	0	0	0	0	0	0	121,720	
			KW >	73	89	80	85	71	0	0	0	0	0	0	0	0	80
			Elec Revenue >	\$3,341.02	\$3,563.10	\$3,170.70	\$3,112.44	\$2,881.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$16,068.86
100484	1494	2000253870	KWH >	0	0	0	0	0	10,080	12,680	16,480	13,680	0	0	12,920	65,840	
			KW >	0	0	0	0	0	28	27	42	33	0	0	35	33	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,327.79	\$1,561.75	\$2,085.71	\$1,702.95	\$0.00	\$0.00	\$462.29	\$7,140.49	
100484	1494	DG79201031	KWH >	14,040	13,160	13,160	11,800	11,680	0	0	0	0	0	0	0	63,840	
			KW >	30	32	32	32	26	0	0	0	0	0	0	0	0	30
			Elec Revenue >	\$1,695.79	\$1,560.19	\$1,565.27	\$1,455.47	\$1,455.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,732.22
100485	1495	2000204466	KWH >	0	0	0	0	0	0	11,680	15,200	12,960	0	0	5,880	45,720	
			KW >	0	0	0	0	0	0	49	62	54	0	0	26	48	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,748.24	\$2,216.27	\$1,903.99	\$0.00	\$0.00	\$345.44	\$6,213.94	
100485	1495	DD80999996	KWH >	5,880	6,160	6,280	5,040	5,280	5,320	0	0	0	0	0	0	33,960	
			KW >	29	60	60	60	60	54	0	0	0	0	0	0	0	54
			Elec Revenue >	\$948.46	\$1,303.11	\$1,313.53	\$1,213.82	\$1,274.17	\$1,201.96	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,255.05
100506	1515	2000148484	KWH >	9,000	9,040	8,160	7,680	7,560	7,640	9,680	10,720	9,600	0	0	8,280	87,360	
			KW >	44	39	45	45	43	45	47	54	54	0	0	45	46	
			Elec Revenue >	\$1,414.72	\$1,296.80	\$1,293.51	\$1,274.29	\$1,278.86	\$1,318.45	\$1,523.93	\$1,698.18	\$1,591.21	\$0.00	\$0.00	\$582.30	\$13,272.25	
100507	1516	2000483716	KWH >	66,440	65,760	62,600	65,920	68,560	70,800	78,400	77,720	78,160	0	0	63,280	697,640	
			KW >	119	134	133	134	142	156	178	182	171	0	0	135	148	
			Elec Revenue >	\$7,536.61	\$7,408.40	\$7,122.78	\$7,712.84	\$8,373.32	\$8,770.61	\$9,676.58	\$9,568.56	\$9,467.15	\$0.00	\$0.00	\$1,774.91	\$77,411.76	
100540	1549	DA31446921	KWH >	28,883	22,188	28,216	26,174	33,176	49,824	75,244	106,343	87,869	57,146	23,072	27,488	565,623	
			KW >	190	180	298	179	223	241	465	463	413	384	246	214	291	
			Elec Revenue >	\$5,224.01	\$4,213.43	\$6,231.45	\$4,614.44	\$6,008.43	\$7,829.08	\$13,044.95	\$15,791.98	\$13,435.77	\$10,062.11	\$5,087.18	\$2,740.21	\$94,283.04	
100591	1595	DA27952777	KWH >	784,637	859,889	810,414	847,373	844,611	914,070	840,283	890,038	897,803	842,013	848,363	741,117	10,120,611	
			KW >	1,313	1,406	1,393	1,347	1,434	1,693	1,438	1,918	1,535	1,438	1,429	1,471	1,485	
			Elec Revenue >	\$73,892.59	\$77,103.56	\$73,115.94	\$75,985.49	\$83,499.66	\$91,242.05	\$83,082.95	\$88,495.93	\$86,725.57	\$81,115.97	\$74,968.24	\$6,939.79	\$896,167.74	
100606	1610	DA28691819	KWH >	786,638	846,420	753,773	783,892	813,661	1,045,582	1,713,563	2,172,815	1,798,826	1,399,809	894,173	763,629	13,772,781	
			KW >	1,244	1,460	1,253	1,425	1,512	2,004	3,110	3,568	3,049	2,859	1,719	1,468	2,056	
			Elec Revenue >	\$80,228.75	\$83,314.97	\$73,847.99	\$78,823.59	\$88,094.83	113,652.37	184,276.28	226,606.53	188,316.22	148,249.18	\$87,843.50	\$11,557.55	\$1,364,811.76	
712537	322858	2000205305	KWH >	0	0	0	7,200	2,240	4,320	4,800	7,520	6,160	5,520	4,400	4,800	46,960	
			KW >	0	0	0	16	12	14	14	17	19	18	14	13	15	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$940.82	\$305.39	\$600.38	\$647.34	\$936.14	\$826.39	\$761.65	\$570.19	\$174.65	\$5,762.95	
712537	322858	DA21629728	KWH >	4,640	5,920	5,600	0	0	0	0	0	0	0	0	0	16,160	
			KW >	14	23	16	0	0	0	0	0	0	0	0	0	0	18
			Elec Revenue >	\$634.96	\$824.68	\$696.94	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,156.58
712538	322859	DG97282715	KWH >	1,060	1,080	1,120	1,040	0	0	0	0	0	0	0	0	4,300	
			KW >	39	4	5	3	0	0	0	0	0	0	0	0	0	13
			Elec Revenue >	\$670.25	\$153.80	\$169.16	\$147.02	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,140.23

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
712792	323113	2000296677	KWH >	0	0	0	0	0	0	2,314	3,580	2,670	2,523	2,860	3,131	17,078
			KW >	0	0	0	0	0	0	7	13	9	11	11	12	11
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$325.85	\$519.17	\$381.09	\$385.63	\$392.95	\$156.17	\$2,160.86
712792	323113	DS01543992	KWH >	2,821	2,784	3,073	2,779	2,940	2,289	0	0	0	0	0	0	16,686
			KW >	8	13	9	10	9	15	0	0	0	0	0	0	11
			Elec Revenue >	\$372.96	\$414.80	\$395.52	\$386.98	\$403.99	\$417.77	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,392.02
712800	323120	2000254013	KWH >	0	0	0	0	0	7,400	7,120	12,080	9,400	0	0	8,560	44,560
			KW >	0	0	0	0	0	26	15	43	33	0	0	23	28
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,051.16	\$885.73	\$1,680.01	\$1,313.02	\$0.00	\$0.00	\$300.19	\$5,230.11
712800	323120	DG50574311	KWH >	9,960	8,640	9,360	8,720	9,360	0	0	0	0	0	0	0	46,040
			KW >	24	26	23	26	25	0	0	0	0	0	0	0	25
			Elec Revenue >	\$1,235.54	\$1,092.31	\$1,114.16	\$1,107.65	\$1,223.42	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,773.08
712809	323127	2000296680	KWH >	0	0	0	0	0	0	2,065	1,557	1,013	989	2,933	5,081	13,638
			KW >	0	0	0	0	0	0	14	6	5	5	13	14	10
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$389.39	\$230.94	\$169.83	\$163.33	\$429.21	\$185.16	\$1,567.86
712809	323127	DG72752779	KWH >	6,140	6,701	6,554	5,825	3,375	5,013	-2,964	0	0	0	0	0	30,644
			KW >	13	16	17	17	17	16	0	0	0	0	0	0	14
			Elec Revenue >	\$752.37	\$801.15	\$794.87	\$740.69	\$555.76	\$694.30	(\$283.54)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,055.60
719225	328323	DA13291191	KWH >	4,379	4,290	3,956	3,862	2,997	2,564	1,341	2,039	1,739	2,186	2,417	0	31,770
			KW >	9	10	10	10	9	9	6	6	6	7	8	0	8
			Elec Revenue >	\$537.40	\$515.45	\$487.90	\$480.51	\$418.70	\$369.29	\$217.33	\$281.73	\$251.96	\$308.27	\$322.48	\$0.00	\$4,191.02
720817	329694	2000395779	KWH >	0	0	0	0	0	0	0	0	4,310	3,562	2,262	2,643	12,777
			KW >	0	0	0	0	0	0	0	0	13	14	12	11	13
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$586.60	\$520.79	\$361.53	\$153.69	\$1,622.61
720817	329694	DA19428727	KWH >	3,004	2,902	2,903	2,549	2,530	2,566	3,704	5,302	0	0	0	0	25,460
			KW >	12	13	11	11	10	12	15	15	0	0	0	0	12
			Elec Revenue >	\$463.59	\$429.33	\$405.23	\$382.21	\$388.87	\$408.14	\$553.25	\$705.69	\$0.00	\$0.00	\$0.00	\$0.00	\$3,736.31
720821	329698		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$21.97	\$20.53	\$20.53	\$20.73	\$21.26	\$21.26	\$21.19	\$21.06	\$21.06	\$0.00	\$0.00	\$0.00	\$189.59
720821	329698	2000523002	KWH >	0	0	0	0	0	0	0	0	25,160	0	3,520	2,520	31,200
			KW >	0	0	0	0	0	0	0	0	67	0	22	7	32
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,206.29	\$0.00	\$595.80	\$100.10	\$3,902.19
720821	329698	DG90051183	KWH >	2,200	2,000	2,000	1,960	1,760	5,280	24,560	31,360	0	0	0	0	71,120
			KW >	4	7	4	5	6	48	65	67	0	0	0	0	26
			Elec Revenue >	\$275.55	\$278.42	\$242.93	\$245.08	\$253.10	\$1,122.09	\$3,189.47	\$3,791.08	\$0.00	\$0.00	\$0.00	\$0.00	\$9,397.72
720829	329705	2000315531	KWH >	0	0	6,200	4,640	2,920	2,680	2,640	2,520	1,960	1,200	2,800	6,040	33,600
			KW >	0	0	20	17	12	11	14	17	12	9	15	18	15
			Elec Revenue >	\$0.00	\$0.00	\$799.66	\$661.02	\$440.61	\$410.55	\$435.04	\$463.68	\$345.57	\$236.79	\$436.78	\$236.09	\$4,465.79
720829	329705	DS01563742	KWH >	7,680	6,720	0	0	0	0	0	0	0	0	0	0	14,400
			KW >	32	28	0	0	0	0	0	0	0	0	0	0	30
			Elec Revenue >	\$1,123.71	\$946.11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,069.82
720834	329709	2000148500	KWH >	0	0	20,360	19,600	18,680	14,640	13,520	12,080	12,360	0	0	19,480	130,720
			KW >	0	0	67	63	52	45	48	43	41	0	0	67	53
			Elec Revenue >	\$0.00	\$0.00	\$2,625.42	\$2,587.64	\$2,458.69	\$1,985.04	\$1,906.17	\$1,685.08	\$1,690.90	\$0.00	\$0.00	\$866.63	\$15,805.57

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
720834	329709	DS68011844	KWH >	24,560	20,640	0	0	0	0	0	0	0	0	0	0	45,200	
			KW >	69	63	0	0	0	0	0	0	0	0	0	0	0	66
			Elec Revenue >	\$3,130.38	\$2,604.10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,734.48
720840	329715	2000514925	KWH >	0	3,120	3,090	2,670	2,820	3,030	3,240	3,750	3,060	2,370	2,670	2,940	32,760	
			KW >	0	10	10	9	11	12	13	11	11	9	10	9	9	10
			Elec Revenue >	\$0.00	\$412.24	\$411.17	\$373.21	\$422.94	\$458.60	\$478.96	\$503.21	\$441.90	\$339.87	\$367.56	\$125.08	\$125.08	\$4,334.74
720840	329715	DG89630437	KWH >	2,910	0	0	0	0	0	0	0	0	0	0	0	2,910	
			KW >	10	0	0	0	0	0	0	0	0	0	0	0	0	10
			Elec Revenue >	\$417.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$417.20
720841	329716		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$13.96	\$13.86	\$13.86	\$14.10	\$14.13	\$14.13	\$14.07	\$14.06	\$14.06	\$0.00	\$0.00	\$0.00	\$0.00	\$126.23
720841	329716	2000483899	KWH >	520	760	800	760	840	6,080	18,040	16,000	8,800	1,360	720	520	55,200	
			KW >	1	1	1	1	13	37	42	33	32	15	1	1	1	15
			Elec Revenue >	\$65.82	\$96.39	\$100.37	\$95.70	\$265.98	\$1,066.82	\$2,250.67	\$1,921.83	\$1,242.88	\$330.35	\$86.63	\$19.74	\$19.74	\$7,543.18
721580	330312	2000381553	KWH >	0	0	0	0	0	2,651	2,491	2,681	2,480	2,525	2,431	2,317	17,576	
			KW >	0	0	0	0	0	5	4	6	5	7	8	6	6	6
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$330.10	\$303.14	\$336.73	\$310.15	\$337.39	\$323.28	\$84.72	\$84.72	\$2,025.51
721580	330312	DA05571941	KWH >	2,373	2,243	2,464	2,320	7,643	0	0	0	0	0	0	0	17,043	
			KW >	5	5	5	5	5	0	0	0	0	0	0	0	0	5
			Elec Revenue >	\$291.82	\$267.28	\$288.86	\$279.95	\$806.36	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,934.27
722251	330939		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
722251	330939	2000296771	KWH >	0	0	0	0	0	0	1,294	2,390	1,400	1,050	0	0	6,134	
			KW >	0	0	0	0	0	0	21	13	13	18	0	0	0	16
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$352.75	\$370.85	\$274.99	\$289.07	\$0.00	\$0.00	\$0.00	\$1,287.66
722251	330939	DG93700374	KWH >	0	0	0	0	439	157	0	0	0	0	0	0	596	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$43.47	\$23.83	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$67.30
722252	330940	2000204419	KWH >	0	0	0	0	0	640	960	28,000	13,600	0	0	22,720	65,920	
			KW >	0	0	0	0	0	16	2	104	170	0	0	172	93	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$272.71	\$126.31	\$3,943.57	\$3,440.34	\$0.00	\$0.00	\$2,206.31	\$9,989.24	
722252	330940	DA21705331	KWH >	2,080	1,920	2,880	4,000	1,760	0	0	0	0	0	0	0	12,640	
			KW >	105	4	105	180	105	0	0	0	0	0	0	0	0	100
			Elec Revenue >	\$1,683.08	\$235.99	\$1,596.66	\$2,651.72	\$1,515.34	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,682.79
722257	81078		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
722257	81078	2000484676	KWH >	0	265	279	275	299	402	3,919	5,723	3,787	3,662	599	321	19,531	
			KW >	0	0	0	0	0	23	27	30	30	27	28	2	15	
			Elec Revenue >	\$0.00	\$36.74	\$38.20	\$38.29	\$34.42	\$286.21	\$669.08	\$869.05	\$681.78	\$636.08	\$349.47	\$26.13	\$26.13	\$3,665.45
722257	81078	DG23689620	KWH >	316	0	0	0	0	0	0	0	0	0	0	0	316	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$42.45	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$42.45

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
722260	330947		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
722260	330947	2000232323	KWH >	0	0	0	0	0	0	0	0	0	0	74	396	470
			KW >	0	0	0	0	0	0	0	0	0	0	1	3	2
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$21.42	\$43.07	\$64.49
722260	330947	DD82180941	KWH >	960	1,027	787	316	91	188	1,373	2,127	1,691	1,215	0	0	9,775
			KW >	3	3	3	3	2	19	19	20	15	19	0	0	11
			Elec Revenue >	\$142.68	\$141.58	\$120.27	\$80.18	\$38.86	\$223.67	\$343.94	\$417.68	\$327.61	\$313.75	\$0.00	\$0.00	\$2,150.22
722264	330951	2000231723	KWH >	0	0	0	0	29,440	37,840	125,760	186,720	162,800	0	0	18,880	561,440
			KW >	0	0	0	0	171	151	279	282	282	0	0	130	216
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$4,975.53	\$5,553.77	\$15,576.21	\$21,033.69	\$18,762.32	\$0.00	\$0.00	\$1,664.49	\$67,566.01
722264	330951	DG16604929	KWH >	18,560	36,960	28,080	22,080	0	0	0	0	0	0	0	0	105,680
			KW >	140	131	131	131	0	0	0	0	0	0	0	0	133
			Elec Revenue >	\$3,696.92	\$4,909.21	\$4,105.77	\$3,585.62	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$16,297.52
722270	330957	2000231705	KWH >	0	0	20,320	18,880	21,920	39,520	63,840	56,640	46,880	0	0	19,200	287,200
			KW >	0	0	170	98	96	174	185	168	109	0	0	84	136
			Elec Revenue >	\$0.00	\$0.00	\$3,927.78	\$3,016.71	\$3,330.31	\$6,005.47	\$8,350.74	\$7,423.06	\$5,764.81	\$0.00	\$0.00	\$1,093.99	\$38,912.87
722270	330957	DA19272334	KWH >	17,600	21,920	0	0	0	0	0	0	0	0	0	0	39,520
			KW >	84	110	0	0	0	0	0	0	0	0	0	0	97
			Elec Revenue >	\$2,689.84	\$3,308.15	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,997.99
722287	330973		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
722287	330973	2000484674	KWH >	96	109	100	108	184	887	6,714	9,585	7,629	0	321	109	25,842
			KW >	0	0	0	0	0	21	63	64	63	0	17	0	21
			Elec Revenue >	\$19.38	\$19.97	\$24.10	\$24.67	\$24.20	\$316.86	\$1,325.19	\$1,605.59	\$1,399.87	\$0.00	\$212.91	\$1.87	\$4,974.61
723027	331643		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
723027	331643	2000179840	KWH >	0	0	0	0	0	0	0	120	100	120	100	120	560
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13.88	\$11.13	\$12.67	\$10.31	\$1.58	\$49.57
723040	331655	2000231712	KWH >	0	0	17,880	15,560	21,240	35,440	73,960	116,280	90,600	0	0	16,840	387,800
			KW >	0	0	105	99	108	195	293	303	297	0	0	142	193
			Elec Revenue >	\$0.00	\$0.00	\$2,897.07	\$2,620.90	\$3,400.35	\$5,875.71	\$10,798.95	\$14,719.70	\$12,225.41	\$0.00	\$0.00	\$1,817.78	\$54,355.87
723040	331655	DA15191578	KWH >	19,400	17,360	0	0	0	0	0	0	0	0	0	0	36,760
			KW >	106	104	0	0	0	0	0	0	0	0	0	0	105
			Elec Revenue >	\$3,269.47	\$2,836.78	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,106.25
723043	331658	2000179826	KWH >	0	0	0	0	15,080	32,200	50,960	79,800	52,520	0	0	82,800	313,360
			KW >	0	0	0	0	140	212	266	196	161	0	0	136	185
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$3,938.66	\$5,781.73	\$8,184.19	\$9,943.48	\$6,948.17	\$0.00	\$0.00	\$1,802.63	\$36,598.86
723043	331658	DA17236706	KWH >	1,560	720	9,200	1,080	0	0	0	0	0	0	0	0	12,560
			KW >	48	2	48	58	0	0	0	0	0	0	0	0	39
			Elec Revenue >	\$818.57	\$106.60	\$1,414.58	\$849.12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,188.87



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
723044	331659	2000484609	KWH >	0	107	100	98	112	242	548	826	135	132	707	223	3,230
			KW >	0	0	0	0	0	8	10	10	0	6	1	1	3
			Elec Revenue >	\$0.00	\$19.76	\$19.28	\$19.25	\$13.60	\$114.61	\$161.04	\$187.09	\$19.01	\$75.30	\$80.47	\$21.75	\$731.16
723044	331659	DG23689619	KWH >	101	0	0	0	0	0	0	0	0	0	0	0	101
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$19.74	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19.74
723045	331660		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
723045	331660	2000522352	KWH >	0	0	0	0	0	0	0	0	0	2,706	611	480	3,797
			KW >	0	0	0	0	0	0	0	0	0	41	1	0	14
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$694.80	\$67.50	\$8.38	\$770.68
723045	331660	DG23689614	KWH >	0	0	0	0	3,165	610	3,129	5,178	4,248	0	0	0	16,330
			KW >	0	0	0	0	26	11	41	41	41	0	0	0	32
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$590.31	\$180.99	\$743.22	\$934.38	\$843.76	\$0.00	\$0.00	\$0.00	\$3,292.66
723048	331662		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
723048	331662	DG21220089	KWH >	0	0	0	0	1	52	371	572	621	304	0	0	1,921
			KW >	0	0	0	0	2	6	6	6	6	6	0	0	5
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$25.52	\$68.69	\$100.14	\$119.00	\$125.93	\$93.24	\$0.00	\$0.00	\$532.52
723050	331664		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
723054	331668		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
723054	331668	2000232058	KWH >	0	0	0	44	116	1,504	3,248	4,556	3,086	1,715	106	114	14,489
			KW >	0	0	0	0	0	27	21	26	26	26	0	0	14
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$5.67	\$14.42	\$432.50	\$539.80	\$713.89	\$570.42	\$433.78	\$10.94	\$3.14	\$2,724.56
723090	331701	DG97272252	KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$43.50
723170	331777		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
723170	331777	2000232594	KWH >	0	0	0	0	0	675	4,745	6,458	4,854	3,872	1,098	108	21,810
			KW >	0	0	0	0	0	35	21	34	34	41	41	0	29
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$439.58	\$687.86	\$989.65	\$831.45	\$797.16	\$531.00	\$2.00	\$4,278.70
723170	331777	DA04750404	KWH >	0	0	0	0	708	0	0	0	0	0	0	0	708
			KW >	0	0	0	0	33	0	0	0	0	0	0	0	33
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$420.13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$420.13
723878	332450	2000203926	KWH >	2,027	2,027	2,661	2,304	2,216	2,645	2,817	2,604	3,076	2,861	3,235	2,979	31,452
			KW >	7	5	4	6	6	7	5	9	6	7	9	7	7
			Elec Revenue >	\$260.17	\$247.90	\$301.23	\$300.83	\$297.23	\$355.88	\$341.78	\$373.67	\$378.39	\$369.45	\$406.08	\$95.19	\$3,727.80

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
723879	332451	KWH >		0	0	0	0	0	0	0	0	0	0	0	0	0
		KW >		0	0	0	0	0	0	0	0	0	0	0	0	0
		Elec Revenue >		\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
723879	332451	2000149596	KWH >	0	0	0	0	0	0	0	0	0	2,638	58	67	2,763
			KW >	0	0	0	0	0	0	0	0	0	16	0	0	5
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$427.52	\$5.95	\$1.21	\$434.68
723879	332451	DA13291229	KWH >	61	62	60	57	509	463	2,123	1,123	0	0	0	0	4,458
			KW >	0	0	0	0	8	8	8	8	0	0	0	0	4
			Elec Revenue >	\$15.12	\$15.09	\$14.92	\$14.98	\$139.91	\$135.36	\$296.93	\$198.52	\$0.00	\$0.00	\$0.00	\$0.00	\$830.83
793134	349162		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
871546	351410	2000253945	KWH >	0	0	0	0	0	3,680	4,120	4,880	3,800	3,400	3,680	3,640	27,200
			KW >	0	0	0	0	0	21	24	26	21	28	24	22	24
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$634.46	\$707.83	\$801.84	\$639.80	\$680.26	\$631.70	\$288.17	\$4,384.06
871546	351410	DG68838848	KWH >	4,200	4,560	4,680	3,640	3,680	0	0	0	0	0	0	0	20,760
			KW >	30	24	24	32	21	0	0	0	0	0	0	0	26
			Elec Revenue >	\$810.35	\$718.32	\$728.72	\$734.32	\$634.46	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,626.17
925496	331631	2000231370	KWH >	0	0	0	0	0	2,480	2,100	1,980	2,080	2,500	2,060	1,600	14,800
			KW >	0	0	0	0	0	16	3	7	10	13	12	8	10
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$454.54	\$253.78	\$283.81	\$332.42	\$407.21	\$336.61	\$106.38	\$2,174.75
925496	331631	DA05551496	KWH >	1,400	1,200	1,340	1,940	2,640	0	0	0	0	0	0	0	8,520
			KW >	3	3	4	12	16	0	0	0	0	0	0	0	8
			Elec Revenue >	\$181.20	\$158.35	\$180.64	\$333.47	\$471.61	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,325.27
975808	381443	2000253840	KWH >	0	0	0	0	0	14,960	18,240	20,840	20,040	0	0	17,200	91,280
			KW >	0	0	0	0	0	30	37	51	38	0	0	34	38
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,820.99	\$2,218.65	\$2,598.72	\$2,361.90	\$0.00	\$0.00	\$454.47	\$9,454.73
975808	381443	DA21629734	KWH >	18,920	16,840	17,360	16,600	15,480	0	0	0	0	0	0	0	85,200
			KW >	33	36	34	31	30	0	0	0	0	0	0	0	33
			Elec Revenue >	\$2,162.54	\$1,935.00	\$1,949.66	\$1,886.69	\$1,869.70	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,803.59
1059093	279444	2000314644	KWH >	1,520	1,360	1,040	960	760	800	920	1,000	1,160	1,320	1,280	1,360	13,480
			KW >	2	3	3	4	4	6	5	7	7	7	4	4	5
			Elec Revenue >	\$182.16	\$165.63	\$140.93	\$149.83	\$133.12	\$161.28	\$163.03	\$191.67	\$209.12	\$225.01	\$172.75	\$55.97	\$1,950.50
1116452	372359	2000254254	KWH >	0	0	0	0	0	0	7,400	9,340	8,540	0	3,660	3,780	32,720
			KW >	0	0	0	0	0	0	34	38	39	0	36	8	31
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,150.60	\$1,364.72	\$1,303.80	\$0.00	\$781.30	\$110.87	\$4,711.29
1116452	372359	DG93778435	KWH >	4,840	4,780	5,240	4,100	3,360	3,840	0	0	0	0	0	0	26,160
			KW >	9	8	9	9	11	23	0	0	0	0	0	0	12
			Elec Revenue >	\$567.71	\$534.62	\$577.03	\$487.09	\$469.53	\$667.53	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,303.51
1141284	331674		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
1141284	331674	2000232017	KWH >	0	322	79	76	102	2,098	4,934	4,633	5,177	1,746	62	64	19,293
			KW >	0	0	0	0	6	6	8	8	8	7	0	0	4
			Elec Revenue >	\$0.00	\$32.78	\$17.07	\$17.16	\$77.08	\$280.94	\$572.81	\$540.14	\$586.21	\$234.27	\$6.44	\$1.21	\$2,366.11

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
1160780	331770		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	
1160780	331770	2000232018	KWH >	0	434	329	275	673	3,204	8,878	7,078	4,748	669	190	403	26,881	
			KW >	0	3	3	1	18	48	49	48	46	21	1	2	22	22
		Elec Revenue >	\$0.00	\$95.11	\$77.28	\$55.71	\$264.48	\$824.13	\$1,379.20	\$1,192.03	\$949.22	\$286.03	\$34.27	\$29.12	\$29.12	\$5,186.58	
1160780	331770	DA15269521	KWH >	975	0	0	0	0	0	0	0	0	0	0	0	975	
			KW >	5	0	0	0	0	0	0	0	0	0	0	0	0	5
		Elec Revenue >	\$164.06	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$164.06
1160802	381868	2000253782	KWH >	0	0	0	0	5,260	5,060	6,200	7,860	6,920	5,020	5,360	5,540	47,220	
			KW >	0	0	0	0	15	17	26	34	22	21	15	11	20	20
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$701.96	\$710.96	\$935.18	\$1,180.57	\$935.79	\$742.40	\$663.46	\$146.68	\$146.68	\$6,017.00	
1160802	381868	DA19880570	KWH >	6,920	6,480	6,560	5,940	0	0	0	0	0	0	0	0	25,900	
			KW >	13	16	14	12	0	0	0	0	0	0	0	0	0	14
		Elec Revenue >	\$819.53	\$783.37	\$762.42	\$697.11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,062.43
1160804	381869	2000204455	KWH >	0	0	0	0	0	12,280	11,200	11,160	11,360	0	0	19,160	65,160	
			KW >	0	0	0	0	0	37	30	46	31	0	0	72	43	43
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,654.85	\$1,454.70	\$1,635.79	\$1,468.40	\$0.00	\$0.00	\$936.80	\$7,150.54		
1160804	381869	DG76859592	KWH >	23,400	21,360	22,840	19,880	16,560	0	0	0	0	0	0	0	104,040	
			KW >	56	70	70	88	40	0	0	0	0	0	0	0	0	65
		Elec Revenue >	\$2,891.50	\$2,757.74	\$2,880.98	\$2,898.48	\$2,099.74	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13,528.44
1175972	377151	2000515480	KWH >	0	0	0	0	0	0	0	4,143	1,016	1,166	1,137	1,317	8,779	
			KW >	0	0	0	0	0	0	0	5	6	3	4	5	5	5
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$464.06	\$189.98	\$166.34	\$158.44	\$69.12	\$69.12	\$1,047.94	
1175972	377151	DG90025399	KWH >	1,575	1,500	1,530	1,306	1,225	1,126	1,112	0	0	0	0	0	9,374	
			KW >	5	4	7	5	4	7	7	0	0	0	0	0	0	6
		Elec Revenue >	\$222.88	\$195.31	\$238.93	\$190.74	\$180.37	\$215.26	\$206.32	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,449.81
1183483	377663	2000315607	KWH >	0	0	0	12,280	12,440	13,360	14,640	20,700	16,980	0	0	12,600	103,000	
			KW >	0	0	0	25	25	29	43	42	47	0	0	25	34	34
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$1,395.21	\$1,500.92	\$1,655.76	\$1,959.44	\$2,489.06	\$2,189.35	\$0.00	\$0.00	\$330.95	\$11,520.69		
1183483	377663	DG15107552	KWH >	12,180	12,440	13,860	0	0	0	0	0	0	0	0	0	38,480	
			KW >	25	29	29	0	0	0	0	0	0	0	0	0	0	28
		Elec Revenue >	\$1,477.46	\$1,470.85	\$1,580.33	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,528.64
1191404	378526		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
1191404	378526	2000232007	KWH >	0	0	954	190	258	323	2,007	2,552	2,295	1,771	255	163	10,768	
			KW >	0	0	1	0	17	10	12	13	10	14	11	0	9	9
		Elec Revenue >	\$0.00	\$0.00	\$100.89	\$22.99	\$213.11	\$142.73	\$333.34	\$384.52	\$331.53	\$324.41	\$138.83	\$2.76	\$2.76	\$1,995.11	
1269391	380261	2000204453	KWH >	0	0	0	0	0	22,160	26,640	31,040	28,400	0	0	22,000	130,240	
			KW >	0	0	0	0	0	84	92	103	95	0	0	61	87	87
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,193.07	\$3,716.03	\$4,208.78	\$3,861.22	\$0.00	\$0.00	\$797.43	\$15,776.53		
1269391	380261	DA04680721	KWH >	23,280	20,000	22,480	21,520	21,600	0	0	0	0	0	0	0	108,880	
			KW >	58	59	63	71	68	0	0	0	0	0	0	0	0	64
		Elec Revenue >	\$2,903.03	\$2,492.83	\$2,758.52	\$2,826.47	\$2,946.86	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13,927.71

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
1569636	1486	2000148498	KWH >	0	0	15,280	13,200	12,400	11,360	10,720	10,000	12,240	0	0	16,280	101,480	
			KW >	0	0	32	30	27	26	27	22	23	0	0	32	27	
			Elec Revenue >	\$0.00	\$0.00	\$1,738.93	\$1,610.21	\$1,549.24	\$1,429.97	\$1,368.76	\$1,232.10	\$1,449.58	\$0.00	\$0.00	\$424.25	\$10,803.04	
1569636	1486	DS49353753	KWH >	18,920	15,600	0	0	0	0	0	0	0	0	0	0	34,520	
			KW >	36	36	0	0	0	0	0	0	0	0	0	0	0	36
			Elec Revenue >	\$2,174.50	\$1,817.34	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,991.84
1594282	411701	2000315693	KWH >	0	9,760	10,960	10,760	11,960	10,440	10,360	8,920	8,800	0	0	11,200	93,160	
			KW >	0	37	35	44	39	37	29	36	29	0	0	37	36	
			Elec Revenue >	\$0.00	\$1,326.27	\$1,406.49	\$1,541.11	\$1,658.20	\$1,477.81	\$1,361.58	\$1,302.24	\$1,199.79	\$0.00	\$0.00	\$482.54	\$11,756.03	
1594282	411701	DG16639324	KWH >	12,560	0	0	0	0	0	0	0	0	0	0	0	12,560	
			KW >	38	0	0	0	0	0	0	0	0	0	0	0	0	38
			Elec Revenue >	\$1,646.09	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,646.09
1647695	416128	2000296740	KWH >	0	0	0	0	0	0	289	155	156	185	412	725	1,922	
			KW >	0	0	0	0	0	0	3	3	2	1	5	3	3	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$77.74	\$64.72	\$58.73	\$38.79	\$113.04	\$45.64	\$398.66	
1647695	416128	DA07518548	KWH >	1,054	974	1,014	738	761	470	0	0	0	0	0	0	5,011	
			KW >	3	4	3	7	4	3	0	0	0	0	0	0	4	
			Elec Revenue >	\$152.49	\$147.37	\$144.88	\$171.91	\$135.99	\$95.34	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$847.98
1669567	81113	2000304982	KWH >	0	0	0	0	0	0	6,740	7,460	6,160	5,580	3,880	3,800	33,620	
			KW >	0	0	0	0	0	0	20	26	22	18	15	9	18	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$902.83	\$1,040.36	\$863.90	\$753.29	\$533.88	\$128.13	\$4,222.39	
1669567	81113	DG21203263	KWH >	4,320	4,000	4,420	4,040	4,320	4,860	0	0	0	0	0	0	25,960	
			KW >	13	15	12	13	11	21	0	0	0	0	0	0	14	
			Elec Revenue >	\$582.59	\$555.70	\$543.98	\$529.93	\$571.49	\$747.33	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,531.02
1741314	354015	2000483650	KWH >	5,560	5,720	5,360	5,160	7,120	7,720	7,680	9,040	7,920	6,560	4,680	5,000	77,520	
			KW >	14	14	14	15	26	26	27	28	26	26	23	13	21	
			Elec Revenue >	\$703.49	\$688.62	\$653.34	\$665.28	\$1,028.93	\$1,085.31	\$1,086.45	\$1,216.59	\$1,079.72	\$927.42	\$703.51	\$178.88	\$10,017.54	
1756893	421959	2000512280	KWH >	0	0	0	0	0	2,361	2,229	2,273	1,870	2,042	2,410	2,434	15,619	
			KW >	0	0	0	0	0	9	6	3	7	6	7	7	6	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$358.24	\$299.36	\$271.08	\$275.96	\$284.01	\$306.20	\$100.29	\$1,895.14	
1756893	421959	DA08508171	KWH >	2,230	3,122	2,308	2,219	3,176	-731	0	0	0	0	0	0	12,324	
			KW >	9	15	11	11	15	0	0	0	0	0	0	0	10	
			Elec Revenue >	\$342.14	\$475.74	\$359.11	\$351.39	\$508.77	(\$69.50)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,967.65
1784756	424195	2000287812	KWH >	0	0	2,567	1,825	1,016	747	955	1,330	1,257	1,404	1,898	3,195	16,194	
			KW >	0	0	11	9	10	8	7	7	7	7	10	12	9	
			Elec Revenue >	\$0.00	\$0.00	\$374.31	\$300.28	\$237.55	\$181.67	\$192.76	\$226.37	\$220.82	\$231.21	\$304.98	\$156.74	\$2,426.69	
1784756	424195	DA19428526	KWH >	4,050	3,139	0	0	0	0	0	0	0	0	0	0	7,189	
			KW >	12	12	0	0	0	0	0	0	0	0	0	0	12	
			Elec Revenue >	\$538.96	\$433.17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$972.13
1920951	431212	2000232009	KWH >	0	0	2,980	2,859	2,929	3,402	5,105	4,698	4,840	2,980	2,322	3,036	35,151	
			KW >	0	0	7	7	7	15	17	17	16	11	8	6	11	
			Elec Revenue >	\$0.00	\$0.00	\$362.34	\$364.73	\$381.53	\$527.79	\$708.16	\$664.23	\$670.37	\$413.64	\$315.55	\$79.02	\$4,487.36	
1920951	431212	DG45760138	KWH >	3,453	3,565	0	0	0	0	0	0	0	0	0	0	7,018	
			KW >	8	9	0	0	0	0	0	0	0	0	0	0	9	
			Elec Revenue >	\$424.44	\$439.69	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$864.13

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1984150	79279	2000251151	KWH >	2,536	2,197	2,182	1,284	1,772	1,716	1,445	1,449	1,733	1,475	1,753	2,466	22,008
			KW >	8	9	6	5	7	6	6	6	5	6	7	7	7
			Elec Revenue >	\$341.74	\$316.27	\$278.59	\$200.13	\$273.63	\$251.80	\$221.49	\$223.40	\$246.22	\$222.54	\$248.43	\$100.69	\$2,924.93
1984155	79281	2000251152	KWH >	2,466	2,240	2,198	1,961	1,501	1,956	4,049	6,341	6,600	4,271	1,395	2,528	37,506
			KW >	7	7	7	11	12	14	17	17	12	13	12	7	11
			Elec Revenue >	\$327.42	\$300.85	\$293.41	\$340.23	\$312.10	\$383.63	\$611.50	\$825.28	\$780.60	\$558.71	\$283.12	\$95.80	\$5,112.65
1993430	432144	2000305016	KWH >	0	0	0	0	0	0	12,160	11,040	9,920	0	0	8,880	42,000
			KW >	0	0	0	0	0	0	54	50	40	0	0	40	46
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,853.99	\$1,679.87	\$1,451.73	\$0.00	\$0.00	\$514.92	\$5,500.51
1993430	432144	DA12994659	KWH >	11,440	8,160	10,640	10,720	12,320	11,440	0	0	0	0	0	0	64,720
			KW >	53	48	42	44	55	51	0	0	0	0	0	0	49
			Elec Revenue >	\$1,781.34	\$1,324.44	\$1,468.48	\$1,522.39	\$1,886.79	\$1,751.92	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,735.36
2001846	432582	2000305018	KWH >	0	0	0	0	0	0	2,000	2,080	2,120	2,400	2,520	3,520	14,640
			KW >	0	0	0	0	0	0	6	8	9	8	9	10	8
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$279.93	\$314.68	\$326.01	\$331.44	\$338.46	\$135.48	\$1,726.00
2001846	432582	DA12994661	KWH >	3,400	3,520	3,600	3,080	2,920	2,440	0	0	0	0	0	0	18,960
			KW >	10	10	11	10	9	10	0	0	0	0	0	0	10
			Elec Revenue >	\$458.33	\$445.67	\$467.81	\$407.20	\$409.69	\$378.97	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,567.67
2001848	432583	2000525755	KWH >	0	0	0	0	0	0	2,114	1,372	1,485	1,962	2,452	3,305	12,690
			KW >	0	0	0	0	0	0	9	8	9	9	10	12	10
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$326.62	\$238.00	\$264.52	\$311.81	\$350.93	\$167.22	\$1,659.10
2001848	432583	DG45391522	KWH >	4,368	3,259	3,453	3,268	3,361	2,593	0	0	0	0	0	0	20,302
			KW >	12	12	12	10	10	9	0	0	0	0	0	0	11
			Elec Revenue >	\$569.41	\$445.21	\$462.05	\$427.33	\$463.02	\$373.72	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,740.74
2082903	431078	2000205718	KWH >	0	0	0	0	8,080	5,520	5,120	7,920	6,160	5,680	0	16,240	54,720
			KW >	0	0	0	0	55	57	21	27	22	21	0	55	37
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$1,481.17	\$1,260.61	\$776.27	\$1,095.59	\$867.95	\$808.01	\$0.00	\$714.17	\$7,003.77
2082903	431078	DA12318772	KWH >	21,200	26,400	22,480	20,320	0	0	0	0	0	0	0	0	90,400
			KW >	55	57	57	56	0	0	0	0	0	0	0	0	56
			Elec Revenue >	\$2,707.55	\$3,027.39	\$2,687.55	\$2,485.71	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,908.20
2132749	440323	2000254300	KWH >	0	0	0	0	0	16,520	22,560	24,040	21,080	0	0	11,080	95,280
			KW >	0	0	0	0	0	48	52	61	50	0	0	41	50
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,201.87	\$2,792.84	\$3,031.92	\$2,619.03	\$0.00	\$0.00	\$533.11	\$11,178.77
2132749	440323	DG57404427	KWH >	10,920	10,440	9,400	9,320	10,240	0	0	0	0	0	0	0	50,320
			KW >	39	43	36	36	38	0	0	0	0	0	0	0	38
			Elec Revenue >	\$1,496.91	\$1,466.34	\$1,279.87	\$1,330.93	\$1,469.83	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,043.88
3039007	437588	2000483950	KWH >	61,200	72,000	71,440	58,080	58,160	75,680	87,760	92,960	96,800	0	0	70,400	744,480
			KW >	132	146	141	170	186	223	252	307	251	0	0	138	195
			Elec Revenue >	\$7,229.80	\$8,101.97	\$7,999.67	\$7,489.67	\$7,939.62	\$10,083.98	\$11,480.23	\$12,573.69	\$12,219.03	\$0.00	\$0.00	\$1,818.34	\$86,936.00
3252194	609375	2000254288	KWH >	0	0	0	0	0	0	0	0	6,120	0	0	4,320	10,440
			KW >	0	0	0	0	0	0	0	0	88	0	0	53	71
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,696.61	\$0.00	\$0.00	\$686.21	\$2,382.82
3252194	609375	DA19487345	KWH >	11,440	10,400	10,600	8,600	8,160	7,080	7,120	5,360	0	0	0	0	68,760
			KW >	96	104	103	90	87	86	87	88	0	0	0	0	93
			Elec Revenue >	\$2,372.89	\$2,228.31	\$2,235.50	\$1,919.81	\$1,899.45	\$1,775.85	\$1,795.66	\$1,633.85	\$0.00	\$0.00	\$0.00	\$0.00	\$15,861.32

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3279035	79276	DG50004280	KWH >	7,280	3,080	0	0	0	0	0	0	0	0	0	0	10,360
			KW >	21	19	0	0	0	0	0	0	0	0	0	0	20
			Elec Revenue >	\$941.73	\$390.61	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3446396	81130	2000384032	KWH >	0	0	0	0	0	1,339	1,341	2,235	1,495	1,334	1,047	1,464	10,255
			KW >	0	0	0	0	0	7	4	8	5	5	4	6	6
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$230.71	\$190.54	\$326.85	\$222.74	\$197.13	\$160.16	\$81.42	\$1,409.55
3446396	81130	DA31499990	KWH >	6,146	-1,736	2,265	1,662	1,722	0	0	0	0	0	0	0	10,059
			KW >	7	7	7	7	7	0	0	0	0	0	0	0	7
			Elec Revenue >	\$664.82	(\$58.50)	\$298.97	\$249.27	\$267.33	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3448739	621466	2000483665	KWH >	21,120	22,240	21,000	20,720	23,680	24,560	28,800	28,680	25,240	0	0	20,480	236,520
			KW >	42	45	44	50	49	54	75	70	60	0	0	44	53
			Elec Revenue >	\$2,467.25	\$2,507.06	\$2,391.97	\$2,522.63	\$2,906.56	\$3,054.12	\$3,681.55	\$3,577.59	\$3,132.14	\$0.00	\$0.00	\$580.61	\$26,821.48
3463478	295853	2000315532	KWH >	0	0	2,240	1,840	1,680	1,480	0	0	0	0	0	0	7,240
			KW >	0	0	6	7	7	6	0	0	0	0	0	0	7
			Elec Revenue >	\$0.00	\$0.00	\$284.00	\$266.03	\$270.28	\$231.88	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,052.19
3463478	295853	DA15843218	KWH >	1,840	1,480	0	0	0	0	0	0	0	0	0	0	3,320
			KW >	7	5	0	0	0	0	0	0	0	0	0	0	6
			Elec Revenue >	\$274.93	\$202.90	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3733186	368748	2000381554	KWH >	0	0	0	0	0	17	21	20	23	60	28	31	200
			KW >	0	0	0	0	0	2	0	0	0	2	0	0	1
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$38.09	\$11.59	\$14.00	\$12.36	\$39.90	\$16.40	\$2.31	\$134.65
3733186	368748	DG79657697	KWH >	32	25	25	22	76	0	0	0	0	0	0	0	180
			KW >	0	0	0	1	2	0	0	0	0	0	0	0	1
			Elec Revenue >	\$13.52	\$14.15	\$11.62	\$25.72	\$43.73	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3927205	77885	2000485137	KWH >	0	0	0	47,600	43,040	60,240	74,800	76,240	65,920	0	0	47,760	415,600
			KW >	0	0	0	138	205	277	299	331	318	0	0	155	246
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$6,067.92	\$6,730.49	\$9,285.26	\$10,871.08	\$11,321.90	\$10,196.42	\$0.00	\$0.00	\$2,018.97	\$56,492.04
3927205	77885	DG90051529	KWH >	98,480	48,560	47,680	0	0	0	0	0	0	0	0	0	194,720
			KW >	220	144	136	0	0	0	0	0	0	0	0	0	167
			Elec Revenue >	\$11,745.20	\$6,053.63	\$5,875.94	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total KWH				2,680,795	2,749,502	2,563,553	2,563,218	2,593,595	3,024,138	3,974,076	4,762,555	4,188,556	2,716,297	2,189,873	2,643,796	36,649,954
Combined Average KW				5,750	5,921	5,930	5,930	6,311	7,632	9,220	10,530	9,095	6,011	4,664	6,293	9,315
USBC Charge				\$2,412.70	\$2,474.55	\$2,307.18	\$2,306.90	\$2,334.22	\$2,721.72	\$3,576.65	\$4,286.29	\$3,769.68	\$2,444.65	\$1,970.90	\$2,379.45	\$32,984.89
Total Elec Revenue				293,215.81	286,123.75	271,976.90	276,048.46	302,858.61	353,116.53	457,063.83	533,111.99	467,809.55	289,495.66	215,726.46	\$57,623.63	\$3,804,171.18



February 14, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – City of Billings**

Dear Mr. Schafer:

Please accept this letter and the attached documents as the City of Billings' official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of the City of Billings' 2024 USBC account activities.**
- **At year-end 2024, the City of Billings had a current request balance of \$1,182,328.91.**
- **Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024.**
- **At year-end 2024, the City of Billings had a credit balance of \$2,384.93 (carried over into 2025).**

If you have any questions, please contact me at (406) 237-6294.

Sincerely,

John Caterino  
Facilities Manager

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





February 21, 2025

Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached document as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.
- We did not submit any USBC Form B Large Customer Credit Request Forms (USBC Projects) for 2024.
- We had a current request balance of \$ 1,581,614.38 (shown on the attached USBC Progress Report) for a past project that was previously submitted to NorthWestern Energy and to the MDOR in our Summary Reports.
- At year-end 2024, we had a credit balance of \$1,248.38 (carried over into 2025).

If you have any questions, please contact me at (406)455-8476.

Sincerely,

A handwritten signature in blue ink, appearing to read "Melissa Kinzler", followed by a blue checkmark.

Melissa Kinzler  
City of Great Falls  
Finance Director

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
[rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)





Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

CITY OF GREAT FALLS

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$682,704.87
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$1,597,662.69	Total Payment Requests:	\$1,597,662.69
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$1,581,614.38
2023 Carryover USBC Credit:	\$1,166.36	Total USBC Credit:	\$17,296.69
USBC Credit YTD:	\$16,130.33	Payments Issued YTD:	\$16,048.31
Average Monthly Credit Earned:	\$1,344.19	USBC Credit Balance:	\$1,248.38
		Payment Pending:	\$1,248.38

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$4,821.26
			07/09/2024	\$3,761.91
			10/08/2024	\$5,178.65
			12/17/2024	\$2,286.49

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100390	1393	DD39206846	KWH >	37,520	44,400	37,760	34,480	40,400	30,880	31,120	43,680	32,560	31,760	45,600	47,680	457,840
			KW >	139	151	124	145	131	109	125	217	124	140	122	160	141
			Elec Revenue >	\$1,803.23	\$1,855.64	\$1,542.98	\$1,714.16	\$1,627.87	\$1,335.96	\$1,492.84	\$2,490.97	\$1,499.14	\$1,645.98	\$1,592.04	\$1,590.12	\$20,190.93
100391	1394	DG78944355	KWH >	11,160	12,480	9,720	9,600	11,160	9,240	12,120	10,920	9,720	9,360	7,200	11,280	123,960
			KW >	34	34	34	33	32	36	36	38	37	32	30	34	34
			Elec Revenue >	\$464.48	\$453.76	\$429.39	\$416.78	\$419.00	\$436.68	\$462.64	\$475.33	\$453.09	\$403.70	\$301.93	\$345.00	\$5,061.78
100392	1395	DG23747229	KWH >	6,880	0	0	0	0	0	0	0	0	0	0	0	6,880
			KW >	20	0	0	0	0	0	0	0	0	0	0	0	20
			Elec Revenue >	\$286.06	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$286.06
100392	1395	DG36300745	KWH >	0	8,320	8,960	7,680	7,520	7,360	10,000	10,800	10,480	8,160	8,160	8,720	96,160
			KW >	0	24	25	22	20	23	26	29	24	28	24	28	25
			Elec Revenue >	\$0.00	\$320.80	\$334.14	\$292.05	\$267.55	\$296.93	\$351.36	\$389.58	\$340.53	\$358.40	\$319.90	\$284.97	\$3,556.21
100398	1403	DG52303327	KWH >	20,600	18,560	17,760	19,680	19,040	19,360	23,480	24,120	22,600	16,720	18,840	0	220,760
			KW >	42	43	43	42	43	55	62	64	61	49	38	0	49
			Elec Revenue >	\$637.40	\$592.11	\$585.05	\$586.61	\$592.51	\$710.79	\$813.39	\$839.04	\$798.58	\$634.67	\$549.62	\$0.00	\$7,339.77
100401	1404	2000316788	KWH >	0	0	0	0	0	0	0	0	0	5,760	8,240	11,880	25,880
			KW >	0	0	0	0	0	0	0	0	0	17	20	23	20
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$229.68	\$275.98	\$240.47	\$746.13
100401	1404	DG94919857	KWH >	14,280	11,240	10,680	9,680	8,280	5,800	5,640	5,120	5,200	0	0	0	75,920
			KW >	29	24	24	22	19	18	14	12	20	0	0	0	20
			Elec Revenue >	\$436.18	\$346.58	\$341.63	\$309.71	\$266.57	\$240.82	\$193.48	\$169.70	\$255.09	\$0.00	\$0.00	\$0.00	\$2,559.76

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100448	1456	DG93700236	KWH >	2,840	3,520	3,320	2,760	2,600	4,440	2,160	3,160	2,760	2,400	2,480	3,280	35,720
			KW >	7	12	9	10	31	39	7	10	8	9	9	9	13
			Elec Revenue >	\$117.27	\$162.95	\$126.55	\$129.29	\$331.86	\$428.95	\$100.91	\$136.87	\$114.08	\$118.57	\$119.28	\$95.32	\$1,981.90
100466	1475	DA18484075	KWH >	6,120	6,240	6,440	5,880	7,160	10,240	17,040	45,600	31,760	21,440	10,960	6,200	175,080
			KW >	53	54	54	54	53	53	101	146	144	92	92	54	79
			Elec Revenue >	\$650.97	\$590.23	\$585.17	\$580.22	\$587.67	\$614.87	\$1,136.79	\$1,822.78	\$1,676.77	\$1,084.63	\$995.26	\$525.17	\$10,850.53
100468	1479	DG93770327	KWH >	640	720	760	640	560	440	800	880	720	680	600	760	8,200
			KW >	3	28	3	4	3	4	5	5	4	4	3	2	6
			Elec Revenue >	\$53.36	\$284.47	\$46.21	\$52.84	\$44.43	\$51.07	\$69.66	\$66.57	\$61.30	\$57.08	\$44.82	\$27.62	\$859.43
100470	1480	2000316787	KWH >	0	0	0	0	0	0	0	0	0	0	0	33,280	33,280
			KW >	0	0	0	0	0	0	0	0	0	0	0	124	124
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,223.07	\$1,223.07
100470	1480	DG16639312	KWH >	29,760	27,040	26,880	30,400	30,560	64,320	97,120	108,000	86,240	0	0	0	500,320
			KW >	120	120	121	120	121	232	337	334	244	0	0	0	194
			Elec Revenue >	\$1,483.64	\$1,402.14	\$1,416.11	\$1,431.80	\$1,448.60	\$2,809.01	\$4,119.72	\$4,186.95	\$3,131.26	\$0.00	\$0.00	\$0.00	\$21,429.23
100472	1482	2000305020	KWH >	0	0	0	0	0	0	0	0	0	0	16,960	20,240	37,200
			KW >	0	0	0	0	0	0	0	0	0	0	54	58	56
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$682.99	\$577.83	\$1,260.82
100472	1482	DA20062888	KWH >	20,280	16,800	17,640	15,840	15,000	15,240	19,920	0	0	0	0	0	120,720
			KW >	60	54	56	48	48	46	58	0	0	0	0	0	53
			Elec Revenue >	\$794.11	\$676.65	\$707.16	\$610.45	\$603.03	\$593.58	\$751.31	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,736.29
100472	1482	DG99592821	KWH >	0	0	0	0	0	0	0	12,880	17,040	15,040	0	0	44,960
			KW >	0	0	0	0	0	0	0	58	55	53	0	0	55
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$689.03	\$691.41	\$658.22	\$0.00	\$0.00	\$2,038.66
100486	1496	DG35734578	KWH >	8,640	9,680	10,480	10,000	9,200	9,280	19,760	0	0	0	0	0	77,040
			KW >	29	32	35	35	33	31	53	0	0	0	0	0	35
			Elec Revenue >	\$398.72	\$409.78	\$439.94	\$435.71	\$413.24	\$390.85	\$896.23	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,384.47
100490	1500	2000316773	KWH >	0	0	0	0	0	0	0	0	0	0	0	24,720	24,720
			KW >	0	0	0	0	0	0	0	0	0	0	0	67	67
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$668.84	\$668.84
100490	1500	DG90038328	KWH >	25,840	25,360	24,720	23,520	28,480	35,920	38,400	47,920	40,720	34,880	0	0	325,760
			KW >	69	96	70	65	96	104	118	124	116	112	0	0	97
			Elec Revenue >	\$980.12	\$1,164.06	\$904.38	\$847.61	\$1,191.62	\$1,334.30	\$1,487.96	\$1,635.77	\$1,487.05	\$1,396.62	\$0.00	\$0.00	\$12,429.49
100515	1524	DS81105850	KWH >	3,160	4,560	15,200	3,080	3,400	3,240	3,040	4,440	4,520	3,480	3,560	4,280	55,960
			KW >	11	22	48	14	13	12	11	16	16	13	12	15	17
			Elec Revenue >	\$158.55	\$264.50	\$612.48	\$170.60	\$169.59	\$160.48	\$147.24	\$206.00	\$206.71	\$166.67	\$159.67	\$153.95	\$2,576.44
100516	1525	DA15607722	KWH >	11,720	12,600	4,360	3,800	3,720	3,080	3,560	3,720	3,640	3,560	3,160	3,720	60,640
			KW >	38	38	14	12	10	10	10	12	14	12	11	12	16
			Elec Revenue >	\$533.10	\$485.61	\$181.91	\$165.42	\$145.47	\$135.95	\$144.12	\$161.10	\$175.79	\$163.52	\$148.43	\$118.81	\$2,559.23
100518	1527	2000315804	KWH >	0	0	0	0	0	0	0	0	0	3,940	2,080	1,160	7,180
			KW >	0	0	0	0	0	0	0	0	0	13	10	3	9
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$174.60	\$130.73	\$35.10	\$340.43
100518	1527	DD37113681	KWH >	2,020	1,980	2,040	2,420	3,620	4,860	5,860	5,780	5,240	0	0	0	33,820
			KW >	4	4	8	8	12	14	16	15	14	0	0	0	11
			Elec Revenue >	\$71.26	\$66.59	\$105.62	\$114.74	\$161.91	\$190.17	\$216.45	\$212.13	\$193.87	\$0.00	\$0.00	\$0.00	\$1,332.74

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100519	1528	DG28164629	KWH >	17,360	17,200	16,960	16,560	16,000	20,960	29,040	44,080	39,040	36,800	20,240	19,760	294,000
			KW >	69	71	115	70	69	69	117	120	119	119	112	113	97
			Elec Revenue >	\$925.56	\$845.68	\$1,266.92	\$832.31	\$819.69	\$863.49	\$1,396.76	\$1,555.43	\$1,502.89	\$1,482.97	\$1,266.39	\$1,110.84	\$13,868.93
100542	1550	DA28382566	KWH >	353,424	362,947	348,614	357,689	332,718	506,756	699,844	951,837	800,366	477,586	336,183	339,296	5,867,260
			KW >	527	558	573	544	812	1,313	1,486	1,748	1,330	1,045	769	593	942
			Elec Revenue >	\$7,143.63	\$6,930.69	\$6,824.19	\$6,800.51	\$7,725.50	\$12,101.80	\$15,227.43	\$19,512.25	\$15,774.75	\$10,572.69	\$7,601.85	\$3,015.76	\$119,231.05
100696	1660	DA28382530	KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.99	\$8.70	\$8.70	\$8.70	\$0.00	\$95.99
100696	1660	DA28382531	KWH >	2,248	2,185	2,057	2,222	2,341	2,299	2,335	2,259	2,298	2,251	2,186	2,210	26,891
			KW >	9	8	10	11	13	9	12	9	9	12	9	11	10
			Elec Revenue >	\$123.51	\$104.98	\$123.08	\$134.18	\$154.45	\$115.60	\$144.83	\$115.39	\$115.74	\$144.18	\$114.74	\$107.84	\$1,498.52
100698	1662	DA28382568	KWH >	443,025	490,051	451,281	507,473	485,364	449,289	0	0	0	0	0	0	2,826,483
			KW >	797	858	797	952	881	869	0	0	0	0	0	0	859
			Elec Revenue >	\$9,781.11	\$9,822.50	\$9,078.18	\$10,461.21	\$9,871.85	\$9,386.87	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$58,401.72
100698	1662	DA33525068	KWH >	0	0	0	0	0	0	151,911	470,806	484,726	451,379	477,377	452,399	2,488,598
			KW >	0	0	0	0	0	0	371	842	879	781	781	871	754
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,545.87	\$9,565.69	\$9,900.59	\$9,050.07	\$9,364.13	\$4,389.39	\$45,815.74
715002	325028	DA05507281	KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$0.00	\$0.00	\$0.00	\$78.30
715007	325033	DA16528765	KWH >	8,600	10,120	9,520	8,920	8,040	7,560	7,320	12,760	10,520	8,080	0	0	91,440
			KW >	29	30	31	28	30	24	26	41	39	30	0	0	31
			Elec Revenue >	\$1,205.49	\$1,284.76	\$1,234.51	\$1,147.00	\$1,151.23	\$1,046.18	\$1,048.58	\$1,723.40	\$1,491.44	\$1,147.35	\$0.00	\$0.00	\$12,479.94
715024	325044	DG54580881	KWH >	163,440	137,880	134,280	135,360	104,400	127,800	170,640	174,600	151,560	116,640	122,040	142,200	1,680,840
			KW >	331	288	302	266	234	306	421	410	345	280	288	306	315
			Elec Revenue >	\$16,798.43	\$13,966.05	\$13,764.37	\$14,461.74	\$11,623.50	\$14,367.27	\$18,945.61	\$19,150.01	\$16,547.86	\$12,130.41	\$12,407.80	\$2,392.62	\$166,555.67
715046	325060	DA28691752	KWH >	25,200	25,200	25,200	20,280	19,440	19,680	20,520	32,160	30,000	17,640	20,040	22,920	278,280
			KW >	64	64	177	61	50	51	66	76	73	57	49	61	71
			Elec Revenue >	\$2,783.98	\$2,665.19	\$3,500.00	\$2,272.94	\$2,237.44	\$2,268.99	\$2,438.82	\$3,558.81	\$3,333.18	\$2,038.02	\$2,074.74	\$473.55	\$29,645.66
715055	325066	DA03890964	KWH >	24,800	22,400	20,800	24,000	27,200	24,000	27,200	24,000	24,000	24,800	19,200	20,800	283,200
			KW >	232	48	48	72	208	72	64	72	168	48	64	48	95
			Elec Revenue >	\$2,607.67	\$668.38	\$654.25	\$913.42	\$2,250.27	\$913.42	\$865.86	\$914.96	\$1,838.67	\$691.16	\$795.28	\$480.58	\$13,593.92
715215	325168	DG57908291	KWH >	11,200	10,240	10,880	9,600	9,600	12,480	10,560	11,200	10,240	9,920	9,600	10,240	125,760
			KW >	25	25	28	38	25	32	73	32	25	35	25	25	32
			Elec Revenue >	\$381.73	\$345.45	\$381.90	\$462.97	\$339.80	\$426.82	\$810.37	\$416.23	\$346.10	\$435.64	\$340.41	\$255.54	\$4,942.96
715217	325170	DA18997909	KWH >	5,725	5,541	5,620	5,084	5,538	6,331	4,438	4,989	4,853	4,453	4,594	5,952	63,118
			KW >	18	18	15	17	28	36	31	15	22	16	12	15	20
			Elec Revenue >	\$262.30	\$231.42	\$209.01	\$225.54	\$335.67	\$412.14	\$348.02	\$206.36	\$266.63	\$206.50	\$167.81	\$154.21	\$3,025.61
715320	325263	DA05147669	KWH >	11,200	12,800	13,280	10,960	9,960	8,640	12,000	16,520	14,560	10,880	10,600	12,840	144,240
			KW >	33	37	38	34	28	27	38	40	40	36	32	38	35
			Elec Revenue >	\$1,484.99	\$1,589.82	\$1,641.58	\$1,410.07	\$1,316.31	\$1,179.91	\$1,636.24	\$2,061.04	\$1,883.37	\$1,467.02	\$1,315.13	\$498.21	\$17,483.69
715322	325264	DG57850854	KWH >	14,320	12,720	12,560	11,120	11,200	13,280	17,120	26,160	19,840	15,040	12,240	12,640	178,240
			KW >	28	30	25	23	24	28	41	45	38	31	26	25	30
			Elec Revenue >	\$1,674.98	\$1,496.72	\$1,421.99	\$1,297.70	\$1,384.24	\$1,633.92	\$2,158.44	\$3,025.79	\$2,345.29	\$1,763.67	\$1,383.56	\$335.81	\$19,922.11

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
715550	325468	DA18979694	KWH >	563	668	572	489	299	260	271	264	229	260	240	300	4,415
			KW >	4	7	4	6	9	7	14	3	15	7	3	3	7
			Elec Revenue >	\$58.61	\$82.82	\$56.46	\$75.85	\$99.95	\$84.02	\$153.60	\$44.44	\$159.03	\$87.80	\$42.29	\$33.66	\$978.53
715568	325484	DG36338704	KWH >	3,360	3,160	3,200	2,880	2,960	3,080	2,800	2,640	3,600	2,840	3,080	2,920	36,520
			KW >	6	6	6	7	8	5	6	5	6	6	5	5	6
			Elec Revenue >	\$103.24	\$94.33	\$94.69	\$103.40	\$119.50	\$89.77	\$91.22	\$82.22	\$102.30	\$95.55	\$86.13	\$52.67	\$1,115.02
721400	308650	DG15003051	KWH >	277	312	486	317	681	879	571	424	563	735	445	153	5,843
			KW >	13	11	11	12	22	21	23	20	22	22	11	18	17
			Elec Revenue >	\$157.82	\$121.14	\$123.16	\$132.74	\$235.63	\$223.62	\$244.47	\$209.63	\$226.74	\$233.27	\$123.30	\$175.35	\$2,206.87
724912	333416	DA04801144	KWH >	6	5	6	5	2,307	4,139	4,322	4,825	4,323	3,033	6	5	22,982
			KW >	0	0	0	0	6	5	6	6	6	5	0	0	3
			Elec Revenue >	\$8.87	\$8.83	\$8.84	\$8.83	\$94.42	\$101.07	\$112.89	\$118.40	\$106.43	\$92.94	\$8.84	\$0.19	\$670.55
724931	333434	DG23524464	KWH >	0	0	0	0	0	0	7,420	9,080	7,720	4,880	40	0	29,140
			KW >	0	0	0	0	0	0	34	32	32	33	0	0	26
			Elec Revenue >	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$403.33	\$399.29	\$389.12	\$369.64	\$9.06	\$0.00	\$1,622.64
725214	333704	DA17487923	KWH >	3,317	3,409	3,463	4,276	6,109	7,152	0	0	0	0	0	0	27,726
			KW >	10	9	18	20	24	27	0	0	0	0	0	0	18
			Elec Revenue >	\$147.80	\$132.52	\$220.28	\$239.86	\$298.86	\$1,038.22	\$354.05	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,431.59
725215	333705	DD55413459	KWH >	280	320	360	440	720	1,000	0	0	0	0	0	0	3,120
			KW >	4	4	5	6	13	18	0	0	0	0	0	0	8
			Elec Revenue >	\$56.02	\$57.72	\$61.92	\$70.32	\$145.92	\$332.48	\$236.82	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$961.20
725219	333708		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$9.78	\$9.62	\$9.62	\$9.62	\$9.62	\$9.62	\$6.42	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$64.30
725219	333708	DG85495631	KWH >	1,760	1,360	1,480	1,960	4,400	10,800	8,240	0	0	0	0	0	30,000
			KW >	3	3	4	60	80	90	115	0	0	0	0	0	51
			Elec Revenue >	\$60.73	\$51.50	\$60.25	\$603.33	\$825.02	\$2,187.49	\$1,854.47	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,642.79
725220	333709		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
725220	333709	DG90038814	KWH >	253	104	358	2,653	4,309	0	0	0	0	0	0	0	7,677
			KW >	0	0	0	50	50	0	0	0	0	0	0	0	20
			Elec Revenue >	\$20.00	\$18.18	\$21.19	\$522.26	\$474.00	\$1,960.58	\$1,344.98	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,361.19
725221	333710		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
725221	333710	DG16639320	KWH >	1,680	1,440	1,520	2,880	4,080	12,080	8,080	0	0	0	0	0	31,760
			KW >	1	2	1	130	129	128	128	0	0	0	0	0	74
			Elec Revenue >	\$39.87	\$44.51	\$37.52	\$1,288.83	\$1,148.66	\$2,544.51	\$1,774.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,878.55
725229	333718	DA21260673	KWH >	1,040	714	793	1,773	3,272	4,967	4,357	0	0	0	0	0	16,916
			KW >	4	2	2	9	13	14	15	0	0	0	0	0	8
			Elec Revenue >	\$59.74	\$38.19	\$36.96	\$120.30	\$163.54	\$669.88	\$564.91	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,653.52
725464	333924	2000316351	KWH >	0	0	0	0	0	0	0	0	0	0	1,120	1,960	3,080
			KW >	0	0	0	0	0	0	0	0	0	0	2	3	3
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$41.75	\$33.70	\$75.45

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
725464	333924	DA07808268	KWH >	2,400	2,160	2,440	2,080	2,320	4,800	11,640	13,000	13,400	2,560	0	0	56,800
			KW >	3	3	3	3	4	20	20	20	20	16	0	0	11
			Elec Revenue >	\$65.96	\$58.56	\$61.04	\$57.86	\$75.38	\$247.38	\$303.98	\$316.77	\$324.19	\$193.12	\$0.00	\$0.00	\$1,704.24
725466	333926	2000317315	KWH >	0	0	0	0	0	0	0	0	0	207	166	373	
			KW >	0	0	0	0	0	0	0	0	0	0	2	0	1
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.76	\$4.19	\$39.95
725466	333926	DA07358114	KWH >	184	156	184	162	249	596	3,357	4,877	4,092	413	0	0	14,270
			KW >	0	0	0	0	0	4	19	20	21	2	0	0	7
			Elec Revenue >	\$18.66	\$17.49	\$17.64	\$17.44	\$19.56	\$53.32	\$228.68	\$253.09	\$255.81	\$35.95	\$0.00	\$0.00	\$917.64
725565	334024	DD79678272	KWH >	158	163	157	168	204	236	249	291	226	184	166	0	2,202
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$16.82	\$13.60	\$13.55	\$14.22	\$14.63	\$16.85	\$15.61	\$16.10	\$14.84	\$14.47	\$14.22	\$0.00	\$164.91
725959	334413	DA20062890	KWH >	0	0	2,400	0	1,200	0	0	2,400	1,200	0	1,200	0	8,400
			KW >	0	0	0	0	0	0	0	156	0	0	0	0	31
			Elec Revenue >	\$8.70	\$8.70	\$29.90	\$8.70	\$19.29	\$8.70	\$8.70	\$1,531.07	\$19.37	\$8.70	\$19.37	\$0.00	\$1,671.20
827705	351134	DA22640088	KWH >	1,800	1,800	1,240	1,400	5,000	13,440	0	0	0	0	0	0	24,680
			KW >	3	3	2	61	87	106	0	0	0	0	0	0	44
			Elec Revenue >	\$210.55	\$210.36	\$146.61	\$913.45	\$1,592.11	\$2,647.87	\$1,362.18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,083.13
917087	357114	2000316753	KWH >	0	0	0	0	0	0	0	0	0	1,320	1,080	2,400	
			KW >	0	0	0	0	0	0	0	0	0	0	5	2	4
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$74.33	\$22.90	\$97.23
917087	357114	DG63924078	KWH >	1,600	1,520	1,680	1,200	520	3,000	29,160	37,760	30,640	480	0	0	107,560
			KW >	2	2	2	2	0	149	156	146	146	4	0	0	61
			Elec Revenue >	\$45.43	\$41.37	\$42.78	\$38.54	\$20.98	\$1,470.78	\$1,767.36	\$1,757.08	\$1,689.90	\$51.44	\$0.00	\$0.00	\$6,925.66
920779	355986	DA33539269	KWH >	16,600	11,440	11,560	11,920	8,800	6,400	5,960	5,120	5,880	5,560	7,880	11,440	108,560
			KW >	38	31	25	23	20	16	13	9	9	12	17	24	20
			Elec Revenue >	\$552.28	\$409.93	\$353.25	\$341.05	\$282.71	\$223.02	\$192.38	\$146.61	\$153.38	\$173.61	\$248.14	\$245.08	\$3,321.44
1356777	392254	DA03986632	KWH >	4,960	4,000	4,400	4,560	4,000	3,680	1,840	1,520	1,840	2,080	3,520	4,240	40,640
			KW >	28	28	28	29	28	38	22	22	22	33	24	48	29
			Elec Revenue >	\$341.39	\$313.43	\$316.97	\$333.78	\$321.14	\$410.68	\$240.57	\$237.75	\$240.60	\$350.50	\$278.63	\$465.68	\$3,851.12
1451728	333403	DA05310602	KWH >	1,104	812	756	1,680	725	1,102	7,209	12,952	7,874	574	1,806	820	37,414
			KW >	3	3	2	6	7	6	35	35	34	5	39	2	15
			Elec Revenue >	\$54.85	\$46.85	\$41.93	\$86.55	\$86.41	\$80.40	\$417.04	\$464.43	\$410.03	\$63.36	\$401.09	\$23.06	\$2,176.00
1605637	134897	DA12391162	KWH >	9,002	6,847	7,028	6,794	5,493	5,313	8,893	7,764	6,811	4,876	4,956	0	73,777
			KW >	34	34	34	31	25	32	30	33	28	23	20	0	29
			Elec Revenue >	\$439.69	\$400.15	\$399.84	\$374.09	\$302.29	\$369.09	\$380.83	\$398.08	\$347.64	\$276.36	\$249.94	\$0.00	\$3,938.00
1824494	256652	DG83017557	KWH >	19,040	20,000	15,840	14,320	14,240	12,800	11,920	14,200	12,640	11,920	10,520	0	157,440
			KW >	35	38	32	31	27	25	28	32	25	24	25	0	29
			Elec Revenue >	\$572.70	\$562.56	\$464.19	\$435.36	\$400.01	\$364.21	\$383.38	\$442.85	\$363.60	\$345.67	\$348.59	\$0.00	\$4,683.12
2111985	438429	DA14667363	KWH >	9,497	10,375	8,874	7,355	5,129	3,852	4,536	4,189	4,306	4,003	4,465	7,583	74,164
			KW >	24	26	25	27	20	18	17	16	21	19	18	24	21
			Elec Revenue >	\$340.80	\$352.03	\$331.57	\$334.89	\$253.85	\$224.01	\$218.40	\$203.67	\$250.22	\$228.47	\$227.10	\$239.00	\$3,204.01
Total KWH				1,360,883	1,383,549	1,316,569	1,358,040	1,299,518	1,522,351	1,563,773	2,219,697	1,970,547	1,377,047	1,203,111	1,249,124	17,824,209
Combined Average KW				3,035	2,983	3,031	3,263	3,639	4,351	4,406	5,085	4,375	3,275	2,763	2,824	4,976
USBC Charge				\$1,224.80	\$1,245.20	\$1,184.90	\$1,222.23	\$1,169.56	\$1,370.12	\$1,407.40	\$1,997.72	\$1,773.53	\$1,239.34	\$1,082.82	\$1,124.22	\$16,041.84
Total Elec Revenue				\$57,458.24	\$52,148.00	\$51,434.96	\$54,434.95	\$54,723.45	\$69,830.49	\$73,629.25	\$81,926.35	\$71,501.78	\$50,851.57	\$44,369.73	\$20,396.10	\$682,704.87

Decker 8792201  
Billing Period 0.0009

Usage	USB Obligation	
16-Dec	1,400,000	1260
16-Nov	1,295,000	1165.5
16-Oct	910,000	819
16-Sep	875,000	787.5
16-Aug	1,050,000	945
16-Jul	875,000	787.5
16-Jun	945,000	850.5
16-May	1,015,000	913.5
16-Apr	1,120,000	1008
16-Mar	1,225,000	1102.5
16-Feb	1,120,000	1008
16-Jan	1,435,000	1291.5

total 13,265,000 \$11,938.50

Less USB Credit \$ 13,400.15

Amont (due) carry forward \$1,461.65

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

date	work order or cost code	Equipment	parts	labor	watts old fixture	watts new fixture
9/26/2024	397289	9-480v High Bay LED Lights	\$ 1,369.00	\$ 1,440.00	9000	2160
9/26/2024	397289	20-4ft LED T8 Light Tubes	\$ 86.57	\$ 720.00	800	360
10/21/2024	397289	40-4ft LED T8 Light Tubes	\$ 173.14	\$ 1,440.00	1600	720
10/31/2024	397289	9-480v High Bay LED Lights	\$ 1,369.00	\$ 1,440.00	9000	2160
11/18/2024	397289	40-4ft LED T8 Light Tubes	\$ 173.14	\$ 1,440.00	1600	720
12/18/2024	397289	9-480v High Bay LED Lights	\$ 1,369.00	\$ 1,440.00	9000	2160
12/18/2024	397289	2-480v Corn Bulb LED Lights	\$ 119.76	\$ 240.00	3000	300
12/18/2024	397289	2-480v 300w Parking Lot Bulbs	\$ 340.54	\$ 240.00	600	2000

total	\$ 5,000.15	\$ 8,400.00	34600	10580
Project Total	\$ 13,400.15			

Decker	8792201		
Billing Period		0.0009	<b>Decker Coa</b>
			<b>date</b>
	Usage	USB Obligation	5/23/2018
16-Dec	3,605,000	3244.5	7//12/2018
16-Nov	2,555,000	2299.5	7/12/2018
16-Oct	3,605,000	3244.5	10/12/2018
16-Sep	3,500,000	3150	12/4/2018
16-Aug	2,590,000	2331	
16-Jul	3,583,720	3225.348	
16-Jun	3,080,000	2772	
16-May	2,824,173	2541.7557	
16-Apr	3,640,000	3276	
16-Mar	3,675,000	3307.5	
16-Feb	3,535,000	3181.5	
16-Jan	4,165,000	3748.5	
total	40,357,893	\$36,322.10	
Less USB Credit		\$ 151,958.19	
Amont (due) carry forward		\$115,636.09	

I Company Power Savings Project: High Efficientcy, Low Consumption LED Replacerr

work order or cost code	Equipment	parts	labor
AFE-1718	EAST LAB	\$ 16,171.58	\$ 2,102.00
381677	1300 bom lights	\$ 51,804.60	\$ 6,734.52
afe-1702	east lab yard lights	\$ 2,763.28	\$ 2,880.00
afe-1810	dragline house lighting	\$ 56,002.00	\$ 7,280.26
384600	replace aleg lights	\$ 5,504.38	\$ 715.57
total		\$ 132,245.84	\$ 19,712.35
Project Total		\$ 151,958.19	



## rents

[illegible]

Decker 8792201 0.0009  
Billing Period

**Decker Coal Compa**

**date**

	Usage	USB Obligation	
			4/7/2017
16-Dec	4,025,000	3622.5	4/10/2017
16-Nov	3,430,000	3087	2/24/2017
16-Oct	3,325,000	2992.5	4/17/2017
16-Sep	2,380,000	2142	4/24/2017
16-Aug	2,940,000	2646	5/17/2017
16-Jul	2,800,000	2520	1/1/2017
16-Jun	2,100,000	1890	6/29/2017
16-May	2,940,000	2646	7/14/2017
16-Apr	2,940,000	2646	7/31/2017
16-Mar	3,605,000	3244.5	3/28/2017
16-Feb	3,010,000	2709	3/28/2017
16-Jan	3,500,000	3150	12/16/2017
			12/16/2017
total	36,995,000	\$33,295.50	1/9/2017
			1/9/2017
Less USB Credit	\$	74,111.77	4/17/2017
Amont (due) carry forward		\$40,816.27	

# ny Power Savings Project: High Efficiency, Low Consumption LED Replacements

work order or cost code	Equipment	parts	labor	
374465	led in change room	\$ 3,424.72	\$	2,298.00
374482	led in shop bay 14	\$ 8,702.70	\$	880.70
373796	led in east plant loadout	\$ 3,389.71	\$	877.24
374572	warehouse	\$ 1,670.15	\$	3,199.52
8011.06	warehouse	\$ 770.00	\$	1,532.00
375134	warehouse	\$ 770.00	\$	1,532.00
372671	warehouse	\$ 770.00	\$	1,532.00
375771	warehouse	\$ 770.00	\$	1,532.00
376039	warehouse	\$ 770.00	\$	1,532.00
376227	warehouse	\$ 770.00	\$	1,532.00
374291	kamatsu hot start	\$ 1,910.77	\$	600.00
374293	kamatsu hot start	\$ 1,910.77	\$	600.00
378806	REBUILD BAY	\$ 3,442.74	\$	1,567.51
378808	REBUILD BAY	\$ 3,518.09	\$	1,713.21
378722	east plant sec building	\$ 8,610.00	\$	653.14
378721	east plant sec building	\$ 8,610.00	\$	1,800.00
374572	conex buildings	\$ 308.00	\$	612.80
	total	\$ 50,117.65	\$	23,994.12
	<b>Project Total</b>	\$ 74,111.77		

watts old fixture	watts new fixture
1020	510
16000	6080
748	374
1360	680
680	340
680	340
680	340
680	340
680	340
680	340
1600	312
1600	312
10000	2400
10000	2400
2625	930
2625	930
272	136
51930	17104

Decker 8792201  
Billing Period 0.0009

## Decker Coal Company Power Savings Project: High Effi

	Usage	USB Obligation
Dec-16	<b>3,006,175</b>	2705.5575
Nov-16	<b>3,115,000</b>	2803.5
Oct-16	<b>3,080,000</b>	2772
Sep-16	<b>2,415,000</b>	2173.5
Aug-16	<b>2,205,000</b>	1984.5
Jul-16	<b>1,575,000</b>	1417.5
Jun-16	<b>1,750,000</b>	1575
May-16	<b>2,485,000</b>	2236.5
Apr-16	<b>2,765,000</b>	2488.5
Mar-16	<b>3,430,000</b>	3087
Feb-16	<b>3,395,000</b>	3055.5
Jan-16	<b>3,920,000</b>	3528

Date	Work Order	Equipment	Materials	Labor
12/30/2016	371441	stock pile	\$2,457.57	\$12,365.62
8/9/2016	368589	14dragline	\$63,911.35	\$3,058.01

**Project Total \$81,792.55**

\$66,368.92 \$15,423.63

total 33,141,175 \$ 29,827.06

Less USB Credit \$ 81,792.55

Amount (due) carry forward \$ 51,965.49

**cientcy, Low Consumption LED Replacements**

**Description**

6-1500watt HID TO 6-500watt LED  
24-1000watt HID to 18-450watt LED

Decker 8792201  
Billing Period 0.0009

	Usage	USB Obligation
Dec-15	3,850,000	3465
Nov-15	3,465,000	3118.5
Oct-15	3,010,000	2709
Sep-15	2,975,000	2677.5
Aug-15	3,010,000	2709
Jul-15	2,800,000	2520
Jun-15	2,555,000	2299.5
May-15	2,765,000	2488.5
Apr-15	2,870,000	2583
Mar-15	3,710,000	3339
Feb-15	3,605,000	3244.5
Jan-15	3,850,000	3465

total 38,465,000 \$ 34,618.50

Less USB Credit \$ 59,199.62

Amount (due) carry forward \$ 24,581.12

## Decker Coal Company Power Savings Project: High Efficiency

Date	Work Order	Equipment	Materials	Labor
5/27/2014	359650	Hitachi 1800	\$4,056.12	\$240.25
7/1/2014	358460	BE 295	\$26,593.26	\$2,364.85
6/6/2014	359644	Allmand Plant	\$10,698.00	\$298.94
6/9/2014	359669	5230B	\$1,999.00	\$212.36
2/13/2015	352991	BE 1570	\$4,878.00	\$318.56
7/10/2015	360139	East Plant	\$2,673.48	\$288.30
1/6/2014	357238	East Shop	\$4,098.00	\$480.50
			\$54,995.86	\$4,203.76

**Project Total \$59,199.62**

**cientcy, Low Consumption LED Replacements**

**Description**

400W HID to 150W LED, 500W HID to 13W LED, 100W HID to 13W LED  
6000W to 1800W LED, House lights 240W to 120W LED  
400W HID to 1200W LED  
1600W to 600W LED  
500W to 65W LED in tub, 4000W to 1200W LED on boom  
175W HID to 70W LED  
2000W HID to 600W LED



Decker	8792201		
Billing Period		0.0009	<b>Decker Coa</b>
			<b>date</b>
	Usage	USB Obligation	2/14/2019
16-Dec	3,395,000	3055.5	1/5/2019
16-Nov	2,870,000	2583	2/1/2019
16-Oct	2,695,000	2425.5	9/11/2019
16-Sep	2,380,000	2142	12/2/2019
16-Aug	2,508,868	2257.9812	
16-Jul	2,100,000	1890	
16-Jun	2,380,000	2142	
16-May	2,520,000	2268	
16-Apr	2,520,000	2268	
16-Mar	3,080,000	2772	
16-Feb	3,395,000	3055.5	
16-Jan	3,395,000	3055.5	
total	33,238,868	\$29,914.98	
Less USB Credit		\$ 32,926.02	
Amont (due) carry forward		\$3,011.04	

I Company Power Savings Project: High Efficiency, Low Consumption LED Replacerr

work order or cost code	Equipment	parts	labor
385662	92-7206	\$ 1,313.00	\$ 2,276.10
385428	91-7206	\$ 1,271.53	\$ 1,702.15
384844	91-7206	\$ 656.50	\$ 391.38
388897	92-7206	\$ 21,213.96	
384885	substation lights	\$ 4,101.40	
total		\$ 28,556.39	\$ 4,369.63
Project Total		\$ 32,926.02	

rents

watts old fixture	watts new fixture
1500	800
1,600	640
600	400
5250	1560
2000	240
10950	3640

Decker	8792201		
Billing Period		0.0009	<b>Decker Coa</b>
			<b>date</b>
	Usage	USB Obligation	6/8/2020
16-Dec	1,951,621	1756.4589	6/8/2020
16-Nov	1,855,000	1669.5	6/8/2020
16-Oct	1,477,140	1329.426	6/8/2020
16-Sep	945,000	850.5	
16-Aug	1,960,000	1764	
16-Jul	2,205,000	1984.5	
16-Jun	1,855,000	1669.5	
16-May	1,855,000	1669.5	
16-Apr	2,940,000	2646	
16-Mar	3,500,000	3150	
16-Feb	3,290,000	2961	
16-Jan	3,080,000	2772	
total	26,913,761	\$24,222.38	
Less USB Credit		\$ 27,034.15	
Amont (due) carry forward		\$2,811.77	

I Company Power Savings Project: High Efficiency, Low Consumption LED Replacerr

work order or cost code	Equipment	parts	labor
392508	truck dump lighting	\$ 8,051.45	
392509	truck dump lighting	\$ 8,783.40	
392510	truck dump lighting	\$ 7,319.50	
392519	substation indicator lights	\$ 2,879.80	

	total	\$ 27,034.15	\$ -
<b>Project Total</b>		\$ 27,034.15	

rents

watts old fixture	watts new fixture
1925	594
2,100	648
1750	540
1400	182
7175	1964

Decker 8792201 0.0009  
Billing Period

Decker Coa

date

12/6/2021

	Usage	USB Obligation	
16-Dec	1,715,000	1543.5	
16-Nov	1,225,000	1102.5	
16-Oct	1,365,000	1228.5	
16-Sep	945,000	850.5	
16-Aug	1,015,000	913.5	
16-Jul	525,000	472.5	
16-Jun	397,250	357.525	
16-May	630,000	567	
16-Apr	1,084,650	976.185	
16-Mar	1,750,000	1575	
16-Feb	1,750,000	1575	
16-Jan	1,785,000	1606.5	
total	14,186,900	\$12,768.21	
Less USB Credit		\$ 14,446.04	
Amont (due) carry forward		\$1,677.83	

I Company Power Savings Project: High Efficientcy, Low Consumption LED Replacerr

work order or cost code	Equipment	parts	labor
k09355	shop lights	\$ 12,766.04	\$ 1,680.00

total	\$ 12,766.04	\$ 1,680.00
Project Total	\$ 14,446.04	



rents

watts old fixture	watts new fixture
28000	8400

28000                      8400

Decker 8792201 0.0009  
Billing Period

Decker Coa

date

12/5/2022

	Usage	USB Obligation
16-Dec	1,610,000	1449
16-Nov	1,330,000	1197
16-Oct	1,190,000	1071
16-Sep	945,000	850.5
16-Aug	1,085,000	976.5
16-Jul	910,000	819
16-Jun	945,000	850.5
16-May	910,000	819
16-Apr	1,260,000	1134
16-Mar	1,505,000	1354.5
16-Feb	1,610,000	1449
16-Jan	1,645,000	1480.5
total	14,945,000	\$13,450.50
Less USB Credit	\$	14,813.12
Amont (due) carry forward		\$1,362.62

I Company Power Savings Project: High Efficiency, Low Consumption LED Replacerr

work order or cost code	Equipment	parts	labor
395940/po#k09886		\$ 13,133.12	\$ 1,680.00

total	\$ 13,133.12	\$ 1,680.00
Project Total	\$ 14,813.12	

rents

watts old fixture	watts new fixture
28000	8400

28000                      8400

Decker 8792201 0.0009  
Billing Period

Decker Coa

date

12/5/2023

	Usage	USB Obligation	
12/16/2023	1,260,000	1134	
11/16/2023	1,085,000	976.5	
10/16/2023	910,000	819	
9/16/2023	801,000	720.9	
8/16/2023	900,000	810	
7/16/2023	945,000	850.5	
6/16/2023	855,000	769.5	
5/16/2023	945,000	850.5	
4/16/2023	1,120,000	1008	
3/16/2023	1,540,000	1386	
2/16/2023	1,505,000	1354.5	
1/16/2023	1,435,000	1291.5	
total	13,301,000	\$11,970.90	
Less USB Credit	\$	15,098.00	
Amont (due) carry forward		\$3,127.10	

I Company Power Savings Project: High Efficiency, Low Consumption LED Replacem

work order or cost code	Equipment	parts	labor
396845 PO K10315		\$ 11,608.00	\$ 3,490.00

total	\$ 11,608.00	\$ 3,490.00
Project Total	\$ 15,098.00	

rents

watts old fixture	watts new fixture
28000	8400

28000                      8400

Decker	8792201		
Billing Period		0.0009	<b>Decker Coa</b>
			<b>date</b>
	Usage	USB Obligation	9/26/2024
16-Dec	1,400,000	1260	9/26/2024
16-Nov	1,295,000	1165.5	10/21/2024
16-Oct	910,000	819	10/31/2024
16-Sep	875,000	787.5	11/18/2024
16-Aug	1,050,000	945	12/18/2024
16-Jul	875,000	787.5	12/18/2024
16-Jun	945,000	850.5	12/18/2024
16-May	1,015,000	913.5	
16-Apr	1,120,000	1008	
16-Mar	1,225,000	1102.5	
16-Feb	1,120,000	1008	
16-Jan	1,435,000	1291.5	
total	13,265,000	\$11,938.50	
Less USB Credit		\$ 13,400.15	
Amont (due) carry forward		\$1,461.65	



**I Company Power Savings Project: High Efficiency, Low Consumption LED Replaceme**

work order or cost code	Equipment	parts	labor
397289	9-480v High Bay LED Lights	\$ 1,369.00	\$ 1,440.00
397289	20-4ft LED T8 Light Tubes	\$ 86.57	\$ 720.00
397289	40-4ft LED T8 Light Tubes	\$ 173.14	\$ 1,440.00
397289	9-480v High Bay LED Lights	\$ 1,369.00	\$ 1,440.00
397289	40-4ft LED T8 Light Tubes	\$ 173.14	\$ 1,440.00
397289	9-480v High Bay LED Lights	\$ 1,369.00	\$ 1,440.00
397289	2-480v Corn Bulb LED Lights	\$ 119.76	\$ 240.00
397289	2-480v 300w Parking Lot Bulbs	\$ 340.54	\$ 240.00
total		\$ 5,000.15	\$ 8,400.00
Project Total		\$ 13,400.15	

nts

watts old fixture	watts new fixture
9000	2160
800	360
1600	720
9000	2160
1600	720
9000	2160
3000	300
600	2000
34600	10580

Decker	8792201			
Billing Period		0.0009		Decker Coa
				date
	Usage	USB Obligation		
	16-Dec		0	
	16-Nov		0	
	16-Oct		0	
	16-Sep		0	
	16-Aug		0	
	16-Jul		0	
	16-Jun		0	
	16-May		0	
	16-Apr		0	
	16-Mar		0	
	16-Feb		0	
	16-Jan		0	
total		0	\$0.00	
Less USB Credit		\$	-	
Amont (due) carry forward			\$0.00	

I Company Power Savings Project: High Efficiency, Low Consumption LED Replacem

work order or cost code	Equipment	parts	labor
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total	\$	-	\$	-
Project Total	\$	-		

ents

watts old fixture	watts new fixture
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0

0

Decker

8792201

Billing Period

0.0009

Decker Coa

date

Usage

USB Obligation

16-Dec	0
16-Nov	0
16-Oct	0
16-Sep	0
16-Aug	0
16-Jul	0
16-Jun	0
16-May	0
16-Apr	0
16-Mar	0
16-Feb	0
16-Jan	0

total	0	\$0.00
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Less USB Credit	\$	-
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Amont (due) carry forward		\$0.00
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I Company Power Savings Project: High Efficiency, Low Consumption LED Replacem

work order or cost code	Equipment	parts	labor
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total	\$	-	\$	-
Project Total	\$	-		

ents

watts old fixture	watts new fixture
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0

0



Decker	8792201			
Billing Period		0.0009		Decker Coa
				date
	Usage	USB Obligation		
	16-Dec		0	
	16-Nov		0	
	16-Oct		0	
	16-Sep		0	
	16-Aug		0	
	16-Jul		0	
	16-Jun		0	
	16-May		0	
	16-Apr		0	
	16-Mar		0	
	16-Feb		0	
	16-Jan		0	
total		0	\$0.00	
Less USB Credit		\$	-	
Amont (due) carry forward			\$0.00	

I Company Power Savings Project: High Efficiency, Low Consumption LED Replacem

work order or cost code	Equipment	parts	labor
-------------------------	-----------	-------	-------

total	\$	-	\$	-
Project Total	\$	-		

ents

watts old fixture	watts new fixture
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0

0

Decker

8792201

Billing Period

0.0009

Decker Coa

date

Usage

USB Obligation

16-Dec	0
16-Nov	0
16-Oct	0
16-Sep	0
16-Aug	0
16-Jul	0
16-Jun	0
16-May	0
16-Apr	0
16-Mar	0
16-Feb	0
16-Jan	0

total	0	\$0.00
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Less USB Credit	\$	-
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Amount (due) carry forward		\$0.00
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I Company Power Savings Project: High Efficiency, Low Consumption LED Replacem

work order or cost code	Equipment	parts	labor
-------------------------	-----------	-------	-------

total	\$	-	\$	-
Project Total	\$	-		

ents

watts old fixture	watts new fixture
-------------------	-------------------

0

0

Decker

8792201

Billing Period

0.0009

Decker Coa

date

Usage

USB Obligation

16-Dec	0
16-Nov	0
16-Oct	0
16-Sep	0
16-Aug	0
16-Jul	0
16-Jun	0
16-May	0
16-Apr	0
16-Mar	0
16-Feb	0
16-Jan	0

total	0	\$0.00
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Less USB Credit	\$	-
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Amont (due) carry forward		\$0.00
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I Company Power Savings Project: High Efficiency, Low Consumption LED Replacem

work order or cost code	Equipment	parts	labor
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total	\$	-	\$	-
Project Total	\$	-		



ents

watts old fixture	watts new fixture
-------------------	-------------------

0

0

Decker

8792201

Billing Period

0.0009

Decker Coa

date

Usage

USB Obligation

16-Dec	0
16-Nov	0
16-Oct	0
16-Sep	0
16-Aug	0
16-Jul	0
16-Jun	0
16-May	0
16-Apr	0
16-Mar	0
16-Feb	0
16-Jan	0

total	0	\$0.00
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Less USB Credit	\$	-
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Amont (due) carry forward		\$0.00
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I Company Power Savings Project: High Efficiency, Low Consumption LED Replacem

work order or cost code	Equipment	parts	labor
-------------------------	-----------	-------	-------

total	\$	-	\$	-
Project Total	\$	-		

ents

watts old fixture	watts new fixture
-------------------	-------------------

0

0



February 6, 2025

Alyson Dunkle  
Russ Christensen  
Montana Department of Revenue  
PO Box 5085  
Helena, MT 59604-5805

Alyson and Russ,

Under the guidelines of the Montana Universal Benefit Fund (USBF), Denbury Inc. is requesting a refund in the amount of \$178,053.06 which is our 2024 USB Available Credit amount. We will also have a carryover amount of \$92,132.71, which will increase our carryover amount to \$1,787,800.25.

Attached is a breakdown of the expenditures that Denbury, Inc. incurred during 2024.

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

Tracey Fuller

Office Manager – North Business Unit  
Denbury Inc.  
2310 Oil Drive  
Casper, Wy 82604  
307.439.1850 Ext. 4501  
Cell: 307.262.4926



**UNIVERSAL SYSTEM BENEFITS (USB)  
LARGE CUSTOMER CREDIT FORM**

Complete and mail to:

Montana Dakota Utilities Co.  
ATTN: Travis R. Jacobson  
Regulatory Affairs Department  
400 North 4th Street  
Bismarck, ND 58501  
Email: [travis.jacobson@mdu.com](mailto:travis.jacobson@mdu.com)  
FAX: (701) 222-7855

DATE: February 6, 2025  
NAME OF BUSINESS: Denbury Onshore  
CITY/TOWN LOCATION: Baker, Montana  
CONTACT PERSON: Tracey Fuller  
MAILING ADDRESS: PO Box 1533  
CITY, STATE AND ZIP: Baker, Mt 59313  
PHONE NUMBER: 307.262.4926  
FAX NUMBER:  
E-MAIL ADDRESS: [tracey.fuller@exxonmobil.com](mailto:tracey.fuller@exxonmobil.com)  
AMOUNT OF CREDIT REQUESTED: **270,185.77**

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

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

Installed insulation over heat tape to prevent heat loss.

Downsized sheaves to make pumping units run more efficiently.

Replace lights with LED lights.

Install PMM pump in well for energy efficiency.

ESTIMATED kWh and KW

SAVINGS: 270,000

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

**CUSTOMER**

Signature: Curtis Reed

Montana-Dakota Utilities Co.  
Electric Utility - Montana  
Summary of Large USB Dollars Collected by Account - Denbury  
Twelve Months Ended December 31, 2024

Customer Name		DENBURY ONSHORE LLC
CHAR_VAL		USBCL
Row Labels	Sum of CALC_AMT	
0264096521	\$16,835.04	
1296267362	\$14,516.96	
1449822241	\$11,021.98	
2482678294	\$1,179.81	
3634483863	\$16,644.65	
4648409082	\$3,324.24	
4657268782	\$6,072.99	
4657702989	\$10,662.94	
4933084650	\$19,724.91	
5011200812	\$14,041.88	
5284019124	\$4,967.98	
5890094741	\$9,639.04	
8055585606	\$12,337.00	
8085268573	\$15,012.34	
9904614287	\$22,071.30	
Grand Total	\$178,053.06	

Workorder	Description	Description of functional location	ActTotCost
DOWNSIZE SHEAVE			
11/13/2024	212034995	Slow down 21X-29CH NP	\$893.50
11/15/2024	212035779	Slow down and balance unit 11X-02H	\$2,728.85
8/13/2024	211967011	43-20 Slowdown	\$628.74
7/30/2024	211940958	34x-13 Slow Down 1 Sheave size	\$2,522.57
6/18/2024	211927225	11x-12H Slow down 1 motor sheave	\$689.71
6/18/2024	211927226	31x-34H slow down 1 sheave size	\$747.94
6/18/2024	211929074	41-3H GC slow down 1 sheave size motor	\$689.72
	212057712	Pennel 12-23 BH PM Sheave Change	1,127.09
	211858980	CHANGE SHEAVE 33-19HRE	855.47

INSULATION			
PO			
11/30/2024	4300282235	Insulation for Debury Pennel B West Injection Manifold	7,900.00
11/30/2024	4300276648	Denbury Wet Gas Insulation Project	170,000.00

INSTALL LED LIGHTS			
6/17/2024	211927224	Replace Lights in East Test Treater	\$4,144.49
4/10/2024	211770196	replace lighting at sec 26 Manifold	\$2,744.57

INSTALL PMM/VFD			
6/26/2024		PMM installed Little Beaver 42-17	74,513.12

Total Energy Savings Expenses in 2024 270,185.77





**MONTANA-DAKOTA**

**UTILITIES CO.**

*A Division of MDU Resources Group, Inc.*

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

February 29, 2024


Denbury Onshore, LLC  
PO Box 1533  
Baker, MT 59313

Pursuant to your claim for \$186,862.19 under the Montana large customer Universal System Benefit Fund (USBF) Montana-Dakota Utilities Co. is providing the enclosed check in the amount of \$186,862.19 representing funds collected from you during calendar year 2023. A cumulative credit of \$1,695,667.54 will be carried forward to future years.

We congratulate Denbury Onshore, LLC for being good stewards of our resources and encourage you to continue your efforts in energy conservation.

Please contact me at 701.222.7855 if you have any questions.

Sincerely,

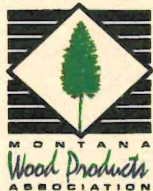


Travis R. Jacobson  
Director of Regulatory Affairs

cc:  
B. Kostecky  
Enclosure



Established in 1912  
Affiliations:



Charter Member

Flathead Valley



Member Since 1960



Rec'd MT DOR

FEB 19 2025

## F. H. STOLTZE LAND & LUMBER COMPANY

### *Lumber Manufacturers*

Box 1429 • Columbia Falls, Montana 59912  
Phone (406) 892-7000 • FAX (406) 892-1612  
E mail: [info@stoltzelumber.com](mailto:info@stoltzelumber.com)  
[www.stoltzelumber.com](http://www.stoltzelumber.com)

February 7, 2025

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

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

Sincerely,

*Josef Kuchera*

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

Flathead Electric Cooperative, Inc.  
2024 USBP Report  
Industrial Member Eligible Credits via Power Purchases

Member	<u>Conservation</u>	<u>Low Income</u>	<u>Renewable</u>	<u>Totals</u>	<u>kWh</u>
F.H. Stoltze Land & Lumber, Inc.	\$24,543	\$1,279	\$5,624	\$31,446	12,782,400



📍 GCC Trident  
4070 Trident Road  
Three Forks MT, 59752

📞 406-285-4998  
✉️ [mbeckett@gcc.com](mailto:mbeckett@gcc.com)

February 25, 2025  
Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – GCC Trident LLC**

Dear Mr. Schafer:

Please accept this letter and the attached document as GCC's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of GCC's 2024 USBC account activities.**
- **GCC did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.**
- **GCC has a current request balance of \$172,415.98 (shown on the attached USBC Progress Report) for a past project that was submitted in 2011 to NorthWestern Energy, and to the DOR in our 2011 Annual Summary Report.**

If you have any questions, please contact me at (406) 285-4998

Sincerely,

Morgan Beckett  
Production Manager

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



Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

GCC TRIDENT LLC

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$213,868.66
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$197,732.96	Total Payment Requests:	\$197,732.96
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$172,415.98
2023 Carryover USBC Credit:	\$3,148.38	Total USBC Credit:	\$27,061.54
USBC Credit YTD:	\$23,913.16	Payments Issued YTD:	\$25,316.98
Average Monthly Credit Earned:	\$1,992.76	USBC Credit Balance:	\$1,744.56
		Payment Pending:	\$1,744.56

Payment Requests Made		
Submitted By	Date	Amount

Payments Issued	
Date	Amount
04/19/2024	\$8,922.82
07/09/2024	\$4,722.62
10/08/2024	\$7,033.89
12/17/2024	\$4,637.65

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3563730	1039	DP20010340	KWH >	2,591,981	1,576,926	2,247,147	2,489,819	1,381,625	1,375,907	2,404,266	2,545,702	2,865,470	2,134,764	3,018,174	1,938,399	26,570,180
			KW >	5,782	3,932	5,380	5,356	5,216	2,632	5,276	5,320	5,904	5,752	5,540	5,448	5,128
			Elec Revenue >	\$22,145.63	\$13,490.12	\$18,705.51	\$19,619.98	\$15,000.58	\$10,388.16	\$19,140.46	\$20,053.92	\$22,387.28	\$19,155.73	\$22,359.63	\$11,421.66	\$213,868.66
			Total KWH	2,591,981	1,576,926	2,247,147	2,489,819	1,381,625	1,375,907	2,404,266	2,545,702	2,865,470	2,134,764	3,018,174	1,938,399	26,570,180
			Combined Average KW	5,782	3,932	5,380	5,356	5,216	2,632	5,276	5,320	5,904	5,752	5,540	5,448	5,128
			USBC Charge	\$2,332.78	\$1,419.23	\$2,022.43	\$2,240.84	\$1,243.46	\$1,238.32	\$2,163.84	\$2,291.13	\$2,578.92	\$1,921.29	\$2,716.36	\$1,744.56	\$23,913.16
			Total Elec Revenue	\$22,145.63	\$13,490.12	\$18,705.51	\$19,619.98	\$15,000.58	\$10,388.16	\$19,140.46	\$20,053.92	\$22,387.28	\$19,155.73	\$22,359.63	\$11,421.66	\$213,868.66



February 14, 2025

Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached document as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.**
- **We did not submit any USBC Form B Large Customer Credit Request Forms (USBC Projects) for 2024.**
- **We have a current request balance of \$ 90,841.13 (shown on the attached USBC Progress Report) for a past project that was submitted in 2021 to NorthWestern Energy, and to the MDOR in our 2021 Annual Summary Report.**
- **At year-end 2024, we had a credit balance of \$ 1,430.09 (carried over into 2025).**

If you have any questions, please contact me at (406)-455-9219.

Sincerely,

Lisa Blades  
General Mills Operations LLC  
Finance Lead

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
[rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)



Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

GENERAL MILLS

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$396,985.70
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$108,762.70	Total Payment Requests:	\$108,762.70
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$90,841.13
2023 Carryover USBC Credit:	\$1,320.29	Total USBC Credit:	\$19,351.66
USBC Credit YTD:	\$18,031.37	Payments Issued YTD:	\$17,921.57
Average Monthly Credit Earned:	\$1,502.61	USBC Credit Balance:	\$1,430.09
		Payment Pending:	\$1,430.09

Payment Requests Made		
Submitted By	Date	Amount

Payments Issued	
Date	Amount
04/19/2024	\$5,846.50
07/09/2024	\$4,389.94
10/08/2024	\$4,560.70
12/17/2024	\$3,124.43

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100619	1623	DA06183421	KWH >	1,675,289	1,693,159	1,660,682	1,671,184	1,687,081	1,519,440	1,698,732	1,757,860	1,610,852	1,609,588	1,861,996	1,588,992	20,034,855
			KW >	3,156	3,110	3,123	3,136	3,143	3,072	3,039	3,033	3,104	3,046	3,084	3,123	3,097
			Elec Revenue >	\$38,228.93	\$34,531.14	\$34,201.23	\$34,386.50	\$34,609.04	\$32,275.18	\$34,273.59	\$35,118.42	\$33,666.93	\$33,386.69	\$36,609.38	\$15,698.67	\$396,985.70
			Total KWH	1,675,289	1,693,159	1,660,682	1,671,184	1,687,081	1,519,440	1,698,732	1,757,860	1,610,852	1,609,588	1,861,996	1,588,992	20,034,855
			Combined Average KW	3,156	3,110	3,123	3,136	3,143	3,072	3,039	3,033	3,104	3,046	3,084	3,123	3,097
			USBC Charge	\$1,507.76	\$1,523.84	\$1,494.61	\$1,504.07	\$1,518.37	\$1,367.50	\$1,528.86	\$1,582.07	\$1,449.77	\$1,448.63	\$1,675.80	\$1,430.09	\$18,031.37
			Total Elec Revenue	\$38,228.93	\$34,531.14	\$34,201.23	\$34,386.50	\$34,609.04	\$32,275.18	\$34,273.59	\$35,118.42	\$33,666.93	\$33,386.69	\$36,609.38	\$15,698.67	\$396,985.70





February 28, 2025

Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached document as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.**
- **We did not submit any USBC Form B Large Customer Credit Request Forms (USBC Projects) for 2024.**
- **We have a current request balance of \$ 17,525.00 (shown on the attached USBC Progress Report) for a past project that was submitted in 2023 to NorthWestern Energy, and to the MDOR in our 2023 Annual Summary Report.**
- **At year-end 2024, we had a credit balance of \$ 1,058.14 (carried over into 2025).**

If you have any questions, please contact me at (406) 205-0406

Sincerely,

Monte Thompson  
Grain Craft  
Plant Manager

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
[rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)



# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

## GRAIN CRAFT

### Account Summary

2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$1,543,408.61
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$30,098.09	Total Payment Requests:	\$30,098.09
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$17,525.00
2023 Carryover USBC Credit:	\$1,027.30	Total USBC Credit:	\$13,631.23
USBC Credit YTD:	\$12,603.93	Payments Issued YTD:	\$12,573.09
Average Monthly Credit Earned:	\$1,050.33	USBC Credit Balance:	\$1,058.14
		Payment Pending:	\$1,058.14

### Payment Requests Made

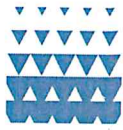
Submitted By	Date	Amount

### Payments Issued

Date	Amount
04/19/2024	\$4,038.65
07/09/2024	\$3,093.60
10/08/2024	\$3,294.39
12/17/2024	\$2,146.45

### Account Detail

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3443810	1600	DA28691816	KWH > 467,302	519,553	516,787	532,352	531,880	480,144	544,207	530,788	481,871	541,964	535,079	520,124	6,202,051
		KW > 1,082	1,104	1,083	1,093	1,113	1,111	1,073	1,107	1,107	1,077	1,096	1,152	1,134	1,102
		Elec Revenue > \$57,104.13	\$59,041.93	\$58,536.00	\$60,935.95	\$64,983.51	\$60,019.09	\$66,402.60	\$63,529.57	\$58,588.25	\$63,537.77	\$60,084.49	\$14,839.41		\$686,612.70
3444118	383712	DA28691767	KWH > 580,604	656,182	605,522	632,972	638,057	621,938	734,926	753,956	614,680	628,073	679,817	655,587	7,802,324
		KW > 1,282	1,353	1,315	1,329	1,369	1,363	1,341	1,341	1,350	1,333	1,323	1,338	1,305	1,333
		Elec Revenue > \$70,628.84	\$74,042.46	\$69,168.95	\$72,092.26	\$78,394.70	\$76,776.72	\$87,187.88	\$87,417.77	\$74,216.88	\$74,992.49	\$74,742.97	\$17,132.99		\$856,795.91
		Total KWH	1,047,906	1,175,735	1,122,309	1,165,324	1,169,937	1,102,082	1,279,133	1,284,744	1,096,561	1,170,037	1,214,896	1,175,711	14,004,375
		Combined Average KW	2,364	2,457	2,398	2,422	2,482	2,474	2,414	2,467	2,410	2,419	2,490	2,439	2,436
		USBC Charge	\$943.11	\$1,058.16	\$1,010.08	\$1,048.79	\$1,052.94	\$991.87	\$1,151.22	\$1,156.27	\$986.90	\$1,053.04	\$1,093.41	\$1,058.14	\$12,603.93
		Total Elec Revenue	127,733.97	133,084.39	127,704.95	133,028.21	143,388.21	136,795.81	152,590.48	150,947.34	132,805.13	138,530.26	134,827.46	\$31,972.40	\$1,543,408.61



**GRAYMONT**

February 20, 2025

Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached document as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.
- We did not submit any USBC Form B Large Customer Credit Request Forms (USBC Projects) for 2024.
- We have a current request balance of \$ 2,447,607.62 (shown on the attached USBC Progress Report) for a past project that was submitted in 2023 to NorthWestern Energy, and to the MDOR in our 2023 Annual Summary Report.
- At year-end 2024, we had a credit balance of \$ 984.92 (carried over into 2025).

If you have any questions, please contact me at 406-521-6008 or [pliner@graymont.com](mailto:pliner@graymont.com)

Sincerely,

Paul Liner  
Graymont  
Plant Manager

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
[rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)



Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

GRAYMONT WESTERN US INC.

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$1,283,673.91
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$2,460,528.02	Total Payment Requests:	\$2,460,528.02
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$2,447,607.62
2023 Carryover USBC Credit:	\$1,137.40	Total USBC Credit:	\$13,905.32
USBC Credit YTD:	\$12,767.92	Payments Issued YTD:	\$12,920.40
Average Monthly Credit Earned:	\$1,063.99	USBC Credit Balance:	\$984.92
		Payment Pending:	\$984.92

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$4,478.56
			07/09/2024	\$2,941.02
			10/08/2024	\$3,335.48
			12/17/2024	\$2,165.34

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100623	1627	DA31846774	KWH >	1,313,030	1,282,629	1,065,854	1,224,279	890,849	1,110,184	1,086,727	1,331,659	1,253,321	1,103,881	1,276,922	1,080,948	14,020,283
			KW >	2,500	2,560	2,362	2,310	2,079	2,062	2,192	2,327	2,215	2,244	2,506	2,373	2,311
			Elec Revenue >	125,442.64	117,814.21	\$99,444.70	112,311.70	\$91,659.67	110,790.22	109,391.82	128,808.69	121,406.51	108,235.21	114,946.33	\$11,092.54	\$1,251,344.24
596774	255054	DG58329592	KWH >	585	491	1,433	601	945	3,813	907	1,033	569	895	958	610	12,840
			KW >	39	1	50	46	41	52	47	45	46	60	60	45	44
			Elec Revenue >	\$615.15	\$74.46	\$766.71	\$648.36	\$620.99	\$1,038.29	\$700.06	\$685.19	\$651.05	\$858.88	\$859.50	\$581.99	\$8,100.63
596774	255054	DS82081027	KWH >	15,320	18,320	14,720	13,840	11,040	12,240	11,640	13,880	6,360	6,800	16,480	12,800	153,440
			KW >	72	82	76	79	62	67	66	78	73	84	74	74	74
			Elec Revenue >	\$2,395.54	\$2,641.20	\$2,258.13	\$2,233.67	\$1,860.66	\$2,036.28	\$1,961.70	\$2,301.53	\$1,534.45	\$1,709.41	\$2,347.14	\$949.33	\$24,229.04
Total KWH				1,328,935	1,301,440	1,082,007	1,238,720	902,834	1,126,237	1,099,274	1,346,572	1,260,250	1,111,576	1,294,360	1,094,358	14,186,563
Combined Average KW				2,611	2,643	2,488	2,435	2,182	2,181	2,305	2,450	2,334	2,388	2,640	2,492	2,429
USBC Charge				\$1,196.05	\$1,171.30	\$973.81	\$1,114.85	\$812.55	\$1,013.62	\$989.35	\$1,211.91	\$1,134.22	\$1,000.42	\$1,164.92	\$984.92	\$12,767.92
Total Elec Revenue				128,453.33	120,529.87	102,469.54	115,193.73	\$94,141.32	113,864.79	112,053.58	131,795.41	123,592.01	110,803.50	118,152.97	\$12,623.86	\$1,283,673.91



687 CANFIELD AVE., SUITE 100 COEUR D'ALENE, ID 83815 IFG.COM 208.255-3200

February 20, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Idaho Forest Group**

Dear Mr. Schafer:

Please accept this letter and the attached document as Idaho Forest Group's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Idaho Forest Group's 2024 USBC account activities.**
- **Idaho Forest Group did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.**
- **Idaho Forest Group has a current request balance of \$106,823.12 (shown on the attached USBC Progress Report) for a past project that was submitted in 2021 to NorthWestern Energy, and to the DOR in our 2021 Annual Summary Report.**
- **At year-end 2024, Idaho Forest Group had a credit balance of \$16.83 (carried over into 2025).**

If you have any questions, please contact me at (406) 649-7252

Sincerely,

Andy Ehlert  
Assistant Corporate Controller

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



Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

IDAHO FOREST GROUP LLC

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$29,408.66
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$107,113.18	Total Payment Requests:	\$107,113.18
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$106,823.12
2023 Carryover USBC Credit:	\$41.30	Total USBC Credit:	\$306.89
USBC Credit YTD:	\$265.59	Payments Issued YTD:	\$290.06
Average Monthly Credit Earned:	\$22.13	USBC Credit Balance:	\$16.83
		Payment Pending:	\$16.83

Payment Requests Made		
Submitted By	Date	Amount

Payments Issued	
Date	Amount
04/19/2024	\$163.15
07/09/2024	\$63.30
10/08/2024	\$35.82
12/17/2024	\$27.79

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3506717	1628	DA30277412	KWH >	45,377	48,189	41,823	31,389	23,914	15,038	13,320	13,194	13,285	13,324	17,551	18,695	295,099
			KW >	78	86	78	65	52	35	35	26	30	43	43	38	51
			Elec Revenue >	\$4,655.86	\$4,790.69	\$4,186.36	\$3,295.24	\$2,672.01	\$1,707.54	\$1,533.74	\$1,435.60	\$1,473.60	\$1,533.61	\$1,819.84	\$304.57	\$29,408.66
			Total KWH	45,377	48,189	41,823	31,389	23,914	15,038	13,320	13,194	13,285	13,324	17,551	18,695	295,099
			Combined Average KW	78	86	78	65	52	35	35	26	30	43	43	38	51
			USBC Charge	\$40.84	\$43.37	\$37.64	\$28.25	\$21.52	\$13.53	\$11.99	\$11.87	\$11.96	\$11.99	\$15.80	\$16.83	\$265.59
			Total Elec Revenue	\$4,655.86	\$4,790.69	\$4,186.36	\$3,295.24	\$2,672.01	\$1,707.54	\$1,533.74	\$1,435.60	\$1,473.60	\$1,533.61	\$1,819.84	\$304.57	\$29,408.66



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

February 14, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)  
**RE: 2024 USB Annual Summary Report – Judith Gap Energy LLC**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Judith Gap Energy's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Judith Gap Energy's 2024 USBC account activities.**
- **Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024. Please note we donated all of our 2024 remaining credits and all our 2023 carry over credits.**

If you have any questions, please contact me at (406) 632-4540.

Sincerely,

Jesse K. Jutila  
Judith Gap Energy O&M Manager

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





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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/25/2024
NAME OF BUSINESS:	Judith Gap Energy Center
PROJECT CITY LOCATION:	Harlow, MT
MAILING ADDRESS:	PO Box 890
MAILING CITY, STATE, ZIP:	Harlowton, MT 59036

CONTACT PERSON:	Jesse Jutila
PHONE NUMBER:	406-632-4553
CELL PHONE:	
FAX NUMBER:	
E-MAIL ADDRESS:	<a href="mailto:jjutila@invenergy.com">jjutila@invenergy.com</a>

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b> \$	
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach):  Donate all remaining actual 2024 USB Credits to Energy Share at the year-end; estimated to be \$1,205	
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	NA
<b>ESTIMATED KW DEMAND SAVINGS:</b>	NA

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	\$1,205
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	Energy Share Montana <b>ONLY WHEATLAND CO. RESIDENTS</b>

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

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

**LARGE CUSTOMER:**

Signature:

*Mary Beth Bennett, Judith Gap Admin*  
*11/25/2024*

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



## Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

### JUDITH GAP ENERGY LLC

#### Account Summary

2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$154,881.29
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$115.34	Total Payment Requests:	\$1,320.34
Payment Requests Made YTD:	\$1,205.00	Current Request Balance:	\$65.78
2023 Carryover USBC Credit:	\$84.69	Total USBC Credit:	\$1,371.65
USBC Credit YTD:	\$1,286.96	Payments Issued YTD:	\$1,254.56
Average Monthly Credit Earned:	\$107.25	USBC Credit Balance:	\$117.09
		Payment Pending:	\$65.78

#### Payment Requests Made

Submitted By	Date	Amount
Jesse Jutila	11/25/2024	\$1,205.00

#### Payments Issued

Date	Amount
04/19/2024	\$115.34
12/17/2024	\$1,139.22

#### Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1428100	398081	2000482619	KWH >	0	0	0	0	0	0	0	0	4,866	3,636	3,425	3,741	15,668
			KW >	0	0	0	0	0	0	0	0	19	16	16	16	17
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$708.27	\$539.26	\$508.02	\$214.76	\$1,970.31
1428100	398081	DA18413804	KWH >	3,784	5,283	4,366	4,218	4,279	4,463	4,461	4,129	0	0	0	0	34,983
			KW >	16	18	16	17	17	17	17	18	0	0	0	0	17
			Elec Revenue >	\$570.72	\$701.66	\$599.99	\$611.19	\$634.10	\$663.11	\$647.54	\$629.42	\$0.00	\$0.00	\$0.00	\$0.00	\$5,057.73
1437192	398952	DD81153244	KWH >	72,240	127,470	97,210	164,780	86,160	98,140	94,670	126,480	123,000	129,590	133,210	126,350	1,379,300
			KW >	1,000	1,200	1,080	1,080	1,000	1,000	960	920	920	920	1,000	1,120	1,017
			Elec Revenue >	\$10,168.03	\$14,218.48	\$11,646.35	\$16,616.93	\$11,356.45	\$12,342.54	\$11,941.51	\$14,138.08	\$13,860.08	\$14,386.53	\$13,833.77	\$3,344.50	\$147,853.25
			<b>Total KWH</b>	76,024	132,753	101,576	168,998	90,439	102,603	99,131	130,609	127,866	133,226	136,635	130,091	1,429,951
			<b>Combined Average KW</b>	1,016	1,218	1,096	1,097	1,017	1,017	977	938	939	936	1,016	1,136	1,050
			<b>USBC Charge</b>	\$68.43	\$119.47	\$91.42	\$152.10	\$81.39	\$92.35	\$89.21	\$117.55	\$115.08	\$119.90	\$122.97	\$117.09	\$1,286.96
			<b>Total Elec Revenue</b>	\$10,738.75	\$14,920.14	\$12,246.34	\$17,228.12	\$11,990.55	\$13,005.65	\$12,589.05	\$14,767.50	\$14,568.35	\$14,925.79	\$14,341.79	\$3,559.26	\$154,881.29





February 17, 2025

Mr. Jon Schafer

UCP/CGR Tax Examiner

Montana Department of Revenue - USB Reports

PO Box 5805

Helena, MT 59604-5805

(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Magris Talc USA**

Dear Mr. Schafer:

Please accept this letter and the attached document as Magris Talc's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Magris Talc's 2024 USBC account activities.**
- **Magris Talc did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.**
- **Magris Talc has a current request balance of \$4,650,595.26 (shown on the attached USBC Progress Report) for a past project that was submitted in 2013 to NorthWestern Energy, and to the DOR in our 2013 Annual Summary Report.**

If you have any questions, please contact me at (406) 285-5318

Sincerely,

Jan Lien  
Operations Controller

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

Montana Operations  
767 Old Yellowstone Trail  
Three Forks, MT 59752  
USA

[magristalc.com](http://magristalc.com)



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

## MAGRIS TALC USA

### Account Summary

2023 Carryover Reservation: \$0.00 YTD Elec Revenue: \$642,767.36  
Reservations Made YTD: \$0.00

2023 Carryover Payment Request: \$4,675,421.17 Total Payment Requests: \$4,675,421.17  
Payment Requests Made YTD: \$0.00 Current Request Balance: \$4,650,595.26

2023 Carryover USBC Credit: \$1,900.11 Total USBC Credit: \$26,838.39  
USBC Credit YTD: \$24,938.28 Payments Issued YTD: \$24,825.91  
Average Monthly Credit Earned: \$2,078.19 USBC Credit Balance: \$2,012.48  
Payment Pending: \$2,012.48

### Payment Requests Made

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

### Payments Issued

Date	Amount
04/19/2024	\$8,287.83
07/09/2024	\$6,419.71
10/08/2024	\$6,032.14
12/17/2024	\$4,086.23

### Account Detail

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100543	1551	DA31423687	KWH > 0 KW> 0	0	0	0	0	0	0	0	0	0	0	0	0
Elec Revenue >			\$34,150.46	\$33,598.98	\$31,494.96	\$35,141.42	\$34,269.23	\$36,126.29	\$38,437.39	\$42,323.51	\$40,156.25	\$0.00	\$0.00	\$0.00	\$325,698.49
3855629	265743	2000177599	KWH > 2,040 KW> 13	2,320	2,120	1,880	1,920	1,560	1,320	1,720	1,400	1,680	2,000	2,040	22,000
Elec Revenue >			\$367.27	\$388.27	\$350.14	\$348.88	\$343.44	\$307.46	\$265.13	\$302.88	\$278.65	\$317.09	\$355.09	\$169.63	\$3,793.93
3855630	304816	2000177601	KWH > 800 KW> 2	1,160	1,360	480	400	360	320	360	360	320	320	600	6,840
Elec Revenue >			\$106.72	\$146.27	\$160.07	\$67.55	\$60.15	\$52.26	\$48.30	\$52.39	\$53.92	\$46.49	\$46.54	\$17.27	\$857.93
3855631	55862	2000204892	KWH > 3,180 KW> 5	2,600	2,820	2,100	2,000	1,020	120	120	120	140	1,460	4,240	19,920
Elec Revenue >			\$356.95	\$300.77	\$320.09	\$273.01	\$269.22	\$170.41	\$35.64	\$30.28	\$44.98	\$51.73	\$210.33	\$71.75	\$2,135.16
3855632	264188	2000123572	KWH > 26,440 KW> 45	21,880	24,600	20,400	12,080	3,120	2,360	2,720	3,480	3,120	0	18,480	138,680
Elec Revenue >			\$2,925.49	\$2,431.76	\$2,724.35	\$2,552.14	\$1,625.08	\$469.37	\$409.17	\$439.23	\$542.55	\$461.32	\$0.00	\$467.79	\$15,048.25
3855633	285892	2000150124	KWH > 455 KW> 7	384	413	365	370	399	391	411	369	365	405	527	4,854
Elec Revenue >			\$153.41	\$72.67	\$64.15	\$63.21	\$62.47	\$70.95	\$79.65	\$77.07	\$59.71	\$57.72	\$61.11	\$18.34	\$840.46
3855636	47739	2000314613	KWH > 11,460 KW> 32	8,240	8,480	6,340	4,700	4,560	3,160	3,440	3,300	3,660	6,120	8,900	72,360
Elec Revenue >			\$434.94	\$275.64	\$285.26	\$237.69	\$215.90	\$210.81	\$149.15	\$168.43	\$152.75	\$205.98	\$240.96	\$221.61	\$2,799.12



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3855638	322052	2000254701	KWH > 5,900 K/V > 15	4,560 14	4,040 12	2,500 16	2,420 14	2,380 15	2,680 16	1,720 9	760 6	1,720 7	2,660 9	3,800 10	35,140 12
		Elec Revenue >	\$729.98	\$586.01	\$516.60	\$453.10	\$426.23	\$431.53	\$470.03	\$288.69	\$158.15	\$251.61	\$356.94	\$130.66	\$4,799.53
3855643	55858	2000204225	KWH > 12,680 K/V > 36	11,320 37	11,240 34	9,440 33	9,480 34	7,480 28	6,600 29	6,920 31	6,360 26	0 0	0 0	14,120 39	95,640 33
		Elec Revenue >	\$1,597.82	\$1,464.05	\$1,414.53	\$1,318.40	\$1,351.01	\$1,083.13	\$1,005.42	\$1,055.42	\$935.78	\$0.00	\$0.00	\$513.05	\$11,738.61
3855644	55861	2000177600	KWH > 3,840 K/V > 25	3,360 27	4,000 24	3,680 24	4,960 20	6,160 24	4,240 23	4,480 28	3,760 26	3,120 16	3,760 26	3,840 17	49,200 23
		Elec Revenue >	\$683.80	\$647.74	\$668.75	\$660.20	\$740.70	\$908.19	\$701.80	\$781.27	\$697.92	\$493.25	\$661.83	\$219.40	\$7,864.85
3855722	269490	2000204975	KWH > 4,600 K/V > 10	3,860 8	3,260 8	2,180 5	1,380 7	900 6	1,200 2	1,220 3	1,480 3	1,340 4	3,120 8	4,460 8	29,000 6
		Elec Revenue >	\$557.99	\$450.05	\$393.22	\$282.79	\$240.32	\$171.59	\$157.65	\$165.29	\$192.06	\$181.78	\$377.28	\$107.67	\$3,277.69
3855723	287203	2000204313	KWH > 4,480 K/V > 29	4,240 32	4,360 37	3,720 29	3,920 40	3,920 33	4,720 26	4,720 34	4,440 36	4,040 21	3,920 18	4,000 15	50,480 29
		Elec Revenue >	\$798.10	\$793.99	\$861.67	\$725.43	\$902.78	\$813.56	\$792.67	\$891.34	\$884.01	\$633.84	\$572.00	\$195.22	\$8,864.61
3855726	360625	2000204973	KWH > 5,080 K/V > 20	4,080 17	3,920 20	3,760 19	3,480 8	4,820 19	6,820 12	6,940 12	6,960 12	3,740 8	4,140 20	4,380 8	58,100 15
		Elec Revenue >	\$725.91	\$583.16	\$605.80	\$607.24	\$447.39	\$718.68	\$805.12	\$811.68	\$817.60	\$435.64	\$614.54	\$109.88	\$7,282.64
3855727	1324	DA15843440	KWH > 1,236,312 K/V > 3,231	1,310,107 3,404	1,295,472 3,110	1,294,937 3,266	1,283,614 3,102	1,253,997 3,214	1,244,946 2,994	1,152,140 2,933	1,217,613 2,877	1,118,200 2,951	1,278,193 3,063	1,172,667 2,846	14,858,198 3,083
		Elec Revenue >	\$11,664.92	\$11,499.93	\$10,919.98	\$11,194.96	\$10,858.99	\$10,941.14	\$10,514.66	\$10,165.87	\$10,331.75	\$10,060.27	\$10,907.66	\$6,112.22	\$125,172.35
3855728	55866	DG28181022	KWH > 77,582 K/V > 300	94,783 351	89,387 298	76,538 305	71,410 277	61,653 277	43,362 254	43,583 224	40,939 219	39,608 236	56,635 275	63,133 291	758,613 276
		Elec Revenue >	\$4,013.70	\$4,223.03	\$3,665.43	\$3,619.29	\$3,304.62	\$3,218.45	\$2,835.61	\$2,551.69	\$2,480.06	\$2,631.80	\$3,158.50	\$2,857.00	\$38,559.18
3855729	1321	DA29137671	KWH > 939,993 K/V > 1,799	913,973 1,756	920,298 1,743	1,007,494 1,752	946,186 1,804	996,605 1,767	903,940 1,737	955,162 1,754	999,188 1,728	966,520 1,722	998,859 1,804	930,903 1,797	11,479,121 1,764
		Elec Revenue >	\$7,614.32	\$7,010.28	\$7,012.14	\$7,372.01	\$7,222.60	\$7,355.73	\$6,936.96	\$7,273.30	\$7,405.55	\$7,262.49	\$7,539.21	\$4,029.97	\$84,034.56
		Total KWH	2,334,842	2,386,867	2,375,770	2,435,814	2,348,300	2,348,934	2,226,179	2,185,656	2,290,529	2,147,573	2,361,592	2,236,090	27,678,146
		Combined Average KW	5,569	5,730	5,372	5,534	5,377	5,428	5,131	5,066	4,973	5,011	5,261	5,108	5,305
		USBC Charge	\$2,101.35	\$2,148.18	\$2,138.19	\$2,192.22	\$2,113.46	\$2,114.03	\$2,003.57	\$1,967.11	\$2,061.46	\$1,932.84	\$2,125.42	\$2,012.48	\$24,910.31
		Total Elec Revenue	\$66,881.78	\$64,472.60	\$61,457.14	\$64,917.32	\$62,340.13	\$63,049.55	\$63,644.35	\$67,378.34	\$65,191.69	\$23,091.01	\$25,101.99	\$15,241.46	\$642,767.36



Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

MALTEUROP NORTH AMERICA, INC.

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$1,677,588.32
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$32,446.50	Total Payment Requests:	\$32,446.50
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$16,778.11
2023 Carryover USBC Credit:	\$1,233.29	Total USBC Credit:	\$16,962.67
USBC Credit YTD:	\$15,729.38	Payments Issued YTD:	\$15,668.39
Average Monthly Credit Earned:	\$1,310.78	USBC Credit Balance:	\$1,294.28
		Payment Pending:	\$1,294.28

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$4,994.13
			07/09/2024	\$3,448.59
			10/08/2024	\$4,322.83
			12/17/2024	\$2,902.84

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1206942	379953	DA29137703	KWH >	1,323,344	1,459,408	1,314,155	1,379,056	1,399,401	979,443	1,287,107	1,722,209	1,695,814	1,562,738	1,601,126	1,414,964	17,138,765
			KW >	2,791	2,929	2,903	2,860	3,059	2,022	3,076	3,542	3,223	3,128	2,972	3,360	2,989
			Elec Revenue >	137,898.61	142,177.30	129,994.38	135,033.65	150,571.98	104,513.20	140,434.13	179,430.09	174,721.41	162,181.36	151,397.04	\$26,147.25	\$1,634,500.40
1308400	387952	DA18929139	KWH >	28,320	26,880	26,600	28,560	22,160	23,160	35,440	31,440	31,120	33,520	28,000	23,120	338,320
			KW >	93	93	93	93	93	93	93	93	93	93	93	93	93
			Elec Revenue >	\$3,756.93	\$3,525.26	\$3,500.96	\$3,829.83	\$3,314.74	\$3,410.39	\$4,527.97	\$4,126.43	\$4,096.60	\$4,138.86	\$3,574.63	\$1,207.02	\$43,009.62
1865214	427970	DA14726085	KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$0.00	\$0.00	\$0.00	\$78.30
Total KWH				1,351,664	1,486,288	1,340,755	1,407,616	1,421,561	1,002,603	1,322,547	1,753,649	1,726,934	1,596,258	1,629,126	1,438,084	17,477,085
Combined Average KW				2,884	3,022	2,996	2,953	3,152	2,115	3,169	3,635	3,316	3,221	3,065	3,453	3,082
USBC Charge				\$1,216.50	\$1,337.66	\$1,206.68	\$1,266.85	\$1,279.40	\$902.34	\$1,190.30	\$1,578.29	\$1,554.24	\$1,436.63	\$1,466.21	\$1,294.28	\$15,729.38
Total Elec Revenue				141,664.24	145,711.26	133,504.04	138,872.18	153,895.42	107,932.29	144,970.80	183,565.22	178,826.71	166,320.22	154,971.67	\$27,354.27	\$1,677,588.32



February 28, 2025

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

RE: Montana-Dakota Utilities Co.  
2024 Electric USB Report

Montana-Dakota Utilities Co. (Montana-Dakota) herewith submits its Annual Report regarding Universal System Benefit Programs (USBP) pursuant to 69-8-402 (MCA) subpart 8 as part of the Electric Utility Industry Restructuring Law.

In accordance with 69-8-402 (MCA), Montana-Dakota is to submit any funds collected in the previous calendar year that exceeded the credits for internal programs and large customer credits as described in the attached report. The Company's internal programs and large customers credits exceeded the funds collected and therefore no excess funds are being submitted to the Montana Department of Revenue for calendar year 2024.

Sincerely,

*/s/ Travis R. Jacobson*

Travis R. Jacobson  
Vice President of Regulatory Affairs

Cc: Montana Public Service Commission  
Montana Consumer Counsel  
Mike Green

**Montana-Dakota Utilities Co.  
Universal System Benefits Program  
2024 Annual Report**

The total dollars collected under the Universal System Benefit Charges (USBC) approved by the Montana Public Service Commission (Commission) during the period January 1, 2024 through December 31, 2024 was \$924,030.92. The large customer group, defined as customers with monthly electric billing demands of 1,000 kW or higher, account for \$246,530.28 of the total amount collected.

The following USBP expenditures were made in calendar year 2024 in accordance with programs approved by the Commission:

Low-Income Discount	\$399,154.57
Low-Income Weatherization (AEM & HRDC)	90,000.00
Low-Income Energy Audits (AEM)	10,000.00
Energy Share Endowment & Admin	35,000.00
Energy Share Bill Assistance	90,000.00
Energy Share & HRDC Furnace Safety	50,000.00
Low-Income Program Promotion (Energy Share)	6,756.16
Conservation Programs (Lighting)	43,628.03
Total USBP Expenditures	<u>\$724,538.76</u>

Following is a description of each program:

Montana-Dakota offers a low-income discount to all customers that have qualified for Low-Income Energy Assistance (LIEAP). The discount remains in place on a calendar basis and qualifying customer's accounts are updated annually upon the start of the LIEAP qualification process the following heating season. Beginning with the 2008-2009 LIEAP season, customers qualifying for LIEAP also qualified for a discount on their electric bill based on a new discount structure filed as part of the Stipulation in Docket No. D2006.1.2 and approved by the Commission on August 20, 2008. Three levels of discount are available under this discount rate structure; 30% discount for customers at 0-60% of the federal poverty level, 25% discount for customers at 61-90% of the federal poverty level and a 20% discount for customers at 91% to the ceiling of the federal poverty percentage of income as established by the Department of Health and Human Services in determining LIEAP benefits.

The income data used to administer the discount is received from the State Department of Health and Human Services at the time a customer qualifies for LIEAP. When combined with a LIEAP benefit, the bill discount serves to mitigate the higher percentage of disposable income necessary to pay utility bills that this group of customers pays in comparison to other customers. Following are statistics regarding the distribution of the electric discounts among the various discount levels based the percentage of poverty for calendar year 2024. On average, 1,292 customers received benefit of the discounts with the months or number of bills discounted for each customer dependent upon the time LIEAP benefits were first received on their behalf. As shown, approximately 42 percent of the recipients were in the lowest percentage of federal poverty.

*Low Income Discounts January 1, 2024 - December 31, 2024*

<b>% of Federal Poverty</b>	<b>Discount</b>	<b>Customers</b>	<b>Average Discount/Bill</b>
0-60%	30%	545	\$(31.82)
61-90%	25%	277	(23.04)
91%-ceiling %	20%	470	(20.35)

The other low-income related programs include weatherization, energy audits, bill assistance and a furnace/water heater repair program. These programs provide assistance to low income customers located in Montana-Dakota's service territory. The bill assistance and furnace/water heater programs are administered by Energy Share of Montana in accordance with their established guidelines to provide assistance to qualifying low-income customers. In 2024, 180 households received bill assistance at an average cost of \$737 per household. The furnace safety program recognizes the problem that arises when a low-income customer is faced with a costly repair bill or in some cases the cost of replacing space or water heating equipment. Ten households were assisted through this program in 2024 at an average cost of \$4,774 per household. The Weatherization and Energy Audit Programs are administered by Action for

Eastern Montana and the HRDC District VII in accordance with guidelines established by the State Department of Health & Human Services and the Department of Energy and assist low-income customers with conservation measures that result in energy savings. Weatherization services were provided to six households utilizing USB funds in 2024 at an average cost of \$538 per household.

The Energy Share endowment will provide for the long-term needs of the low-income customers of Montana by providing a stable funding source for energy assistance dollars and is a cost-effective program that will benefit Montana-Dakota's customers. Customer education consists of outreach required to better inform customers of the available assistance programs noted above and the Federal LIEAP program. Bill inserts, web site promotion and advertising done in conjunction with Energy Share of Montana were tools utilized in 2024. Montana-Dakota has developed a package of bill inserts, posters and direct mail pieces to assist with educating customers regarding assistance available under the programs.

In addition to the low-income related conservation programs, funds were also made available for all residential and commercial customers for conservation measures. The cost effectiveness of the conservation program offerings was determined based on the cost/benefit analyses provided in the Company's Integrated Resource Plan filed in Docket No. N2015.7.54. The Commercial Lighting program was well accepted and accounts for the majority of the conservation related funds expended in 2024.

As noted above, a total of \$246,530.28 was collected from the Large Customer Group. In accordance with 69-8-402 (MCA) the Large Customer Group has the right to self-direct funds collected through the USBC. Funds totaling \$215,891.94 will be refunded to three customers out of the seven customers on Montana-Dakota's system that qualify as a Large Customer. Two of the three customers will receive the total USBC dollars they remitted in 2024 through their utility service bills in the amounts of \$28,581.12, and \$9,257.76, respectively. The third customer submitted a claim for \$270,185.77 which



exceeds the funds collected of \$178,05.06 from this customer in 2024 and will be paid the amount of funds collected. The remaining requested funds will be added to the customer's carry-over for a cumulative balance of \$1,787,800.25 available for future periods.

In accordance with 69-8-402 (MCA), Montana-Dakota is to submit any funds collected in the previous calendar year that exceeded the credits for internal programs and large customer credits described above. As shown in the summary below, the Company collected \$924,030.92 in 2024 and had internal program expenditures of \$724,538.76. After claims to the Large Customer Group of \$215,891.94, the Company's net collections for 2024 is (\$16,399.78). Therefore, no excess funds remained from 2024 and there will be no remittance to the Department of Revenue.

USB Funds Collected	\$924,030.92
Less: Program Expenditures	
Low-Income Discount	399,154.57
Low-Income Weatherization (AEM & HRDC)	90,000.00
Low-Income Energy Audits (AEM)	10,000.00
Energy Share Endowment & Admin	35,000.00
Energy Share Bill Assistance	90,000.00
Energy Share & HRDC Furnace Safety	50,000.00
Low-Income Program Promotion (Energy Share)	6,756.16
Conservation Programs (Lighting)	43,628.03
Total Montana-Dakota Programs	<u>\$724,538.76</u>
Less Large Customer Self-Directed Funds	<u>215,891.94</u>
Net Collections	<u>(\$16,399.78)</u>
Amount to Remit to Department of Revenue	<u><u>\$0.00</u></u>

Montana-Dakota will continue to monitor its USB collections and program expenditures and, if necessary, will submit any modifications to the Company's USB program and rates at some point in the future.

**Year Ending Date**  \*\*\*Enter date in MM/DD/YYYY format to update the Summary page dates

**Report Status**  \*\*\*Select the report status from the dropdown to update the Summary page



## **2024 FINAL YEAR-END MECA USBP POOL REPORT**

### ***SUMMARY***

*Through December 31, 2024*

#### ***Total USBP Spending***

Minimum Pool Spending Requirement (2.4% of 1995 Electricity Sales Revenue)	\$	3,827,022.50
* 2024 Large Customer USB Revenues Collected & Expended		\$507,848.82
2024 Actual Pool Expenditures	\$	11,077,293.66
Surplus Above Requirement	\$	7,758,119.98
<b>Actual Expenditures as a Percent of Base-Year Revenues (2.4% is the minimum required)</b>		<b>6.95%</b>

#### ***Low-Income Spending***

Minimum Pool Spending Requirement (17 % of Total USBP Minimum Pool Spending Requirement)	\$	650,593.82
2024 Actual Pool Expenditures	\$	2,088,671.78
Surplus Above Requirement	\$	1,438,077.96
<b>Actual Low-income Expenditures as a Percent of Minimum Pool Spending Requirement</b>		<b>54.58%</b>

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

	1995 Electricity Revenue Sales	Energy Conservation	Low-Income USBP Expenditures & Credits	Renewable Resource Projects & Applications	Research & Development	Total USBP Expenditures
Beartooth Electric	\$ 2,947,731.00	\$ 30,498.38	\$ 17,464.26	\$ -	\$ -	\$ 47,962.64
Big Flat Electric	3,090,220.00	\$ 9,015.96	\$ 8,153.90	\$ -	\$ 540.00	\$ 17,709.86
Big Horn Electric	3,263,034.00	\$ 395.48	\$ 31,654.79	\$ -	\$ -	\$ 32,050.27
Fall River Rural Electric	2,288,300.00	\$ 94,230.18	\$ 10,000.00	\$ -	\$ -	\$ 104,230.18
Fergus Electric	5,359,940.00	\$ 604,421.04	\$ 28,187.37	\$ -	\$ -	\$ 632,608.41
Flathead Electric	50,214,236.00	\$ 3,484,805.00	\$ 1,412,871.00	\$ -	\$ -	\$ 4,897,676.00
Glacier Electric	9,230,882.00	\$ 375,694.99	\$ 37,683.00	\$ -	\$ -	\$ 413,377.99
Goldenwest Electric	525,154.56	\$ 14,666.23	\$ 1,100.00	\$ 1,800.00	\$ -	\$ 17,566.23
Hill County Electric	3,860,963.00	\$ 21,716.53	\$ 14,051.66	\$ -	\$ -	\$ 35,768.19
Lincoln Electric	5,449,237.00	\$ 421,919.89	\$ 78,789.60	\$ -	\$ -	\$ 500,709.49
LYREC	4,714,641.00	\$ 67,267.10	\$ 7,200.00	\$ -	\$ 1,613.00	\$ 76,080.10
Marias River Electric	3,675,396.00	\$ 11,482.10	\$ 24,612.81	\$ -	\$ 993.00	\$ 37,087.91
McCone Electric	5,538,237.00	\$ 58,969.25	\$ 12,940.33	\$ -	\$ 1,397.00	\$ 73,306.58
Mid-Yellowstone Electric	1,596,165.00	\$ 7,407.29	\$ 3,574.11	\$ -	\$ -	\$ 10,981.40
Missoula Electric	8,943,402.00	\$ 550,755.57	\$ 57,466.10	\$ -	\$ 3,362.00	\$ 611,583.67
NorVal Electric	3,736,575.00	\$ 24,518.06	\$ 7,663.89	\$ -	\$ -	\$ 32,181.95
Northern Lights, Inc.	2,799,775.00	\$ 161,736.52	\$ 12,095.88	\$ -	\$ -	\$ 173,832.40
Park Electric	3,731,388.20	\$ 50,393.44	\$ 44,439.88	\$ -	\$ 1,723.00	\$ 96,556.32
Ravalli Electric	6,341,387.00	\$ 459,848.00	\$ 43,043.00	\$ -	\$ -	\$ 502,891.00
Sheridan Electric	4,629,678.00	\$ 3,500.00	\$ 13,091.00	\$ -	\$ -	\$ 16,591.00
Southeast Electric	1,543,712.00	\$ 15,177.62	\$ 35,954.39	\$ -	\$ -	\$ 51,132.01
Sun River Electric	5,252,060.00	\$ 86,885.07	\$ 21,651.28	\$ -	\$ 1,258.00	\$ 109,794.35
Tongue River Electric	4,796,392.02	\$ 5,878.50	\$ 11,000.00	\$ -	\$ -	\$ 16,878.50
Vigilante Electric	6,711,438.91	\$ 419,956.68	\$ 43,791.53	\$ -	\$ 2,705.00	\$ 466,453.21
Yellowstone Valley Electric	9,219,326.00	\$ 1,992,092.00	\$ 110,192.00	\$ -	\$ -	\$ 2,102,284.00
Large Customer USB Revenues Collected & Expended for Reporting Year						\$507,848.82
<b>TOTAL</b>	<b>\$ 159,459,270.69</b>	<b>\$ 8,973,230.88</b>	<b>\$ 2,088,671.78</b>	<b>\$ 1,800.00</b>	<b>\$ 13,591.00</b>	<b>\$ 11,077,293.66</b>

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

	Item #1	Item #2	Item #3	Item #4	Item #5	Item #6	Item #7
Beartooth					\$ 14,098.38		
Big Flat					\$ 9,015.96		
Big Horn							
Fall River		\$ 130.00					
Fergus					\$ 1,673.71		
Flathead	\$ 7,000.00	\$ 239,828.00	\$ 152,357.00	\$ 117,120.00	\$ 286,776.00	\$ 384,685.00	\$ 152,357.00
Glacier			\$ 30,101.10		\$ 8,308.49		
Goldenwest							
Hill County	\$ 1,436.73				\$ 3,684.86		
Lincoln	\$ 19,634.94						\$ 197,433.80
LYREC	\$ 825.00	\$ 17,992.99			\$ 12,805.11		
Marias River					\$ 3,741.71		
McCone	\$ 2,522.63				\$ 7,412.69		\$ 4,250.00
Mid-Yellowstone					\$ 638.05		
Missoula	\$ 2,294.01				\$ 9,050.73		
NorVal		\$ 900.00			\$ 3,400.56		
Northern Lights							
Park	\$ 3,359.45	\$ 2,700.00			\$ 41,838.10		
Ravalli	\$ 16,550.00	\$ 7,523.00			\$ 12,036.00		
Sheridan	\$ 1,500.00						
Southeast		\$ 1,410.04			\$ 2,259.41		
Sun River		\$ 3,800.00			\$ 24,588.88		
Tongue River							
Vigilante					7,965.68		
Yellowstone Valley	\$ 23,500.00	\$ 34,305.00	\$ 1,773.00		\$ 27,000.00	\$ 18,150.00	\$ 3,600.00
<b>TOTAL</b>	<b>\$ 78,622.76</b>	<b>\$ 308,589.03</b>	<b>\$ 184,231.10</b>	<b>\$ 117,120.00</b>	<b>\$ 476,294.32</b>	<b>\$ 402,835.00</b>	<b>\$ 357,640.80</b>

\*\*\*See Exhibit A for Item Descriptions

\*\*\*See Exhibit A for Item Descriptions

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

	Item #8	Item #9	Item #10	Item #11	Item #12	Item #13	Item #14
Beartooth		\$ 16,400.00					
Big Flat							
Big Horn						\$ 395.48	
Fall River		\$ 5,492.89					
Fergus						\$ 2,550.00	\$ 600,197.33
Flathead		\$ 14,400.00					\$ 7,488.00
Glacier		\$ 36,828.40					
Goldenwest						\$ 14,666.23	
Hill County						\$ 16,594.94	
Lincoln		\$ 4,247.32					
LYREC						\$ 35,644.00	
Marias River		\$ 7,740.39					
McCone						\$ 41,871.42	
Mid-Yellowstone						\$ 2,014.20	
Missoula		\$ 837.68					
NorVal						\$ 19,945.95	\$ 271.55
Northern Lights							
Park						\$ 2,495.89	
Ravalli	\$ 3,009.00	\$ 103,813.00	\$ 7,523.00				
Sheridan			\$ 500.00			\$ 1,500.00	
Southeast						\$ 9,878.06	
Sun River				\$ 58,496.19			
Tongue River						\$ 5,878.50	
Vigilante							
Yellowstone Valley						\$ 36,394.00	\$ 1,847,370.00
<b>TOTAL</b>	<b>\$ 3,009.00</b>	<b>\$ 189,759.68</b>	<b>\$ 8,023.00</b>	<b>\$ 58,496.19</b>	<b>\$ -</b>	<b>\$ 189,828.67</b>	<b>\$ 2,455,326.88</b>

or Item Descriptions

## Line Item Spending - Energy Conservation (Page 6 of 17)

	Item #15	Item #16	Item #17	Item #18	Item #19	Item #19a
Beartooth						
Big Flat						
Big Horn						
Fall River			\$ 88,607.29			
Fergus						
Flathead	\$ 131,940.00		\$ 2,407,000.00		\$ 832,590.00	\$ (1,248,736.00)
Glacier			\$ 300,457.00			
Goldenwest						
Hill County						
Lincoln			\$ 199,260.74		\$ 1,343.09	
LYREC						
Marias River						
McCone	\$ 2,700.00		\$ 212.51			
Mid-Yellowstone	\$ 4,755.04					
Missoula			\$ 538,573.15			
NorVal						
Northern Lights			\$ 161,736.52			
Park						
Ravalli			\$ 309,394.00			
Sheridan						
Southeast					\$ 1,630.11	
Sun River						
Tongue River						
Vigilante			\$ 411,991.00			
Yellowstone Valley						
<b>TOTAL</b>	<b>\$ 139,395.04</b>	<b>\$ -</b>	<b>\$ 4,417,232.21</b>	<b>\$ -</b>	<b>\$ 835,563.20</b>	<b>\$ (1,248,736.00)</b>

\*\*\*See Exhibit A for Item Descriptions

## Line Item Spending - Energy Conservation (Page 7 of 17)

	Total Energy Conservation
Beartooth	\$ 30,498.38
Big Flat	\$ 9,015.96
Big Horn	\$ 395.48
Fall River	\$ 94,230.18
Fergus	\$ 604,421.04
Flathead	\$ 3,484,805.00
Glacier	\$ 375,694.99
Goldenwest	\$ 14,666.23
Hill County	\$ 21,716.53
Lincoln	\$ 421,919.89
LYREC	\$ 67,267.10
Marias River	\$ 11,482.10
McCone	\$ 58,969.25
Mid-Yellowstone	\$ 7,407.29
Missoula	\$ 550,755.57
NorVal	\$ 24,518.06
Northern Lights	\$ 161,736.52
Park	\$ 50,393.44
Ravalli	\$ 459,848.00
Sheridan	\$ 3,500.00
Southeast	\$ 15,177.62
Sun River	\$ 86,885.07
Tongue River	\$ 5,878.50
Vigilante	\$ 419,956.68
Yellowstone Valley	\$ 1,992,092.00
<b>TOTAL</b>	<b>\$ 8,973,230.88</b>



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

	Item #1	Item #2	Item #3	Item #4	Item #5	Item #6	Item #7
Beartooth							
Big Flat	6,000.00	200.00		\$ 503.90			
Big Horn	\$ 5,867.15						
Fall River		\$ 10,000.00					
Fergus		\$ 6,187.37	\$ 22,000.00				
Flathead	\$ 613,919.00	\$ 108,430.00			\$ 379,689.00		
Glacier	\$ 9,984.00	\$ 6,000.00				\$ 6,050.00	
Goldenwest							
Hill County	\$ 1,420.00	\$ 8,580.00					
Lincoln	\$ 1,437.64					\$ 4,462.77	\$ 19,585.09
LYREC	\$ 300.00	\$ 6,900.00					
Marias River	\$ 4,765.20	\$ 15,000.00					
McCone	\$ 3,640.33	\$ 9,300.00					
Mid-Yellowstone	\$ 324.11	\$ 3,250.00					
Missoula		\$ 15,000.00				\$ 4,152.38	
NorVal		\$ 5,900.00					
Northern Lights							
Park	\$ 25,465.12	\$ 4,000.00				\$ 6,912.00	
Ravalli	\$ 2,890.00	\$ 9,153.00			\$ 12,043.00		
Sheridan	\$ 13,091.00						
Southeast	\$ 874.27	\$ 11,750.00				\$ 23,330.12	
Sun River	\$ 11,106.61	\$ 8,500.00					
Tongue River	\$ 11,000						
Vigilante	\$ 5,165.53	\$ 1,500.00				\$ 15,670.00	
Yellowstone Valley	\$ 37,133.00						
<b>TOTAL</b>	<b>\$ 754,382.96</b>	<b>\$ 229,650.37</b>	<b>\$ 22,000.00</b>	<b>\$ 503.90</b>	<b>\$ 391,732.00</b>	<b>\$ 60,577.27</b>	<b>\$ 19,585.09</b>

\*\*\*See Exhibit B for Item Descriptions

Line Item Spending - Low-Income USBP Expenditures (Page 9 of 17)

	Item #8	Item #9	Item #10	Item #11	Item #12	Item #13	Item #14
Beartooth				\$ 9,150.00			
Big Flat					\$ 1,450.00		
Big Horn					\$ 20,017.54	\$ 5,770.10	
Fall River							
Fergus							
Flathead				\$ 158,830.00		\$ 26,640.00	
Glacier							
Goldenwest					\$ 1,100.00		
Hill County		\$ 3,386.66			\$ 665.00		
Lincoln				\$ 31,042.53			
LYREC							
Marias River						\$ 4,847.61	
McCone							
Mid-Yellowstone							
Missoula				\$ 10,263.04			
NorVal						\$ 1,763.89	
Northern Lights				\$ 5,711.54			
Park				\$ 8,062.76			
Ravalli							\$ 2,779.00
Sheridan							
Southeast							
Sun River					\$ 845.00	\$ 1,199.67	
Tongue River							
Vigilante							
Yellowstone Valley					\$ 54,559.00	\$ 18,500.00	
<b>TOTAL</b>	<b>\$ -</b>	<b>\$ 3,386.66</b>	<b>\$ -</b>	<b>\$ 223,059.87</b>	<b>\$ 78,636.54</b>	<b>\$ 58,721.27</b>	<b>\$ 2,779.00</b>

Line Item Spending - Low-Income USBP Expenditures (Page 10 of 17)

	Item #15	Item #16	Item #17	Item #18		Total Low-Income USBP Expenditures
Beartooth			\$ 4,715.62	\$ 3,598.64		\$ 17,464.26
Big Flat						\$ 8,153.90
Big Horn						\$ 31,654.79
Fall River						\$ 10,000.00
Fergus						\$ 28,187.37
Flathead			\$ 125,363.00			\$ 1,412,871.00
Glacier	\$ 15,649.00					\$ 37,683.00
Goldenwest						\$ 1,100.00
Hill County						\$ 14,051.66
Lincoln			\$ 22,261.57			\$ 78,789.60
LYREC						\$ 7,200.00
Marias River						\$ 24,612.81
McCone						\$ 12,940.33
Mid-Yellowstone						\$ 3,574.11
Missoula			\$ 28,050.68			\$ 57,466.10
NorVal						\$ 7,663.89
Northern Lights			\$ 6,384.34			\$ 12,095.88
Park						\$ 44,439.88
Ravalli			\$ 16,178.00			\$ 43,043.00
Sheridan						\$ 13,091.00
Southeast						\$ 35,954.39
Sun River						\$ 21,651.28
Tongue River						\$ 11,000.00
Vigilante			\$ 21,456.00			\$ 43,791.53
Yellowstone Valley						\$ 110,192.00
<b>TOTAL</b>	<b>\$ 15,649.00</b>	<b>\$ -</b>	<b>\$ 224,409.21</b>	<b>\$ 3,598.64</b>		<b>\$ 2,088,671.78</b>

\*\*\*See Exhibit B for Item Descriptions

# Line Item Spending - Renewable Resource Projects (Page 11 of 17)

	Item #1	Item #2	Item #3	Item #4	Item #5	Item #6	Item #7	Item #8	Total Renewable Resource Projects
Beartooth									\$ -
Big Flat									\$ -
Big Horn									\$ -
Fall River									\$ -
Fergus									\$ -
Flathead						\$ 551,606.00		\$ 1,466,654.00	\$ 2,018,260.00
Glacier						\$ 68,855.00			\$ 68,855.00
Goldenwest		\$ 2,400.00		\$ 1,800.00					\$ 4,200.00
Hill County									\$ -
Lincoln									\$ -
LYREC									\$ -
Marias River									\$ -
McCone									\$ -
Mid-Yellowstone									\$ -
Missoula						\$ 123,423.01			\$ 123,423.01
NorVal									\$ -
Northern Lights						\$ 48,946.58			\$ 48,946.58
Park	\$ 6,382.57					\$ 18,284.07			\$ 24,666.64
Ravalli						\$ 32,467.00	\$ 15,075.00		\$ 47,542.00
Sheridan									\$ -
Southeast									\$ -
Sun River						\$ 3,400.00	\$ 3,560.08		\$ 6,960.08
Tongue River									\$ -
Vigilante						\$ 94,413.00			\$ 94,413.00
Yellowstone Valley	\$ 82,450.00					\$ 10,000.00			\$ 92,450.00
<b>TOTAL</b>	<b>\$ 88,832.57</b>	<b>\$ 2,400.00</b>	<b>\$ -</b>	<b>\$ 1,800.00</b>	<b>\$ -</b>	<b>\$ 951,394.66</b>	<b>\$ 18,635.08</b>	<b>\$ 1,466,654.00</b>	<b>\$ 2,529,716.31</b>

\*\*\*See Exhibit C for Item Descriptions



Line Item Spending - Research & Development (Page 13 of 17)

	Item #1	Item #2	Item #3	Item #4	Item #5	Item #6	Item #7	Total Research & Development
Beartooth								\$ -
Big Flat	\$ 540.00							\$ 540.00
Big Horn								\$ -
Fall River								\$ -
Fergus								\$ -
Flathead								\$ -
Glacier								\$ -
Goldenwest								\$ -
Hill County								\$ -
Lincoln								\$ -
LYREC	\$ 1,613.00							\$ 1,613.00
Marias River	\$ 993.00							\$ 993.00
McCone	\$ 1,397.00							\$ 1,397.00
Mid-Yellowstone								\$ -
Missoula	\$ 3,362.00							\$ 3,362.00
NorVal								\$ -
Northern Lights								\$ -
Park	\$ 1,723.00							\$ 1,723.00
Ravalli								\$ -
Sheridan								\$ -
Southeast								\$ -
Sun River	\$ 1,258.00							\$ 1,258.00
Tongue River								\$ -
Vigilante	\$ 2,705.00							\$ 2,705.00
Yellowstone Valley								\$ -
<b>TOTAL</b>	<b>\$ 13,591.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 13,591.00</b>

\*\*\*See Exhibit D for Item Descriptions

## **Appendix A: Large Customers Names for USB Cooperative Reporting Form**

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

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

- 1 Pacific Steel and Recycling
- 2 Express Pipeline, LLC
- 3 Express Pipeline Limited Partnership
- 4 Signal Peak Energy, LLC
- 6 Pyramid Mountain Lumber
- 7 F.H. Stoltze Land & Lumber, Inc.
- 8 The HealthCenter Northwest, LLC
- 9 Kalispell Regional Medical Center
- 10 Semitool, Inc.
- 11 Weyerhaeuser Company
- 12 James P McCormick

**Total large-customer USB revenues collected & expended for the reporting year - \$507,848.82**

**(This amount does not reflect any amount that Large Customers may have utilized as per 69-8-402(7)(a)(ii)(B) MCA)**

## Exhibit A: Energy Conservation

- 1 Energy audits
- 2 Energy efficient appliance incentives
- 3 Grants or loans for lighting efficiency conversions
- 4 Grants for motor efficiency conversions
- 5 Expenses for consumer conservation education
- 6 Expenses for demand side management programs
- 7 Grants or low-interest loans for ground-source heat pumps used for energy efficiency savings
- 8 Irrigation audits to reduce power requirements
- 9 Residential energy efficiency programs
- 10 Design or construction assistance for energy efficient construction
- 11 Design or implementation assistance for retrofits of existing loads
- 12 Waste heat generation expenses
- 13 Street lighting or security lighting upgrades for efficiency
- 14 Incremental cost of distribution efficiency expenditures attributable to increases in energy efficiency above acceptable minimum industry standards documented and verified by an electrical engineer
- 15 Peak-shaving devices applied in customer facilities to reduce peak demands excluding interruptible service or payment for curtailment rates
- 16 Large customer conservation investments made pursuant to 69-8-402 (7)
- 17 Conservation investments made through power purchases pursuant to 69-8-402(2)(c)
- 18 Total loan amounts made for lighting efficiency, ground source heat pumps and miscellaneous energy efficiency loans
- 19 Other:
  - Flathead - Administrative costs associated with promoting energy efficiency
  - Lincoln - Irrigation Conservation Measures
  - Southeast - Labor on tracking USB spending and preparing report
- 19a Flathead- Power supplier reimbursements/rebates for energy efficiency



**Exhibit B: Low-Income USBP Expenditures & Credits**

- 1 Outreach for LIEAP enrollment and other low-income assistance entities
- 2 Energy Share or similar contributions
- 3 Funds contributed to endowments that qualify for low-income USBP purposes
- 4 Safety or repairs related to low-income energy issues
- 5 Energy efficient equipment or technologies that help low-income households meet the cost of home energy
- 6 Heating and energy crisis benefits including payments toward recipient household's energy costs
- 7 Payment toward recipient household weatherization costs
- 8 Purchase and delivery of fuels used by recipient households for home energy
- 9 Purchase, delivery, and installation of weatherization materials
- 10 Purchase and delivery of blankets, space heating devices, equipment and other tangible items that are provided to help low-income households meet the cost of home energy
- 11 Discounted utility and bulk fuel prices for recipient households
- 12 Partial or full waivers of utility and other income (home energy connection and reconnection fees, application fees, and late payment charges)
- 13 Partial or full forgiveness of home energy bill arrearages
- 14 Discounts or reductions in the costs of home heating and weatherization materials
- 15 Services of paid staff donated by their employers to deliver fuel and other tangible items that help low-income households meet the cost of home energy
- 16 Purchase, delivery, and installation of energy efficient equipment or technologies that help low-income households meet the cost of home energy
- 17 Low-income energy assistance investments made through power purchases pursuant to 69-8-402(2)(c)
- 18 Other: Beartooth Electric - BE Members Helping Members, Inc.

### **Exhibit C: Renewable Resource Projects & Applications**

- 1 Photovoltaics conversion
- 2 Solar thermal applications
- 3 Geothermal projects
- 4 Wind power projects
- 5 Local micro-hydro projects that are on streams outside protected areas as defined by the Northwest Power and Conservation Council or state or federal law, or that are irrigation ditch projects
- 6 Renewable energy investments made through power purchases and qualifying internal programs pursuant to 69-8-402(2)(c)
- 7 Co-op's infrastructure/capacity costs unrecovered above any benefits due to net-metering
- 8 Other: Flathead - Land Fill Gas to Energy

### **Exhibit D: Research & Development**

- 1 Big Flat/Lower Yellowstone Rural/Marias River/McCone/Missoula/Park/Sun River/Vigilante - Cooperative Network Research Dues
- 2



February 21, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Metra Park**

Dear Mr. Schafer:

Please accept this letter and the attached document as Metra Park's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Metra Park's 2024 USBC account activities.
- Metra Park did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024 as we no longer qualify.
- Metra Park has a current request balance of \$44,890.71 (shown on the attached USBC Progress Report) for a past project that was submitted in 2004 to NorthWestern Energy, and to the DOR in our 2004 Annual Summary Report.

If you have any questions, please contact me at 406-256-2412

Sincerely,

Kole Kuntz  
Metra Park Facilities Director

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





Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

METRA PARK

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$412,916.43
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$48,449.63	Total Payment Requests:	\$48,449.63
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$44,890.71
2023 Carryover USBC Credit:	\$221.18	Total USBC Credit:	\$3,851.49
USBC Credit YTD:	\$3,630.31	Payments Issued YTD:	\$3,558.92
Average Monthly Credit Earned:	\$302.53	USBC Credit Balance:	\$292.57
		Payment Pending:	\$292.57

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$1,033.52
			07/09/2024	\$769.53
			10/08/2024	\$1,123.83
			12/17/2024	\$632.04

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
256622	81088	DA28691783	KWH >	241,041	305,726	338,063	319,647	256,140	260,578	281,044	441,162	508,730	335,487	354,935	320,069	3,962,622
			KW >	616	731	774	838	695	910	862	1,095	1,541	940	731	660	866
			Elec Revenue >	\$26,283.14	\$31,617.61	\$34,704.93	\$34,514.21	\$29,372.12	\$31,382.62	\$32,740.16	\$48,773.62	\$58,299.08	\$36,980.12	\$35,244.41	\$5,179.69	\$405,091.71
659299	291577	2000288481	KWH >	0	5,460	5,016	6,004	6,554	6,116	5,404	5,703	6,660	6,089	5,757	5,016	63,779
			KW >	0	11	11	11	12	12	10	11	11	11	10	9	11
			Elec Revenue >	\$0.00	\$623.22	\$591.32	\$698.45	\$792.03	\$749.76	\$646.74	\$681.52	\$774.04	\$697.86	\$636.25	\$122.25	\$7,013.44
659299	291577	DA06364379	KWH >	7,305	0	0	0	0	0	0	0	0	0	0	0	7,305
			KW >	11	0	0	0	0	0	0	0	0	0	0	0	11
			Elec Revenue >	\$811.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$811.28
Total KWH				248,346	311,186	343,079	325,651	262,694	266,694	286,448	446,865	515,390	341,576	360,692	325,085	4,033,706
Combined Average KW				627	742	785	849	707	922	872	1,106	1,552	951	741	669	888
USBC Charge				\$223.51	\$280.06	\$308.77	\$293.08	\$236.43	\$240.02	\$257.80	\$402.18	\$463.85	\$307.42	\$324.62	\$292.57	\$3,630.31
Total Elec Revenue				\$27,094.42	\$32,240.83	\$35,296.25	\$35,212.66	\$30,164.15	\$32,132.38	\$33,386.90	\$49,455.14	\$59,073.12	\$37,677.98	\$35,880.66	\$5,301.94	\$412,916.43



February 26, 2025

Mr. Jon Schafer

UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Montana Precision Products**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Montana Precision Product's (MPP) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of MPP's 2024 USBC account activities.**
- **At year-end 2024, MPP had a current request balance of \$49,798.25.**
- **Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024.**
- **At year-end 2024, MPP had a credit balance of \$327.50 (carried over into 2025).**

If you have any questions, please contact me at (406)565-2669

Sincerely,

Justin Parnell  
Facilities Leader

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



Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

MONTANA PRECISION PRODUCTS LLC

Account Summary

2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$450,168.52
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$2,791.32	Total Payment Requests:	\$53,761.78
Payment Requests Made YTD:	\$50,970.46	Current Request Balance:	\$49,798.25
2023 Carryover USBC Credit:	\$340.21	Total USBC Credit:	\$4,291.03
USBC Credit YTD:	\$3,950.82	Payments Issued YTD:	\$3,963.53
Average Monthly Credit Earned:	\$329.24	USBC Credit Balance:	\$327.50
		Payment Pending:	\$327.50

Payment Requests Made

Submitted By	Date	Amount
Justin Parnell	11/19/2024	\$50,970.46

Payments Issued

Date	Amount
04/19/2024	\$1,343.97
07/09/2024	\$958.08
10/08/2024	\$489.27
12/17/2024	\$1,172.21

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1816576	405061	DA29137675	KWH >	341,982	389,364	383,949	405,445	365,200	293,892	341,997	368,230	394,068	364,282	377,514	363,891	4,389,814
			KW >	1,080	1,037	1,020	1,045	1,115	959	1,184	1,166	1,244	1,244	1,236	1,157	1,124
			Elec Revenue >	\$38,275.43	\$39,843.95	\$39,271.10	\$41,809.41	\$41,658.86	\$33,986.78	\$39,909.05	\$41,410.71	\$44,286.25	\$41,142.17	\$39,678.97	\$8,895.84	\$450,168.52
			Total KWH	341,982	389,364	383,949	405,445	365,200	293,892	341,997	368,230	394,068	364,282	377,514	363,891	4,389,814
			Combined Average KW	1,080	1,037	1,020	1,045	1,115	959	1,184	1,166	1,244	1,244	1,236	1,157	1,124
			USBC Charge	\$307.78	\$350.43	\$345.55	\$364.90	\$328.68	\$264.50	\$307.80	\$331.41	\$354.66	\$327.85	\$339.76	\$327.50	\$3,950.82
			Total Elec Revenue	\$38,275.43	\$39,843.95	\$39,271.10	\$41,809.41	\$41,658.86	\$33,986.78	\$39,909.05	\$41,410.71	\$44,286.25	\$41,142.17	\$39,678.97	\$8,895.84	\$450,168.52





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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/19/2024	CONTACT PERSON:	Justin Parnell
NAME OF BUSINESS:	Montana Precision Products	PHONE NUMBER:	406-565-2669
PROJECT CITY LOCATION:	Butte	CELL PHONE:	
MAILING ADDRESS:	119800 Rick Jones Way	FAX NUMBER:	
MAILING CITY, STATE, ZIP:	Butte, MT 59750	E-MAIL ADDRESS:	PJustin@mtpp.com

A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S): \$ 50,970.46

DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S): Install 186 new Led light fixtures in the building to replace old fixtures. The cost of lights were \$39,959.26 and took an hour to replace each fixture, at a rate of \$59.20 per hour X 186 fixtures for a cost of \$11,011.20 for installation. Total project cost is \$50,970.46

ESTIMATED ANNUAL KWH SAVINGS:

ESTIMATED KW DEMAND SAVINGS:

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

B. AMOUNT OF CREDIT REQUESTED FOR DONATION:

\$

NAME OF ORGANIZATION TO RECEIVE DONATION:

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

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

LARGE CUSTOMER:

Signature:

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



Delivering a Bright Future



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

(406) 496-3200  
(406) 723-9542 fax  
[www.montanaresources.com](http://www.montanaresources.com)

REC'D MT DOR  
FEB 14 2025

February 10, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Montana Resources**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Montana Resources' (MR) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of MR's 2024 USBC account activities.**
- **At year-end 2024, MR had a credit balance of \$320,111.71. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.**
- **Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024.**

If you have any questions, please contact me at (406)498-6509

Sincerely,

Rob Sanderson  
Vice President, Maintenance  
406.496.3242  
[rsanderson@montanaresources.com](mailto:rsanderson@montanaresources.com)  
600 Shields Ave.  
Butte, MT 59701

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



# Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

## MONTANA RESOURCES

### Account Summary

2023 Carryover Reservation:	\$307,486.00	YTD Elec Revenue:	\$2,353,235.70
Reservations Made YTD:	\$292,000.00		
2023 Carryover Payment Request:	\$0.00	Total Payment Requests:	\$307,485.53
Payment Requests Made YTD:	\$307,485.53	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$307,485.53	Total USBC Credit:	\$627,597.24
USBC Credit YTD:	\$320,111.71	Payments Issued YTD:	\$307,485.53
Average Monthly Credit Earned:	\$26,675.98	USBC Credit Balance:	\$320,111.71
		Payment Pending:	\$0.00

### Account Detail

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100062	1068	DA28382562	KWH > 1,277.213	1,326.781	1,220.529	1,242.564	1,184.190	1,132.482	1,074.370	1,071.992	1,120.738	1,096.666	1,135.581	1,213.419	14,096.545
		KW > 2,400	2,534	2,534	2,465	2,438	2,446	2,273	2,262	2,124	2,312	2,220	2,289	2,388	2,346
		Elec Revenue >	\$9,867.39	\$9,733.88	\$9,192.26	\$9,231.20	\$9,015.19	\$8,504.00	\$8,255.22	\$8,117.57	\$8,649.08	\$8,388.10	\$8,668.42	\$5,333.80	\$102,956.11
100062	1068	DA28382563	KWH > 2,536.967	2,368.278	2,423.826	2,508.325	2,427.379	2,328.545	2,165.494	2,465.021	2,564.874	2,755.055	2,660.900	2,523.341	29,728.005
		KW > 4,046	3,960	3,960	4,205	4,046	3,816	3,888	3,773	3,730	4,406	29,088	3,715	4,277	6,079
		Elec Revenue >	\$18,148.47	\$16,374.51	\$17,028.77	\$17,079.60	\$16,351.81	\$16,089.90	\$15,242.55	\$16,616.20	\$18,221.67	\$19,274.89	\$18,125.93	\$9,868.10	\$198,422.40
100062	1068	DA28382564	KWH > 2,061.568	2,013.365	1,934.446	2,033.954	1,950.329	1,924.250	1,933.239	2,044.670	2,031.070	2,045.940	1,977.149	1,911.520	23,861.500
		KW > 3,721	3,750	3,750	3,766	3,554	3,606	3,640	3,675	3,594	3,951	2,220	2,289	3,825	3,468
		Elec Revenue >	\$15,619.42	\$14,601.71	\$14,372.15	\$14,334.77	\$14,097.32	\$14,054.86	\$14,152.48	\$14,670.94	\$15,249.95	\$15,402.59	\$14,693.92	\$8,514.58	\$169,764.69
100062	1068	DA28691749	KWH > 18,561	19,859	18,798	17,791	16,840	16,205	13,913	15,518	14,736	13,774	14,476	15,339	195,810
		KW > 101	180	180	131	144	93	90	73	132	72	29,088	3,715	117	2,828
		Elec Revenue >	\$276.47	\$398.05	\$306.83	\$325.95	\$231.61	\$223.78	\$184.54	\$297.37	\$187.61	\$183.72	\$316.22	\$221.63	\$3,153.78
100062	1068	DA29133734	KWH > 432.150	426.259	1,051.948	1,114.249	1,055.837	1,050.789	1,037.181	1,070.451	940.111	988.032	977.438	997.354	11,141.799
		KW > 674	700	700	1,795	1,662	1,607	1,678	1,623	1,591	1,617	2,220	2,289	1,523	1,582
		Elec Revenue >	\$3,060.84	\$2,924.55	\$7,337.28	\$7,346.75	\$7,018.68	\$7,124.88	\$6,973.52	\$7,164.58	\$6,682.49	\$6,738.16	\$6,689.89	\$3,602.88	\$72,664.50
100062	1068	DA29137751	KWH > 1,922.418	1,888.348	1,827.965	1,954.368	1,869.808	1,855.163	1,869.563	1,987.708	1,966.097	1,924.258	0	0	19,065.696
		KW > 3,557	3,571	3,571	3,629	3,571	3,542	3,528	3,629	3,566	3,859	29,088	0	0	6,156
		Elec Revenue >	\$14,740.57	\$13,790.68	\$13,655.57	\$14,051.07	\$13,666.06	\$13,583.44	\$13,819.63	\$14,425.87	\$14,823.20	\$14,346.33	\$0.00	\$0.00	\$140,902.42
100062	1068	DA29137752	KWH > 629.439	691.654	610.159	580.394	580.347	565.356	466.640	448.494	443.370	462.771	591.425	610.792	6,680.841
		KW > 1,953	1,650	1,814	1,737	1,771	1,771	1,564	1,477	1,642	1,443	2,220	3,715	1,771	1,896
		Elec Revenue >	\$6,412.97	\$5,658.72	\$5,628.61	\$5,374.44	\$5,434.65	\$5,007.84	\$4,463.98	\$4,734.36	\$4,360.13	\$4,515.15	\$5,743.52	\$3,695.47	\$61,029.84

.f-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100062	1068	DA30278230	KWH > 20,530,205 KW > 29,664	20,355,195 29,405	18,803,437 28,958	19,970,488 28,929	19,160,229 28,598	18,747,931 28,123	18,567,500 28,296	19,793,681 28,512	19,590,400 28,756	19,636,447 29,088	19,566,694 2,289	19,678,845 29,030	234,401,052 26,637
		Elec Revenue >	140,957.08	132,798.44	125,884.31	130,436.73	126,652.77	124,182.58	123,777.89	131,155.14	130,766.07	131,541.00	131,693.11	\$69,276.67	\$1,499,121.79
100062	1068	DA31423541	KWH > 0 KW > 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	1,931,956 3,715	1,886,682 3,725	3,818,638 3,720
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$14,429.05	\$8,314.60	\$22,743.65
100062	1068	DA31423667	KWH > 998,840 KW > 1,495	998,927 1,512	948,262 1,555	1,019,816 1,529	1,062,564 1,719	1,061,754 1,685	1,075,408 1,668	1,155,628 1,668	1,115,690 1,693	1,117,087 2,220	1,082,566 2,289	1,053,272 1,711	12,689,814 1,729
		Elec Revenue >	\$6,948.16	\$6,625.47	\$6,502.05	\$6,738.06	\$7,244.15	\$7,180.57	\$7,204.22	\$7,646.58	\$7,529.11	\$7,490.37	\$7,380.65	\$3,987.13	\$82,476.52
Total KWH			30,407,361	30,088,666	28,839,370	30,441,949	29,307,523	28,682,485	28,203,308	30,053,163	29,787,086	30,040,030	29,938,195	29,890,564	355,679,700
Combined Average KW			47,611	47,262	48,348	47,610	47,198	46,469	46,476	46,579	48,109	127,452	26,305	48,367	56,442
USBC Charge			\$27,366.63	\$27,079.79	\$25,955.43	\$27,397.74	\$26,376.78	\$25,814.24	\$25,382.98	\$27,047.85	\$26,808.37	\$27,036.03	\$26,944.36	\$26,901.51	\$320,111.71
Total Elec Revenue			216,031.37	202,906.01	199,907.83	204,918.57	199,712.24	195,951.85	194,074.03	204,828.61	206,469.31	207,880.31	207,740.71	112,814.86	\$2,363,235.70





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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/25/24
NAME OF BUSINESS:	Montana Resources
PROJECT CITY LOCATION:	Butte, MT
MAILING ADDRESS:	600 Shields Ave.
MAILING CITY, STATE, ZIP:	Butte, MT 59701

CONTACT PERSON:	Rob Sanderson
PHONE NUMBER:	406-496-3242
CELL PHONE:	406-498-6509
FAX NUMBER:	
E-MAIL ADDRESS:	<a href="mailto:rsanderson@montanaresources.com">rsanderson@montanaresources.com</a>

A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):	\$
DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S) (if more space is needed, please attach):	
ESTIMATED ANNUAL KWH SAVINGS:	
ESTIMATED KW DEMAND SAVINGS:	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

B. AMOUNT OF CREDIT REQUESTED FOR DONATION:	\$ 307,485.53
NAME OF ORGANIZATION TO RECEIVE DONATION:	Energy Share of Montana

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

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

LARGE CUSTOMER:

Signature:

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

***SAMPLE COVER LETTER FOR CUSTOMERS TO PUT ON THEIR COMPANY LETTERHEAD TO SUBMIT  
THEIR ANNUAL USB REPORT TO DOR***

**Date X, 2025**

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Montana Resources**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Montana Resources' (MR) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of MR's 2024 USBC account activities.
- At year-end 2024, MR had a credit balance of \$320,111.71. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.
- Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024.

If you have any questions, please contact me at (xxx) xxx-xxxx.

Sincerely,

**Your Name**

**Title**

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



April 9, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Montana State University Billings**

Dear Mr. Schafer:

Please accept this letter and the attached document as Montana State University Billings' (MSUB) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of MSUB's 2024 USBC account activities.**
- **MSUB did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.**
- **MSUB has a current request balance of \$144,309.33 (shown on the attached USBC Progress Report) for a past project that was submitted in 2023 to NorthWestern Energy, and to the DOR in our 2023 Annual Summary Report.**

If you have any questions, please contact me at (406) 657-1749

Sincerely,

Justin Rife,  
Director, Facilities Services  
(406) 657-1749  
[justin.rife@msubillings.edu](mailto:justin.rife@msubillings.edu)

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



Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

MONTANA STATE UNIVERSITY - BILLINGS

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$1,018,090.15
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$150,638.12	Total Payment Requests:	\$150,638.12
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$144,309.33
2023 Carryover USBC Credit:	(\$1,911.86)	Total USBC Credit:	\$6,965.12
USBC Credit YTD:	\$8,876.98	Payments Issued YTD:	\$6,328.79
Average Monthly Credit Earned:	\$739.75	USBC Credit Balance:	\$636.33
		Payment Pending:	\$636.33

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			07/09/2024	\$2,158.39
			10/08/2024	\$2,613.75
			12/17/2024	\$1,556.65

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100631	1635	DA29137696	KWH >	500,191	546,771	528,912	605,215	581,858	626,239	698,633	740,242	733,903	674,166	615,064	509,890	7,361,084
			KW >	981	1,065	1,192	1,253	1,214	1,324	1,614	1,629	1,493	1,527	1,263	1,270	1,319
			Elec Revenue >	\$51,258.84	\$54,730.64	\$54,141.26	\$64,409.84	\$63,987.96	\$68,995.29	\$76,938.19	\$80,278.40	\$78,687.91	\$69,957.73	\$61,031.18	\$9,857.91	\$734,275.15
228127	67210	DA30277395	KWH >	77,120	71,280	100,800	84,000	98,240	80,320	100,960	77,440	87,600	100,480	82,320	88,640	1,049,200
			KW >	277	268	298	310	332	325	329	319	299	323	322	374	315
			Elec Revenue >	\$10,967.04	\$9,635.82	\$12,529.12	\$11,224.72	\$13,531.23	\$11,818.47	\$13,843.60	\$11,291.65	\$11,968.49	\$13,473.59	\$11,163.67	\$4,824.58	\$136,271.98
252225	79210	2000148534	KWH >	0	0	0	0	0	7,360	5,260	5,160	4,060	3,440	3,800	7,040	36,120
			KW >	0	0	0	0	0	26	27	16	16	23	29	35	25
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,219.27	\$851.37	\$701.21	\$598.90	\$613.69	\$700.19	\$449.90	\$5,134.53
252225	79210	DG28214380	KWH >	2,100	4,040	5,160	4,620	0	0	0	0	0	0	0	0	15,920
			KW >	14	24	24	29	0	0	0	0	0	0	0	0	23
			Elec Revenue >	\$384.81	\$665.64	\$767.80	\$793.03	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,611.28
260058	82712	2000296726	KWH >	0	0	0	0	0	0	1	1,142	912	718	74	4	2,851
			KW >	0	0	0	0	0	0	0	17	17	17	17	0	11
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.19	\$294.79	\$272.29	\$251.77	\$190.83	\$0.10	\$1,009.97
260058	82712	DA18997869	KWH >	0	0	0	0	2	0	0	0	0	0	0	0	2
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.19	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.19
260086	82733	2000381555	KWH >	0	0	0	0	0	751	1,050	1,653	1,395	1,214	1,003	983	8,049
			KW >	0	0	0	0	0	5	5	8	8	7	6	6	6
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$153.42	\$172.62	\$273.22	\$252.07	\$211.51	\$174.05	\$85.40	\$1,322.29

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
260086	82733	DA08261258	KWH >	960	943	963	880	882	0	0	0	0	0	0	0	4,628	
			KW >	6	6	6	5	5	0	0	0	0	0	0	0	6	
			Elec Revenue >	\$182.41	\$166.87	\$169.12	\$152.99	\$165.81	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$837.20	
260195	82802	2000253896	KWH >	0	0	0	0	0	0	5,200	5,320	5,160	5,360	5,720	5,320	32,080	
			KW >	0	0	0	0	0	0	17	18	21	20	17	17	18	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$726.13	\$737.43	\$766.09	\$752.45	\$720.43	\$220.73	\$3,923.26	
260195	82802	DG83128345	KWH >	6,880	5,120	5,760	5,400	5,560	5,200	0	0	0	0	0	0	33,920	
			KW >	21	21	19	23	16	18	0	0	0	0	0	0	20	
			Elec Revenue >	\$930.88	\$726.31	\$751.39	\$777.54	\$748.41	\$739.30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,673.83	
260372	82912	2000231364	KWH >	0	0	0	0	0	4,220	4,820	5,380	4,920	4,620	4,160	4,840	32,960	
			KW >	0	0	0	0	0	9	10	14	14	13	10	10	11	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$537.34	\$598.92	\$695.35	\$646.65	\$597.14	\$491.26	\$137.17	\$3,703.83	
260372	82912	DA17237077	KWH >	5,720	4,280	4,760	4,600	4,980	0	0	0	0	0	0	0	24,340	
			KW >	12	10	9	10	9	0	0	0	0	0	0	0	10	
			Elec Revenue >	\$697.10	\$506.47	\$540.50	\$544.99	\$606.74	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,895.80	
260420	82943	2000389938	KWH >	0	0	0	0	0	0	1,442	2,915	2,234	1,618	1,165	1,109	10,483	
			KW >	0	0	0	0	0	0	10	11	11	9	4	4	8	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$275.32	\$421.55	\$357.04	\$273.15	\$160.45	\$55.50	\$1,543.01	
260420	82943	DG87256754	KWH >	1,325	973	1,054	1,022	1,305	1,030	0	0	0	0	0	0	6,709	
			KW >	6	4	4	4	7	6	0	0	0	0	0	0	5	
			Elec Revenue >	\$225.03	\$154.77	\$152.66	\$157.88	\$225.79	\$194.43	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,110.56	
1012131	364638	2000483540	KWH >	0	0	0	0	0	1,400	2,220	2,800	2,360	1,940	1,580	1,600	13,900	
			KW >	0	0	0	0	0	8	5	13	10	9	8	8	9	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$246.54	\$294.51	\$436.81	\$366.63	\$304.36	\$249.70	\$109.15	\$2,007.70	
1012131	364638	DA03678203	KWH >	1,480	1,540	1,760	1,220	1,380	0	0	0	0	0	0	0	7,380	
			KW >	6	6	9	6	5	0	0	0	0	0	0	0	6	
			Elec Revenue >	\$234.60	\$225.86	\$275.34	\$199.94	\$211.67	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,147.41	
1631000	414555	2000204403	KWH >	0	0	0	0	58,000	55,800	71,400	100,600	89,600	0	0	55,200	430,600	
			KW >	0	0	0	0	208	177	179	193	207	0	0	169	189	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$8,144.23	\$7,594.75	\$9,107.30	\$11,861.93	\$10,991.59	\$0.00	\$0.00	\$2,201.58	\$49,901.38	
1631000	414555	DG64922893	KWH >	47,600	43,400	50,200	41,600	0	0	0	0	0	0	0	0	182,800	
			KW >	158	84	100	170	0	0	0	0	0	0	0	0	128	
			Elec Revenue >	\$6,580.86	\$4,857.40	\$5,628.04	\$5,769.59	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$22,835.89	
4123539	79209	2000315658	KWH >	0	0	0	0	35,760	48,080	42,240	38,640	43,760	0	0	32,400	240,880	
			KW >	0	0	0	0	69	84	82	84	81	0	0	66	78	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$4,315.60	\$5,683.71	\$5,037.79	\$4,678.14	\$5,124.12	\$0.00	\$0.00	\$876.74	\$25,716.10	
4123539	79209	DA20155000	KWH >	38,240	40,080	34,880	35,040	0	0	0	0	0	0	0	0	148,240	
			KW >	68	81	69	96	0	0	0	0	0	0	0	0	79	
			Elec Revenue >	\$4,321.55	\$4,517.51	\$3,914.64	\$4,415.09	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$17,168.79	
Total KWH				681,616	718,427	734,249	783,597	787,967	830,400	933,226	981,292	975,904	793,556	714,886	707,026	9,642,146	
Combined Average KW				1,549	1,569	1,730	1,906	1,865	1,982	2,278	2,322	2,177	1,948	1,676	1,959	2,265	
USBC Charge				\$613.45	\$646.59	\$660.81	\$705.24	\$709.15	\$747.38	\$839.91	\$883.17	\$878.30	\$714.21	\$643.40	\$636.33	\$8,677.94	
Total Elec Revenue				\$75,783.12	\$76,187.29	\$78,869.87	\$88,445.61	\$91,937.63	\$97,182.52	107,845.94	111,670.48	110,031.78	\$86,435.39	\$74,881.76	\$18,818.76	\$1,018,090.15	





February 25, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue – USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406)444-6908, Email: Jon.Schafer@mt.gov

RE: Self-Directed USBC Progress Report for 2024 – MONTANA STATE UNIVERSITY

Dear Mr. Schafer:

Per the Montana Code Annotated (MCA) 69-8-402 & 69-8-214 and administrative rules, a NorthWestern Energy Large Customer claiming Universal Systems Benefit Program (USB) credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the DOR and to NorthWestern Energy by March 1<sup>st</sup> for the previous calendar year. This letter and attachments are our official **USB Annual Report** for 2024. Enclosed are:

- *Self-Directed USBC Progress Report for 2024* we received from NorthWestern Energy showing our 2024 USB activities including payments received and if we submitted new USB credit requests for projects.
- Below is a summary of the USB credit reimbursement payments we received in 2024 and listing of historical USB projects requested. We did not submit any new projects (Form B's) in 2024.

<b>MONTANA STATE UNIVERSITY LARGE CUSTOMER 2024 USB ANNUAL REPORT SUMMARY HISTORICAL SELF-DIRECT USB CREDIT REQUEST</b>		
<b>TOTAL USB CREDIT PAYMENTS RECEIVED IN 2024 REPORTING YEAR</b>		
2024 USB CREDIT PAYMENTS		<b>\$46,525.44</b>
2023 USB CREDIT PAYMENTS		<b>\$6,668.89</b>
<b>TOTAL USB PAYMENTS ISSUED IN 2024</b>		<b>\$53,194.33</b>
<b>QUALIFYING PROJECT(S) RESULTING IN USB CREDIT REIMBURSEMENT IN 2024</b>		
<b>REQUEST BALANCE REMAINING AT YEAR-END 2024</b>		<b>\$248,248.83</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECTS PREVIOUSLY SUBMITTED:</b>	<b>DATE CLAIM SUBMITTED</b>	<b>INDIVIDUAL CLAIM AMOUNT</b>
Upgrade lighting systems in Linfield Hall north and south, approximately 59,000 sq. ft. to be completed by September 2008 work order 313166 and 31360.	2/12/2013	<b>\$74,985.00</b>
This was a request sent in on January 5, 2007 that was not entered in to the Large USB database. It was for a project to Upgrade Lighting Systems in Plant Growth Center that was completed October 2006, MSU work order 453500.	2/12/2013	<b>\$70,445.00</b>
Upgrade lighting systems Leon Johnson Hall Approx. 110,000 sq. ft. MSU Work Order 307360.	1/5/2008	<b>\$171,420.00</b>
<b>TOTAL AMOUNT OF ORIGINAL REQUESTS</b>		<b>\$316,850.00</b>

At year-end 2024, we had a 2024 USB credit balance of \$4,446.44 carried over into 2025, because we filed a Request Balance.

If you have any questions, please don't hesitate to contact me or Megan Sterl.  
Sincerely,

Jill R. Zimbric  
Financial Manager  
Montana State University  
University Facilities Management

CC: Rick Edwards, NorthWestern Energy [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
Megan Sterl, Montana State University [megan.sterl@montana.edu](mailto:megan.sterl@montana.edu)

## University Facilities Management

Business Operations

Engineering & Utilities

Facilities Services

Planning, Design & Construction

Safety & Risk Management

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

Tel 406-994-2001

**Mountains & Minds**





Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

MONTANA STATE UNIVERSITY - BOZEMAN

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$3,950,357.92
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$301,443.16	Total Payment Requests:	\$301,443.16
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$248,248.83
2023 Carryover USBC Credit:	\$6,668.89	Total USBC Credit:	\$57,640.77
USBC Credit YTD:	\$50,971.88	Payments Issued YTD:	\$53,194.33
Average Monthly Credit Earned:	\$4,247.66	USBC Credit Balance:	\$4,446.44
		Payment Pending:	\$4,446.44

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$18,394.45
			07/09/2024	\$12,156.32
			10/08/2024	\$13,207.72
			12/17/2024	\$9,435.84

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100611	1615	DA29133721	KWH >	1,495,995	1,563,556	1,620,500	1,588,650	1,538,462	1,009,555	912,074	970,949	1,044,301	1,030,789	1,059,743	1,587,685	15,422,259
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$5,900.21	\$6,166.66	\$6,391.25	\$6,265.64	\$6,067.70	\$3,981.69	\$3,597.22	\$3,935.25	\$4,232.55	\$4,177.79	\$4,295.14	\$1,428.92	\$56,440.02
100611	1615	DA29133722	KWH >	2,232,356	2,235,905	2,169,033	2,346,528	2,669,422	2,909,333	3,034,641	3,574,378	3,723,264	3,743,646	3,674,990	5,666,956	37,980,452
			KW >	7,394	7,063	7,342	7,497	7,919	7,225	7,731	8,858	9,325	9,539	9,001	16,212	8,085
			Elec Revenue >	230,203.84	216,738.99	210,748.94	228,232.55	279,862.29	296,488.37	315,178.91	356,909.69	372,595.62	375,698.20	336,687.85	\$32,140.47	\$3,251,485.72
163370	34943	2000231124	KWH >	1,660	1,760	1,820	1,540	1,440	1,920	2,640	2,860	2,500	2,260	1,920	1,820	24,140
			KW >	11	10	10	10	9	11	8	13	11	10	12	10	10
			Elec Revenue >	\$314.73	\$298.91	\$300.06	\$284.18	\$268.11	\$335.59	\$372.74	\$442.40	\$391.62	\$347.35	\$332.09	\$128.37	\$3,816.15
176372	40615		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
176372	40615	2000122101	KWH >	117	113	118	107	111	120	744	805	113	110	0	0	2,458
			KW >	0	0	0	0	0	0	21	19	0	0	0	0	4
			Elec Revenue >	\$23.37	\$23.82	\$28.30	\$21.34	\$13.19	\$14.61	\$301.85	\$278.43	\$13.31	\$12.67	\$0.00	\$0.00	\$730.89
176372	40615	2000206064	KWH >	0	0	0	0	0	0	0	0	0	0	107	124	231
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$11.46	\$5.94	\$17.40
176374	40617		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$11.87	\$10.88	\$10.88	\$10.90	\$11.02	\$11.02	\$11.01	\$10.98	\$10.98	\$0.00	\$0.00	\$0.00	\$99.54

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
176374	40617	2000314580	KWH >	2,120	2,320	2,880	3,440	2,440	1,640	1,880	3,400	5,200	3,240	5,000	1,840	35,400
			KW >	34	37	36	39	33	12	16	23	40	39	37	25	31
			Elec Revenue >	\$686.20	\$685.34	\$715.63	\$807.88	\$669.95	\$329.31	\$397.60	\$627.86	\$1,008.08	\$808.85	\$908.64	\$329.13	\$7,974.47
176376	40619		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
176376	40619	2000203807	KWH >	36	42	35	30	29	26	81	1,660	24	25	24	31	2,043
			KW >	0	0	0	0	0	0	42	39	0	0	0	0	7
			Elec Revenue >	\$12.81	\$13.11	\$12.49	\$12.06	\$3.49	\$3.20	\$447.76	\$576.18	\$2.65	\$2.72	\$2.76	\$0.66	\$1,089.89
199197	52018	2000231141	KWH >	1,280	1,320	1,300	1,360	1,340	1,220	1,200	940	880	1,000	960	1,100	13,900
			KW >	17	18	18	17	18	17	11	15	14	14	15	18	16
			Elec Revenue >	\$364.62	\$359.87	\$350.29	\$352.29	\$371.60	\$341.35	\$265.37	\$294.80	\$278.05	\$285.35	\$285.71	\$231.89	\$3,781.19
199552	52106	2000231142	KWH >	1,480	1,260	1,180	1,180	1,080	960	860	900	860	940	900	1,040	12,640
			KW >	19	18	19	17	15	13	0	13	13	10	10	18	14
			Elec Revenue >	\$413.17	\$348.33	\$358.64	\$331.95	\$312.75	\$271.63	\$102.04	\$262.19	\$258.70	\$231.45	\$222.05	\$229.06	\$3,341.96
413082	165380	2000206463	KWH >	0	0	0	0	562	1,405	2,085	1,188	1,014	659	370	346	7,629
			KW >	0	0	0	0	2	17	16	16	11	10	2	0	9
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$90.34	\$359.18	\$415.59	\$327.16	\$244.17	\$203.33	\$66.75	\$7.03	\$1,713.55
413082	165380	DA11667864	KWH >	326	554	446	453	0	0	0	0	0	0	0	0	1,779
			KW >	0	0	1	2	0	0	0	0	0	0	0	0	1
			Elec Revenue >	\$47.36	\$68.89	\$64.97	\$76.64	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$257.86
413091	165387		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$13.47	\$13.23	\$13.23	\$13.47	\$13.53	\$13.53	\$8.41	\$13.46	\$13.46	\$0.00	\$0.00	\$0.00	\$115.79
413091	165387	2000526810	KWH >	0	0	0	0	0	0	1,480	1,560	1,520	1,520	1,920	3,120	11,120
			KW >	0	0	0	0	0	0	9	5	5	5	11	11	8
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$264.41	\$229.18	\$222.42	\$215.92	\$316.38	\$144.24	\$1,392.55
413091	165387	DD82361657	KWH >	3,040	3,280	2,560	2,200	1,640	1,560	-1,480	0	0	0	0	0	12,800
			KW >	9	11	9	9	7	7	0	0	0	0	0	0	7
			Elec Revenue >	\$399.22	\$440.08	\$347.22	\$334.01	\$256.81	\$249.16	(\$131.01)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,895.49
615185	266623	DA29137702	KWH >	252,883	323,015	292,028	280,372	247,426	160,818	158,912	222,750	280,554	270,049	267,164	265,101	3,021,072
			KW >	584	701	621	603	562	431	404	525	735	680	608	637	591
			Elec Revenue >	\$27,324.56	\$32,876.07	\$29,630.53	\$28,899.45	\$27,564.48	\$18,412.01	\$17,969.67	\$24,433.96	\$31,313.32	\$29,571.83	\$26,963.28	\$4,954.38	\$299,913.54
710867	321643	2000205794	KWH >	99,520	110,080	105,920	95,200	84,320	80,640	97,600	101,600	83,840	0	0	87,040	945,760
			KW >	199	261	232	183	192	208	218	254	197	0	0	184	213
			Elec Revenue >	\$11,690.11	\$12,861.18	\$12,143.68	\$10,812.07	\$10,520.15	\$10,370.92	\$12,048.58	\$12,710.18	\$10,334.38	\$0.00	\$0.00	\$2,412.22	\$105,903.47
710869	321645	2000253682	KWH >	0	0	0	9,280	8,800	8,560	8,800	10,720	10,320	0	0	9,840	66,320
			KW >	0	0	0	20	22	22	23	32	29	0	0	22	24
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$1,100.31	\$1,129.32	\$1,118.53	\$1,144.61	\$1,416.84	\$1,344.06	\$0.00	\$0.00	\$298.82	\$7,552.49
710869	321645	2000296069	KWH >	6,000	7,280	9,040	0	0	0	0	0	0	0	0	0	22,320
			KW >	21	25	20	0	0	0	0	0	0	0	0	0	22
			Elec Revenue >	\$849.99	\$958.19	\$1,056.01	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,864.19
711575	322182		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$11.99	\$10.88	\$10.88	\$10.90	\$11.02	\$11.02	\$11.02	\$10.98	\$10.98	\$0.00	\$0.00	\$0.00	\$99.67

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total		
711575	322182	2000217147	KWH >	3,493	5,503	5,326	4,657	3,530	3,386	2,295	2,121	1,585	2,454	2,903	3,316	40,569		
			KW >	11	13	13	12	11	11	8	6	5	7	7	8	9		
			Elec Revenue >	\$491.05	\$662.04	\$637.46	\$573.32	\$490.86	\$472.27	\$341.37	\$289.34	\$223.28	\$330.29	\$354.41	\$104.74	\$4,970.43		
715994	325877		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0		
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0		
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50		
715994	325877	2000205585	KWH >	0	0	0	0	680	1,640	5,360	7,960	200	80	0	0	15,920		
			KW >	0	0	0	0	32	42	43	33	29	1	0	0	30		
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$406.47	\$612.08	\$977.30	\$1,114.90	\$323.71	\$20.28	\$0.00	\$0.00	\$3,454.74		
719536	328585	2000254387	KWH >	1,160	1,280	1,080	1,000	880	800	1,000	1,320	880	680	840	1,400	12,320		
			KW >	3	4	3	2	2	3	4	9	5	4	4	4	4		
			Elec Revenue >	\$161.00	\$180.50	\$142.89	\$135.23	\$129.38	\$134.91	\$160.97	\$250.92	\$159.70	\$123.79	\$132.82	\$59.05	\$1,771.16		
721021	329867	2000206656	KWH >	400	520	580	0	480	0	0	0	0	0	0	0	1,980		
			KW >	2	3	3	0	2	0	0	0	0	0	0	0	3		
			Elec Revenue >	\$75.16	\$93.82	\$104.86	\$0.00	\$70.87	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$344.71		
1987509	269040	2000205029	KWH >	6,720	6,600	6,080	5,520	6,080	5,160	7,160	10,000	7,520	6,880	5,520	6,120	79,360		
			KW >	27	27	26	20	26	26	24	35	30	27	22	29	27		
			Elec Revenue >	\$991.89	\$930.65	\$871.89	\$763.62	\$924.88	\$842.45	\$997.99	\$1,390.26	\$1,092.60	\$989.42	\$762.73	\$374.04	\$10,932.42		
2075251	135993	DA18484023	KWH >	135,040	156,640	143,840	132,960	151,200	123,840	120,960	126,560	110,720	121,920	116,640	136,960	1,577,280		
			KW >	313	331	315	316	329	337	316	246	275	278	291	300	304		
			Elec Revenue >	\$16,720.44	\$17,857.05	\$16,473.35	\$15,550.37	\$18,526.31	\$16,133.69	\$15,594.59	\$14,950.60	\$13,820.10	\$14,904.97	\$13,612.33	\$3,935.33	\$178,079.13		
Total KWH				4,243,626	4,421,028	4,363,766	4,474,477	4,719,922	4,312,583	4,358,292	5,041,671	5,275,295	5,186,252	5,139,001	7,773,839	59,309,752		
Combined Average KW				8,644	8,522	8,668	8,747	9,181	8,382	8,894	10,141	10,724	10,624	10,020	17,478	9,418		
USBC Charge				\$3,819.26	\$3,978.91	\$3,927.39	\$4,027.04	\$4,247.95	\$3,881.33	\$3,922.46	\$4,537.49	\$4,747.77	\$4,667.62	\$4,625.11	\$6,996.47	\$53,378.80		
Total Elec Revenue				296,707.06	291,598.49	280,413.45	294,588.18	348,034.02	350,506.52	370,478.00	420,475.56	437,893.74	427,924.21	384,954.40	\$46,784.29	\$3,950,357.92		

Date 02-25-2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Montana Department of Corrections**

Dear Mr. Schafer:


Please accept this letter and the attached documents as Montana Department of Corrections' (MTDOC) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of MTDOC's 2024 USBC account activities.
- At year-end 2024, MTDOC had a credit balance of \$7,018.87. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.
- Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024.

If you have any questions, please contact me at (406)647-3565

Sincerely,

Myron Beeson   
Maintenance Manager MSP

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

## Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

# MONTANA DEPARTMENT OF CORRECTIONS

Account Summary			
2023 Carryover Reservation:	\$6,940.00	YTD Elec Revenue:	\$767,171.45
Reservations Made YTD:	\$7,215.00		
2023 Carryover Payment Request:	\$0.00	Total Payment Requests:	\$6,845.96
Payment Requests Made YTD:	\$6,845.96	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$6,845.96	Total USBC Credit:	\$13,864.83
USBC Credit YTD:	\$7,018.87	Payments Issued YTD:	\$6,845.96
Average Monthly Credit Earned:	\$584.91	USBC Credit Balance:	\$7,018.87
		Payment Pending:	\$0.00

Payment Requests Made		
Submitted By	Date	Amount
Myron Beeson	11/12/2024	\$6,845.96

Payments Issued	
Date	Amount
12/17/2024	\$6,845.96

## Account Detail

[illegible]

# Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
824609	245787	2000122055	KWH >	0	0	0	0	0	0	0	0	0	5,069	0	0	5,069
			KW >	0	0	0	0	0	0	0	0	0	14	0	0	14
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$612.86	\$0.00	\$0.00	\$612.86
824609	245787	2000122451	KWH >	0	0	0	0	1,815	6,710	500	1,770	2,565	0	0	0	13,360
			KW >	0	0	0	0	11	12	12	12	12	0	0	0	12
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$303.77	\$798.60	\$182.57	\$298.70	\$376.65	\$0.00	\$0.00	\$0.00	\$1,960.29
824617	275247		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
824617	275247	2000203770	KWH >	0	0	0	0	36,638	23,332	5,971	7	7	0	0	0	65,955
			KW >	0	0	0	0	77	74	76	0	0	0	0	0	45
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$4,437.28	\$3,086.37	\$1,381.92	\$0.79	\$0.79	\$0.00	\$0.00	\$0.00	\$8,907.15
1065150	311624	2000483866	KWH >	4,280	5,000	4,840	4,360	3,840	4,400	5,480	5,960	5,480	3,240	3,400	3,480	53,760
			KW >	23	23	21	23	24	29	34	34	28	23	25	18	25
			Elec Revenue >	\$716.52	\$743.80	\$704.06	\$698.24	\$691.36	\$805.76	\$969.08	\$1,005.45	\$885.66	\$597.64	\$622.61	\$234.80	\$8,674.98
			Total KWH	737,126	737,754	682,619	699,425	670,783	683,276	546,234	636,090	618,731	487,838	534,131	709,526	7,743,533
			Combined Average KW	1,367	1,522	1,441	1,388	1,417	1,381	1,374	1,392	1,290	1,132	1,220	1,394	1,493
			USBC Charge	\$663.41	\$663.98	\$614.36	\$629.48	\$603.70	\$614.96	\$491.60	\$572.49	\$556.87	\$439.05	\$480.71	\$638.58	\$6,969.19
			Total Elec Revenue	\$78,047.69	\$75,416.53	\$70,066.54	\$71,445.93	\$75,488.67	\$76,224.43	\$63,262.77	\$70,271.36	\$67,750.74	\$53,494.80	\$54,226.70	\$11,475.29	\$767,171.45



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

Complete and mail or scan as a PDF and email to:

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

DATE:	11-7-24
NAME OF BUSINESS:	Montana State Prison
PROJECT CITY LOCATION:	Deer Lodge
MAILING ADDRESS:	400 Conley Road
MAILING CITY, STATE, ZIP:	Deer Lodge, MT 59722

CONTACT PERSON:	Myron Beeson
PHONE NUMBER:	406-415-6272
CELL PHONE:	406-647-3565
FAX NUMBER:	
E-MAIL ADDRESS:	Myron.Beeson@mt.gov

A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):	\$
DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S) (if more space is needed, please attach):	
ESTIMATED ANNUAL KWH SAVINGS:	
ESTIMATED KW DEMAND SAVINGS:	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

B. AMOUNT OF CREDIT REQUESTED FOR DONATION:	\$ 6,845.96
NAME OF ORGANIZATION TO RECEIVE DONATION:	Energy Share of Montana (to benefit southwest Montana residents)

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

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

LARGE CUSTOMER:

Signature:

Myron Beeson

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

NorthWestern  
Energy

Delivering a Bright Future



DEPARTMENT OF HEALTH & HUMAN SERVICES

Public Health Services

National Institutes Health  
Hamilton, Montana 59840

10 February 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – US Public Health – National Institute of Health**

Dear Mr. Schafer:

Please accept this letter and the attached documents as US Public Health – National Institute of Health's (USNIH) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of USNIH's 2024 USBC account activities.
- At year-end 2024, USNIH had a credit balance of \$27,395.47. We have submitted a Form A – Universal Systems Benefit Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.

If you have any questions, please contact me at (406-363-9207).

Sincerely,

A handwritten signature in black ink, appearing to read "Jim Parr", is written over a horizontal line. Below the signature, the name "Jim Parr" and title "Contracting Officer" are printed.

Jim Parr  
Contracting Officer

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





Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

US PUBLIC HEALTH - NATIONAL INSTITUTE OF HEALTH

Account Summary			
2023 Carryover Reservation:	\$1,663.00	YTD Elec Revenue:	\$2,776,569.55
Reservations Made YTD:	\$26,000.00		
2023 Carryover Payment Request:	\$213.82	Total Payment Requests:	\$213.82
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$1,875.93	Total USBC Credit:	\$27,609.29
USBC Credit YTD:	\$25,733.36	Payments Issued YTD:	\$213.82
Average Monthly Credit Earned:	\$2,144.45	USBC Credit Balance:	\$27,395.47
		Payment Pending:	\$0.00

Payment Requests Made		
Submitted By	Date	Amount

Payments Issued	
Date	Amount
04/19/2024	\$213.82

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1923677	430537	DA30277426	KWH >	1,335,999	1,388,463	1,283,358	1,460,948	1,488,331	1,655,726	1,819,968	2,003,474	1,762,433	1,602,184	1,480,116	1,405,534	18,686,534
			KW >	2,100	2,436	2,264	2,748	2,782	3,188	3,853	3,905	3,456	3,180	2,791	2,332	2,920
			Elec Revenue >	133,764.26	136,952.90	126,679.61	151,725.83	161,238.68	180,059.39	198,353.23	213,497.83	187,968.99	164,636.94	144,980.50	\$18,529.55	\$1,818,387.71
4113431	280778	DA32100966	KWH >	806,154	850,709	833,081	872,386	832,213	636,249	851,401	807,683	906,186	843,725	847,617	818,690	9,906,094
			KW >	1,452	1,497	1,486	1,464	1,456	1,555	1,581	1,722	1,784	1,644	1,456	1,632	1,561
			Elec Revenue >	\$84,419.83	\$83,954.60	\$82,363.67	\$85,566.62	\$89,433.22	\$71,650.65	\$92,171.28	\$87,179.66	\$96,713.11	\$89,922.76	\$81,984.42	\$12,822.02	\$958,181.84
			Total KWH	2,142,153	2,239,172	2,116,439	2,333,334	2,320,544	2,291,975	2,671,369	2,811,157	2,668,619	2,445,909	2,327,733	2,224,224	28,592,628
			Combined Average KW	3,552	3,933	3,750	4,212	4,238	4,743	5,434	5,627	5,240	4,824	4,247	3,964	4,480
			USBC Charge	\$1,927.94	\$2,015.26	\$1,904.79	\$2,100.00	\$2,088.49	\$2,062.77	\$2,404.23	\$2,530.04	\$2,401.76	\$2,201.32	\$2,094.96	\$2,001.80	\$25,733.36
			Total Elec Revenue	218,184.09	220,907.50	209,043.28	237,292.45	250,671.90	251,710.04	290,524.51	300,677.49	284,682.10	254,559.70	226,964.92	\$31,351.57	\$2,776,569.55



February 28, 2025

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

Dear Mr. Schafer:

Enclosed with this letter is the 2024 Electric Universal System Benefits (USB) report for NorthWestern Energy. Copies of this report are also being provided to the Montana Public Service Commission and 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 \$10,467,790 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

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**Electric Universal System Benefits**  
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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.

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**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.

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**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.

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## **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.

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***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.

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**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.

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***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

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**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.

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**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

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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.”

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- “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.



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***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.

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<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  
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Butte, MT 59701-1711  
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# 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.

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%
	\$ 10,467,790	100%	\$ 5,217,883	\$ 5,249,908	\$ 10,467,790	100.0%	\$ 10,467,790	100.00%

2024 LOW INCOME EXPENDITURES SUMMARY

2024 Low Income Expenditures	
Bill Discount	\$ 2,826,777
Electric Weatherization Incentives	\$ 9,613
Energy Share	\$ 223,159
Promotion	\$ 62,761
Labor	\$ 26,199
Admin. Non-labor	\$ 26,551
Interest Income	\$ (164,777)
Self-Directed Large Customer to Low Income	\$ 65,224
Total:	\$ 3,075,506
Low Income Expenditures share of 2024 Electric USB revenues :	29.4%

2024 ENERGY SAVINGS & RENEWABLE RESOURCES ESTIMATES

Savings & Resources acquired in 2024 w/ 2024 Funds		
	aMW	MWH
Local Conservation	0.028	246.50
Market Transformation	0.008	73.17
Renewables	-	-
Research & Development	N/A	N/A
Low Income	0.000	0.59
Large Customer <sup>(b)</sup>	N/A	N/A
Total Savings & Resources	0.037	320.25

<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 EnergyCheck	468	homes
Home EnergySurvey	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>(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	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	Total Electric USB Funds	USB Categories					Large Customers
		Local Conservation	Market Transformation	Renewables	Research Development	Low Income <sup>(c)</sup>	
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%
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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.*

**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>	
Program Participation Summary				
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>	
Program Participation Summary				
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.

**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>	
Program Participation Summary				
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>	
Program Participation Summary				
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	N/A
Low Income	0.004	35.43	-	-
	<b>0.006</b>	<b>54.16</b>		
Program Participation Summary				
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>	
Program Participation Summary				
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.

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





UNIVERSAL SYSTEM BENEFITS (USB)  
LARGE CUSTOMER CREDIT FORM

Complete and mail to: Montana Dakota Utilities Co.  
ATTN: Travis R. Jacobson  
Regulatory Affairs Department  
400 North 4th Street  
Bismarck, ND 58501  
Email: [travis.jacobson@mdu.com](mailto:travis.jacobson@mdu.com)  
FAX: (701) 222-7855

DATE: February 7, 2025

NAME OF BUSINESS: ONEOK Bakken Pipeline, L.L.C.

CITY/TOWN LOCATION: Tulsa, OK

CONTACT PERSON: Jennifer Koch

MAILING ADDRESS: 100 W 5th Street, 9th Floor

CITY, STATE AND ZIP: Tulsa, OK 74103

PHONE NUMBER: (918) 607-0940

FAX NUMBER:

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

AMOUNT OF CREDIT REQUESTED: \$9,257.76

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

DESCRIPTION OF PROJECT(S) (if more space is needed please attach):  
Changed out transformer installed in the 1940's from overhead to pad mount.  
Changed Delta to Y.

ESTIMATED kWh and KW  
SAVINGS: Approximately 40,000 kWh/mo 250 kW/mo

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

CUSTOMER

Signed by: Amanda Calhoun, Manager, Energy Management  
Signature: 28B6CF26E5EAA45D...



**UNIVERSAL SYSTEM BENEFITS (USB)  
LARGE CUSTOMER CREDIT FORM**

Complete and mail to: Montana Dakota Utilities Co.  
ATTN: Travis R. Jacobson  
Regulatory Affairs Department  
400 North 4th Street  
Bismarck, ND 58501  
Email: [travis.jacobson@mdu.com](mailto:travis.jacobson@mdu.com)  
FAX: (701) 222-7855

DATE: February 7, 2025

NAME OF BUSINESS: ONEOK Elk Creek Pipeline, L.L.C.

CITY/TOWN LOCATION: Tulsa, OK

CONTACT PERSON: Jennifer Koch

MAILING ADDRESS: 100 W 5th Street, 9th Floor

CITY, STATE AND ZIP: Tulsa, OK 74103

PHONE NUMBER: (918) 607-0940

FAX NUMBER:

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

AMOUNT OF CREDIT REQUESTED: **\$28,581.12**

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

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

Installed VFD and synchronize transfer to ensure starting the pumps don't inrush the power grid. All pumps are VFD start.

ESTIMATED kWh and KW  
SAVINGS: Approximately 218,880 kWh/mo 300 kW/mo

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

**CUSTOMER**

Signed by: Amanda Calhoun Amanda Calhoun, Manager, Energy Management  
Signature: 28BCF26E5EAA46D...



March 25, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Par Pacific Montana**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Par Pacific's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Par Pacific's 2024 USBC account activities.**
- **At year-end 2024, Par Pacific had a credit balance of \$19,261.91– Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.**
- **Attached are two Form Bs – USB Large USB Customer Credit Request forms that we submitted to NorthWestern Energy in 2024.**

If you have any questions, please contact me at (406) 696-2812.

Sincerely,

A handwritten signature in blue ink, appearing to read "Brock Pearson", written in a cursive style.

Brock Pearson  
Director of Planning and Economics  
Par Montana  
Par Montana, LLC  
Billings Refinery  
549 Klenck Ln, Billings, MT 59101

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



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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/5/2024	CONTACT PERSON:	Kyle Lewis
NAME OF BUSINESS:	Par Montana	PHONE NUMBER:	406-661-0331
PROJECT CITY LOCATION:	Par Montana Refinery	CELL PHONE:	406-661-0331
MAILING ADDRESS:	549 Klenck Lane	FAX NUMBER:	
MAILING CITY, STATE, ZIP:	Billings, MT, 59101	E-MAIL ADDRESS:	kalewis@parpacific.com

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>		<b>\$ 529,907</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach): Requesting USB credit to cover material, labor and commissioning costs to install a replacement 150 HP motor, new variable frequency drive, new feeder and associated material.		
ESTIMATED ANNUAL KWH SAVINGS:	175,000	
ESTIMATED KW DEMAND SAVINGS:		

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	\$
NAME OF ORGANIZATION TO RECEIVE DONATION:	

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

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

LARGE CUSTOMER:

Signature:

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





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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/5/2024	CONTACT PERSON:	Kyle Lewis
NAME OF BUSINESS:	Par Montana	PHONE NUMBER:	406-661-0331
PROJECT CITY LOCATION:	Par Montana Refinery	CELL PHONE:	406-661-0331
MAILING ADDRESS:	549 Klenck Lane	FAX NUMBER:	
MAILING CITY, STATE, ZIP:	Billings, MT, 59101	E-MAIL ADDRESS:	kalewis@parpacific.com

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>		<b>\$ 46,200</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach): Requesting USB credit to cover material, labor and commissioning costs to install a 480V, 60 HP motor, variable frequency drive, new feeder and associated material.		
ESTIMATED ANNUAL KWH SAVINGS:	125,000	
ESTIMATED KW DEMAND SAVINGS:		

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	\$
NAME OF ORGANIZATION TO RECEIVE DONATION:	

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

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

LARGE CUSTOMER:

Signature:

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



# Self-Directed USBC Progress Report for 2024

Prepared by Rick Edwards on 2/10/2025

## PAR PACIFIC

### Account Summary

2023 Carryover Reservation:	\$130,638.14	YTD Elec Revenue:	\$1,700,100.72
Reservations Made YTD:	\$0.00		

2023 Carryover Payment Request:	\$0.00	Total Payment Requests:	\$576,107.00
Payment Requests Made YTD:	\$576,107.00	Current Request Balance:	\$249,334.59

2023 Carryover USBC Credit:	\$130,638.14	Total USBC Credit:	\$346,034.32
USBC Credit YTD:	\$215,396.18	Payments Issued YTD:	\$326,772.41
Average Monthly Credit Earned:	\$17,949.68	USBC Credit Balance:	\$19,261.91
		Payment Pending:	\$19,261.91

### Payment Requests Made

Submitted By	Date	Amount
BROCK PEARSON	11/05/2024	\$46,200.00
BROCK PEARSON	11/05/2024	\$529,907.00

### Payments Issued

Date	Amount
12/23/2024	\$326,772.41

### Account Detail

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
4087158	73972	2000522722	KWH > 0 KW > 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	2,265 5	0 0	2,266 6
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$283.78	\$0.00	\$283.78
4087158	73972	DA21533508	KWH > 2,700 KW > 10	7,280 17	7,870 17	-415 9	3,280 9	792 8	1,327 3	1,776 6	1,920 6	2,532 2	0 0	0 0	29,042 9
		Elec Revenue >	\$388.83	\$862.62	\$913.76	\$107.28	\$444.49	\$190.91	\$180.44	\$254.77	\$268.21	\$264.04	\$0.00	\$0.00	\$3,875.35
4087175	77884	2000483967	KWH > 70,440 KW > 176	73,200 184	62,560 169	52,760 136	62,360 160	52,840 167	54,040 163	57,400 151	46,880 157	0 0	0 0	66,280 174	598,560 164
		Elec Revenue >	\$8,589.14	\$8,694.16	\$7,581.12	\$6,604.89	\$8,008.84	\$7,161.66	\$7,173.29	\$7,275.46	\$6,372.62	\$0.00	\$0.00	\$2,273.39	\$69,734.57
4087176	287717	2000241436	KWH > 0 KW > 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	54,520 119	54,520 119
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,566.80	\$1,566.80
4087176	287717	DD37190734	KWH > 67,880 KW > 134	54,520 122	46,560 129	33,240 120	31,840 119	39,520 116	49,360 110	39,480 113	42,860 107	34,560 111	0 0	0 0	439,840 118
		Elec Revenue >	\$7,741.92	\$6,291.52	\$5,682.53	\$4,623.56	\$4,570.21	\$5,269.42	\$6,042.46	\$5,129.58	\$5,370.54	\$4,419.29	\$0.00	\$0.00	\$55,141.03
4087252	431390	2000205560	KWH > 54,800 KW > 119	54,160 122	56,560 122	47,200 142	42,640 117	37,280 113	30,240 92	30,400 113	33,120 109	0 0	0 0	54,560 126	440,960 118
		Elec Revenue >	\$6,569.81	\$6,316.06	\$6,460.24	\$6,037.65	\$5,571.91	\$5,013.56	\$4,054.15	\$4,279.88	\$4,486.85	\$0.00	\$0.00	\$1,653.00	\$50,443.11
4087256	396985	DA27025284	KWH > 200,531 KW > 732	179,855 659	172,684 753	192,144 749	96,208 632	136,138 692	159,336 706	143,974 642	144,198 645	149,186 732	166,574 682	130,909 621	1,871,747 687
		Elec Revenue >	\$19,094.57	\$16,511.46	\$16,255.84	\$17,675.07	\$11,121.97	\$14,581.66	\$16,531.48	\$14,733.73	\$14,760.27	\$15,409.72	\$15,313.16	\$1,910.90	\$173,899.83



Self-Directed USBC Progress Report for 2024

Prepared by Rick Edwards on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
4104044	635764	2000483993	KWH > KW >	89,920 140	92,800 149	84,480 168	84,800 132	94,080 194	96,640 207	111,360 294	125,280 297	104,800 231	0 0	86,880 143	971,040 196	
		Elec Revenue >	\$9,821.79	\$9,947.77	\$9,467.76	\$9,515.26	\$11,472.03	\$11,879.14	\$14,221.82	\$15,465.64	\$12,710.49	\$0.00	\$0.00	\$1,892.98	\$106,394.70	
4104047	627659	2000483888	KWH > KW >	4,800 27	3,680 26	2,800 21	2,480 8	2,080 16	1,840 11	2,320 15	2,480 17	1,840 14	1,680 12	2,320 18	3,440 17	31,760 17
		Elec Revenue >	\$803.73	\$664.32	\$520.11	\$340.92	\$414.50	\$333.74	\$426.82	\$460.96	\$365.79	\$314.88	\$445.15	\$221.08	\$5,312.00	
4160072	1315	DA15063056	KWH > KW >	0 0	0 0	20,476,884 31,933	21,849,595 30,507	16,845,816 29,004	18,079,485 27,527	19,452,079 28,615	19,260,296 29,211	18,768,399 28,149	18,208,625 29,445	19,220,185 29,833	21,005,536 30,119	193,166,900 29,434
		Elec Revenue >	\$0.00	\$0.00	139,669.05	140,651.23	118,246.04	120,487.21	127,834.55	130,234.94	126,355.06	126,388.33	131,178.80	\$72,404.34	\$1,233,449.55	
		Total KWH	491,071	465,495	20,910,408	22,261,804	17,178,284	18,444,335	19,860,062	19,661,086	19,144,037	18,396,583	19,391,345	21,402,125	197,606,635	
		Combined Average KW	1,338	1,284	33,312	31,803	30,251	28,841	29,998	30,550	29,418	30,302	30,539	31,319	30,867	
		USBC Charge	\$441.97	\$418.94	\$18,819.35	\$20,035.63	\$15,460.45	\$16,599.91	\$17,874.05	\$17,694.98	\$17,229.64	\$16,556.92	\$17,452.22	\$19,261.91	\$177,845.97	
		Total Elec Revenue	\$53,009.79	\$49,287.91	186,550.43	185,555.86	159,849.99	164,917.30	176,465.01	177,834.96	170,689.83	146,796.26	147,220.89	\$81,922.49	\$1,700,100.72	



PASTA  
MONTANA®

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

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02/21/2025

Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached document as our official 2024 USBC Annual Summary Report.

2024 Activities and Expenditures Summary:

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.
- We did not submit any USBC Form B Large Customer Credit Request Forms (USBC Projects) for 2024.
- We had a current request balance of \$ 723.29 (shown on the attached USBC Progress Report) for a past project that was submitted in 2023 to NorthWestern Energy, and to the MDOR in our 2023 Annual Summary Report.
- At year-end 2024, we had a credit balance of \$7,771.17 (carried over into 2025).

If you have any questions, please contact me.

Regards,

**C. Daniel Bateman**

*Executive Vice President & Chief Financial Officer*

*Pasta Montana LLC*

*Great Falls, MT 59401*

*Phone: [406-771-2206](tel:406-771-2206) | Fax: [406-761-1403](tel:406-761-1403) | Cell: [406-403-8462](tel:406-403-8462)*

*[danb@pastamontana.com](mailto:danb@pastamontana.com)*

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





Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/13/2025

PASTA MONTANA

Account Summary			
2023 Carryover Reservation:	\$500.00	YTD Elec Revenue:	\$842,434.99
Reservations Made YTD:	\$7,476.57		
2023 Carryover Payment Request:	\$723.29	Total Payment Requests:	\$723.29
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$676.22	Total USBC Credit:	\$8,494.46
USBC Credit YTD:	\$7,818.24	Payments Issued YTD:	\$723.29
Average Monthly Credit Earned:	\$651.52	USBC Credit Balance:	\$7,771.17
		Payment Pending:	\$0.00

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$723.29

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100630	1634	DA06183419	KWH >	654,211	774,511	673,338	717,198	656,343	636,417	755,087	831,462	731,890	787,782	802,754	665,935	8,686,928
			KW >	1,348	1,238	1,251	1,244	1,238	1,296	1,555	1,523	1,452	1,536	1,470	1,387	1,378
			Elec Revenue >	\$67,539.33	\$75,512.81	\$66,945.37	\$74,540.04	\$71,203.14	\$69,749.73	\$81,751.17	\$87,897.54	\$78,199.01	\$79,904.96	\$78,327.64	\$10,864.25	\$842,434.99
			Total KWH	654,211	774,511	673,338	717,198	656,343	636,417	755,087	831,462	731,890	787,782	802,754	665,935	8,686,928
			Combined Average KW	1,348	1,238	1,251	1,244	1,238	1,296	1,555	1,523	1,452	1,536	1,470	1,387	1,378
			USBC Charge	\$588.79	\$697.06	\$606.00	\$645.48	\$590.71	\$572.78	\$679.58	\$748.32	\$658.70	\$709.00	\$722.48	\$599.34	\$7,818.24
			Total Elec Revenue	\$67,539.33	\$75,512.81	\$66,945.37	\$74,540.04	\$71,203.14	\$69,749.73	\$81,751.17	\$87,897.54	\$78,199.01	\$79,904.96	\$78,327.64	\$10,864.25	\$842,434.99



PROVIDING ENERGY. IMPROVING LIVES.

February 27, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue – USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
406-444-3808, or Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

RE: Self-Directed USBC Progress Report for 2024 – PHILLIPS 66 PIPELINE & YELLOWSTONE PIPELINE

Dear Mr. Schafer:

Per the Montana Code Annotated (MCA) 69-8-402 & 69-8-214 and administrative rules, a NorthWestern Energy Large Customer claiming Universal Systems Benefit Program (USB) credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the DOR and to NorthWestern Energy by March 1<sup>st</sup> for the previous calendar year. This letter and attachments are our official **USB Annual Summary Report for 2024**. Enclosed are:

- *Self-Directed USBC Progress Report for 2024* we received from NorthWestern Energy showing our 2024 USB account activities.
- Below is a summary of the USB credit reimbursement payments we received in 2024 and listing of historical USB projects that we are still receiving USB payments on. We did not submit any new projects (Form B's) in 2024.
- We have a current request balance of \$6,626,764.35 (shown on the attached USBC Progress Report) for a past project that was submitted in 2010 to NorthWestern Energy, and to the DOR in our 2010 Annual Summary Report.

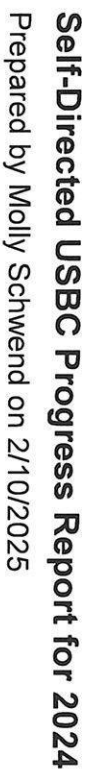
If you have any questions, please contact me at 918-977-2658.

Sincerely,

A handwritten signature in cursive script that reads "Tammy Hill".

Tammy Hill  
Energy Management Analyst  
Phillips 66 Pipeline / Yellowstone Pipeline / Phillips 66 Carrier  
411 S. Keeler Ave AB-1206-01  
Bartlesville, OK 74003-6670

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



## Account Summary

Payment Requests Made			Payments Issued		
Submitted By	Date	Amount	Date	Amount	
	04/19/2024	\$36,663.39			
	07/09/2024	\$28,647.63			
	10/08/2024	\$28,523.16			
	12/17/2024	\$18,824.23			

[illegible]



Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100022	1028	DA32100985	KWH > KW > 0 1,430	104.884 1.430 158.581	156.329 1.464 3,503.48	94.000 838 \$2,145.70	21.017 799 \$1,788.58	12.323 808 \$1,770.27	42.317 795 \$1,870.11	11.970 804 \$1,763.08	4.051 9 \$318.86	4.122 9 \$319.15	6.151 21 \$43.91	615.745 764 \$20,215.27	
100023	1029	DA28691733	KWH > KW > 918,560 1,858	863,430 1,935 \$7,128.89	835,190 1,892 \$6,941.14	934,176 1,953 \$7,439.89	840,166 1,896 \$6,967.87	972,446 1,974 \$7,628.13	919,228 1,953 \$7,380.94	970,675 1,957 \$7,666.75	962,822 1,931 \$7,618.74	905,625 1,974 \$7,463.30	953,293 1,953 \$7,619.19	959,066 1,913 \$4,262.51	11,034,677 1,932 \$85,795.87
100024	1031	DA28691803	KWH > KW > 36,361 1,691	52,384 1,661 \$3,443.44	196,259 1,369 \$3,492.20	117,638 1,367 \$3,179.36	244,685 1,452 \$3,830.63	157,013 1,484 \$3,541.69	77,653 1,322 \$2,940.94	50,664 948 \$2,175.78	85,782 1,292 \$2,929.05	58,206 1,279 \$2,794.21	163,811 1,264 \$3,195.58	12,114 561 \$1,008.45	1,252,790 1,308 \$36,364.36
100026	1033	DA33525066	KWH > KW > 1,268,065 2,866	1,208,111 2,866 \$1,208.11	1,200,165 2,645 \$1,378.015	1,378,015 2,870 \$1,390.202	1,190,202 2,909 \$1,390.277	1,312,543 2,962 1,381,657	1,312,543 2,942 1,381,657	1,381,657 2,942 1,405,948	1,381,657 2,942 1,405,948	1,278,732 2,914 1,278,732	1,334,328 2,928 1,334,328	1,316,909 2,942 1,316,909	15,664,952 2,876 \$123,484.96
100028	1034	DA30278158	KWH > KW > 1,036,613 2,212	891,328 2,199 \$8,826.55	803,510 2,186 \$7,338.41	947,490 2,216 \$7,959.55	831,151 2,134 \$7,355.06	835,566 2,091 \$7,296.05	941,481 2,199 \$7,905.65	861,140 2,169 \$7,654.02	852,322 2,203 \$6,730.60	773,932 1,862 \$6,404.44	697,402 1,853 \$4,226.16	978,363 1,883 \$87,033.71	10,450,288 2,101 \$87,033.71
100029	1035	DA33525063	KWH > KW > 101,218 446	103,567 418 \$3,657.29	92,212 420 \$3,051.75	87,077 396 \$2,880.57	80,774 422 \$2,923.79	82,986 456 \$3,105.74	76,601 427 \$2,896.60	83,039 401 \$2,862.72	80,822 397 \$2,817.66	78,136 410 \$2,844.60	88,188 436 \$3,084.82	92,762 440 \$2,096.49	1,047,392 422 \$35,400.75
100030	1038	DA28691777	KWH > KW > 1,453,557 3,110	1,241,470 2,946 \$2,959	466,500 2,959 \$7,382.30	540,173 2,627 \$7,083.15	1,216,242 2,946 \$10,316.19	1,405,288 2,994 \$11,146.97	1,490,151 3,015 \$11,519.06	1,309,306 3,002 \$10,925.42	1,090,959 3,050 \$10,125.71	1,400,688 3,028 \$11,341.97	1,223,502 3,046 \$10,655.80	1,722,150 2,946 \$6,783.25	14,559,966 2,972 \$119,973.73
100031	1037	DA31423610	KWH > KW > 32,712 1,356	82,708 1,319 \$3,144.45	159,918 1,310 \$2,244.07	141,486 1,293 \$3,141.18	271,823 1,259 \$3,594.84	167,129 1,279 \$3,217.46	16,618 1,267 \$3,519.06	57,488 1,210 \$10,925.42	14,613 1,207 \$10,125.71	3,154 9 \$11,341.97	177,964 1,002 \$10,655.80	18,224 990 \$6,783.25	1,143,837 1,125 \$119,973.73
100033	1040	DA28382547	KWH > KW > 8,343 27	47,649 811 \$3,373.70	77,545 809 \$2,029.29	89,078 796 \$2,051.68	72,516 801 \$1,995.24	181,478 791 \$2,407.23	13,466 33 \$398.18	26,944 804 \$1,823.77	35,817 823 \$1,893.49	79,260 765 \$1,966.53	30,292 657 \$1,576.23	15,311 33 \$72.61	677,699 596 \$18,502.87
100034	1041	DA29137679	KWH > KW > 20,495 1,529	37,871 873 \$1,986.49	109,484 873 \$2,268.94	89,559 1,564 \$3,417.75	17,144 855 \$1,872.78	20,880 799 \$1,788.03	12,085 795 \$1,746.26	14,291 795 \$1,756.51	10,859 799 \$1,749.69	4,595 13 \$328.17	4,710 17 \$335.74	8,289 21 \$45.83	350,262 744 \$20,740.63
100036	1044	DA29174229	KWH > KW > 1,517,769 2,868	1,277,460 2,773 \$2,773	622,223 2,748 \$7,621.68	859,776 2,699 \$8,471.55	1,451,610 2,742 \$10,882.12	1,564,775 2,765 \$11,369.30	1,612,262 2,802 \$11,622.31	1,325,612 2,773 \$10,584.74	1,219,470 2,794 \$10,191.85	1,391,687 2,840 \$10,971.56	1,419,334 2,776 \$10,969.93	1,653,061 2,810 \$6,480.62	15,915,039 2,783 \$121,460.45
100594	1598	DA28691741	KWH > KW > 88,110 342	68,401 344 \$9,430.88	92,336 343 \$10,473.08	88,277 345 \$10,140.31	60,279 342 \$8,254.10	71,133 340 \$9,264.83	86,035 338 \$10,658.01	87,767 335 \$10,592.50	87,311 336 \$10,557.88	86,023 337 \$10,446.63	83,654 338 \$9,554.27	84,975 343 \$2,621.39	984,301 340 \$111,782.36
710047	321077	DD56126244	KWH > KW > 54,900 139	39,200 124 \$4,978.55	37,000 123 \$4,775.18	30,000 112 \$4,211.43	28,300 118 \$4,211.31	26,900 118 \$4,077.39	20,100 118 \$3,388.72	22,000 118 \$3,555.45	29,200 102 \$4,024.02	18,100 90 \$2,722.45	31,400 112 \$4,096.77	33,800 116 \$1,500.50	370,900 116 \$48,209.29
710048	321078		KWH > KW > 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0
710048	321078	DG87035750	KWH > KW > 3,644 39	2,886 39 \$755.31	2,850 39 \$752.20	3,482 38 \$821.53	4,851 38 \$964.35	3,295 36 \$782.81	3,481 29 \$704.82	3,552 36 \$796.78	5,545 36 \$988.31	3,786 37 \$808.25	4,388 33 \$803.28	3,826 26 \$341.43	45,586 36 \$9,365.10

Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
712192	322631	DG68838851	KWH > KW > Elec Revenue > 14,400 226 \$3,128.80	25,200 226 \$3,864.12	25,560 226 \$3,894.95	6,120 230 \$2,273.73	84,600 223 \$9,359.56	24,120 216 \$3,905.19	20,880 216 \$3,581.60	17,640 216 \$3,251.36	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	218,520 222 \$33,259.31
712364	322728	2000483968	KWH > KW > Elec Revenue > 20,840 103 \$3,228.17	25,200 103 \$3,502.26	24,920 103 \$3,480.53	10,000 0 \$935.34	10,600 103 \$2,328.00	16,920 101 \$2,915.89	16,560 102 \$2,864.18	23,280 101 \$3,469.00	21,720 102 \$3,331.12	0 0 \$0.00	0 0 \$0.00	16,960 103 \$1,331.23	187,000 92 \$27,385.72
713779	323922	2000394821	KWH > KW > Elec Revenue > 0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	598 1 \$85.12	451 2 \$77.50	247 2 \$62.89	1,360 10 \$259.38	3,928 1 \$142.95	6,584 5 \$627.84
713779	323922	DS00971838	KWH > KW > Elec Revenue > 2,500 10 \$375.91	9,693 13 \$1,013.76	3,653 5 \$388.76	2,737 7 \$350.35	1,362 7 \$234.04	521 7 \$147.27	483 3 \$92.37	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	20,949 7 \$2,602.46
713818	323958	DS01496798	KWH > KW > Elec Revenue > 134 1 \$33.59	113 1 \$37.51	69 1 \$27.35	146 0 \$24.35	109 0 \$21.66	118 0 \$22.51	137 2 \$46.88	119 2 \$45.15	114 2 \$44.69	140 2 \$46.15	128 1 \$32.26	115 1 \$12.78	1,442 1 \$394.88
715059	325070		KWH > KW > Elec Revenue > 0 0 \$13.80	0 0 \$13.23	0 0 \$13.23	0 0 \$13.41	0 0 \$13.53	0 0 \$13.53	0 0 \$13.48	0 0 \$13.46	0 0 \$13.46	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$121.13
715059	325070	DA14613585	KWH > KW > Elec Revenue > 20,240 100 \$3,167.11	17,640 80 \$2,561.98	19,680 85 \$2,794.59	16,120 77 \$2,469.40	15,440 83 \$2,545.16	14,560 74 \$2,344.40	14,160 76 \$2,306.99	15,800 79 \$2,490.70	14,760 76 \$2,358.25	14,120 77 \$2,242.68	14,680 81 \$2,285.41	20,360 85 \$1,103.14	197,560 81 \$28,669.81
717588	223503	2000177529	KWH > KW > Elec Revenue > 8,440 53 \$1,494.91	8,880 83 \$1,835.98	7,440 53 \$1,327.43	5,520 48 \$1,125.48	5,160 49 \$1,131.39	4,160 45 \$989.09	3,800 38 \$855.69	4,960 46 \$1,062.26	3,760 45 \$936.67	3,960 47 \$963.19	0 0 \$0.00	6,320 49 \$633.26	62,400 51 \$12,355.35
719434	328497	2000090317	KWH > KW > Elec Revenue > 5,276 10 \$621.19	6,102 13 \$702.59	4,721 11 \$558.92	3,406 9 \$431.29	3,674 7 \$460.91	3,243 7 \$408.41	3,534 9 \$469.92	4,586 10 \$574.95	3,464 7 \$432.95	2,770 6 \$344.73	3,611 7 \$413.43	3,911 11 \$150.02	48,298 9 \$5,569.31
720100	280106	2000090320	KWH > KW > Elec Revenue > 3,317 11 \$468.94	4,626 12 \$572.08	3,007 12 \$421.86	2,565 12 \$401.64	2,705 12 \$431.19	1,546 8 \$266.72	1,468 7 \$243.26	1,445 6 \$222.52	1,446 6 \$226.15	1,744 9 \$291.83	3,108 11 \$423.55	4,150 14 \$186.48	31,127 10 \$4,156.22
720798	329676	2000090318	KWH > KW > Elec Revenue > 505 1 \$73.65	609 1 \$80.00	444 1 \$65.58	262 1 \$50.81	217 1 \$47.85	114 1 \$36.46	96 1 \$33.50	117 0 \$22.65	87 1 \$30.77	88 1 \$32.72	255 1 \$48.61	421 1 \$18.76	3,215 1 \$541.36
797092	321910	2000314579	KWH > KW > Elec Revenue > 3,840 8 \$467.38	4,000 8 \$469.02	3,360 54 \$987.38	3,360 7 \$402.61	3,200 7 \$412.15	3,040 6 \$384.67	2,880 5 \$354.88	3,200 6 \$394.26	3,040 6 \$377.31	2,560 7 \$332.09	2,880 6 \$338.62	3,520 7 \$94.41	38,880 11 \$5,014.78
797094	321909	2000314584	KWH > KW > Elec Revenue > 19,680 100 \$3,155.86	20,480 103 \$3,096.10	22,720 109 \$3,361.28	18,240 106 \$2,991.20	17,440 108 \$3,047.74	17,600 103 \$2,998.15	16,320 74 \$2,499.60	16,160 93 \$2,697.63	16,480 99 \$2,802.51	0 0 \$0.00	0 0 \$0.00	20,960 103 \$1,326.72	186,080 100 \$27,976.79
906878	356475	2000399720	KWH > KW > Elec Revenue > 0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	4,520 10 \$519.60	4,240 10 \$137.13	8,760 10 \$656.73
906878	356475	DA05479669	KWH > KW > Elec Revenue > 5,000 10 \$565.32	5,200 11 \$606.51	3,240 10 \$416.33	3,560 9 \$460.65	5,000 9 \$608.67	1,720 8 \$274.60	2,080 9 \$320.82	4,240 9 \$520.64	4,920 9 \$584.06	3,160 9 \$399.27	0 0 \$0.00	0 0 \$0.00	38,120 9 \$4,776.87



Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
933571	358346	DA31423684	KWH > KW >	1,355.910 2,278	1,267.371 2,275	811.923 2,212	966.250 2,091	1,264.276 2,174	1,288.178 2,154	1,276.345 2,200	1,216.436 2,212	1,180.558 2,229	1,253.933 2,284	1,256.976 2,206	1,383.790 2,217	14,521,946 2,211
			Elec Revenue >	\$6,073.94	\$5,468.09	\$4,946.28	\$4,870.25	\$5,285.90	\$5,271.89	\$5,342.95	\$5,310.34	\$5,308.25	\$5,471.98	\$5,336.17	\$5,184.45	\$63,870.49
1109769	303411	2000296017	KWH > KW >	14,200 23	13,120 25	13,840 23	10,080 18	9,600 17	9,260 14	3,400 7	4,040 7	2,860 7	1,640 5	3,580 9	6,060 12	91,680 14
			Elec Revenue >	\$1,607.58	\$1,468.26	\$1,509.16	\$1,148.62	\$1,147.81	\$1,078.53	\$424.47	\$482.99	\$370.92	\$227.13	\$430.58	\$162.85	\$10,058.90
1213184	380450	DG35779927	KWH > KW >	731 3	1,150 3	565 3	938 2	370 3	370 2	818 2	477 1	498 1	230 1	0 0	0 0	5,784 2
			Elec Revenue >	\$125.04	\$153.92	\$101.41	\$128.94	\$83.38	\$40.41	\$112.35	\$75.22	\$77.18	\$49.69	\$0.00	\$0.00	\$947.54
1319986	388952	2000526791	KWH > KW >	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	3,400 14	3,740 10	7,140 12
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$482.70	\$138.95	\$619.65
1319986	388952	DA05023395	KWH > KW >	5,480 12	5,320 15	3,900 10	4,940 14	5,260 14	-280 13	3,600 17	3,840 17	3,480 14	2,820 11	0 0	0 0	38,360 14
			Elec Revenue >	\$663.04	\$670.14	\$483.67	\$640.97	\$689.28	\$162.91	\$568.05	\$587.26	\$515.68	\$407.21	\$0.00	\$0.00	\$5,388.21
1358984	392479	2000484668	KWH > KW >	3,465 0	2,904 0	2,378 0	1,889 0	1,404 0	1,321 0	1,352 0	1,458 0	1,582 0	1,401 0	2,346 0	2,975 0	24,475 0
			Elec Revenue >	\$313.27	\$260.46	\$214.86	\$185.89	\$143.01	\$135.06	\$135.41	\$144.64	\$156.20	\$130.17	\$208.08	\$2.68	\$2,029.73
1558140	408863	DA28382525	KWH > KW >	4,158 14	6,300 21	4,416 17	4,301 20	2,764 19	1,433 10	460 6	494 3	403 3	329 2	775 11	3,422 19	29,255 12
			Elec Revenue >	\$584.38	\$821.02	\$606.98	\$636.28	\$513.89	\$272.50	\$128.70	\$92.78	\$84.30	\$64.64	\$213.98	\$246.53	\$4,265.98
2077216	80379	2000205701	KWH > KW >	0 0	0 0	0 0	7,520 17	7,040 14	6,960 12	7,200 15	8,480 17	7,840 15	7,120 16	6,240 12	7,680 13	66,080 15
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$907.77	\$859.58	\$838.74	\$891.81	\$1,024.47	\$935.38	\$864.24	\$693.13	\$180.28	\$7,195.40
2077222	80405	2000362121	KWH > KW >	0 0	0 0	0 0	4,689 14	4,141 14	4,494 15	4,732 15	5,931 17	5,030 17	4,388 15	4,148 14	4,576 13	42,129 15
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$616.14	\$584.79	\$634.63	\$656.65	\$779.32	\$696.43	\$607.90	\$541.57	\$180.15	\$5,297.58
3637233	80395	2000485292	KWH > KW >	0 0	0 0	0 0	640 1	560 1	1,040 1	960 1	640 1	640 1	440 1	720 1	520 1	6,160 1
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$86.66	\$81.01	\$126.43	\$117.93	\$85.63	\$84.11	\$67.74	\$88.65	\$16.19	\$754.35
3795740	80391	2000362914	KWH > KW >	0 0	0 0	0 0	587 4	561 4	344 3	279 4	510 3	613 5	1,195 12	533 4	778 3	5,400 5
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$118.38	\$117.11	\$86.71	\$89.25	\$102.12	\$133.66	\$277.68	\$111.41	\$48.60	\$1,084.92
Total KWH				11,293.600	10,542.678	8,724.509	9,594.778	10,755.987	11,479.884	10,939.675	10,513.522	10,239.183	10,252.257	10,595.642	11,655.018	126,586.733
Combined Average KWH				31.491	29.796	29.375	29.878	28.782	28.893	27.715	28.429	28.527	27.755	25.662	24.802	29.725
USBC Charge				\$10,164.25	\$9,488.40	\$7,852.07	\$8,635.32	\$9,680.41	\$10,331.90	\$9,845.70	\$9,462.22	\$9,215.24	\$9,227.06	\$9,536.08	\$10,489.52	\$113,928.17
Total Elec Revenue				145,693.43	129,995.00	124,102.92	123,180.41	131,300.52	128,639.34	123,728.95	125,954.66	122,249.24	107,529.55	110,616.19	\$64,550.14	\$1,437,540.35



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BIT

Duncan Crosbie  
Phillips 66  
General Manager Billings Refinery

P.O. Box 30198  
Billings, MT 59107  
406-255-2551

February 25, 2024

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue  
P.O Box 5805  
Helena, MT 59604-5805

Rick Edwards  
Customer Services Dept.  
Northwestern Energy  
11 East Park  
Butte, MT 59701

### USBP Annual Report

Phillips 66, as a qualified "large customer" is required to file an annual summary report of the company's Universal System Benefits program activities and expenditures. The summary table below is submitted in accordance with the requirements of 69-8-402, MCA.

### USBP Annual Report 2024 Phillips 66

USB Claim	Qualifying Project or Expenditure	Credit Request		USBP Payment made		USBP Credit Receipt	
		Date Submitted	Amount	Date	Amount	Date	Amount
1	Coker Conveyor VFD	11/29/2024	\$295,353	2023 Carryover USBC Credit	\$7,853.55		
2	MachineEdge VFDs	11/29/2024	\$500,000				
3							
4							
5							
6							
7							
All request forms attached				January	\$26,874.01	04/19/24	\$7,853.55
				February	\$26,806.70	12/17/24	\$305,107.83
				March	\$21,609.50		
				April	\$23,108.28		
				May	\$26,105.11		
				June	\$27,306.26		
				July	\$27,168.98		
				August	\$27,776.87		
				September	\$27,557.53		
				October	\$26,102.92		
				November	\$27,096.84		
				December	\$26,958.38		
Total			\$795,353.00		\$322,324.93		\$312,961.38
USBP Credit Balance Carryover to 2024			\$9,363.55				

2023	Carryover Payment Request	\$9,363.55
2024	USBP Credits	\$312,961.38
2024	Request Balance	\$491,755.17

We submitted two Form B's in 2024 and we have provided an end of year request balance for the USB carry over credits.

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Phillips66 Refinery's 2024 USBC account activities.
- We had \$7,853.55 in 2023 credits brought forward into 2024. We earned \$795,353.00 in 2024 credits.
- Attached are the two Form B's submitted for USB credits totaling \$795,353 in 2024.
- In 2024, we received \$312,961.38 total in USB payments. These payments were composed of energy efficiency projects.
- At year end we had \$9,363.55 in 2024 USB credits that were carried over for payment in 2025.

If you have any questions, please direct them to:

Scott Raver  
(406) 255-1628  
Phillips 66  
401 South 23<sup>rd</sup> St.  
Billings, MT 59101

Sincerely,



Duncan Crosbie  
General Manager, Billings Refinery

Encls: (5 sheets)  
Cc: Scott Raver  
Adam McAbee  
Blake Holiday  
Duncan Crosbie



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

PHILLIPS66 REFINERY

Account Summary			Payment Requests Made		Payments Issued	
2023 Carryover Reservation:	\$17,515.00	YTD Elec Revenue:	\$2,340,675.02	Submitted By	Date	Amount
Reservations Made YTD:	\$0.00			Scott Raver	11/27/2024	\$500,000.00
2023 Carryover Payment Request:	\$7,853.55	Total Payment Requests:	\$803,206.55	Scott Raver	11/27/2024	\$295,353.00
Payment Requests Made YTD:	\$795,353.00	Current Request Balance:	\$490,245.17			
2023 Carryover USBC Credit:	\$25,368.31	Total USBC Credit:	\$339,919.76			
USBC Credit YTD:	\$314,551.45	Payments Issued YTD:	\$312,961.38			
Average Monthly Credit Earned:	\$26,212.62	USBC Credit Balance:	\$26,958.38			
		Payment Pending:	\$26,958.38			

## Account Detail

[illegible]

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
2077224	422548	2000484082	KWH >	0	0	0	0	0	0	0	57	91	330	519	997
			KW >	0	0	0	0	0	0	0	0	1	1	1	1
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$26.05	\$33.06	\$55.25	\$18.59	\$132.95
2077224	422548	DA08154404	KWH >	704	624	451	375	275	-73	174	0	0	0	0	2,793
			KW >	2	1	1	1	1	1	0	0	0	0	0	1
			Elec Revenue >	\$98.10	\$86.36	\$67.45	\$64.48	\$55.92	\$17.91	\$31.26	\$0.00	\$0.00	\$0.00	\$0.00	\$476.25
2077225	80406	2000205720	KWH >	0	0	0	15,680	13,840	14,520	19,120	16,000	0	0	20,920	113,640
			KW >	0	0	0	45	45	38	45	40	0	0	50	43
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$1,991.09	\$1,910.54	\$1,868.93	\$2,370.39	\$2,016.62	\$0.00	\$0.00	\$662.62	\$12,578.21
2077225	80406	DG35882441	KWH >	24,120	22,280	20,120	0	0	0	0	0	0	0	0	66,520
			KW >	49	52	59	0	0	0	0	0	0	0	0	53
			Elec Revenue >	\$2,849.08	\$2,609.38	\$2,503.23	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,961.69
2116605	428553	2000253556	KWH >	0	0	920	880	840	1,040	1,160	1,000	1,080	960	1,040	10,000
			KW >	0	0	4	4	4	5	4	5	5	5	6	5
			Elec Revenue >	\$0.00	\$0.00	\$144.74	\$149.06	\$181.96	\$172.16	\$168.56	\$167.85	\$177.28	\$163.79	\$81.54	\$1,555.32
2116605	428553	DG36048606	KWH >	1,800	240	0	0	0	0	0	0	0	0	0	2,040
			KW >	6	6	0	0	0	0	0	0	0	0	0	6
			Elec Revenue >	\$263.00	\$115.69	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$378.69
3391668	617925	2000230899	KWH >	0	0	0	0	0	0	0	3,052	2,835	2,902	2,745	11,534
			KW >	0	0	0	0	0	0	0	9	10	7	5	8
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$419.87	\$389.05	\$354.43	\$76.98	\$1,240.33
3391668	617925	DG71226685	KWH >	2,633	2,920	2,709	2,695	2,908	3,544	2,860	0	0	0	0	23,052
			KW >	8	6	6	8	9	8	12	0	0	0	0	8
			Elec Revenue >	\$351.81	\$344.60	\$323.53	\$369.70	\$395.94	\$453.52	\$431.88	\$0.00	\$0.00	\$0.00	\$0.00	\$3,078.89
3627167	322608	2000254737	KWH >	0	0	15,120	15,240	13,140	13,380	12,780	13,920	0	0	13,500	111,000
			KW >	0	0	24	25	22	21	21	21	0	0	23	23
			Elec Revenue >	\$0.00	\$0.00	\$1,635.07	\$1,713.86	\$1,551.58	\$1,548.46	\$1,471.78	\$1,578.09	\$0.00	\$0.00	\$312.51	\$11,465.68
3627167	322608	DA06004553	KWH >	15,900	15,960	0	0	0	0	0	0	0	0	0	31,860
			KW >	28	30	0	0	0	0	0	0	0	0	0	29
			Elec Revenue >	\$1,812.25	\$1,772.52	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,584.77
3627168	322609	2000484285	KWH >	0	4,022	3,825	3,113	1,704	1,423	1,981	1,666	1,180	1,328	3,331	24,759
			KW >	0	22	19	13	9	9	12	22	22	10	22	15
			Elec Revenue >	\$0.00	\$638.72	\$587.55	\$467.10	\$297.91	\$269.70	\$354.48	\$448.42	\$403.28	\$258.43	\$286.50	\$4,253.37
3627168	322609	DD80999793	KWH >	4,191	0	0	0	0	0	0	0	0	0	0	4,191
			KW >	17	0	0	0	0	0	0	0	0	0	0	17
			Elec Revenue >	\$612.71	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$612.71
3627448	357539	2000483814	KWH >	0	6,220	6,620	6,220	4,980	5,760	6,140	5,240	4,660	5,800	6,020	62,180
			KW >	0	15	15	14	13	13	14	11	13	14	15	14
			Elec Revenue >	\$0.00	\$743.10	\$778.79	\$758.94	\$652.62	\$717.75	\$761.91	\$642.01	\$595.42	\$686.67	\$196.03	\$7,140.60
3627448	357539	DD80999980	KWH >	6,460	0	0	0	0	0	0	0	0	0	0	6,460
			KW >	20	0	0	0	0	0	0	0	0	0	0	20
			Elec Revenue >	\$857.19	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$857.19
3637231	80392	2000485641	KWH >	0	0	0	315	272	213	192	169	144	171	293	2,012
			KW >	0	0	0	1	0	0	0	0	0	1	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$50.20	\$47.01	\$34.83	\$32.56	\$30.41	\$25.01	\$38.20	\$11.17	\$313.38

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3637231	80392	DA15269497	KWH > KW >	506 2	1,157 2	399 1	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	2,062 2
		Elec Revenue >	\$86.02	\$135.12	\$57.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$278.89
3637233	80395	DA15843250	KWH > KW >	1,000 2	1,040 1	880 1	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	2,920 1
		Elec Revenue >	\$125.68	\$119.14	\$105.27	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$350.09
3795740	80391	DA21190294	KWH > KW >	1,040 5	823 5	856 4	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	2,719 5
		Elec Revenue >	\$182.00	\$145.31	\$141.83	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$469.14
3835673	258179	2000483813	KWH > KW >	0 0	3,200 9	5,200 10	5,200 10	5,200 13	6,120 11	4,880 11	5,600 11	4,200 8	4,520 11	4,840 8	53,520 10
		Elec Revenue >	\$0.00	\$406.28	\$588.25	\$619.44	\$554.41	\$671.89	\$736.79	\$611.75	\$675.83	\$486.81	\$537.35	\$114.87	\$6,003.67
3835673	258179	DD36237731	KWH > KW >	3,760 5	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	0 0	3,760 5
		Elec Revenue >	\$413.29	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$413.29
Total KWH			29,860,015	29,785,229	24,010,543	25,675,858	29,005,690	30,340,267	30,187,767	30,863,201	30,619,468	29,003,256	30,107,605	29,953,738	349,412,637
Combined Average KW			43,290	43,818	43,009	41,651	43,460	43,914	44,576	44,467	44,400	44,264	44,641	44,644	44,109
USBC Charge			\$26,874.01	\$26,806.70	\$21,609.50	\$23,108.28	\$26,105.11	\$27,306.26	\$27,168.98	\$27,776.87	\$27,557.53	\$26,102.92	\$27,096.84	\$26,958.38	\$314,471.38
Total Elec Revenue			217,641.39	206,851.47	182,621.97	183,868.74	199,869.68	205,782.70	206,933.10	213,890.16	212,104.42	198,801.40	203,883.08	108,426.91	\$2,340,675.02





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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/29/24
NAME OF BUSINESS:	Phillips 66
PROJECT CITY LOCATION:	Phillips 66 Refinery
MAILING ADDRESS:	401 S 23rd St.
MAILING CITY, STATE, ZIP:	Billings, MT, 59101

CONTACT PERSON:	Scott Raver
PHONE NUMBER:	406-255-1628
CELL PHONE:	636-544-5562
FAX NUMBER:	
E-MAIL ADDRESS:	Scott.M.Raver@p66.com

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>		<b>\$ 295,353</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach): Coker conveyor was replaced. 75 HP full speed motor was replaced with a high efficiency motor on a VFD for speed control based on coke loading. Typical speed in normal operation will be ~75% full speed in normal operation and 20% full speed in winter mode when the old conveyor would be running full speed at all times.		
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	~130MWh	
<b>ESTIMATED KW DEMAND SAVINGS:</b>	~15kW	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	<b>\$ 0</b>
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	

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

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

**LARGE CUSTOMER:**

Signature:

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

**NorthWestern**  
Energy

*Delivering a Bright Future*

11/15/2021 Update



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

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

DATE REQUESTED:	11/29/24
NAME OF BUSINESS:	Phillips 66
PROJECT CITY LOCATION:	Phillips 66 Refinery
MAILING ADDRESS:	401 S 23rd St.
MAILING CITY, STATE, ZIP:	Billings, MT, 59101

CONTACT PERSON:	Scott Raver
PHONE NUMBER:	406-255-1628
CELL PHONE:	636-544-5562
FAX NUMBER:	
E-MAIL ADDRESS:	Scott.M.Raver@p66.com

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>		<b>\$ 500,000</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (If more space is needed, please attach): MachineEdge VFD installation project. This project is installing 14 VFD on motors ranging from 50 to 200HP currently running across the line with control valves operating 50% or more closed. The VFD will monitor operating conditions to reduce speed to allow the control valve to operate ~20% more open. This will significantly reduce power consumption by lowering the pressure drop across the control valves. The project was started in 2023 expecting to complete in 2025 with a lump sum budget for engineering, materials and installation around \$3MM. The first payments have been completed for ~\$500M with the rest being paid in 2025.		
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	~1752MWh	
<b>ESTIMATED KW DEMAND SAVINGS:</b>	~200kW	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	<b>\$ 0</b>
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	

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LARGE CUSTOMER:

Signature:

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NorthWestern  
Energy

*Delivering a Bright Future*

11/15/2021 Update

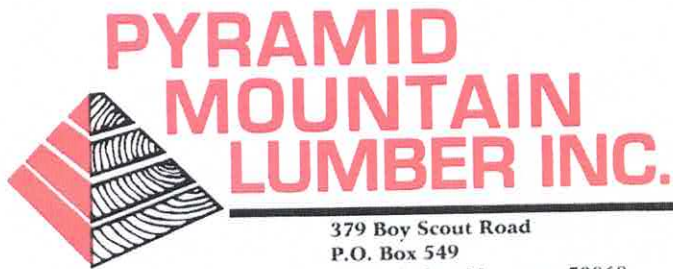
USBP Credit Activities Report	
January 1, 2024 - December 31, 2024	
Powder River Energy Corporation	
Contact Person: Karri Blasi or Bill Mertz	
1995 Retail Sales Amount: \$59,988	Amount of Credit Expenditure
<b><u>A. Energy Conservation</u></b>	
1. Energy Audits	
2. Energy efficient appliance incentives	
3. Grants or loans for lighting efficiency conversions	
4. Grants for motor efficiency conversions	
5. Expenses for consumer conservation education	
6. Expenses for demand side management programs	
7. Grants or low-interest loans for ground-source heat pumps used for energy efficiency savings	
8. Irrigation audits to reduce power requirements	
9. Residential energy efficiency programs	
10. Design/construction assistance for energy-efficient construction	
11. Design/implementation assistance for energy efficiency retrofits of existing loads	
12. Waste heat generation expenses	
13. Street lighting - security lighting upgrades for efficiency	
14. Incremental cost of distribution efficiency expenditures attributable to increases in energy efficiency above acceptable minimum industry standards that are documented and verified by an electrical engineer	
15. Peak-shaving devices applied in customer facilities for the purpose of reducing peak demands excluding interruptible service or payment for curtailment rates	
16. Large customer conservation investments made pursuant to 69-8-101 et.seq	
17. Conservation investments made through power purchases pursuant to 69-8-402(2)(b)	
18. Other (Please specify)	
<b>TOTAL</b>	\$0.00

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

[illegible]

	Page 3 of 3
<b><u>C. Renewable Resource Projects and Applications</u></b>	
1. Photovoltaics conversion	
2. Solar thermal applications	
3. Geothermal projects	
4. Wind power projects	
5. Local micro hydro projects that are on streams outside protected areas as defined by the Northwest Power & Conservation Council or state or federal law, or that are irrigation ditch projects	
6. Renewable energy investments made through power purchases pursuant to 69-8-402(2)(b)	
7. Co-op's infrastructure/capacity costs unrecovered above any benefits due to net metering	
7. Other (Please specify)	
<b><i>TOTAL</i></b>	\$0.00
<b><u>D. Research &amp; Development</u></b>	
1.	
2.	
3.	
4.	
<b><i>TOTAL</i></b>	\$0.00
<b>E. Total Large Customer USB Revenues Included in All Cooperative USB Expenditures ***</b>	
1.	
<b><i>TOTAL</i></b>	\$0.00
<b>GRAND TOTAL</b>	\$1,415.00





379 Boy Scout Road  
P.O. Box 549  
Seeley Lake, Montana 59868  
(406) 677-2201

March 14, 2025

Russ Christensen, Unit Manager  
Montana Department of Revenue  
P. O. Box 5805  
Helena, MT 59604-5805

Russ:

Last March, Pyramid Mountain Lumber filed its eighth USB report. That report indicated we had total credits to carry forward of \$1,192,271.00.

Pyramid Mountain Lumber's USB charge for 2024 purchased energy is \$6,837.31 (0.9 mills per kilowatt hour times 7,597,007 KWH). Applying the 2024 USB charges to the carry forward leaves a balance of \$1,185,433.69 to carry forward.

Please let me know if there is anything else required.

Respectfully,

Wendy R Dalrymple  
Controller  
Pyramid Mountain Lumber, Inc.

Cc: Mark Hayden, General Manager, MEC

**REC Advanced Silicon Materials LLC**

119140 Rick Jones Way  
Silver Bow, MT 59750  
USA  
Phone +1 406 496 9898  
Fax +1 406 496 9854  
www.recsilicon.com

**RECSiLICON**

February 13th, 2025

Mr. Jon Schafer

UCP/CGR Tax Examiner

Montana Department of Revenue - USB Reports

PO Box 5805

Helena, MT 59604-5805

(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – REC Silicon**

Dear Mr. Schafer:

Please accept this letter and the attached documents as REC Silicon's (MPP) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of REC Silicon's 2024 USBC account activities.**
- **At year-end 2024, REC had a current request balance of \$796,424.21. This credit balance is the result of the project submitted in the attached Form B, and for a past project that was submitted in 2022 to NorthWestern Energy, and to the DOR in our 2022 Annual Summary Report.**
- **Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024.**
- **At year-end 2024, REC had a credit balance of \$8,902.96 (carried over into 2025).**

If you have any questions, please contact me at (406) 496-9742.

Sincerely,



John Helfrich  
Electrical Engineer

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

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

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

DATE:	November 30, 2024
NAME OF BUSINESS:	REC Silicon
CITY/TOWN LOCATION:	Butte Plant
CONTACT PERSON:	John Helfrich
MAILING ADDRESS:	119140 Rick Jones Way
CITY, STATE AND ZIP:	Silver Bow, MT 59750
PHONE NUMBER:	406-496-9742
FAX NUMBER:	406-496-9793
E-MAIL ADDRESS:	John.Helfrich@recsilicon.com

AMOUNT OF CREDIT REQUESTED:	\$107,600.42
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*The amount of credit available at any given time will be limited by the amount of USB funds paid by the Large Customer – less any previous credits processed during the calendar year. If request is greater than the Large Customer USB funds paid year to date, customer will receive credit payment(s) on a quarterly basis not to exceed funds accumulated until the credit request has been satisfied.*

<b>DESCRIPTION OF PROJECT(S)</b> (if more space is needed, please attach): In 2024, REC Silicon completed projects related to improving process equipment efficiency, and installing new lighting technologies. A detailed description of each project is included on the USB Request Form B Attachment document.
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Estimated Savings in kWh and/or KW for project needs to be provided

ESTIMATED kWh SAVINGS:	354,417 kWh/year
ESTIMATED KW SAVINGS:	61.5 kW

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

LARGE CUSTOMER:

Signature:

*John Helfrich*

FOR NORTHWESTERN ENERGY USE ONLY:

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

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

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

**RECSiLICON**

REC Silicon

119140 Rick Jones Way

Silver Bow, MT 59750

Phone: (406) 496-9898

Fax: (406) 496-9793

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

## **USB REQUEST FORM B ATTACHMENT**

### **BACKGROUND**

REC Silicon is a major supplier of high purity polycrystalline silicon and silane gas to the semiconductor and photovoltaic industries. REC Silicon has production facilities in Butte, MT and Moses Lake, WA.

### **LARGE BOILER UPGRADES**

This project involved upgrading the control system and installing a VFD on the large boiler. Prior to this upgrade the 125 Hp motor would run at full speed and send excess heat to atmosphere. This project was done improved efficiency and lowered electricity usage. The annual electric savings is 262,116 kWh.

Labor and Materials Costs

= \$94,657

**TOTAL = \$94,647**

### **PLANT LIGHT BULB UPGRADE PROJECT DESCRIPTION**

The plant continues to invest in replacing existing outdated technology light bulbs with more energy efficient LED bulbs. These changes are very notable even from a distance—the orange glow from the plant as result of the original HPS lights is now overtaken by the bright white glow from the LED lights. A total of 139 bulbs were changed to LED bulbs which led to a total savings of 14,049 W. Each light bulb took an estimated 15 minutes to replace. Because these lights are located both interior and exterior, they are estimated to be turned on 75% of the time.

## PLANT LIGHT BULB UPGRADE PROJECT JUSTIFICATION AND COSTS

139 existing light bulbs were replaced and saved an estimated 14,049 watts  $((70-18)*34+(100-15)*5+(400-136)*34+(400-110)*6+(32-13)*60)$ . Assuming an average operating time of 75%, this reduction will save 92,301 kWh annually  $(9.23\text{kW}*6570\text{hrs})$ .

70W Equivalent (MH/HPS)	LED 18 Watt	34	\$40.35	\$1,371.90
100W Equivalent (Incandescent)	LED 15 Watt	5	\$102.18	\$510.90
400w Equivalent (High Bay HO's)	LED 136W	34	\$217.00	\$7,378.00
400w Equivalent (High Bay HO's)	LED 110 Watt	6	\$147.67	\$886.02
32w Equivalent (Fluorescent)	LED 13w U-bend	60	\$16.66	\$999.60
Total Materials				\$11,146.42

The following is a summary of the project cost:

Project Materials =	\$11,146.42
Project Labor = $\$52/\text{hr} * 139 \text{ bulbs} * 0.25 \text{ hrs/bulb}$	\$1,807.00
<b>TOTAL =</b>	<b>\$12,953.42</b>

**Total Energy saved 354,417kWH**

**Total project cost \$107,600.42**

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100734	1694	DP20050430	KWH >	46,997,985	48,678,393	32,046,546	48,684,005	49,449,389	48,447,468	43,791,214	10,700,766	9,797,572	9,332,800	10,197,353	9,892,174	368,015,665
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$42,298.19	\$43,810.55	\$28,841.89	\$43,815.60	\$44,504.45	\$43,602.72	\$39,412.09	\$9,630.69	\$8,817.81	\$8,399.52	\$9,177.62	\$8,902.96	\$331,214.09
			<b>Total KWH</b>	46,997,985	48,678,393	32,046,546	48,684,005	49,449,389	48,447,468	43,791,214	10,700,766	9,797,572	9,332,800	10,197,353	9,892,174	368,015,665
			<b>Combined Average KW</b>	0	0	0	0	0	0	0	0	0	0	0	0	0
			<b>USBC Charge</b>	\$42,298.19	\$43,810.55	\$28,841.89	\$43,815.60	\$44,504.45	\$43,602.72	\$39,412.09	\$9,630.69	\$8,817.81	\$8,399.52	\$9,177.62	\$8,902.96	\$331,214.09
			<b>Total Elec Revenue</b>	\$42,298.19	\$43,810.55	\$28,841.89	\$43,815.60	\$44,504.45	\$43,602.72	\$39,412.09	\$9,630.69	\$8,817.81	\$8,399.52	\$9,177.62	\$8,902.96	\$331,214.09





T 406.638.9140  
F 406.638.9156

Colorado Energy Management, LLC  
Route 1, Box 1144A

643 Industrial Park Road  
Hardin, MT 59034

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

2-17-2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Rocky Mountain Power**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Rocky Mountain Power's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Rocky Mountain Power's 2024 USBC account activities.**
- **Attached is our Form A- At year-end 2024, Rocky Mountain Power had a credit balance of \$1,428.89 vs the \$1,000 estimate. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.**

If you have any questions, please contact me at (406) 679-0966.

Sincerely,

Kevin Calloway  
Plant Engineer

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



## FORM A – UNIVERSAL SYSTEMS BENEFITS (USB) LARGE USB CREDIT RESERVATION TO CARRY OVER CREDITS

Complete and mail or scan as a PDF and email to:

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

<b>DATE:</b>	<b>11/22/24</b>
<b>NAME OF BUSINESS:</b>	<b>Rocky Mountain Power</b>
<b>PROJECT CITY LOCATION:</b>	<b>Hardin</b>
<b>MAILING ADDRESS:</b>	<b>643 Industrial Park Rd</b>
<b>MAILING CITY, STATE, ZIP:</b>	<b>Hardin, MT 59034</b>

<b>CONTACT PERSON:</b>	<b>Kevin Calloway</b>
<b>PHONE NUMBER:</b>	<b>406-679-0966</b>
<b>CELL PHONE:</b>	
<b>FAX NUMBER:</b>	
<b>E-MAIL ADDRESS:</b>	<b>kcalloway@heorotpower.com</b>

BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY OR UNDER CONSIDERATION THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. CURRENT YEAR USB CREDITS REMAINING AT YEAR-END CAN ONLY BE CARRIED FORWARD WITH THIS RESERVATION FOR ONE ADDITIONAL CALENDAR YEAR.

Reserve all remaining 2024 USB credits at year-end for use in 2025

<b>ESTIMATED USB CREDITS TO RESERVE AT YEAR END:</b>	<b>\$1,100.00</b>
<b>ESTIMATED COMPLETION DATE NEXT YEAR:</b>	<b>11/30/24</b>

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

**LARGE CUSTOMER:**

Signature:

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

NorthWestern  
Energy

Delivering a Bright Future





Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

ROCKY MOUNTAIN POWER

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$585,590.19
Reservations Made YTD:	\$1,100.00		
2023 Carryover Payment Request:	\$3,094.06	Total Payment Requests:	\$3,094.06
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$461.79	Total USBC Credit:	\$4,522.95
USBC Credit YTD:	\$4,061.16	Payments Issued YTD:	\$3,094.06
Average Monthly Credit Earned:	\$338.43	USBC Credit Balance:	\$1,428.89
		Payment Pending:	\$0.00

Payment Requests Made		
Submitted By	Date	Amount

Payments Issued	
Date	Amount
04/19/2024	\$837.99
07/09/2024	\$953.55
10/08/2024	\$1,302.52

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
2049844	395353	DD80693488	KWH >	187,500	197,300	33,200	141,000	588,900	329,600	267,200	587,200	773,400	538,300	316,700	552,100	4,512,400
			KW >	9,200	8,000	9,200	8,800	9,600	800	2,400	7,600	8,400	8,000	8,000	8,400	7,367
			Elec Revenue >	\$44,595.15	\$38,970.75	\$30,360.78	\$37,495.01	\$77,544.72	\$30,817.06	\$30,102.17	\$70,213.35	\$87,396.18	\$66,160.20	\$47,207.12	\$24,727.70	\$585,590.19
			Total KWH	187,500	197,300	33,200	141,000	588,900	329,600	267,200	587,200	773,400	538,300	316,700	552,100	4,512,400
			Combined Average KW	9,200	8,000	9,200	8,800	9,600	800	2,400	7,600	8,400	8,000	8,000	8,400	7,367
			USBC Charge	\$168.75	\$177.57	\$29.88	\$126.90	\$530.01	\$296.64	\$240.48	\$528.48	\$696.06	\$484.47	\$285.03	\$496.89	\$4,061.16
			Total Elec Revenue	\$44,595.15	\$38,970.75	\$30,360.78	\$37,495.01	\$77,544.72	\$30,817.06	\$30,102.17	\$70,213.35	\$87,396.18	\$66,160.20	\$47,207.12	\$24,727.70	\$585,590.19



February 20, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Roseburg Forest Products**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Roseburg Forest Products' (RFP) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of RFP's 2024 USBC account activities.**
- **Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024. Please note we donated all of our 2024 remaining credits and all our 2023 carry over credits.**

If you have any questions, please contact me at (541) 784-2491.

Sincerely,

A handwritten signature in blue ink, appearing to read 'KR', followed by a long, horizontal, wavy line.

Kristen Rutherford  
Sr. Director of Accounting and Corporate Controller

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



## Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

### ROSEBURG FOREST PRODUCTS

#### Account Summary

2023 Carryover Reservation: \$8,362.00 YTD Elec Revenue: \$464,224.03  
Reservations Made YTD: \$0.00

2023 Carryover Payment Request: \$0.00 Total Payment Requests: \$28,500.00  
Payment Requests Made YTD: \$28,500.00 Current Request Balance: \$204.00

2023 Carryover USBC Credit: \$8,361.55 Total USBC Credit: \$28,480.03  
USBC Credit YTD: \$20,118.48 Payments Issued YTD: \$28,296.00

Average Monthly Credit Earned: \$1,676.54 USBC Credit Balance: \$184.03  
Payment Pending: \$184.03

#### Payment Requests Made

Submitted By	Date	Amount
Tareena Brint	11/26/2024	\$28,500.00

#### Payments Issued

Date	Amount
12/17/2024	\$28,296.00

#### Account Detail

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1120533	223500	2000185393	8,693	10,122	7,950	7,695	5,946	4,945	4,038	4,272	3,977	4,391	8,093	4,913	75,035
		KWH >	13	15	14	12	16	10	7	7	7	9	16	15	12
		KW >													
		Elec Revenue >	\$225.17	\$251.64	\$216.11	\$197.42	\$221.03	\$154.94	\$119.89	\$121.64	\$120.75	\$136.37	\$237.53	\$153.37	\$2,155.86
1120571	223498		0	0	0	0	0	0	0	0	0	0	0	0	0
		KWH >													
		KW >													
		Elec Revenue >	\$22.29	\$20.91	\$20.91	\$20.91	\$20.91	\$20.91	\$20.91	\$20.91	\$20.91	\$0.00	\$0.00	\$0.00	\$189.57
1120571	223498	2000177584	14,080	10,280	9,120	9,400	10,240	10,280	9,680	12,960	10,960	10,800	9,960	10,040	127,800
		KWH >	50	58	47	44	49	51	58	68	62	58	48	66	55
		KW >													
		Elec Revenue >	\$669.13	\$666.79	\$543.40	\$515.85	\$570.99	\$599.06	\$658.27	\$787.11	\$703.52	\$672.08	\$562.99	\$652.95	\$7,602.14
1120644	1686	DA29137695	3,948,356	4,212,517	3,971,203	4,090,230	3,520,767	1,021,070	294,283	254,159	224,958	215,118	208,878	189,522	22,151,061
		KWH >	6,474	6,584	6,486	6,441	6,169	5,333	590	492	389	363	311	278	3,326
		KW >													
		Elec Revenue >	\$85,070.66	\$80,601.12	\$77,260.78	\$78,481.99	\$70,413.23	\$36,630.23	\$6,250.58	\$5,345.56	\$4,522.28	\$4,284.63	\$3,971.71	\$1,443.49	\$454,276.46
Total KWH			3,971,129	4,232,919	3,988,273	4,107,325	3,536,953	1,036,295	308,001	271,391	239,895	230,309	226,931	204,475	22,353,896
Combined Average KW			6,537	6,657	6,547	6,497	6,234	5,394	655	567	458	430	375	359	3,393
USBC Charge			\$3,809.63	\$3,809.63	\$3,589.45	\$3,696.60	\$3,183.26	\$932.66	\$277.19	\$244.24	\$215.90	\$207.28	\$204.23	\$184.03	\$20,118.48
Total Elec Revenue			\$85,987.45	\$81,540.46	\$78,041.20	\$79,216.17	\$71,226.16	\$37,405.14	\$7,049.65	\$6,275.22	\$5,367.46	\$5,093.08	\$4,772.23	\$2,249.81	\$464,224.03



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

Complete and mail or scan as a PDF and email to:

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

<b>DATE REQUESTED:</b>	11/26/24
<b>NAME OF BUSINESS:</b>	Roseburg Forest Products
<b>PROJECT CITY LOCATION:</b>	Missoula
<b>MAILING ADDRESS:</b>	PO Box 4007
<b>MAILING CITY, STATE, ZIP:</b>	Missoula, MT 59806

<b>CONTACT PERSON:</b>	Ellen Porter
<b>PHONE NUMBER:</b>	
<b>CELL PHONE:</b>	541-643-1748
<b>FAX NUMBER:</b>	
<b>E-MAIL ADDRESS:</b>	ellen@lmienviro.com

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>	\$
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach):	
<b>ESTIMATED ANNUAL KWH SAVINGS:</b>	
<b>ESTIMATED KW DEMAND SAVINGS:</b>	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	Donate all remaining year-end & all 2023 carry-over credits – estimated amount of \$28,500.00
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	Energy Share of Montana

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

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

**LARGE CUSTOMER:**

**Signature:**

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

February 10, 2025

Mr. Jon Schafer  
UCO/CGR Tax Examiner  
Montana Department of Revenue – USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report- Saint Patrick Hospital**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Saint Patrick Hospital's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Report for 2024 (provided to us by NorthWestern Energy) is a summary of Saint Patrick Hospital's 2024 USBC account activities.**
- **At year-end 2024, Saint Patrick Hospital had a credit balance of \$4,516.44. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.**
- **Attached is the Form B – USB Large USB Customer Credit Request forms that we submitted to NorthWestern Energy in 2024.**

If you have any questions, please contact me at (406) 329-2605.

Sincerely,

Tim Chopp  
Facilities Manager

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701 Email:  
[Rick.edwards@northwestern.com](mailto:Rick.edwards@northwestern.com)



## Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

### SAINT PATRICK HOSPITAL

#### Account Summary

2023 Carryover Reservation:	\$12,818.61	YTD Elec Revenue:	\$1,373,343.41
Reservations Made YTD:	\$4,600.00		
2023 Carryover Payment Request:	\$0.00	Total Payment Requests:	\$20,816.00
Payment Requests Made YTD:	\$20,816.00	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$12,671.48	Total USBC Credit:	\$25,332.44
USBC Credit YTD:	\$12,660.96	Payments Issued YTD:	\$20,816.00
Average Monthly Credit Earned:	\$1,055.08	USBC Credit Balance:	\$4,516.44
		Payment Pending:	\$0.00

#### Payment Requests Made

Submitted By	Date	Amount
Tim Chopp	09/10/2024	\$20,816.00

#### Payments Issued

Date	Amount
10/08/2024	\$20,816.00

#### Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100027	1036	DA29133738	KWH >	144,850	144,469	136,549	155,435	160,677	166,211	167,849	183,971	182,428	170,854	169,154	144,943	1,927,390
			KW >	289	280	292	291	277	270	290	307	293	322	338	317	297
			Elec Revenue >	\$17,254.12	\$16,081.75	\$15,547.23	\$17,171.86	\$18,889.51	\$19,330.18	\$19,740.33	\$21,053.17	\$20,731.89	\$20,020.21	\$18,668.61	\$4,155.56	\$208,644.42
100621	1625	DA29133736	KWH >	867,296	864,519	814,312	897,432	898,188	952,865	951,784	1,010,069	996,677	945,956	956,508	879,252	11,034,858
			KW >	1,461	1,466	1,463	1,505	1,523	1,545	1,567	1,575	1,573	1,567	1,555	1,539	1,528
			Elec Revenue >	\$89,658.71	\$84,907.76	\$80,586.22	\$88,527.25	\$96,162.60	101,491.47	101,402.53	104,736.56	103,488.02	\$98,257.16	\$91,861.56	\$12,181.16	\$1,053,261.00
512426	214091	2000088702	KWH >	30,720	31,280	29,040	38,240	40,400	43,680	47,040	51,520	47,520	0	0	30,160	389,600
			KW >	75	68	64	84	81	103	92	93	92	0	0	67	82
			Elec Revenue >	\$3,780.37	\$3,592.40	\$3,343.45	\$4,530.64	\$4,909.51	\$5,498.03	\$5,628.99	\$6,002.79	\$5,615.62	\$0.00	\$0.00	\$876.75	\$43,778.55
697838	311978	2000078361	KWH >	22,160	25,360	23,920	25,200	27,120	31,520	37,120	44,880	39,520	0	0	20,080	296,880
			KW >	106	106	107	108	116	148	135	145	137	0	0	106	121
			Elec Revenue >	\$3,449.27	\$3,550.61	\$3,445.03	\$3,657.92	\$4,084.23	\$4,900.53	\$5,239.13	\$6,042.66	\$5,434.43	\$0.00	\$0.00	\$1,361.42	\$41,165.23
1505900	404330	2000177582	KWH >	20,880	21,440	20,160	19,200	21,360	19,200	20,400	19,200	19,600	0	0	20,640	202,080
			KW >	31	30	31	30	34	30	29	29	30	0	0	31	31
			Elec Revenue >	\$2,294.02	\$2,257.74	\$2,154.88	\$2,124.64	\$2,487.95	\$2,232.64	\$2,313.17	\$2,174.06	\$2,223.52	\$0.00	\$0.00	\$415.00	\$20,677.62
3363139	395466	2000090810	KWH >	4,512	4,150	4,124	3,881	3,771	3,609	3,728	3,599	3,701	3,443	3,732	3,910	46,160
			KW >	14	13	13	12	12	10	10	10	11	11	11	14	12
			Elec Revenue >	\$612.34	\$541.47	\$541.88	\$517.87	\$525.17	\$492.59	\$493.26	\$473.67	\$501.30	\$457.36	\$477.59	\$182.09	\$5,816.59
Total KWH				1,090,418	1,091,218	1,028,105	1,139,388	1,151,516	1,217,085	1,227,921	1,313,239	1,289,446	1,120,253	1,129,394	1,098,985	13,896,968
Combined Average KW				1.976	1.963	1.970	2.030	2.043	2.106	2.123	2.159	2.136	1.900	1.904	2.074	2.071
USBC Charge				\$981.38	\$982.10	\$925.29	\$1,025.45	\$1,036.36	\$1,095.38	\$1,105.14	\$1,181.91	\$1,160.51	\$1,008.23	\$1,016.46	\$989.09	\$12,507.30
Total Elec Revenue				117,048.83	110,931.73	105,618.69	116,530.18	127,058.97	133,945.44	134,817.41	140,482.91	137,994.78	118,734.73	111,007.76	\$19,171.98	\$1,373,343.41



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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	9/10/2024
NAME OF BUSINESS:	St. Patrick Hospital
PROJECT CITY LOCATION:	Missoula
MAILING ADDRESS:	500 W. Broadway
MAILING CITY, STATE, ZIP:	Missoula, MT 59802

CONTACT PERSON:	Tim Chopp
PHONE NUMBER:	406-329-2605
CELL PHONE:	
FAX NUMBER:	
E-MAIL ADDRESS:	timothy.chopp@providence.org

A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):	\$ 18,714.00
DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S) (if more space is needed, please attach): We will be replacing 344 (T8) Fluorescent bulbs with 11 watt GE LED tubes the cost is \$20,816 including labor	
ESTIMATED ANNUAL KWH SAVINGS:	34,152
ESTIMATED KW DEMAND SAVINGS:	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

B. AMOUNT OF CREDIT REQUESTED FOR DONATION:	\$
NAME OF ORGANIZATION TO RECEIVE DONATION:	

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

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

LARGE CUSTOMER:

Signature:

Tim Chopp Facilities Manager

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

NorthWestern  
Energy

Delivering a Bright Future

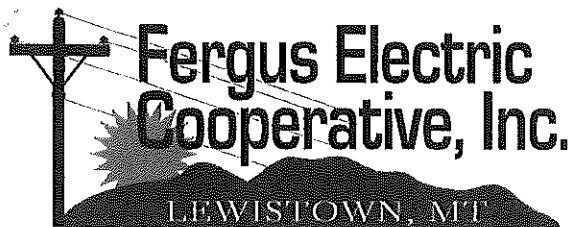
**Flathead Electric Cooperative, Inc.**


**2024 USBP Report**

**Industrial Member Eligible Credits via Power Purchases**

<u>Member</u>	<u>Conservation</u>	<u>Low Income</u>	<u>Renewable</u>	<u>Totals</u>	<u>kWh</u>
Semitool, Inc.	\$7,897	\$411	\$1,809	\$10,117	4,112,700





Your Touchstone Energy® Partner 

February 5, 2025

Kristopher Schaff  
Mine Project Engineer  
Signal Peak Energy  
100 Portal Drive  
Roundup, MT 59072

Re: USB Program Agreement

Dear Kris,

I am sending the Agreement between Signal Peak Energy LLC, a large customer and member of the co-op, and Fergus Electric Cooperative, which is necessary to comply with state laws that require large loads to report USB energy conservation activities to the Montana Department of Revenue. Fergus Electric Co-op's General Manager, Carson Sweeney has signed and dated the attached Agreement.

Based on Signal Peak's usage for 2024, the billing for the USB program for 2024 is \$106,785.15. Signal Peak's 2024 usage calculation is as follows:

$$\begin{array}{r} 9,635,517 \text{ kWh } 50\text{kV, Acct. \#321969} \\ + 109,014,653 \text{ kWh } 100\text{kV, Acct. \#383962} \\ \hline 118,650,170 \text{ (total kWh usage in 2024)} \\ \times .0009/\text{kWh} \\ \hline \$106,785.15 \text{ USB} \end{array}$$

Please review the Agreement and if acceptable, please sign, date and email it to:  
[csweeney@ferguselectric.coop](mailto:csweeney@ferguselectric.coop) and Cc me at [fergusap@ferguselectric.coop](mailto:fergusap@ferguselectric.coop) or if you prefer, mail it to:  
Carson Sweeney, General Manager, Fergus Electric Cooperative, Inc., 84423 US Highway 87, Lewistown,  
MT 59457-2058.

Thank you in advance for signing and returning the Agreement. Please contact either Carson or me if you have questions concerning the Agreement.

Sincerely,



Janine Rife Didier  
Payroll Administrator

Enclosure

---

84423 US Highway 87 · Lewistown MT 59457-2058 · 406-538-3465  
17128 Hwy 12 East · Roundup MT 59072 · 406-323-1602  
fax 406-538-7391 · e-mail [ferguselectric@ferguselectric.coop](mailto:ferguselectric@ferguselectric.coop)  
web site <http://www.ferguselectric.coop>  
*Fergus Electric is an Equal Opportunity Provider and Employer*

## **Agreement**

This agreement is made and entered into this 5<sup>th</sup> day of February 2025, by and between Signal Peak Energy LLC doing business at Roundup, Montana, hereinafter called ("**Member**") and Fergus Electric Cooperative, Inc., of Lewistown, Montana, hereinafter called ("**Co-op**").

**Whereas** there exists a Montana statute, § 69-8-402 of the Montana Code Annotated, implementing a Universal Systems Benefits program, hereinafter called ("**USB**") program to provide funding for energy conservation and assistance programs,

**Whereas** the USB program in Montana imposes requirements on every "large customer" of Montana electric cooperatives, it being understood that a large customer is defined in the USB statutes as a customer with an individual load greater than a monthly average of 1,000 kilowatt demand in the previous calendar year for that individual load,

**Whereas** Member understands that it may qualify as such a large customer of the Co-op,

**Whereas**, effective March 1, 2017, electric cooperatives in Montana will be required to report to the Montana Department of Revenue certain information involving USB activities, which report will include the names of all large customers which utilized credits to eliminate or minimize a charge for USB benefits or which received benefits related to USB program expenditures, and

**Whereas** such large customers are obligated to submit reports of USB activities to the Montana Department of Revenue,

Member and Co-op do therefore agree as follows:

1. Member has selected the following option ("A" or "B") in order to comply with the requirements of the Montana USB law, § 69-8-402 of the Montana Code Annotated:

☐ **Option A.** Member requests Co-op to add a .9 mill per kilowatt hour charge, up to a maximum \$500,000.00 per year, to its rate for electric service and advises Co-op as follows [*Check one*]:

- ☐ 1. Member will provide a report both to the Co-op and to the Montana Department of Revenue detailing such internal qualifying Activities consistent with § 69-8-402(10) of the Montana Code Annotated;

or

- ☐ 2. Member will not utilize any credits or request any credit back for USB activities and on such basis, Member acknowledges that Co-op is not required to report Member as a large customer utilizing credits to the Montana Department of Revenue, as would otherwise be required by § 69-8-402(8)(a)(iv) of the Montana Code Annotated and agrees that it will determine whether to make any report to the Montana Department of Revenue, as may otherwise be required by § 69-8-402(10) of the Montana Code Annotated

or

☒ **Option B.** Member requests Co-op not add .9 mills per kilowatt hour to its rate and hereby certifies that Member will maintain qualifying internal activities to meet the Montana universal systems benefits law funding requirement for large customers and that a report of the program and activities will be provided annually consistent with § 69-8-402(10) of the Montana Code Annotated both to the Montana Department of Revenue and to the Co-op.

2. Member acknowledges and Co-op agrees that Co-op will not approve of, nor take responsibility for, the Member's internal or other activities for the purpose of Member's complying with the USB requirements of § 69-8-402(10) of the Montana Code Annotated .

**Signal Peak Energy LLC**

By: 

Title: Mine Engineer

Date: 2/12/2025

**Fergus Electric Cooperative, Inc.**

By: 

Title: General Manager

Date: 02/11/2025

## **SIGNAL PEAK ENERGY POWER EFFICIENCY, VOLTAGE CORRECTION AND POWER SAVINGS PROJECTS - UPDATED THRU 2022**

### **PROJECTS IN 2012-2013**

- 1) 2400 KVAR LONGWALL SECTION CAPACITOR BANK FOR UNDERGROUND
  - a. USED TO MINIMIZE VOLTAGE FLUCTUATIONS AND INCREASE POWER FACTOR AT THE LONGWALL.
  - b. \$98,860 – COMPLETED APR 2013 – AFE 14-2012
- 2) 15 MVA ISOLATION SUBSTATION 21.6KV PRI: 21.6KV SEC
  - a. USED TO REDUCE VOLTAGE DROP TO REMOTE MINE POWER FEED BOREHOLE AND MITIGATE HEAVY START LOADS ON OVERALL SYSTEM
  - b. \$387,068 – COMPLETED JAN 2014 – AFE 14-2012

### **PROJECTS 2013-2014**

- 1) DUAL 2400 KVAR SURFACE ENCLOSED CAPACITOR BANKS FOR 100KV SUBSTATION
  - a. SPE WAS SEEING SIGNIFICANT VOLTAGE FLUCTUATIONS ON INCOMING FEED THAT CAUSED THE MINE TO HAVE INCONSISTENT VOLTAGE AND POWER FACTOR. SPE INSTALLED DUAL CAPACITOR BANKS TO STABILIZE VOLTAGE AND INCREASE OVERALL POWER FACTOR.
  - b. \$174,259 – COMPLETED APR 2015 – AFE 19-2014

### **PROJECTS 2014-2015**

- 1) LONGWALL HIGH PRESSURE PUMPS VFD'S
  - a. CONVERTED 5 300HP 480VAC HIGH PRESSURE PUMPS FROM ACROSS-THE-LINE STARTERS TO VARIABLE FREQUENCY DRIVES TO HELP WITH POWER CONSUMPTION AND EFFICIENCY.
  - b. \$365,900 – COMPLETED MAY 2015 – AFE 20-2014
- 2) 1 EAST BELT DRIVE VFD PURCHASE
  - a. INSTALLED 4 500HP AND 1 250HP VFD'S ON 1 EAST BELT DRIVE TO INCREASE EFFICIENCY.
  - b. \$253,000 – COMPLETED MAY 2015
- 3) 3 EAST BELT DRIVE VFD PURCHASE
  - a. INSTALLED 4 500HP AND 1 250 HP VFD'S ON NEW 3 EAST BELT DRIVE TO INCREASE EFFICIENCY
  - b. \$253,000 – COMPLETED MAY 2015
- 4) UPGRADE 2 EAST BELT DRIVE VFD'S
  - a. UPGRADED 2 EAST BELT DRIVE VFD'S TO HEAVY DUTY TO COMPENSATE FOR INCREASED LOAD ON BELTS. THIS INCREASED THEIR EFFICIENCY AND POWERFACTOR AND REDUCED THEIR POWER CONSUMPTION
  - b. \$101,980 – COMPLETED NOV 2015

- 5) TRANSITION TO HIGH EFFICIENCY, LOW CONSUMPTION LED LIGHTS ON THE SURFACE AND UNDERGROUND
  - a. 2015 EXPENDITURE \$36,931

#### **PROJECTS 2016**

- 1) FRESH WATER PUMP SYSTEM
  - a. INSTALLED 3 X 200HP VFD'S ON FRESH WATER MINE PUMPS. COMPLETED DEC 2016.
  - b. \$221,940 – COMPLETED DEC 2016
- 2) LED LIGHTS \$52,564

#### **PROJECTS 2017**

- 1) INSTALLED VFD ON 125 HP PLANT FEED PUMP \$14,000.
- 2) UPGRADED 100KV CAPACITOR BANK COMMS \$26,000.
- 3) REPLACED 25KV CAPACITORS UNDERGROUND ON LW POWER CENTER \$19,000
- 4) REPLACED PANCAKE REACTORS AT 100KV SUB \$9,000.
- 5) INSTALLED VFD ON PREP PLANT HEAVY MEDIA 250 HP PUMP \$24,000

#### **PROJECTS 2018**

- 1) INSTALL HEAVY DUTY CAPACITORS AT 100 KVA SUBSTATION \$60,000
- 2) INSTALL 880 VFD, UPGRADE 2 EAST BELT DRIVE \$241,000
- 3) INSTALL 21,600 VOLT TRANSFORMER, 20 MVA, UNDERGROUND POWER SUPPLY \$1,200,000

#### **PROJECTS 2019**

- 1) INSTALLED TWO VFD'S, 4 EAST SUMP \$28,000
- 2) REBUILD POWER CENTER AND UPGRADED VFD TO IMPROVE EFFICIENCY \$167,395
- 3) INSTALLED VFD, UPGRADE PUMP AT WDA POND \$5,900

#### **PROJECTS 2020**

- 1) Crib Pad 7 Work to Reduce Voltage Drop to Underground Working Sections
  - a. Power Line \$577,658
  - b. Cased Borehole \$92,052
  - c. Transformer 15/20MVA \$292,155
  - d. Underground Switch \$170,000
- 2) Underground Capacitor Bank
  - a. 8R Longwall Power Supply \$206,431
- 3) PC14 Rebuild \$216,000

#### **PROJECTS 2021**

- 1) Underground 1 East Belt Drive
  - a. VFD Upgrade \$320,000
- 2) Load Cell \$132,000
- 3) Switch #34 \$130,000

**PROJECTS 2022**

- |                                                         |           |
|---------------------------------------------------------|-----------|
| 1) Underground Belt Drive VFD Upgrade                   | \$95,000  |
| 2) Surface Transformers (750 KVA, 3000 KVA, & 4000 KVA) | \$214,925 |

**PROJECTS 2023**

- |                                     |           |
|-------------------------------------|-----------|
| 1) 3 East Belt VFD Upgrade/Overhaul | \$428,450 |
| 2) Replaced 2,000 kVA Transformer   | \$41,750  |
| 3) Schneider VFD                    |           |

**PROJECTS 2024**

- |                                                                |          |
|----------------------------------------------------------------|----------|
| 1) 21.6kV/5MVA Step Down Transformer                           | \$90,915 |
| a. Allowed us to utilize some new VFD Conveyor Belt Drives     |          |
| 2) Surface and Underground Capacitor Banks in 100kV Substation | \$22,000 |

**TOTAL YEAR EXPENDITURES****Signal Peak Energy LLC**

USB Program liability requirements for large power users with loads >= 1 MW passed legislation in 2015: MCA 69-8-414.		
Year	Expenditures	Large Power Users USB Program Annual Liability (based on total annual kWh usage x.9 mills)
2012-2013	\$ 485,928.00	
2013-2014	\$ 174,259.00	
2014-2015	\$ 1,010,811.00	\$ 82,823.27
2016	\$ 274,504.00	\$ 75,592.67
2017	\$ 92,000.00	\$ 84,390.13
2018	\$ 1,501,000.00	\$ 90,321.36
2019	\$ 201,295.00	\$ 98,870.84
2020	\$ 1,554,296.00	\$ 86,220.81
2021	\$ 582,000.00	\$ 96,034.85
2022	\$ 309,925.00	\$ 93,852.24
2023	\$ 503,825.00	\$ 104,265.14
2024	\$ 112,915.00	\$ 106,785.15
<b>Total</b>	<b>\$ 6,802,758.00</b>	<b>\$ 919,156.46</b>

February 24, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808,  
Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Saint James Healthcare**

Dear Mr. Schafer:

Please accept this letter and the attached document as Saint James Healthcare's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Saint James Healthcare's 2024 USBC account activities.
- Saint James Healthcare did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.
- Saint James Healthcare has a current request balance of \$1,712.26 (shown on the attached USBC Progress Report) for a past project that was submitted in 2011 to NorthWestern Energy, and to the DOR in our 2011 Annual Summary Report.

At year-end 2024, Saint James Healthcare had a credit balance of \$420.01 (carried over into 2025).

If you have any questions, please contact me at (406) 237-3749

Sincerely,



Thomas McKenna  
St. James Hospital – Facility Manager

CC: **File**

**Rick Edward** – NorthWestern Energy, 11 East Park, Butte, MT 59701

Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
[paulbabb@northwestern.com](mailto:paulbabb@northwestern.com)

TM/mla



Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

SAINT JAMES HOSPITAL

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$761,850.67
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$7,819.19	Total Payment Requests:	\$7,819.19
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$1,712.26
2023 Carryover USBC Credit:	\$423.45	Total USBC Credit:	\$6,526.94
USBC Credit YTD:	\$6,103.49	Payments Issued YTD:	\$6,106.93
Average Monthly Credit Earned:	\$508.62	USBC Credit Balance:	\$420.01
		Payment Pending:	\$420.01

Payment Requests Made		
Submitted By	Date	Amount

Payments Issued	
Date	Amount
04/19/2024	\$1,741.30
07/09/2024	\$1,427.51
10/08/2024	\$1,871.26
12/17/2024	\$1,066.86

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100059	1060	DA29133751	KWH >	479,647	500,199	456,036	504,851	497,417	556,354	628,867	761,932	662,812	613,493	554,223	455,518	6,671,349
			KW >	887	917	913	1,094	1,183	1,432	1,460	1,467	1,322	1,389	1,259	1,011	1,195
			Elec Revenue >	\$55,580.78	\$55,004.34	\$51,114.83	\$58,379.59	\$62,583.90	\$71,377.41	\$78,421.76	\$89,653.07	\$78,568.27	\$73,975.01	\$63,078.97	\$13,233.88	\$750,971.81
100059	1060	DA29133765	KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$0.00	\$95.70
3916649	240919	2000124001	KWH >	9,440	9,280	9,680	8,800	9,240	9,440	8,320	8,800	8,440	0	0	11,160	92,600
			KW >	21	23	21	22	22	22	34	34	26	0	0	23	25
			Elec Revenue >	\$1,149.60	\$1,106.22	\$1,126.20	\$1,088.77	\$1,174.95	\$1,200.18	\$1,235.21	\$1,266.21	\$1,132.27	\$0.00	\$0.00	\$303.55	\$10,783.16
Total KWH				489,087	509,479	465,716	513,651	506,657	565,794	637,187	770,732	671,252	613,493	554,223	466,678	6,763,949
Combined Average KW				908	940	934	1,116	1,205	1,454	1,494	1,501	1,348	1,389	1,259	1,034	1,219
USBC Charge				\$440.18	\$458.53	\$419.14	\$462.29	\$456.00	\$509.22	\$573.47	\$693.66	\$604.13	\$552.14	\$498.80	\$420.01	\$6,087.57
Total Elec Revenue				\$56,739.08	\$56,119.26	\$52,249.73	\$59,477.06	\$63,767.55	\$72,586.29	\$79,665.67	\$90,927.98	\$79,709.24	\$73,983.71	\$63,087.67	\$13,537.43	\$761,850.67



Date February 19, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808  
Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

RE: 2024 USB Annual Summary Report – St. Vincent Hospital Intermountain Healthcare

Dear Mr. Schafer,

Please accept this letter and the attached document as St. Vincent Hospital's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy is a summary of St. Vincent Hospital's 2024 USBC account activities.
- St. Vincent Hospital did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.
- St. Vincent Hospital has a current request balance of \$1,210,286.23 (shown on the attached USBC Progress Report) for a past project that was submitted in 2022 to:  
NorthWestern Energy, and to the DOR in our 2022 Annual Summary Report.

If you have any questions, please contact me at (406) 237-3749.

Sincerely,



Tom McKenna  
Facilities Manager

CC: Rick Edwards - NorthWestern Energy, 11 East Park, Butte, MT 59701 | Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)  
File

TM/mla

# Self-Directed USBC Progress Report for 2024

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
712464	322814	2000485875	KWH >	0	0	0	0	1,498	2,389	296	1,660	1,673	1,170	1,129	1,347	11,162
			KW >	0	0	0	0	9	7	9	10	7	8	8	8	8
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$267.17	\$332.91	\$158.40	\$293.00	\$264.94	\$220.16	\$209.21	\$111.21	\$1,857.00
712464	322814	DD38419013	KWH >	1,338	1,418	784	1,321	0	0	0	0	0	0	0	0	4,861
			KW >	10	8	6	7	0	0	0	0	0	0	0	0	8
			Elec Revenue >	\$273.96	\$236.31	\$162.46	\$220.26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$892.99
775396	347607	2000502913	KWH >	0	0	0	0	0	841	720	746	955	909	1,197	1,546	6,914
			KW >	0	0	0	0	0	2	2	2	2	2	2	2	2
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$125.52	\$106.74	\$107.65	\$126.90	\$118.83	\$145.42	\$36.87	\$767.93
775396	347607	DG93142125	KWH >	1,347	1,268	1,045	943	867	0	0	0	0	0	0	0	5,470
			KW >	2	3	3	2	2	0	0	0	0	0	0	0	2
			Elec Revenue >	\$161.23	\$157.27	\$137.92	\$130.14	\$128.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$714.56
874310	354140	2000502914	KWH >	0	0	0	0	0	976	1,148	997	1,281	1,272	1,463	2,105	9,242
			KW >	0	0	0	0	0	5	5	5	4	5	4	4	5
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$169.87	\$185.24	\$172.52	\$186.30	\$187.91	\$192.99	\$60.19	\$1,155.02
874310	354140	DA19955857	KWH >	1,990	1,672	1,714	1,849	1,571	0	0	0	0	0	0	0	8,796
			KW >	5	6	4	5	5	0	0	0	0	0	0	0	5
			Elec Revenue >	\$253.89	\$237.41	\$217.98	\$247.22	\$226.78	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,183.28
922450	356361	DA19166590	KWH >	15,400	14,120	15,000	15,680	14,600	0	0	0	0	0	0	0	74,800
			KW >	34	36	37	35	36	0	0	0	0	0	0	0	36
			Elec Revenue >	\$1,884.45	\$1,694.12	\$1,780.56	\$1,828.01	\$1,871.71	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,058.85
1342725	379742	DA04686576	KWH >	7,298	5,939	0	0	0	0	0	0	0	0	0	0	13,237
			KW >	17	16	0	0	0	0	0	0	0	0	0	0	17
			Elec Revenue >	\$910.38	\$738.90	\$8.70	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,657.98
1363028	388931	2000315518	KWH >	0	12,200	10,760	10,520	10,280	11,760	15,160	13,240	12,960	0	0	11,280	108,160
			KW >	0	28	28	26	25	30	37	38	32	0	0	30	30
			Elec Revenue >	\$0.00	\$1,427.81	\$1,300.94	\$1,318.17	\$1,312.96	\$1,517.40	\$1,904.50	\$1,726.84	\$1,631.25	\$0.00	\$0.00	\$395.92	\$12,535.79
1363028	388931	DA05050654	KWH >	12,320	0	0	0	0	0	0	0	0	0	0	0	12,320
			KW >	35	0	0	0	0	0	0	0	0	0	0	0	35
			Elec Revenue >	\$1,563.56	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,563.56
1454739	67484	2000484432	KWH >	2,068	2,557	2,408	2,065	1,914	2,173	2,455	4,055	2,951	1,757	1,382	1,578	27,363
			KW >	7	8	10	7	13	11	15	16	14	9	8	5	10
			Elec Revenue >	\$300.46	\$340.01	\$355.85	\$283.69	\$356.52	\$360.79	\$436.32	\$601.09	\$463.05	\$292.28	\$232.61	\$75.93	\$4,098.60
1454749	67471	2000484444	KWH >	901	1,057	1,092	914	911	945	832	886	794	741	785	905	10,763
			KW >	3	3	3	3	3	3	3	3	3	3	3	3	3
			Elec Revenue >	\$134.54	\$146.95	\$148.11	\$134.90	\$137.03	\$138.13	\$134.08	\$135.80	\$122.26	\$116.70	\$118.51	\$47.83	\$1,514.84
1454755	67466	2000484443	KWH >	876	862	935	827	867	1,131	1,196	1,982	1,412	1,117	856	856	12,917
			KW >	2	2	3	2	2	5	7	11	7	6	4	3	5
			Elec Revenue >	\$128.87	\$120.06	\$128.17	\$117.03	\$124.07	\$190.77	\$221.79	\$333.93	\$238.07	\$200.48	\$133.92	\$41.70	\$1,978.86
1490119	403086	2000484001	KWH >	51,400	64,040	51,160	33,880	30,440	31,680	37,360	35,400	37,560	0	0	43,840	416,760
			KW >	140	125	115	76	63	61	97	98	89	0	0	98	96
			Elec Revenue >	\$6,465.45	\$7,147.76	\$5,905.42	\$4,088.79	\$3,728.12	\$3,818.85	\$4,762.68	\$4,551.42	\$4,646.88	\$0.00	\$0.00	\$1,282.43	\$46,397.80
1504283	402163	2000253759	KWH >	0	0	0	0	0	11,400	13,560	17,520	15,320	0	0	10,480	68,280
			KW >	0	0	0	0	0	48	47	51	49	0	0	35	46
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,710.07	\$1,910.60	\$2,296.27	\$2,069.81	\$0.00	\$0.00	\$462.62	\$8,449.37

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1504283	402163	DG28550506	KWH >	12,880	10,720	11,720	11,720	11,280	0	0	0	0	0	0	0	58,320
			KW >	42	35	38	38	38	0	0	0	0	0	0	0	38
			Elec Revenue >	\$1,780.66	\$1,389.22	\$1,516.45	\$1,509.59	\$1,579.46	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,775.38
1517321	264299	2000485134	KWH >	0	0	5,740	6,020	6,620	6,560	7,740	8,140	7,880	6,940	6,040	6,180	67,860
			KW >	0	0	15	16	20	20	22	26	24	23	18	15	20
			Elec Revenue >	\$0.00	\$0.00	\$703.53	\$767.87	\$903.30	\$893.47	\$1,024.99	\$1,108.62	\$1,049.12	\$931.57	\$755.98	\$203.51	\$8,341.96
1517321	264299	DG75983234	KWH >	6,780	5,860	0	0	0	0	0	0	0	0	0	0	12,640
			KW >	18	18	0	0	0	0	0	0	0	0	0	0	18
			Elec Revenue >	\$854.01	\$744.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,598.86
1570057	400440	2000296766	KWH >	0	0	0	0	0	0	1,746	2,412	2,259	1,989	1,700	1,852	11,958
			KW >	0	0	0	0	0	0	8	7	9	8	7	5	7
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$280.03	\$330.46	\$334.28	\$299.58	\$249.84	\$70.35	\$1,564.54
1570057	400440	DA05495611	KWH >	2,291	2,229	2,117	1,847	1,924	1,543	0	0	0	0	0	0	11,951
			KW >	6	6	6	9	9	9	0	0	0	0	0	0	8
			Elec Revenue >	\$303.26	\$286.18	\$275.11	\$288.96	\$313.35	\$281.02	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,747.88
1863850	427923	DG36289846	KWH >	7,880	7,680	7,360	7,080	6,040	1,840	10,680	7,360	7,360	0	0	0	63,280
			KW >	18	18	16	17	17	16	19	24	24	0	0	0	19
			Elec Revenue >	\$970.25	\$912.76	\$859.67	\$858.32	\$804.47	\$397.61	\$1,270.72	\$999.12	\$999.12	\$0.00	\$0.00	\$0.00	\$8,072.04
1914958	79345	2000205618	KWH >	0	0	0	0	0	0	0	0	0	0	0	39,360	39,360
			KW >	0	0	0	0	0	0	0	0	0	0	0	122	122
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,585.60	\$1,585.60
1914958	79345	DA29174168	KWH >	57,280	52,160	50,400	57,120	61,760	60,560	72,160	79,040	61,120	54,080	0	0	605,680
			KW >	121	132	122	139	152	152	156	168	158	132	0	0	143
			Elec Revenue >	\$6,736.76	\$6,213.65	\$5,929.25	\$6,972.58	\$7,853.11	\$7,738.31	\$8,802.40	\$9,517.76	\$7,715.06	\$6,479.20	\$0.00	\$0.00	\$73,958.08
3950984	258385	2000254799	KWH >	4,000	2,960	2,440	1,760	1,280	880	960	1,000	960	960	1,800	2,440	21,440
			KW >	11	8	8	6	4	5	3	3	3	4	6	8	6
			Elec Revenue >	\$509.70	\$374.28	\$321.62	\$250.54	\$193.50	\$163.84	\$143.99	\$150.62	\$145.37	\$150.00	\$244.31	\$106.63	\$2,754.40
3992818	79412	2000253581	KWH >	0	0	0	0	0	0	0	0	13,040	0	0	10,560	23,600
			KW >	0	0	0	0	0	0	0	0	40	0	0	19	30
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,741.63	\$0.00	\$0.00	\$255.87	\$1,997.50
3992818	79412	DG21353939	KWH >	12,240	10,400	9,840	12,080	13,840	13,600	16,720	19,280	0	0	0	0	108,000
			KW >	23	27	17	30	28	28	40	45	0	0	0	0	30
			Elec Revenue >	\$1,408.64	\$1,255.02	\$1,084.83	\$1,493.65	\$1,687.49	\$1,664.52	\$2,092.75	\$2,384.29	\$0.00	\$0.00	\$0.00	\$0.00	\$13,071.19
Total KWH				1,699,118	1,480,057	1,258,898	1,347,078	1,332,196	1,413,951	1,513,702	1,709,533	1,588,149	1,350,857	1,198,730	1,218,506	17,110,775
Combined Average KW				3,289	2,871	2,515	2,609	2,599	2,609	2,930	3,059	2,976	2,458	2,209	2,303	3,794
USBC Charge				\$1,529.20	\$1,332.05	\$1,133.01	\$1,212.36	\$1,198.97	\$1,272.56	\$1,362.33	\$1,538.59	\$1,429.32	\$1,215.77	\$1,078.87	\$1,096.64	\$15,399.67
Total Elec Revenue				185,825.89	179,031.81	153,770.96	167,537.98	176,436.83	188,820.79	204,858.46	225,525.22	209,033.57	141,704.55	117,637.80	\$27,607.52	\$1,977,791.38

REVIEWED

By uph91117 at 11:42 am, Feb 21, 2025





March 3rd, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Sibanye Stillwater Mining Company**

Dear Mr. Schafer:

Please accept this letter and the attached document as Sibanye Stillwater's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Sibanye Stillwater's 2024 USBC account activities.
- Sibanye Stillwater did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.
- Sibanye Stillwater has a current request balance of \$1,348,090.73 (shown on the attached USBC Progress Report) for a past project that was submitted in 2023 to NorthWestern Energy, and to the DOR in our 2023 Annual Summary Report.

If you have any questions, please contact me at (406) 322-8985.

Sincerely,

Phil Ault  
Electrical Engineer

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

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

# STILLWATER MINING COMPANY

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$1,541,758.80
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$1,596,387.99	Total Payment Requests:	\$1,596,387.99
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$1,348,090.73
2023 Carryover USBC Credit:	\$20,993.71	Total USBC Credit:	\$264,630.75
USBC Credit YTD:	\$243,637.04	Payments Issued YTD:	\$248,297.26
Average Monthly Credit Earned:	\$20,303.09	USBC Credit Balance:	\$16,333.49
		Payment Pending:	\$16,333.49

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$85,347.44
			07/09/2024	\$63,099.59
			10/08/2024	\$59,425.35
			12/17/2024	\$40,424.88

## Account Detail

[illegible]



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
2075059	436535	DA05748542	KWH >	5,827,294	5,691,433	5,112,524	5,445,460	5,305,153	5,401,464	5,077,247	4,936,308	5,222,776	5,153,796	5,391,564	5,186,090	63,751,109
			KW >	8,440	8,476	8,241	7,988	8,132	7,916	8,078	7,446	7,771	7,897	7,952	7,915	8,021
			Elec Revenue >	\$15,702.01	\$14,548.28	\$13,804.18	\$13,863.65	\$13,874.08	\$13,755.72	\$13,617.70	\$12,890.93	\$13,457.26	\$13,514.78	\$13,780.99	\$12,181.44	\$164,991.02
2147225	101095	2000253783	KWH >	0	0	0	0	1,800	2,020	2,460	2,400	2,580	2,140	2,960	3,720	20,080
			KW >	0	0	0	0	10	7	8	8	7	9	7	8	8
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$312.68	\$300.28	\$355.81	\$334.37	\$338.23	\$325.19	\$353.28	\$113.61	\$2,433.45
2147225	101095	DD56118070	KWH >	3,300	3,800	4,120	3,700	0	0	0	0	0	0	0	0	14,920
			KW >	10	10	9	10	0	0	0	0	0	0	0	0	10
			Elec Revenue >	\$458.06	\$475.00	\$487.53	\$468.38	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,888.97
Total KWH				23,976,003	24,337,588	23,190,558	24,253,394	22,201,896	23,661,960	22,917,413	19,892,942	23,211,223	23,305,210	21,594,673	18,148,310	270,691,170
Combined Average KW				38,358	39,254	38,832	38,591	38,429	38,043	38,396	37,151	38,181	37,466	37,221	33,924	37,860
USBC Charge				\$21,578.41	\$21,903.83	\$20,871.49	\$21,828.05	\$19,981.71	\$21,295.77	\$20,625.66	\$17,903.65	\$20,890.10	\$20,974.69	\$19,435.21	\$16,333.49	\$243,622.06
Total Elec Revenue				143,972.28	140,141.88	136,175.76	138,772.94	130,634.22	135,362.95	134,479.89	123,499.80	136,317.32	134,188.23	125,515.76	\$62,697.77	\$1,541,758.80

February 28th, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue – USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: Jon.Schafer@mt.gov

Dear Mr. Schafer:

Please find below a summary of the projects related to expenditure for cost-effective energy savings and conservation for 2024. A total of 84,059,712 kWh was consumed at our East Boulder Mine that was purchased from the Park Electric Cooperative (PEC). Therefore, the Universal System Benefit (USB) charge (before credits) is \$75,653.74.

In the letter dated March 1st, 2024, it was stated that the remaining 2023 USB credits of \$3,516,276.56 would be carried over into 2024.

In 2024, no new qualifying energy saving projects were completed at the East Boulder mine site.

PROJECT	ANNUAL ENERGY SAVING	PROJECT COST
None	0 kwh	\$0
		\$0
<b>Totals</b>	0 kwh	\$0

Below is a summary of the 2024 USB funding:

DESCRIPTION	CREDITS	CHARGES
2024 USB Charges		\$ 75,653.74
Carry over from 2023	\$ 3,516,276.56	
Qualifying Projects for 2024	\$ 0	
Totals	\$ 3,516,276.56	\$ 75,653.74
Carry over credits to 2025	\$ 3,440,622.82	

The self-directed USB is an excellent program and has provided significant positive benefits to the Stillwater Mining Company in 2024. If you require further information or more a detailed explanation of the projects and benefits, please feel free to contact me as follows:

Phil Ault  
Sibanye Stillwater  
PO Box 1330  
Columbus, MT 59019  
(406) 322-8985 (Phone)



[Phil.Ault@SibanyeStillwater.com](mailto:Phil.Ault@SibanyeStillwater.com) (e-mail)

Sincerely,

A handwritten signature in black ink that reads "Phil Ault". The script is cursive and fluid, with the first name "Phil" and last name "Ault" clearly distinguishable.

Phil Ault  
Electrical Engineer

Cc: Matt Haggerty – Park Electric Cooperative



February 16, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Sun Mountain Lumber**

Dear Mr. Schafer:

Please accept this letter and the attached document as the Sun Mountain Lumber's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Sun Mountain Lumber's 2024 USBC account activities.
- Sun Mountain Lumber did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.
- Sun Mountain Lumber has a current request balance of \$11,583.26 (shown on the attached USBC Progress Report) for a past project that was submitted in 2018 to NorthWestern Energy, and to the DOR in our 2018 Annual Summary Report.
- At year-end 2024, Sun Mountain Lumber had a credit balance of \$1,079.80 (carried over into 2025).

If you have any questions, please contact me at (406) 846-1600.

Sincerely,

A handwritten signature in blue ink that reads "Christopher Anderson".

Christopher Anderson  
Vice President

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

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1233818	245475	2000132932	KWH >	7,601	7,926	7,371	4,986	3,826	3,490	3,983	3,880	3,704	3,536	5,217	7,136	62,656
			KW >	16	15	15	12	11	11	12	11	12	12	13	14	13
			Elec Revenue >	\$898.72	\$887.70	\$848.58	\$634.86	\$515.49	\$488.30	\$542.01	\$512.29	\$507.17	\$472.23	\$619.13	\$190.05	\$7,116.53
1233841	263122	DA13299769	KWH >	922,498	1,169,109	1,087,188	1,070,421	1,094,118	1,118,258	951,029	970,835	984,852	808,834	1,122,175	864,505	12,163,822
			KW >	2,886	3,013	3,076	3,205	3,186	3,244	3,024	2,832	2,955	2,987	3,048	2,903	3,030
			Elec Revenue >	106,866.49	122,439.45	115,890.63	115,409.54	126,982.19	129,692.25	112,263.77	110,424.93	112,626.54	\$96,647.71	116,823.34	\$22,262.86	\$1,288,329.70
4138137	1591	DA28691838	KWH >	225,267	320,080	340,892	375,634	355,133	305,077	301,866	301,341	283,342	297,321	304,250	317,187	3,727,390
			KW >	1,323	1,349	1,565	1,580	1,584	1,532	1,512	1,492	1,469	1,571	1,536	1,517	1,503
			Elec Revenue >	\$27,639.28	\$34,135.76	\$37,153.28	\$41,162.15	\$41,519.10	\$36,797.50	\$36,131.33	\$35,514.87	\$33,831.54	\$34,792.73	\$33,582.57	\$6,757.65	\$399,017.76
4138138	320884	2000077600	KWH >	0	0	0	0	0	0	0	0	0	0	3,600	7,360	10,960
			KW >	0	0	0	0	0	0	0	0	0	0	16	24	20
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$519.46	\$312.80	\$832.26
4138138	320884	2000122213	KWH >	5,880	9,640	8,400	7,320	5,080	4,600	3,360	3,920	3,040	3,040	0	0	54,280
			KW >	24	28	27	25	23	18	17	11	10	14	0	0	20
			Elec Revenue >	\$884.93	\$1,199.27	\$1,088.24	\$975.54	\$796.27	\$680.91	\$544.73	\$518.18	\$425.97	\$469.52	\$0.00	\$0.00	\$7,583.56
			Total KWH	1,161,246	1,506,755	1,443,851	1,458,361	1,458,157	1,431,425	1,260,238	1,279,976	1,274,938	1,112,731	1,435,242	1,196,188	16,019,108
			Combined Average KW	4,249	4,405	4,683	4,822	4,804	4,805	4,565	4,346	4,446	4,584	4,613	4,458	4,585
			USBC Charge	\$1,045.12	\$1,356.08	\$1,299.46	\$1,312.53	\$1,312.34	\$1,288.28	\$1,134.21	\$1,151.98	\$1,147.45	\$1,001.46	\$1,291.73	\$1,076.56	\$14,417.20
			Total Elec Revenue	136,289.42	158,662.18	154,980.73	158,182.09	169,813.05	167,658.96	149,481.84	146,970.27	147,391.22	132,382.19	151,544.50	\$29,523.36	\$1,702,879.81



Amy Smallwood • Senior Staff Accountant • Colstrip Power Plant  
PO Box 38 • Colstrip, MT 59323-0038  
(406) 748-5380 • [Amy.Smallwood@talenenergy.com](mailto:Amy.Smallwood@talenenergy.com)

February 12, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Talen Energy Montana**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Talen's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Talen's 2024 USBC account activities.
- Attached is the Form B– USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024. Please note we donated all of our 2024 remaining credits and all our 2023 carry over credits.

If you have any questions, please contact me at (406)748-3256.

Sincerely,

A handwritten signature in blue ink, appearing to read "Amy Smallwood".

Amy Smallwood  
Senior Staff Accountant

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





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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/21/24
NAME OF BUSINESS:	Talen Montana LLC
PROJECT CITY LOCATION:	Colstrip
MAILING ADDRESS:	PO Box 38
MAILING CITY, STATE, ZIP:	59323

CONTACT PERSON:	Amy Smallwood
PHONE NUMBER:	406-748-5380
CELL PHONE:	
FAX NUMBER:	
E-MAIL ADDRESS:	Amy.Smallwood@TalenEnergy.com

A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):	\$
DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S) (if more space is needed, please attach):	
Donate all remaining actual 2024 USB Credits to Energy Share at year-end; estimated to \$44,573.06	
ESTIMATED ANNUAL KWH SAVINGS:	NA
ESTIMATED KW DEMAND SAVINGS:	NA

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e. Energy Share, etc.)

B. AMOUNT OF CREDIT REQUESTED FOR DONATION:	\$
NAME OF ORGANIZATION TO RECEIVE DONATION:	Energy Share

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

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

LARGE CUSTOMER:

Signature:

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





## Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

### TALEN MONTANA, LLC

#### Account Summary

2023 Carryover Reservation:	\$1,644.00	YTD Elec Revenue:	\$2,440,344.00
Reservations Made YTD:	\$0.00		

2023 Carryover Payment Request:	\$1,570.07	Total Payment Requests:	\$46,143.13
Payment Requests Made YTD:	\$44,573.06	Current Request Balance:	\$298.65

2023 Carryover USBC Credit:	\$3,212.37	Total USBC Credit:	\$50,933.37
USBC Credit YTD:	\$47,721.00	Payments Issued YTD:	\$45,844.48
Average Monthly Credit Earned:	\$3,976.75	USBC Credit Balance:	\$5,088.89
		Payment Pending:	\$298.65

#### Payment Requests Made

Submitted By	Date	Amount
Amy Smallwood	11/21/2024	\$44,573.06

#### Payments Issued

Date	Amount
04/19/2024	\$1,570.07
12/17/2024	\$44,274.41

#### Account Detail

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3212929	316344	2000242218	KWH >	0	0	0	0	0	0	0	0	25	25	26	76
			KW >	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$11.78	\$12.59	\$0.78	\$25.15
3212929	316344	DG78206964	KWH >	34	6,027	26	29	32	-5,947	23	22	0	0	0	246
			KW >	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$12.50	\$532.72	\$11.45	\$12.27	\$22.02	(\$485.44)	\$11.35	\$16.83	\$0.00	\$0.00	\$0.00	\$133.70
3212930	316343	2000242706	KWH >	0	0	0	0	0	0	0	0	1,236	1,150	1,137	3,523
			KW >	0	0	0	0	0	0	0	0	4	4	2	3
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175.55	\$167.41	\$26.50	\$369.46
3212930	316343	DG36207779	KWH >	1,689	1,307	1,468	1,542	1,964	1,906	1,453	1,099	0	0	0	14,581
			KW >	3	2	5	5	3	3	2	3	0	0	0	3
			Elec Revenue >	\$200.31	\$155.73	\$206.80	\$221.98	\$239.66	\$229.18	\$177.37	\$151.86	\$0.00	\$0.00	\$0.00	\$1,847.86
3212934	316023	2000395104	KWH >	0	0	0	0	0	0	0	0	1,254	855	845	2,954
			KW >	0	0	0	0	0	0	0	0	3	2	1	2
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$162.32	\$108.25	\$23.06	\$293.63
3212934	316023	DA14206400	KWH >	2,018	1,652	1,039	1,260	1,504	1,347	1,323	1,384	0	0	0	12,964
			KW >	3	3	2	3	4	2	2	2	0	0	0	3
			Elec Revenue >	\$227.00	\$191.46	\$131.35	\$172.61	\$205.67	\$171.06	\$165.53	\$174.13	\$0.00	\$0.00	\$0.00	\$1,633.51
3212936	333800	DD32261711	KWH >	4,960	3,680	3,360	3,520	4,080	6,240	2,240	2,720	3,440	4,160	3,200	45,840
			KW >	6	6	5	5	6	8	8	8	8	8	6	7
			Elec Revenue >	\$530.35	\$408.83	\$370.95	\$404.81	\$480.09	\$696.63	\$318.95	\$363.70	\$412.22	\$473.76	\$83.99	\$5,039.69



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3213037	333801	2000254329	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	4,400 11 \$542.16	3,560 15 \$513.01	2,280 11 \$142.98	10,240 12 \$1,198.15
3213037	333801	DG28727246	KWH > KW > Elec Revenue >	6,720 14 \$791.57	5,600 12 \$656.39	5,200 13 \$626.79	5,120 13 \$648.93	4,920 12 \$631.43	4,920 12 \$623.26	4,840 11 \$607.01	3,200 20 \$565.60	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	46,160 14 \$5,891.83
3213045	334214	2000522150	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	3,550 50 \$956.05	3,316 13 \$461.10	3,117 33 \$423.81	9,983 32 \$1,840.96
3213045	334214	DA05310580	KWH > KW > Elec Revenue >	4,826 16 \$652.71	3,919 17 \$572.40	4,206 24 \$681.30	3,689 18 \$586.58	4,804 25 \$789.01	4,364 13 \$592.40	3,342 11 \$465.92	2,796 12 \$427.83	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	36,142 18 \$5,481.89
3213046	334250	2000522149	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	11,081 41 \$538.19	11,081 41 \$538.19
3213046	334250	DG84489346	KWH > KW > Elec Revenue >	7,608 41 \$1,227.28	6,296 51 \$1,210.99	7,145 51 \$1,277.38	9,223 58 \$1,600.64	9,097 48 \$1,487.36	9,782 34 \$1,359.32	6,280 33 \$1,015.01	7,001 36 \$1,130.13	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	78,229 45 \$12,483.53
3213048	333689	2000255425	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	2,130 9 \$311.23	3,596 10 \$449.42	5,049 14 \$183.61	10,775 11 \$944.26
3213048	333689	DA14169293	KWH > KW > Elec Revenue >	7,902 18 \$948.22	5,057 14 \$632.63	4,460 13 \$571.11	4,477 13 \$591.31	3,362 10 \$458.81	2,068 9 \$325.02	1,093 6 \$195.77	1,208 7 \$210.57	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	31,242 11 \$4,190.26
3213049	334439	2000242217	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	1,656 8 \$266.06	814 17 \$297.38	5,293 15 \$196.76	7,763 13 \$760.20
3213049	334439	DG96834699	KWH > KW > Elec Revenue >	13,422 24 \$1,516.90	10,839 20 \$1,213.38	9,160 19 \$1,050.44	5,342 15 \$704.52	1,849 6 \$272.87	2,311 6 \$307.04	2,473 6 \$320.54	1,852 6 \$261.99	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	48,752 12 \$5,923.68
3213050	333370	2000205597	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	151,120 321 \$4,208.64	151,120 321 \$4,208.64
3213050	333370	DA04680717	KWH > KW > Elec Revenue >	222,720 408 \$25,045.58	141,200 327 \$16,396.52	125,520 304 \$14,753.29	107,680 304 \$13,818.12	72,640 304 \$10,820.21	44,640 146 \$6,134.32	34,880 64 \$4,082.20	32,480 109 \$4,426.16	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	818,640 226 \$99,864.21
3213056	332006	2000254285	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	75,120 160 \$2,100.38	75,120 160 \$2,100.38
3213056	332006	2000254627	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	71,200 148 \$1,950.86	71,200 148 \$1,950.86
3213056	332006	DA07642869	KWH > KW > Elec Revenue >	129,600 264 \$14,924.48	108,560 267 \$12,806.45	81,600 248 \$10,225.86	101,040 260 \$12,637.03	58,160 152 \$7,508.74	65,200 163 \$8,313.97	81,920 260 \$10,952.24	61,680 176 \$7,990.31	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	792,720 229 \$98,640.31



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3213056	332006	DG36046609	KWH > KW > Elec Revenue >	99,680 162 \$8,695.54	77,280 156 \$8,695.54	76,640 172 \$8,832.71	74,640 158 \$8,910.80	25,040 86 \$3,498.98	47,520 132 \$6,148.32	66,560 268 \$9,611.27	83,520 151 \$9,712.44	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	578,560 159 \$70,852.88
3213068	368680	2000522725	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	10,118 15 \$202.37	10,118 15 \$202.37
3213068	368680	DG45760153	KWH > KW > Elec Revenue >	15,523 19 \$1,630.16	12,515 18 \$1,330.52	12,100 18 \$1,294.69	12,770 18 \$1,422.36	12,883 19 \$1,490.25	13,764 18 \$1,540.86	12,632 18 \$1,417.96	10,451 17 \$1,202.68	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	116,240 18 \$12,872.81
3213069	369050	2000242240	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	556 2 \$90.61	577 2 \$90.94	640 2 \$34.54	1,773 2 \$216.09
3213069	369050	DG82711475	KWH > KW > Elec Revenue >	840 2 \$115.33	648 2 \$98.58	930 2 \$125.07	1,379 2 \$171.31	730 2 \$108.58	625 2 \$99.38	536 2 \$91.62	503 2 \$89.32	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	7,238 2 \$1,040.62
3213070	377960	DA31446933	KWH > KW > Elec Revenue >	430,543 694 \$47,201.33	443,648 682 \$47,113.37	377,057 668 \$41,162.90	434,228 703 \$48,949.07	285,073 460 \$33,108.42	288,136 569 \$34,341.54	308,280 550 \$35,723.56	314,464 535 \$36,110.07	326,193 554 \$35,739.71	330,562 634 \$36,147.41	444,110 703 \$9,308.89	4,301,424 614 \$443,274.94
3213071	382029	2000522343	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	43 0 \$20.19	39 0 \$12.92	41 0 \$0.80	123 0 \$33.91
3213071	382029	DG23734694	KWH > KW > Elec Revenue >	41 0 \$12.97	39 0 \$12.71	38 0 \$12.61	41 0 \$13.11	42 1 \$31.73	39 0 \$13.00	44 0 \$13.43	41 0 \$13.14	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	368 0 \$136.15
3213072	382027	2000255398	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	2,314 4 \$271.34	2,549 4 \$288.06	2,950 5 \$70.46	7,813 4 \$629.86
3213072	382027	DG23734707	KWH > KW > Elec Revenue >	2,732 4 \$305.52	2,352 4 \$268.37	2,657 4 \$302.18	2,471 5 \$300.43	2,127 5 \$276.93	2,403 4 \$288.68	2,289 4 \$281.95	1,732 4 \$222.65	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	21,410 4 \$2,574.01
3213075	400631	2000522345	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	1,321 5 \$193.16	1,788 4 \$220.23	1,130 2 \$27.51	4,239 4 \$440.90
3213075	400631	DA05495613	KWH > KW > Elec Revenue >	2,666 3 \$286.57	1,766 3 \$201.97	1,736 3 \$200.65	2,166 3 \$250.62	1,779 2 \$216.27	1,922 2 \$224.60	1,978 2 \$228.36	947 2 \$131.73	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	17,214 3 \$2,004.76
3213076	400630	2000522344	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	786 1 \$91.31	732 1 \$84.59	167 1 \$14.10	1,685 1 \$190.00
3213076	400630	DA05267609	KWH > KW > Elec Revenue >	388 1 \$61.59	340 1 \$55.41	731 1 \$86.63	707 1 \$88.57	744 1 \$94.94	782 1 \$95.75	760 1 \$93.26	695 1 \$87.71	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	5,958 1 \$764.71
3213077	400633	2000522346	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	402 1 \$58.45	432 0 \$54.54	446 0 \$9.01	1,280 0 \$122.00



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Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3213077	400633	DA07641108	KWH > KW > Elec Revenue >	505 0 \$61.79	415 0 \$53.16	408 0 \$52.69	438 0 \$59.93	462 0 \$61.40	450 0 \$60.51	471 0 \$61.57	455 0 \$59.72	417 0 \$56.20	0 0 \$0.00	0 0 \$0.00	4,021 0 \$526.97
3213078	401439	2000205594	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	880 20 \$348.11	880 1 \$15.99	1,760 11 \$364.10
3213078	401439	DA11042381	KWH > KW > Elec Revenue >	640 0 \$75.67	800 0 \$88.20	800 0 \$88.20	13,360 295 \$4,983.90	29,840 346 \$7,253.17	56,320 352 \$9,857.22	68,560 381 \$11,289.23	95,440 369 \$13,591.69	75,200 354 \$11,511.84	0 0 \$0.00	0 0 \$0.00	340,960 233 \$58,739.12
3213080	413689	2000242193	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	1 0 \$8.77	2 0 \$10.91	5 0 \$19.68
3213080	413689	DC36058397	KWH > KW > Elec Revenue >	1 0 \$9.97	0 0 \$9.71	0 0 \$8.70	0 0 \$8.70	3 1 \$22.54	1 0 \$9.17	0 0 \$8.70	0 0 \$8.70	0 0 \$16.30	0 0 \$0.00	0 0 \$0.00	5 0 \$102.49
3213084	424773	2000254625	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	6,600 12 \$740.43	0 0 \$0.00	77,100 71 \$2,446.31
3213084	424773	DC36058788	KWH > KW > Elec Revenue >	109,200 159 \$11,733.99	72,600 150 \$8,203.65	65,400 150 \$7,579.45	60,000 141 \$7,337.96	38,400 111 \$5,088.77	25,500 69 \$3,322.47	10,800 36 \$1,480.12	7,800 39 \$1,230.24	5,400 12 \$664.28	0 0 \$0.00	0 0 \$0.00	395,100 96 \$46,640.93
3213085	426054	2000396243	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	20 0 \$10.97	22 0 \$12.22	110 0 \$50.82
3213085	426054	DA16783069	KWH > KW > Elec Revenue >	38 0 \$14.29	30 0 \$12.45	26 0 \$11.70	31 0 \$12.20	23 0 \$17.61	22 0 \$11.31	20 0 \$10.98	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	190 0 \$90.54
3213086	429795	2000395103	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	4,082 7 \$465.53	3,895 6 \$421.22	12,096 6 \$971.06
3213086	429795	DA19955899	KWH > KW > Elec Revenue >	5,899 9 \$648.48	4,498 8 \$501.04	4,745 8 \$533.24	4,422 8 \$524.64	4,745 7 \$556.38	4,500 7 \$537.90	4,799 7 \$558.52	3,557 7 \$463.42	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	40,983 8 \$4,762.70
3213087	431769	2000254626	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	5,440 9 \$129.61	5,440 9 \$129.61
3213087	431769	DA12994657	KWH > KW > Elec Revenue >	28,160 36 \$2,965.92	22,000 36 \$2,372.21	20,400 36 \$2,233.48	11,840 25 \$1,426.82	14,880 28 \$1,786.97	14,640 24 \$1,723.46	9,360 18 \$1,121.68	39,680 124 \$5,290.15	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	171,760 38 \$20,169.59
3213088	434671	2000254292	KWH > KW > Elec Revenue >	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	0 0 \$0.00	1,680 45 \$728.34	1,440 4 \$54.02	3,120 25 \$782.36
3213088	434671	DA13873458	KWH > KW > Elec Revenue >	1,200 3 \$156.85	1,520 4 \$201.30	1,920 4 \$235.99	18,320 333 \$5,928.73	38,960 353 \$8,216.83	64,480 362 \$10,769.61	92,560 431 \$14,173.75	99,120 368 \$13,914.55	79,360 323 \$11,504.32	0 0 \$0.00	0 0 \$0.00	397,440 242 \$65,101.93



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3213089	434672	2000205596	0	0	0	0	0	0	0	0	0	1,640	2,840	2,920	7,400
		KWH >	0	0	0	0	0	0	0	0	0	5	5	5	5
		KW >	0	0	0	0	0	0	0	0	0	5	5	5	5
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$224.22	\$322.56	\$74.11	\$620.89
3213089	434672	DG52303331	720	3,560	4,320	3,640	3,880	3,160	3,680	3,480	2,680	0	0	0	29,120
		KWH >	720	3,560	4,320	3,640	3,880	3,160	3,680	3,480	2,680	0	0	0	29,120
		KW >	0	7	6	6	6	4	5	5	6	0	0	0	5
		Elec Revenue >	\$82.71	\$408.56	\$464.32	\$426.05	\$460.96	\$371.81	\$420.51	\$399.09	\$339.69	\$0.00	\$0.00	\$0.00	\$3,373.70
3213090	437607	2000205404	0	0	0	0	0	0	0	0	0	7,200	8,400	13,200	28,800
		KWH >	0	0	0	0	0	0	0	0	0	7,200	8,400	13,200	28,800
		KW >	0	0	0	0	0	0	0	0	0	12	27	32	24
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$741.32	\$937.37	\$251.66	\$1,930.35
3213090	437607	DA15527122	21,600	14,400	12,000	12,000	9,600	7,200	7,200	7,200	6,000	0	0	0	97,200
		KWH >	21,600	14,400	12,000	12,000	9,600	7,200	7,200	7,200	6,000	0	0	0	97,200
		KW >	36	36	36	24	24	12	12	12	0	0	0	0	21
		Elec Revenue >	\$2,187.38	\$1,527.23	\$1,321.73	\$1,300.19	\$1,112.35	\$796.79	\$785.12	\$779.81	\$580.45	\$0.00	\$0.00	\$0.00	\$10,391.05
3213092	603812	2000242707	0	0	0	0	0	0	0	0	0	226	229	264	719
		KWH >	0	0	0	0	0	0	0	0	0	226	229	264	719
		KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$32.87	\$33.38	\$5.95	\$72.20
3213092	603812	DA12999945	500	655	613	611	629	467	236	241	202	0	0	0	4,154
		KWH >	500	655	613	611	629	467	236	241	202	0	0	0	4,154
		KW >	1	1	1	1	1	1	0	0	0	0	0	0	1
		Elec Revenue >	\$66.39	\$82.22	\$78.70	\$83.01	\$81.78	\$70.10	\$35.70	\$35.50	\$31.85	\$0.00	\$0.00	\$0.00	\$565.25
3213093	1052	DA31423545	3,042,158	2,529,413	2,477,945	2,265,068	1,041,974	702,407	1,585,138	2,733,717	3,343,913	3,456,104	3,414,873	2,139,123	28,731,833
		KWH >	3,042,158	2,529,413	2,477,945	2,265,068	1,041,974	702,407	1,585,138	2,733,717	3,343,913	3,456,104	3,414,873	2,139,123	28,731,833
		KW >	6,217	6,229	6,208	3,106	3,075	3,192	3,045	6,039	5,996	5,970	6,086	6,203	5,114
		Elec Revenue >	\$24,796.58	\$21,326.81	\$21,086.52	\$14,737.14	\$9,859.44	\$8,727.48	\$11,948.02	\$22,093.08	\$24,490.18	\$24,898.70	\$24,938.88	\$12,944.27	\$221,847.10
3238432	614387	2000205600	0	0	0	0	0	0	0	0	0	320	680	1,240	2,240
		KWH >	0	0	0	0	0	0	0	0	0	320	680	1,240	2,240
		KW >	0	0	0	0	0	0	0	0	0	1	2	3	2
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$60.12	\$99.97	\$50.29	\$210.38
3238432	614387	DG71214283	1,840	1,040	960	1,040	600	320	280	280	240	0	0	0	6,600
		KWH >	1,840	1,040	960	1,040	600	320	280	280	240	0	0	0	6,600
		KW >	4	4	3	3	2	2	1	0	0	0	0	0	2
		Elec Revenue >	\$223.79	\$149.55	\$137.55	\$150.39	\$91.43	\$64.66	\$50.22	\$44.94	\$41.20	\$0.00	\$0.00	\$0.00	\$953.73
3296948	618372	DA30278151	6,618	6,733	5,673	23,410	118,521	205,431	195,039	99,811	80,199	194,088	27,853	7,804	971,180
		KWH >	6,618	6,733	5,673	23,410	118,521	205,431	195,039	99,811	80,199	194,088	27,853	7,804	971,180
		KW >	13	12	12	672	1,004	1,017	996	984	970	1,019	1,013	16	644
		Elec Revenue >	\$744.31	\$723.26	\$634.72	\$10,609.36	\$23,696.52	\$31,901.06	\$30,367.01	\$21,464.50	\$19,521.53	\$29,381.02	\$15,132.04	\$209.79	\$184,385.12
3420372	619310	2000205595	0	0	0	0	0	0	0	0	0	2,720	3,760	4,160	10,640
		KWH >	0	0	0	0	0	0	0	0	0	2,720	3,760	4,160	10,640
		KW >	0	0	0	0	0	0	0	0	0	6	7	7	7
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$329.70	\$426.61	\$101.07	\$857.38
3420372	619310	DA20957153	6,400	4,080	3,040	2,960	2,800	2,560	1,920	2,000	2,320	0	0	0	28,080
		KWH >	6,400	4,080	3,040	2,960	2,800	2,560	1,920	2,000	2,320	0	0	0	28,080
		KW >	8	7	5	5	6	7	4	4	5	0	0	0	6
		Elec Revenue >	\$689.00	\$453.63	\$343.21	\$353.07	\$357.66	\$344.82	\$239.88	\$256.01	\$295.99	\$0.00	\$0.00	\$0.00	\$3,333.27
4032411	101781	DA31846800	89,703	70,944	55,250	63,878	26,053	6,517	3,900	2,813	2,899	6,405	45,882	83,766	458,010
		KWH >	89,703	70,944	55,250	63,878	26,053	6,517	3,900	2,813	2,899	6,405	45,882	83,766	458,010
		KW >	136	136	132	129	122	122	120	5	5	121	128	132	107
		Elec Revenue >	\$8,967.62	\$7,109.30	\$5,735.80	\$6,725.99	\$3,392.15	\$1,546.36	\$1,279.67	\$323.85	\$331.78	\$1,487.16	\$4,828.07	\$1,053.70	\$42,781.45
4065032	674142	DP18070840	147,696	0	0	0	0	0	0	0	0	0	0	0	147,696
		KWH >	147,696	0	0	0	0	0	0	0	0	0	0	0	147,696
		KW >	289	0	0	0	0	0	0	0	0	0	0	0	289
		Elec Revenue >	\$13,284.11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13,284.11
4065032	674142	DP23031840	0	103,930	88,104	78,151	635,934	1,762,798	1,355,813	1,404,324	2,038,233	1,724,212	2,057,055	1,846,644	13,095,198
		KWH >	0	103,930	88,104	78,151	635,934	1,762,798	1,355,813	1,404,324	2,038,233	1,724,212	2,057,055	1,846,644	13,095,198
		KW >	0	257	201	199	2,703	2,974	2,837	2,916	3,021	2,996	3,033	3,016	2,196
		Elec Revenue >	\$0.00	\$9,766.64	\$8,440.91	\$8,122.02	\$61,520.86	\$155,054.77	\$119,080.91	\$121,980.18	\$172,924.81	\$138,972.28	\$157,898.06	\$10,362.01	\$964,123.45

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
Total KWH			4,416,790	3,669,343	3,456,677	3,330,493	2,497,042	3,331,954	3,863,345	5,004,265	6,208,115	5,752,924	5,922,206	4,970,600	\$2,423,754
Combined Average KW			8,593	8,472	8,354	6,531	9,152	9,148	9,046	12,014	11,914	10,809	11,086	11,043	11,299
USBC Charge			\$3,975.12	\$3,302.42	\$3,111.01	\$2,997.47	\$2,247.35	\$2,998.78	\$3,477.00	\$4,503.85	\$5,587.33	\$5,177.63	\$5,329.99	\$4,473.56	\$47,181.51
Total Elec Revenue			173,340.27	145,542.89	130,911.07	154,295.17	191,787.63	283,595.85	257,083.03	263,678.44	311,344.51	236,655.23	245,519.35	\$46,590.56	\$2,440,344.00



# Thompson River Lumber Company of Montana, Inc.

241 Airport Road, PO Box 279, Thompson Falls, MT 59873  
Phone: (406) 827-4311 Fax: (406) 827-5506

2/17/2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

## **RE: 2024 USB Annual Summary Report – Thompson River Lumber**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Thompson River Lumber's (TRL) official 2024 USB Annual Summary Report.

### **2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of TRL's 2024 USBC account activities.**
- **At year-end 2024, TRL had a credit balance of \$5,944.46. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.**
- **Attached is the Form B – USB Large USB Customer Credit Request form that we submitted to NorthWestern Energy in 2024.**

If you have any questions, please contact me at 406-827-3322

Sincerely,

*Dan Claridge*

Dan Claridge  
President

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





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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	11/27/2024
NAME OF BUSINESS:	Thompson River Lbr Co, of MT, Inc
PROJECT CITY LOCATION:	Thompson Falls, MT
MAILING ADDRESS:	PO Box 279
MAILING CITY, STATE, ZIP:	Thompson Falls, MT 59873

CONTACT PERSON:	Dan Claridge
PHONE NUMBER:	406-827-3322
CELL PHONE:	406-827-2963
FAX NUMBER:	406-827-5506
E-MAIL ADDRESS:	dan@thompsonriver.net

A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S): \$	
DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S) (if more space is needed, please attach):	
ESTIMATED ANNUAL KWH SAVINGS:	
ESTIMATED KW DEMAND SAVINGS:	

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)


B. AMOUNT OF CREDIT REQUESTED FOR DONATION:	\$ 4,308.32 (2023 carryover)
NAME OF ORGANIZATION TO RECEIVE DONATION:	Energy Share

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

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

LARGE CUSTOMER:

Signature:

 President

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

## Self-Directed USBC Progress Report for 2024



2100 9<sup>TH</sup> Avenue

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February 26, 2025

Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
Jon Schafer, (406) 444-6908, Email: Jon.Schafer@mt.gov.

**RE: Self-Directed USBC Progress Report for 2024 – United Materials**

Dear Mr. Jon Schafer:

Per the Montana Code Annotated (MCA) 69-8-402 & 69-8-214 and administrative rules, a NorthWestern Energy Large Customer claiming Universal Systems Benefit Program (USB) credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the DOR and to NorthWestern Energy by March 1<sup>st</sup> for the previous calendar year. **This letter and attachments are our official USB Annual Report for 2024.**

Along with our Large Customer 2024 USB Annual Report Summary below, I am attaching the following two documents:

- *Self-Directed USBC Progress Report for 2024 we received from NorthWestern Energy showing our 2024 USB activities including payments received and if we submitted new USB credit requests for projects.*
- *Below is a summary of the USB credit reimbursement payments we received in 2024 and listing of historical USB projects requested.*
- *At year-end 2024, we had a 2024 USB credit balance of \$146.05 carried over into 2025, because we have a Request Balance.*

<b>UNITED MATERIALS INCORPORATED</b> <b>LARGE CUSTOMER 2024 USB ANNUAL REPORT SUMMARY</b> <b>HISTORICAL SELF-DIRECT USB CREDIT REQUEST</b>		
2024 USB CREDIT PAYMENTS		<b>\$2,109.58</b>
2023 USB CREDIT PAYMENTS		<b>\$190.83</b>
TOTAL USB CREDIT PAYMENTS RECEIVED IN 2024 REPORTING YEAR		<b>\$2,300.41</b>
<b>TOTAL USB PAYMENTS ISSUED IN 2024</b>		
<b>PROJECT(S) RESULTING IN USB CREDIT REIMBURSEMENT IN 2024</b>		
REQUEST BALANCE REMAINING AT YEAR-END 2024		<b>\$44,089.97</b>
DESCRIPTION OF ENERGY EFFICIENCY PROJECT PREVIOUSLY SUBMITTED	DATE CLAIM SUBMITTED	INDIVIDUAL CLAIM AMOUNT
Main office lighting upgrades. Replace 54 fluorescent lights with LED lights. Savings estimate was 3.565 kW. (Form B submitted in 2018.)	11/12/2018	\$6,772.05
Construct new concrete batch plant to replace existing plant. Upgrade includes new VFD motor drives to increase efficiency with energy savings to be determined.	11/30/2020	\$54,000.00
TOTAL AMOUNT OF ORIGINAL REQUESTS		<b>\$60,772.05</b>

If you have any questions, please contact me at (406) 453-7692.

Rob Skawinski

Vice President

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





# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

## UNITED MATERIALS INCORPORATED

Account Summary			Payment Requests Made			Payments Issued		
			Submitted By	Date	Amount	Date	Amount	
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:				04/19/2024	\$451.33	
Reservations Made YTD:	\$0.00					07/09/2024	\$655.87	
						10/08/2024	\$695.95	
						12/17/2024	\$497.26	
2023 Carryover Payment Request:	\$46,390.38	Total Payment Requests:						
Payment Requests Made YTD:	\$0.00	Current Request Balance:						
2023 Carryover USBC Credit:	\$190.83	Total USBC Credit:						
USBC Credit YTD:	\$2,255.63	Payments Issued YTD:						
Average Monthly Credit Earned:	\$187.97	USBC Credit Balance:						
		Payment Pending:						

Account Detail		Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
357185	136156	DA14691052	KWH >	43,360	31,680	25,120	33,440	13,280	800	640	800	800	800	1,440	1,600	1,280	154,240
			KW >	388	331	340	331	337	6	6	3	3	3	33	36	6	152
			Elec Revenue >	\$9,511.49	\$6,994.74	\$6,505.45	\$7,105.09	\$5,550.08	\$166.35	\$151.05	\$123.98	\$123.86	\$123.86	\$568.78	\$611.05	\$82.26	\$37,494.18
366981	140606	DG63128377	KWH >	2,868	2,876	2,195	2,070	1,164	790	2,339	2,339	2,595	3,319	2,784	2,251	3,281	28,532
			KW >	12	12	13	10	13	13	14	14	14	14	12	11	14	13
			Elec Revenue >	\$437.18	\$419.75	\$365.52	\$335.77	\$292.16	\$252.06	\$417.25	\$438.86	\$438.86	\$505.47	\$416.33	\$315.36	\$184.93	\$4,380.64
366982	140607	DG81218593	KWH >	2,400	2,240	1,920	1,960	2,160	1,880	1,920	1,920	1,720	1,720	1,840	1,600	2,280	23,640
			KW >	10	10	10	10	9	8	8	8	8	8	8	10	13	9
			Elec Revenue >	\$355.66	\$329.62	\$306.96	\$320.12	\$331.93	\$295.01	\$300.81	\$280.58	\$280.58	\$270.44	\$281.82	\$244.32	\$174.40	\$3,491.67
366982	140607	DG99701036	KWH >	2,160	3,120	3,120	2,160	1,920	2,280	3,120	3,120	2,640	2,280	2,160	1,920	4,440	31,320
			KW >	10	10	10	10	8	7	10	10	7	6	6	12	10	9
			Elec Revenue >	\$345.21	\$416.03	\$416.03	\$343.50	\$298.84	\$318.05	\$438.98	\$438.98	\$346.09	\$297.33	\$274.45	\$291.82	\$140.86	\$3,927.19
1362170	392751	DB08049094	KWH >	49,362	58,200	52,852	139,942	287,792	254,432	241,270	259,552	246,658	235,838	235,838	299,205	147,733	2,252,836
			KW >	740	650	630	1,050	1,300	1,350	1,460	1,410	1,410	1,400	1,230	1,340	1,230	1,149
			Elec Revenue >	\$7,650.83	\$7,712.09	\$7,244.83	\$15,323.32	\$27,980.70	\$26,984.92	\$26,086.52	\$26,997.13	\$25,897.74	\$24,192.48	\$24,192.48	\$27,677.97	\$3,681.04	\$227,429.57
1699245	419608	DA30906688	KWH >	1,812	2,171	1,978	1,224	911	561	622	622	596	659	653	1,211	3,262	15,660
			KW >	16	16	17	13	15	9	10	10	14	8	8	15	12	13
			Elec Revenue >	\$385.15	\$406.53	\$395.88	\$293.48	\$285.94	\$183.26	\$203.31	\$243.10	\$243.10	\$181.41	\$168.43	\$262.67	\$166.80	\$3,175.96
			Total KWH	101,962	100,287	87,185	180,796	287,227	260,743	249,911	267,903	255,436	244,715	307,787	162,276	2,506,228	
			Combined Average KW	1,176	1,029	1,020	1,424	1,682	1,393	1,508	1,456	1,439	1,297	1,424	1,285	1,344	
			USBC Charge	\$91.76	\$90.26	\$78.48	\$162.71	\$258.50	\$234.66	\$224.93	\$241.13	\$229.89	\$220.25	\$277.01	\$146.05	\$2,255.63	
			Total Elec Revenue	\$18,685.52	\$16,278.76	\$15,234.67	\$23,721.28	\$34,739.65	\$28,199.65	\$27,597.92	\$28,429.74	\$27,276.25	\$25,902.29	\$29,403.19	\$4,430.29	\$279,899.21	



Rec'd MT DOR  
FEB 20 2025

February 13, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – United Properties, Inc.**

Dear Mr. Schafer:

Please accept this letter and the attached document as United Properties' official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of United Properties' 2024 USBC account activities.
- United Properties did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024 as we no longer qualify.
- United Properties has a current request balance of \$0. (shown on the attached USBC Progress Report) and no longer qualify for USB credits.

If you have any questions, please contact me at (406) 255-7103.

Sincerely,

A handwritten signature in blue ink that reads 'Jerome L. Ries'.

Jerome L. Ries



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



# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

## UNITED PROPERTIES, INC.

### Account Summary

2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$757,512.85
Reservations Made YTD:	\$0.00		

2023 Carryover Payment Request:	\$1,429.58	Total Payment Requests:	\$1,429.58
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$0.00

2023 Carryover USBC Credit:	\$586.41	Total USBC Credit:	\$6,656.20
USBC Credit YTD:	\$6,069.79	Payments Issued YTD:	\$1,429.58

Average Monthly Credit Earned:	\$505.82	USBC Credit Balance:	\$5,226.62
		Payment Pending:	\$0.00

### Payment Requests Made

Submitted By	Date	Amount
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### Payments Issued

Date	Amount
------	--------

04/19/2024	\$1,429.58
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### Account Detail

Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100601	1605	DA31846670	KWH > 384,993	443,134	386,769	333,926	256,016	268,221	260,788	289,668	278,422	250,084	251,483	312,604	3,716,108
			KW > 720	847	742	747	715	705	732	808	791	721	679	754	747
		Elec Revenue >	\$44,642.10	\$49,159.88	\$42,942.68	\$39,004.36	\$33,560.46	\$34,601.26	\$34,106.28	\$37,257.79	\$35,993.75	\$32,051.60	\$29,987.28	\$9,843.96	\$423,151.40
712486	322827	2000252969	KWH > 0	0	0	0	74,560	72,640	75,840	77,280	85,600	0	0	116,320	502,240
			KW > 0	0	0	0	227	241	278	294	303	0	0	237	263
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$10,020.45	\$10,021.29	\$10,683.78	\$10,941.35	\$11,836.75	\$0.00	\$0.00	\$3,113.78	\$56,617.40
712486	322827	DG28214383	KWH > 125,760	102,240	94,560	88,320	0	0	0	0	0	0	0	0	410,880
			KW > 257	230	232	214	0	0	0	0	0	0	0	0	233
		Elec Revenue >	\$14,653.16	\$11,792.18	\$11,146.66	\$10,765.80	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$48,357.80
712487	322828	2000179827	KWH > 0	0	0	0	0	0	0	0	0	0	0	0	410,880
			KW > 0	0	0	0	0	0	0	0	0	0	0	0	233
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$48,357.80
712487	322828	DA05500116	KWH > 161,280	105,600	96,640	83,920	68,480	67,120	66,240	92,000	45,600	0	0	0	786,880
			KW > 556	546	546	548	384	384	302	290	226	0	0	0	420
		Elec Revenue >	\$21,850.32	\$16,088.15	\$15,311.39	\$14,592.99	\$11,425.97	\$11,295.87	\$10,089.21	\$12,267.23	\$7,129.72	\$0.00	\$0.00	\$0.00	\$120,050.85
712488	322829	2000179823	KWH > 0	0	0	0	0	0	0	0	0	0	0	0	92,960
			KW > 0	0	0	0	0	0	0	0	0	0	0	0	244
		Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,178.44	\$3,178.44
712488	322829	DA05500110	KWH > 119,520	83,080	81,320	70,360	61,720	60,520	51,800	62,200	65,440	0	0	0	655,960
			KW > 244	284	248	236	236	236	210	207	203	0	0	0	234
		Elec Revenue >	\$13,920.86	\$10,815.45	\$10,201.60	\$9,414.72	\$8,913.81	\$8,799.02	\$7,566.27	\$8,439.29	\$8,690.70	\$0.00	\$0.00	\$0.00	\$86,761.72



Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
2087487	1517	2000483954	KWH >	13,840	12,100	11,920	9,860	7,960	6,500	5,560	5,380	6,060	5,400	6,420	9,120	100,120
			KW >	41	38	31	29	28	26	20	21	20	19	24	28	27
			Elec Revenue >	\$1,800.52	\$1,546.63	\$1,440.29	\$1,286.13	\$1,132.10	\$962.53	\$797.32	\$784.32	\$834.31	\$738.29	\$865.33	\$374.97	\$12,562.74
Total KWH				805,393	746,154	671,209	586,386	468,736	475,001	460,228	526,528	481,122	255,484	257,903	635,964	6,370,108
Combined Average KW				1,818	1,945	1,799	1,774	1,590	1,592	1,542	1,620	1,543	740	703	1,794	2,699
USBC Charge				\$724.85	\$671.54	\$604.09	\$527.74	\$421.85	\$427.51	\$414.21	\$473.87	\$433.01	\$229.94	\$232.11	\$572.36	\$5,733.08
Total Elec Revenue				\$96,866.96	\$89,402.29	\$81,042.62	\$75,064.00	\$65,052.79	\$65,679.97	\$63,242.86	\$69,689.98	\$64,485.23	\$32,789.89	\$30,852.61	\$23,343.65	\$757,512.85



February 17<sup>th</sup>, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [JoDunn@mt.gov](mailto:JoDunn@mt.gov)

**RE: 2024 USB Annual Report – University of Montana**

Dear Mr. Schafer:

Please accept this letter and the attached document as the University of Montana's (UM) official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of UM's 2024 USBC account activities.**
- **UM did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.**
- **UM has a current request balance of \$2,349,575.33 (shown on the attached USBC Progress Report) for a past project that was submitted in 2013 to NorthWestern Energy, and to the DOR in our 2013 Annual Summary Report.**
- **At year-end 2024, UM had a credit balance of \$3,631.32 (carried over into 2025).**

If you have any questions, please contact me at 406-214-8966.

Sincerely,

Tim Gauthier  
Associate Director of Engineering and Utilities

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



## Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

### UNIVERSITY OF MONTANA

#### Account Summary

2023 Carryover Reservation: \$0.00 YTD Elec Revenue: \$4,542,123.32

Reservations Made YTD: \$0.00

2023 Carryover Payment Request: \$2,392,913.37 Total Payment Requests: \$2,392,913.37

Payment Requests Made YTD: \$0.00 Current Request Balance: \$2,349,575.33

2023 Carryover USBC Credit: \$3,905.44 Total USBC Credit: \$46,959.36

USBC Credit YTD: \$43,053.92 Payments Issued YTD: \$43,338.04

Average Monthly Credit Earned: \$3,587.83 USBC Credit Balance: \$3,621.32

Payment Pending: \$3,621.32

#### Payment Requests Made

Submitted By Date Amount

#### Payments Issued

Date Amount

04/19/2024 \$14,776.52  
07/09/2024 \$10,405.46  
10/08/2024 \$10,696.60  
12/17/2024 \$7,459.46

#### Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100610	1614	DA06183515	KWH >	590,638	650,620	598,552	620,842	652,615	547,622	604,376	657,570	704,958	568,439	595,625	619,074	7,410,931
			KW >	1,089	1,066	1,050	1,115	1,160	1,092	1,296	1,273	1,270	1,267	1,179	1,163	1,168
			Elec Revenue >	\$59,913.19	\$63,630.84	\$59,053.75	\$64,811.48	\$70,273.63	\$59,850.34	\$65,755.37	\$70,027.54	\$74,370.96	\$58,298.66	\$58,775.31	\$9,164.29	\$713,925.36
100625	1629	DA29137691	KWH >	2,820,260	2,955,178	2,806,169	2,754,536	2,207,540	0	300,668	2,189,018	0	0	5,821	172,081	16,211,271
			KW >	5,270	5,357	5,322	5,063	5,184	0	4,571	5,521	0	0	1,054	0	4,149
			Elec Revenue >	296,335.32	292,731.54	279,712.58	274,160.80	246,968.42	\$27.70	\$62,241.10	242,550.77	\$27.70	\$27.70	\$8,316.98	\$154.87	\$1,703,255.48
533793	222611	2000089029	KWH >	6,400	6,400	6,600	6,480	8,480	10,400	11,280	9,880	5,320	4,160	3,760	3,800	82,960
			KW >	22	23	26	26	33	35	37	39	22	17	13	14	26
			Elec Revenue >	\$873.46	\$857.05	\$915.44	\$952.64	\$1,245.72	\$1,458.27	\$1,539.89	\$1,427.72	\$790.15	\$593.92	\$504.18	\$190.99	\$11,349.43
534357	222713	2000089882	KWH >	3,000	2,520	2,660	2,260	2,220	2,540	2,880	2,580	2,420	2,060	2,200	2,280	29,620
			KW >	11	10	10	11	10	10	11	12	10	10	10	10	10
			Elec Revenue >	\$420.07	\$355.93	\$373.90	\$364.41	\$359.21	\$382.23	\$428.68	\$403.13	\$371.46	\$318.61	\$330.77	\$130.80	\$4,239.20
535331	222891	2000088917	KWH >	24,720	20,760	19,440	15,480	16,160	19,160	30,840	29,920	25,640	0	0	21,960	224,080
			KW >	85	57	54	46	46	53	77	77	66	0	0	52	61
			Elec Revenue >	\$3,302.89	\$2,538.45	\$2,382.95	\$2,053.38	\$2,148.67	\$2,524.87	\$3,876.06	\$3,784.47	\$3,241.93	\$0.00	\$0.00	\$682.82	\$26,536.49
535332	222892	2000088918	KWH >	29,640	21,640	19,760	17,840	18,240	22,320	32,040	30,840	28,320	0	0	20,560	241,200
			KW >	81	61	50	51	54	60	75	74	66	0	0	50	62
			Elec Revenue >	\$3,691.17	\$2,667.44	\$2,366.57	\$2,330.53	\$2,441.94	\$2,908.28	\$3,974.33	\$3,830.73	\$3,490.32	\$0.00	\$0.00	\$654.19	\$28,355.50
578371	244994	2000148668	KWH >	44,928	53,952	54,336	49,728	51,264	37,056	35,328	39,168	38,976	0	0	44,352	449,088
			KW >	102	130	133	134	130	77	66	67	118	0	0	132	109
			Elec Revenue >	\$5,497.51	\$6,343.02	\$6,408.00	\$6,091.93	\$6,562.42	\$4,534.12	\$4,213.39	\$4,519.80	\$5,149.09	\$0.00	\$0.00	\$1,716.44	\$51,035.72

# Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
650489	286796	2000089765	KWH >	1,380	1,380	1,500	1,100	1,000	1,420	1,540	1,300	1,500	1,120	1,200	1,380	15,820
			KW >	4	7	6	7	4	6	4	5	5	4	5	6	5
			Elec Revenue >	\$185.52	\$218.57	\$221.89	\$201.86	\$159.62	\$220.83	\$209.31	\$198.59	\$223.60	\$167.13	\$182.92	\$80.83	\$2,270.67
692547	308805	2000148659	KWH >	2,400	3,264	2,784	1,344	1,248	1,248	1,056	768	576	576	576	1,440	17,280
			KW >	5	5	6	4	4	5	5	5	7	3	3	6	5
			Elec Revenue >	\$297.02	\$364.66	\$336.49	\$187.30	\$181.56	\$196.26	\$173.96	\$155.70	\$151.25	\$109.31	\$103.93	\$77.97	\$2,335.41
701825	314718	2000148662	KWH >	13,240	20,680	21,600	17,680	18,840	12,720	11,600	13,880	19,000	0	0	21,880	171,120
			KW >	47	52	44	41	44	24	28	33	46	0	0	51	41
			Elec Revenue >	\$1,879.67	\$2,461.05	\$2,446.50	\$2,077.95	\$2,378.70	\$1,533.71	\$1,481.45	\$1,729.72	\$2,373.90	\$0.00	\$0.00	\$666.02	\$19,028.67
710201	321192	2000399805	KWH >	0	0	0	0	0	0	0	0	23,040	0	0	24,880	47,920
			KW >	0	0	0	0	0	0	0	0	86	0	0	147	117
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,251.95	\$0.00	\$0.00	\$1,897.00	\$5,148.95
710201	321192	DG28611521	KWH >	20,560	22,800	22,880	18,880	25,280	19,040	24,080	23,040	0	0	0	0	176,560
			KW >	122	133	140	134	137	60	68	65	0	0	0	0	107
			Elec Revenue >	\$3,433.76	\$3,678.45	\$3,766.49	\$3,459.44	\$4,170.80	\$2,600.58	\$3,142.25	\$2,988.34	\$0.00	\$0.00	\$0.00	\$0.00	\$27,240.11
710201	321192	DG28727355	KWH >	12,960	10,400	10,240	8,080	8,800	2,240	3,760	4,160	4,400	4,240	6,000	7,040	82,320
			KW >	33	25	26	34	24	9	20	23	20	22	27	27	24
			Elec Revenue >	\$1,591.96	\$1,234.74	\$1,231.02	\$1,194.29	\$1,164.80	\$344.64	\$625.45	\$690.59	\$682.57	\$661.36	\$863.36	\$351.05	\$10,635.83
710214	321203		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$393.85	\$351.53	\$351.53	\$351.53	\$354.43	\$354.43	\$354.43	\$353.65	\$353.65	\$0.00	\$0.00	\$0.00	\$3,219.03
710214	321203	DG97062770	KWH >	47,480	56,520	55,760	40,600	38,600	35,400	37,560	46,960	54,440	55,640	51,720	50,960	571,640
			KW >	100	149	122	114	117	122	110	140	143	190	132	125	130
			Elec Revenue >	\$5,737.18	\$6,863.11	\$6,388.89	\$4,978.26	\$5,128.79	\$4,946.24	\$5,000.80	\$6,190.65	\$6,904.66	\$7,604.57	\$6,155.88	\$1,632.53	\$67,531.56
716833	326576	2000177514	KWH >	15,360	19,920	19,280	14,560	17,280	9,280	9,120	9,520	15,120	0	0	16,320	145,760
			KW >	75	86	89	71	84	55	41	43	85	0	0	87	72
			Elec Revenue >	\$2,407.09	\$2,834.67	\$2,810.60	\$2,227.31	\$2,730.29	\$1,605.10	\$1,402.04	\$1,444.88	\$2,506.38	\$0.00	\$0.00	\$1,119.79	\$21,088.15
716834	326577		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$11.54	\$10.88	\$10.88	\$10.95	\$11.02	\$11.02	\$10.99	\$10.98	\$10.98	\$0.00	\$0.00	\$0.00	\$99.24
716834	326577	2000088855	KWH >	13,120	16,880	16,880	14,880	13,600	10,400	7,360	8,160	10,480	0	0	12,720	124,480
			KW >	64	77	68	63	65	57	52	35	41	0	0	72	59
			Elec Revenue >	\$2,056.48	\$2,454.53	\$2,336.93	\$2,162.97	\$2,139.01	\$1,729.48	\$1,374.58	\$1,224.78	\$1,511.03	\$0.00	\$0.00	\$931.01	\$17,920.80
717367	326932	2000078449	KWH >	207	178	174	143	206	861	1,590	2,420	1,591	915	179	219	8,683
			KW >	0	0	0	0	15	18	15	21	16	15	0	1	8
			Elec Revenue >	\$32.04	\$28.94	\$28.60	\$27.06	\$229.79	\$329.44	\$353.53	\$504.15	\$371.10	\$289.77	\$35.57	\$19.47	\$2,249.46
717372	326937		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106.50
717372	326937	2000121905	KWH >	480	320	320	1,920	160	8,960	19,520	15,200	12,640	0	320	480	60,320
			KW >	0	0	0	33	32	106	106	106	106	0	0	0	44
			Elec Revenue >	\$50.74	\$35.52	\$35.52	\$536.59	\$350.80	\$1,997.70	\$3,010.78	\$2,587.29	\$2,338.28	\$0.00	\$34.98	\$7.13	\$10,985.33
717373	326938	2000149036	KWH >	1,440	1,800	1,720	1,600	1,360	1,480	1,240	2,280	2,600	2,680	2,040	1,680	21,920
			KW >	4	4	6	5	4	5	6	13	13	13	13	4	8
			Elec Revenue >	\$187.88	\$227.09	\$243.47	\$230.77	\$198.11	\$218.20	\$200.95	\$397.20	\$420.43	\$406.29	\$355.96	\$58.29	\$3,144.64

# Self-Directed USBC Progress Report for 2024

Prepared by Paul Babb on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
717450	327000	DA32100986	KWH >	0	0	0	0	0	3,276,727	2,315,242	601,733	2,927,921	3,003,452	3,034,215	2,706,137	17,865,427
			KW >	0	0	0	0	5,124	4,916	0	0	0	0	0	5,495	1,942
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	346,032.70	218,596.73	\$55,462.34	269,762.43	275,905.07	254,835.00	\$43,102.88	\$1,463,697.15
718301	327614		KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$156.57	\$141.95	\$141.95	\$142.16	\$143.86	\$143.86	\$143.80	\$143.33	\$143.33	\$0.00	\$0.00	\$0.00	\$1,300.81
718301	327614	DA29137685	KWH >	258,448	276,918	262,012	266,109	264,714	239,732	236,253	256,941	276,764	275,873	274,054	255,608	3,143,426
			KW >	562	562	553	544	518	488	488	514	583	566	531	531	537
			Elec Revenue >	\$27,892.43	\$27,899.99	\$26,556.95	\$26,841.18	\$28,872.28	\$26,289.87	\$25,961.18	\$27,502.40	\$29,839.24	\$29,631.36	\$26,972.03	\$4,162.53	\$308,421.44
719003	328127	2000090194	KWH >	9,999	10,592	9,743	9,948	10,943	10,201	9,920	9,066	10,706	0	0	9,860	100,978
			KW >	13	15	15	14	14	16	18	15	15	0	0	14	15
			Elec Revenue >	\$1,091.63	\$1,122.50	\$1,050.17	\$1,094.17	\$1,243.45	\$1,195.02	\$1,176.81	\$1,052.76	\$1,207.69	\$0.00	\$0.00	\$190.98	\$10,425.18
763520	315583	2000148472	KWH >	21,312	26,880	28,992	24,000	25,152	21,120	19,968	23,616	23,424	0	0	28,992	243,456
			KW >	48	62	57	54	57	44	40	44	64	0	0	61	53
			Elec Revenue >	\$2,619.63	\$3,127.44	\$3,252.10	\$2,800.28	\$3,147.12	\$2,598.45	\$2,432.20	\$2,780.10	\$3,012.76	\$0.00	\$0.00	\$807.13	\$26,577.21
Total KWH				3,937,972	4,179,602	3,961,402	3,888,010	3,383,702	4,289,927	3,717,221	3,978,020	4,189,836	3,919,155	3,977,710	4,023,703	47,446,260
Combined Average KW				7,737	7,881	7,777	7,564	12,860	7,258	7,134	8,125	2,782	2,107	2,967	8,048	8,753
USBC Charge				\$3,544.17	\$3,761.65	\$3,565.26	\$3,499.20	\$3,045.33	\$3,860.93	\$3,345.51	\$3,580.21	\$3,770.88	\$3,527.25	\$3,579.94	\$3,621.32	\$42,701.65
Total Elec Revenue				420,058.60	422,179.89	402,423.17	399,289.24	382,710.94	464,033.34	407,680.06	431,961.61	412,506.84	374,013.75	357,466.87	\$67,799.01	\$4,542,123.32





**DEPARTMENT OF THE AIR FORCE  
HEADQUARTERS 341st MISSILE WING (AFGSC)**

18 February 2025

MEMORANDUM FOR: Montana Department of Revenue – USB Reports  
Attention: Jon Schafer  
P.O. Box 5805  
Helena, MT 59604-5805

FROM: 341 CES/CENPE  
39 78<sup>th</sup> St. N  
Malmstrom AFB, MT 59402-7536

SUBJECT: Malmstrom AFB Universal System Benefits (USB) Progress Report for 2024

References: (a) Montana Code Annotated (MCA) 69-8-402, *USB Programs*  
(b) MCA 69-8-214, *Electricity Utility Industry Generation Reintegration*  
(c) Montana Administrative Rule (MAR) 42-29-103, *Annual Reporting and Penalties*

1. Per the MCA 69-8-402, MCA 69-8-214, MAR 42-29-103 and administrative rules, a NorthWestern Energy Large Customer claiming USB credits for a calendar year shall submit an annual summary report of its USB programs, activities, and expenditures to the Montana Department of Revenue (MDOR) and to NorthWestern Energy by 1 March for the previous calendar year. This letter and two attachments are our official USB Annual Report for 2024.

2. A total of \$49,350.36 in USB payments were issued in 2024. At year-end 2024 there was a 2024 USB credit balance of \$4,138.43 carried over into 2025 resulting from a Request Balance. The Request Balance remaining at year-end 2024 is \$166,476.67. A summary of this is shown in Attachment 2. No form Bs were submitted in 2024.

3. If you have any questions, please call me at 406-731-6151 or email [tyler.breuer@us.af.mil](mailto:tyler.breuer@us.af.mil).

TYLER J. BREUER, GS-12, USAF  
Energy Manager

1 Attachment:

1. USAF Self-Directed USB Progress Report for 2024

cc: NorthWestern Energy  
Attention: Rick Edwards  
11 East Park Street, Butte, MT 59701  
Email: [rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)

## Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/17/2025

# US AIR FORCE

## Account Summary

2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$2,807,664.88
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$215,827.03	Total Payment Requests:	\$215,827.03
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$166,476.67
2023 Carryover USBC Credit:	\$4,023.90	Total USBC Credit:	\$53,488.79
USBC Credit YTD:	\$49,464.89	Payments Issued YTD:	\$49,350.36
Average Monthly Credit Earned:	\$4,122.07	USBC Credit Balance:	\$4,138.43
		Payment Pending:	\$4,138.43

## Payment Requests Made

Submitted By	Date	Amount
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## Payments Issued

[illegible]

## Account Detail

[illegible]

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/17/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
714058	324166	DD56554467	KWH >	11,547	12,636	11,560	11,363	11,972	11,999	11,212	11,510	6,863	0	0	0	100,662
			KW >	20	36	36	17	41	41	32	30	19	0	0	0	30
			Elec Revenue >	\$1,347.01	\$1,576.72	\$1,476.62	\$1,218.75	\$1,673.16	\$1,682.46	\$1,493.12	\$1,466.95	\$889.41	\$0.00	\$0.00	\$0.00	\$12,824.20
714059	324167	DG28771683	KWH >	11,121	12,026	10,878	10,744	11,247	9,903	10,189	11,299	9,819	10,779	9,742	9,802	127,549
			KW >	19	32	32	22	22	19	17	16	27	15	15	15	21
			Elec Revenue >	\$1,293.13	\$1,466.31	\$1,360.60	\$1,223.63	\$1,368.88	\$1,196.79	\$1,199.61	\$1,266.93	\$1,266.93	\$1,216.28	\$1,031.46	\$200.95	\$14,091.50
714060	324168	2000215798	KWH >	0	0	0	0	0	0	0	8,866	9,234	0	9,036	8,724	35,860
			KW >	0	0	0	0	0	0	0	16	19	0	14	31	20
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,047.16	\$1,118.34	\$0.00	\$963.62	\$404.00	\$3,533.12
714060	324168	DG99700454	KWH >	12,312	10,732	9,415	8,734	9,617	8,854	10,190	0	0	0	0	0	69,854
			KW >	20	19	21	26	15	15	15	0	0	0	0	0	19
			Elec Revenue >	\$1,365.29	\$1,188.37	\$1,095.25	\$1,149.80	\$1,130.92	\$1,049.45	\$1,162.74	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,141.82
714061	324169	2000231567	KWH >	0	0	0	0	0	0	0	0	10,559	0	0	11,268	21,827
			KW >	0	0	0	0	0	0	0	0	18	0	0	38	28
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,225.79	\$0.00	\$0.00	\$493.87	\$1,719.66
714061	324169	DG67722728	KWH >	11,861	13,037	11,885	10,972	8,400	13,916	11,745	10,422	0	0	0	0	92,238
			KW >	20	19	25	21	17	22	19	18	0	0	0	0	20
			Elec Revenue >	\$1,356.94	\$1,384.41	\$1,364.76	\$1,251.48	\$1,028.07	\$1,624.55	\$1,371.95	\$1,220.74	\$0.00	\$0.00	\$0.00	\$0.00	\$10,602.90
714062	324170	2000231565	KWH >	0	0	0	0	0	0	0	0	9,612	0	0	10,715	20,327
			KW >	0	0	0	0	0	0	0	0	18	0	0	31	25
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,136.73	\$0.00	\$0.00	\$407.32	\$1,544.05
714062	324170	DG67722726	KWH >	10,523	14,227	13,393	10,386	11,652	9,209	11,256	9,579	0	0	0	0	90,225
			KW >	22	29	27	25	18	17	18	18	0	0	0	0	22
			Elec Revenue >	\$1,266.51	\$1,613.92	\$1,522.48	\$1,248.63	\$1,352.21	\$1,116.36	\$1,307.73	\$1,137.59	\$0.00	\$0.00	\$0.00	\$0.00	\$10,565.43
714063	324171	2000253722	KWH >	0	0	0	0	0	0	0	31,560	33,320	0	0	36,200	101,080
			KW >	0	0	0	0	0	0	0	70	67	0	0	71	69
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,848.67	\$3,966.66	\$0.00	\$0.00	\$940.99	\$8,756.32
714063	324171	DA02747874	KWH >	39,080	36,440	34,560	32,160	36,520	31,080	36,040	0	0	0	0	0	245,880
			KW >	83	68	68	68	72	69	71	0	0	0	0	0	71
			Elec Revenue >	\$4,572.40	\$4,034.68	\$3,871.69	\$3,843.91	\$4,419.73	\$3,858.79	\$4,302.95	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$28,904.15
714064	324172	2000231588	KWH >	0	0	0	0	0	0	0	9,952	9,398	0	7,572	9,191	36,113
			KW >	0	0	0	0	0	0	0	19	17	0	15	15	17
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,186.44	\$1,100.94	\$0.00	\$849.82	\$208.25	\$3,345.45
714064	324172	DA17397865	KWH >	14,324	8,794	8,354	10,812	12,079	9,910	11,754	0	0	0	0	0	76,027
			KW >	38	17	21	24	33	18	19	0	0	0	0	0	24
			Elec Revenue >	\$1,785.21	\$994.14	\$1,006.93	\$1,314.16	\$1,593.41	\$1,186.95	\$1,364.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,245.00
714065	324173	DA12994709	KWH >	12,287	11,756	12,881	11,262	10,804	11,698	10,637	11,823	10,359	10,280	9,908	12,144	135,839
			KW >	18	20	26	20	18	43	19	19	19	19	19	18	22
			Elec Revenue >	\$1,362.20	\$1,287.55	\$1,461.13	\$1,273.32	\$1,279.45	\$1,677.50	\$1,262.53	\$1,358.09	\$1,220.45	\$1,178.76	\$1,102.59	\$240.06	\$14,703.63
714066	324174	DG99700323	KWH >	12,764	12,491	11,601	10,849	12,144	10,442	11,708	10,142	10,476	10,995	10,754	11,507	135,873
			KW >	19	19	20	19	19	18	20	19	19	18	18	21	19
			Elec Revenue >	\$1,394.22	\$1,339.23	\$1,279.05	\$1,264.72	\$1,413.34	\$1,242.66	\$1,367.62	\$1,198.19	\$1,226.56	\$1,212.98	\$1,159.81	\$281.44	\$14,379.82
714067	324175	DG99700324	KWH >	12,779	12,477	11,112	11,059	11,791	10,171	10,976	9,539	9,779	9,748	9,993	11,262	130,686
			KW >	20	23	23	22	18	17	18	18	18	17	17	22	19
			Elec Revenue >	\$1,409.14	\$1,383.27	\$1,264.93	\$1,312.15	\$1,376.16	\$1,205.35	\$1,268.30	\$1,130.83	\$1,149.89	\$1,090.24	\$1,084.21	\$294.02	\$13,968.49

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/17/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
714068	324176	2000215806	KWH >	0	0	0	0	0	0	0	9,133	9,381	0	0	9,407	27,921
			KW >	0	0	0	0	0	0	0	17	17	0	0	14	16
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,086.88	\$1,103.15	\$0.00	\$0.00	\$194.89	\$2,384.92
714068	324176	DG99700509	KWH >	11,282	11,380	10,433	9,686	9,562	9,397	10,524	0	0	0	0	0	72,264
			KW >	18	18	17	21	17	17	17	0	0	0	0	0	18
			Elec Revenue >	\$1,245.86	\$1,231.00	\$1,138.77	\$1,171.28	\$1,144.29	\$1,130.04	\$1,223.14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,284.38
714069	324177	2000231568	KWH >	0	0	0	0	0	0	0	7,742	8,341	8,427	7,582	7,698	39,790
			KW >	0	0	0	0	0	0	0	13	18	18	17	17	17
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$898.76	\$1,015.17	\$976.99	\$878.42	\$234.91	\$4,004.25
714069	324177	DG67722725	KWH >	8,655	8,469	8,422	7,741	8,667	7,942	9,186	0	0	0	0	0	59,082
			KW >	19	16	28	17	17	17	17	0	0	0	0	0	19
			Elec Revenue >	\$1,036.18	\$950.87	\$1,099.38	\$947.21	\$1,060.58	\$989.22	\$1,097.17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,180.61
714070	324178	2000317312	KWH >	0	0	0	0	0	0	0	0	0	0	8,508	10,240	18,748
			KW >	0	0	0	0	0	0	0	0	0	0	13	34	24
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$906.06	\$449.36	\$1,355.42
714070	324178	DG96229446	KWH >	11,247	11,541	10,910	10,788	12,073	11,589	12,160	12,151	10,918	0	0	0	103,377
			KW >	16	16	28	16	26	19	21	28	18	0	0	0	21
			Elec Revenue >	\$1,265.02	\$1,217.52	\$1,321.92	\$1,152.56	\$1,497.49	\$1,363.55	\$1,439.33	\$1,501.28	\$1,262.06	\$0.00	\$0.00	\$0.00	\$12,020.73
714071	324179	2000515266	KWH >	0	0	0	0	0	0	0	0	32,369	0	0	11,129	43,498
			KW >	0	0	0	0	0	0	0	0	37	0	0	20	29
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,507.78	\$0.00	\$0.00	\$271.47	\$3,779.25
714071	324179	DG96229447	KWH >	14,965	16,093	14,875	14,784	13,953	12,517	11,157	12,659	0	0	0	0	111,003
			KW >	22	22	22	24	31	24	20	21	0	0	0	0	23
			Elec Revenue >	\$1,687.61	\$1,696.25	\$1,585.44	\$1,599.35	\$1,739.39	\$1,521.14	\$1,339.96	\$1,462.75	\$0.00	\$0.00	\$0.00	\$0.00	\$12,631.89
714072	324180	2000253724	KWH >	0	0	0	0	0	0	0	40,240	32,200	0	0	32,960	105,400
			KW >	0	0	0	0	0	0	0	71	66	0	0	55	64
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,663.07	\$3,850.55	\$0.00	\$0.00	\$737.83	\$9,251.45
714072	324180	DG93799079	KWH >	58,640	-17,920	38,240	31,680	29,400	26,360	30,880	0	0	0	0	0	197,280
			KW >	132	71	132	62	71	71	62	0	0	0	0	0	86
			Elec Revenue >	\$7,060.38	(\$816.31)	\$5,006.87	\$3,653.69	\$3,723.44	\$3,432.61	\$3,723.61	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25,784.29
714073	324181	2000215805	KWH >	0	0	0	0	0	0	0	11,781	9,746	0	0	10,898	32,425
			KW >	0	0	0	0	0	0	0	25	18	0	0	20	21
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,424.90	\$1,148.20	\$0.00	\$0.00	\$270.75	\$2,843.85
714073	324181	DG99700328	KWH >	11,626	14,728	12,317	8,611	8,332	7,686	14,546	0	0	0	0	0	77,846
			KW >	41	31	39	26	12	12	25	0	0	0	0	0	27
			Elec Revenue >	\$1,621.59	\$1,690.81	\$1,575.84	\$1,125.54	\$967.20	\$899.20	\$1,703.83	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,584.01
714074	324182	2000216018	KWH >	0	0	0	0	0	0	0	14,620	10,317	0	0	0	24,937
			KW >	0	0	0	0	0	0	0	24	18	0	0	0	21
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,688.23	\$1,202.34	\$0.00	\$0.00	\$0.00	\$2,890.57
714074	324182	DG23524418	KWH >	8,461	9,130	19,382	10,698	11,775	10,662	11,187	0	0	0	0	0	81,295
			KW >	18	29	15	43	22	19	34	0	0	0	0	0	26
			Elec Revenue >	\$1,011.29	\$1,175.61	\$1,881.00	\$1,520.15	\$1,416.32	\$1,274.61	\$1,509.83	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,788.81
714075	324183	2000526249	KWH >	0	0	0	0	0	0	0	0	9,388	0	0	10,719	20,107
			KW >	0	0	0	0	0	0	0	0	21	0	0	17	19
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,155.65	\$0.00	\$0.00	\$234.35	\$1,390.00

Prepared by Howard Skjervem on 2/17/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
714075	324183	DG93489919	KWH >	0	0	0	0	0	5,916	3,941	17,551	0	0	0	0	27,408	
			KW >	0	0	0	0	0	10	13	17	0	0	0	0	13	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$713.51	\$553.22	\$1,882.26	\$0.00	\$0.00	\$0.00	\$0.00	\$3,148.99	
714075	324183	DG99700428	KWH >	4,146	4,172	7,432	3,773	4,317	0	0	0	0	0	0	0	23,840	
			KW >	8	8	8	10	8	0	0	0	0	0	0	0	0	8
			Elec Revenue >	\$498.20	\$477.58	\$760.21	\$478.15	\$535.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,749.34
714076	324184	2000215807	KWH >	0	0	0	0	0	0	0	20,111	11,002	0	0	11,508	42,621	
			KW >	0	0	0	0	0	0	0	29	20	0	0	21	23	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,252.55	\$1,294.72	\$0.00	\$0.00	\$288.92	\$3,836.19	
714076	324184	DG35598098	KWH >	11,194	10,358	10,649	10,045	9,628	9,639	9,440	0	0	0	0	70,953		
			KW >	19	29	19	24	19	20	25	0	0	0	0	0	22	
			Elec Revenue >	\$1,275.28	\$1,275.34	\$1,180.55	\$1,223.31	\$1,176.72	\$1,185.61	\$1,222.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,539.41
714077	324185	2000205293	KWH >	0	0	0	0	0	0	0	24,920	31,600	0	0	36,800	93,320	
			KW >	0	0	0	0	0	0	0	72	60	0	0	68	67	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,254.90	\$3,725.17	\$0.00	\$0.00	\$897.43	\$7,877.50	
714077	324185	DA03705240	KWH >	36,880	17,240	32,440	31,520	33,120	31,040	30,720	0	0	0	0	212,960		
			KW >	75	72	70	64	64	64	61	0	0	0	0	0	67	
			Elec Revenue >	\$4,334.68	\$2,425.91	\$3,718.32	\$3,664.64	\$3,993.10	\$3,794.14	\$3,693.26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25,624.05
714078	324186	2000317311	KWH >	0	0	0	0	0	0	0	0	9,220	0	0	9,810	19,030	
			KW >	0	0	0	0	0	0	0	0	15	0	0	18	17	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,058.87	\$0.00	\$0.00	\$248.86	\$1,307.73	
714078	324186	DG36058689	KWH >	11,643	12,640	11,498	8,329	14,107	0	0	0	0	0	0	58,217		
			KW >	27	27	21	17	20	0	0	0	0	0	0	0	22	
			Elec Revenue >	\$1,427.30	\$1,455.55	\$1,282.53	\$985.82	\$1,612.90	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,764.10
714078	324186	DG93489921	KWH >	0	0	0	0	0	8,745	10,659	8,258	0	0	0	0	27,662	
			KW >	0	0	0	0	0	20	23	19	0	0	0	0	21	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,099.97	\$1,310.02	\$1,023.42	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,433.41
714079	324187	2000216017	KWH >	0	0	0	0	0	0	0	7,463	9,707	0	0	10,772	27,942	
			KW >	0	0	0	0	0	0	0	25	30	0	0	17	24	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,022.28	\$1,296.16	\$0.00	\$0.00	\$234.89	\$2,553.33	
714079	324187	DD56554463	KWH >	7,854	8,386	7,371	9,643	7,107	6,661	4,829	0	0	0	0	51,851		
			KW >	11	25	25	11	11	11	25	0	0	0	0	0	17	
			Elec Revenue >	\$869.00	\$1,053.43	\$965.43	\$1,026.27	\$837.32	\$794.67	\$783.69	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,329.81
714080	324188	2000232472	KWH >	0	0	0	0	0	32,760	31,240	33,520	30,600	0	0	35,800	163,920	
			KW >	0	0	0	0	0	64	59	65	64	0	0	65	63	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,963.73	\$3,729.30	\$3,961.98	\$3,684.12	\$0.00	\$0.00	\$860.53	\$16,199.66	
714080	324188	DG10189920	KWH >	34,440	36,800	36,760	31,680	31,000	0	0	0	0	0	0	170,680		
			KW >	72	79	71	65	82	0	0	0	0	0	0	0	74	
			Elec Revenue >	\$4,084.14	\$4,207.80	\$4,097.88	\$3,684.45	\$4,023.49	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20,097.76
714081	324189	2000149952	KWH >	0	0	0	0	0	11,904	11,439	12,196	10,789	0	0	12,758	59,086	
			KW >	0	0	0	0	0	23	20	19	20	0	0	21	21	
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,446.26	\$1,357.55	\$1,386.79	\$1,280.57	\$0.00	\$0.00	\$280.15	\$5,751.32	
714081	324189	DG93489924	KWH >	12,345	12,489	13,323	11,993	11,786	0	0	0	0	0	0	61,936		
			KW >	21	20	20	18	18	0	0	0	0	0	0	0	19	
			Elec Revenue >	\$1,400.49	\$1,349.46	\$1,423.02	\$1,324.89	\$1,375.55	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,873.41

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/17/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
714082	324190	2000515264	KWH >	0	0	0	0	0	0	0	0	10,500	0	0	11,291	21,791
			KW >	0	0	0	0	0	0	0	0	27	0	0	18	23
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,338.78	\$0.00	\$0.00	\$242.33	\$1,581.11
714082	324190	DG93489923	KWH >	12,207	14,020	11,858	10,523	11,697	10,420	8,240	9,887	0	0	0	0	88,852
			KW >	23	29	23	17	19	20	40	32	0	0	0	0	25
			Elec Revenue >	\$1,429.81	\$1,591.69	\$1,340.75	\$1,162.32	\$1,369.69	\$1,260.58	\$1,308.66	\$1,339.30	\$0.00	\$0.00	\$0.00	\$0.00	\$10,802.80
714083	324191	2000515263	KWH >	0	0	0	0	0	0	9,973	11,797	11,089	0	0	12,840	45,699
			KW >	0	0	0	0	0	0	18	19	23	0	0	18	20
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,189.09	\$1,351.49	\$1,342.75	\$0.00	\$0.00	\$240.57	\$4,123.90
714083	324191	DA05507200	KWH >	12,746	12,689	13,585	12,534	11,313	14,125	0	0	0	0	0	0	76,992
			KW >	22	18	38	18	21	20	0	0	0	0	0	0	23
			Elec Revenue >	\$1,459.97	\$1,343.09	\$1,679.80	\$1,373.23	\$1,366.16	\$1,613.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,836.00
714084	324192	2000526250	KWH >	0	0	0	0	0	0	0	0	10,209	8,710	8,723	0	27,642
			KW >	0	0	0	0	0	0	0	0	25	13	13	0	17
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,287.70	\$952.45	\$923.82	\$0.00	\$3,163.97
714084	324192	DA05102830	KWH >	12,236	10,719	9,144	10,808	10,792	9,876	0	0	0	0	0	0	63,575
			KW >	20	18	19	18	22	22	0	0	0	0	0	0	20
			Elec Revenue >	\$1,365.11	\$1,176.74	\$1,044.76	\$1,239.37	\$1,321.76	\$1,234.14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,381.88
714084	324192	DG93489922	KWH >	0	0	0	0	0	0	2,654	14,958	0	0	0	0	17,612
			KW >	0	0	0	0	0	0	13	14	0	0	0	0	14
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$312.89	\$1,738.56	\$0.00	\$0.00	\$0.00	\$0.00	\$2,051.45
714085	324193	2000216019	KWH >	0	0	0	0	0	0	0	9,025	0	0	0	0	9,025
			KW >	0	0	0	0	0	0	0	18	0	0	0	0	18
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,090.10	\$0.00	\$0.00	\$0.00	\$0.00	\$1,090.10
714085	324193	2000526248	KWH >	0	0	0	0	0	0	0	0	11,269	0	0	11,944	23,213
			KW >	0	0	0	0	0	0	0	0	18	0	0	19	19
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,297.57	\$0.00	\$0.00	\$254.96	\$1,552.53
714085	324193	DG99700426	KWH >	9,626	14,885	11,740	6,216	10,931	11,315	10,753	0	0	0	0	0	75,466
			KW >	21	26	19	17	19	17	18	0	0	0	0	0	20
			Elec Revenue >	\$1,147.36	\$1,633.98	\$1,279.57	\$799.11	\$1,300.85	\$1,310.46	\$1,261.76	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,733.09
714086	324194	2000216020	KWH >	0	0	0	0	0	0	0	13,086	0	0	0	0	13,086
			KW >	0	0	0	0	0	0	0	22	0	0	0	0	22
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,514.65	\$0.00	\$0.00	\$0.00	\$0.00	\$1,514.65
714086	324194	2000317313	KWH >	0	0	0	0	0	0	0	0	11,341	0	0	10,149	21,490
			KW >	0	0	0	0	0	0	0	0	22	0	0	16	19
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,351.55	\$0.00	\$0.00	\$217.35	\$1,568.90
714086	324194	DG23689627	KWH >	11,243	11,605	10,311	9,777	11,048	10,357	10,261	0	0	0	0	0	74,602
			KW >	30	30	33	38	36	36	17	0	0	0	0	0	31
			Elec Revenue >	\$1,423.56	\$1,395.35	\$1,325.64	\$1,377.10	\$1,529.12	\$1,463.02	\$1,206.42	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,720.21
714087	324195	2000215808	KWH >	0	0	0	0	0	0	0	9,979	8,939	8,517	6,842	11,769	46,046
			KW >	0	0	0	0	0	0	0	24	18	13	18	26	20
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,250.79	\$1,082.35	\$954.64	\$825.79	\$346.94	\$4,460.51
714087	324195	DG99700458	KWH >	10,206	19,655	8,153	7,375	9,920	10,750	10,192	0	0	0	0	0	76,251
			KW >	18	33	12	12	17	38	17	0	0	0	0	0	21
			Elec Revenue >	\$1,170.02	\$2,139.89	\$877.87	\$825.48	\$1,178.67	\$1,526.10	\$1,199.46	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,917.49

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/17/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
714088	324196	2000216018	KWH >	0	0	0	0	0	0	0	0	0	0	0	13,008	13,008
			KW >	0	0	0	0	0	0	0	0	0	0	0	19	19
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$265.05	\$265.05
714088	324196	DG99700456	KWH >	10,843	11,340	12,018	10,515	10,678	11,390	11,416	11,426	9,720	9,791	0	0	109,137
			KW >	17	18	17	17	18	18	39	27	18	18	0	0	21
			Elec Revenue >	\$1,213.98	\$1,226.90	\$1,274.40	\$1,171.78	\$1,267.15	\$1,335.26	\$1,589.57	\$1,422.10	\$1,146.30	\$1,128.61	\$0.00	\$0.00	\$12,776.05
715572	325488	DA21134446	KWH >	35,040	42,960	33,960	33,360	34,920	30,120	34,480	33,000	31,720	31,880	32,240	33,240	406,920
			KW >	80	88	78	78	79	60	64	71	66	68	69	75	73
			Elec Revenue >	\$4,233.64	\$4,858.44	\$3,951.47	\$4,012.91	\$4,352.87	\$3,650.36	\$4,077.70	\$3,988.00	\$3,807.82	\$3,729.31	\$3,625.77	\$988.01	\$45,276.30
715573	325489	DA18997911	KWH >	11,012	11,508	11,912	10,185	11,642	10,495	11,158	9,854	9,451	10,243	10,341	10,713	128,514
			KW >	22	22	21	17	18	17	18	18	18	18	16	23	19
			Elec Revenue >	\$1,303.83	\$1,296.45	\$1,310.32	\$1,151.99	\$1,351.25	\$1,229.99	\$1,292.23	\$1,162.34	\$1,118.30	\$1,160.17	\$1,102.53	\$305.05	\$13,784.45
715574	325490	DG96178906	KWH >	13,594	12,134	12,775	11,443	10,750	10,893	10,778	10,278	11,478	9,713	9,694	13,300	136,830
			KW >	20	20	21	22	17	18	18	18	18	18	17	17	19
			Elec Revenue >	\$1,496.80	\$1,325.01	\$1,382.36	\$1,323.67	\$1,264.28	\$1,285.81	\$1,269.17	\$1,202.25	\$1,308.95	\$1,121.88	\$1,058.41	\$239.33	\$14,277.92
715575	325491	DG28273067	KWH >	12,725	10,991	12,861	10,943	15,563	-2,550	11,133	10,216	11,169	9,706	10,314	11,703	124,774
			KW >	16	16	18	18	18	24	23	26	22	23	16	21	20
			Elec Revenue >	\$1,379.54	\$1,176.36	\$1,358.74	\$1,219.59	\$1,729.75	\$69.04	\$1,367.71	\$1,297.47	\$1,336.67	\$1,179.43	\$1,093.62	\$283.01	\$13,490.93
715576	325492	DG28273068	KWH >	6,727	0	0	0	0	0	0	0	0	0	0	0	6,727
			KW >	22	0	0	0	0	0	0	0	0	0	0	0	22
			Elec Revenue >	\$921.29	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$921.29
715576	325492	DG98831376	KWH >	0	6,116	8,000	20,466	11,121	10,044	9,557	8,586	9,174	9,699	9,118	9,122	111,003
			KW >	0	22	22	26	23	18	29	23	19	27	23	18	23
			Elec Revenue >	\$0.00	\$824.43	\$981.05	\$2,158.07	\$1,364.77	\$1,205.73	\$1,285.26	\$1,103.16	\$1,109.20	\$1,241.79	\$1,080.95	\$248.62	\$12,603.03
715577	325493	DG28273069	KWH >	12,877	11,767	12,617	11,208	10,636	10,094	10,557	10,155	11,658	10,168	10,675	8,357	130,769
			KW >	18	21	18	22	18	20	18	18	31	33	18	34	22
			Elec Revenue >	\$1,419.85	\$1,301.68	\$1,341.30	\$1,294.98	\$1,261.60	\$1,228.65	\$1,241.63	\$1,195.98	\$1,493.15	\$1,349.67	\$1,148.39	\$439.80	\$14,716.68
715578	325494	DG28273062	KWH >	9,915	7,988	10,845	8,450	9,992	6,420	8,841	8,797	9,851	9,606	10,033	9,982	110,720
			KW >	16	21	17	13	17	19	13	13	14	22	17	17	17
			Elec Revenue >	\$1,121.32	\$979.13	\$1,165.73	\$938.87	\$1,186.95	\$872.00	\$1,018.93	\$1,002.44	\$1,109.72	\$1,168.49	\$1,079.26	\$236.96	\$11,879.80
715579	325495	DG28273063	KWH >	12,474	13,317	11,916	11,234	12,758	11,327	11,982	8,977	4,287	8,422	11,569	11,290	129,553
			KW >	20	21	18	18	18	19	20	18	18	19	23	17	19
			Elec Revenue >	\$1,395.39	\$1,439.61	\$1,279.88	\$1,246.71	\$1,468.90	\$1,342.39	\$1,395.19	\$1,083.62	\$647.43	\$1,019.96	\$1,290.91	\$235.49	\$13,845.48
715580	325496	DG28273185	KWH >	10,070	12,445	9,114	11,648	12,699	11,901	12,462	10,852	10,392	11,604	11,829	0	125,016
			KW >	18	18	22	19	18	18	18	19	19	20	24	0	19
			Elec Revenue >	\$1,160.98	\$1,316.10	\$1,083.21	\$1,307.58	\$1,462.88	\$1,384.64	\$1,417.51	\$1,266.82	\$1,228.97	\$1,309.77	\$1,322.52	\$0.00	\$14,260.98
715581	325497	DG21490214	KWH >	11,252	13,162	11,246	10,883	12,402	11,029	11,900	10,700	10,152	10,916	10,799	0	124,441
			KW >	19	19	24	19	19	19	20	20	23	19	20	0	20
			Elec Revenue >	\$1,274.90	\$1,393.72	\$1,296.05	\$1,239.68	\$1,446.77	\$1,306.66	\$1,388.98	\$1,260.61	\$1,256.04	\$1,233.35	\$1,188.47	\$0.00	\$14,285.23
715582	325498	DG15003070	KWH >	11,849	11,168	10,923	11,764	11,138	11,231	10,159	10,355	10,795	9,816	10,289	10,939	130,426
			KW >	20	18	17	17	17	18	19	18	17	20	23	25	19
			Elec Revenue >	\$1,354.11	\$1,215.16	\$1,179.47	\$1,278.25	\$1,299.49	\$1,311.43	\$1,223.68	\$1,214.76	\$1,242.61	\$1,158.88	\$1,184.52	\$327.94	\$13,990.30
715583	325499	DG59962908	KWH >	55,040	62,040	70,320	49,920	47,200	31,960	28,000	35,520	30,840	32,360	36,920	39,200	519,320
			KW >	109	122	119	103	86	77	54	61	57	58	73	74	83
			Elec Revenue >	\$6,500.98	\$6,933.33	\$7,620.72	\$5,697.37	\$5,623.87	\$4,049.44	\$3,374.42	\$4,101.31	\$3,614.27	\$3,724.22	\$4,079.28	\$983.24	\$56,302.45



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Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
715584	325500	DD80878884	KWH >	11,071	11,000	12,300	10,144	11,667	9,797	9,293	11,837	9,434	9,649	10,469	10,866	127,527
			KW >	17	17	17	17	18	18	26	26	26	26	18	18	20
			Elec Revenue >	\$1,248.38	\$1,185.26	\$1,293.64	\$1,116.86	\$1,362.64	\$1,183.76	\$1,231.48	\$1,448.60	\$1,224.55	\$1,233.62	\$1,131.39	\$242.71	\$13,902.89
715585	325501	DA15843290	KWH >	9,183	10,460	17,513	11,944	10,524	9,055	8,559	11,496	9,145	9,150	9,775	9,035	125,839
			KW >	14	27	36	43	19	14	14	15	20	14	19	14	21
			Elec Revenue >	\$1,042.99	\$1,269.47	\$1,986.37	\$1,600.85	\$1,264.19	\$1,052.44	\$1,006.59	\$1,281.86	\$1,122.96	\$1,039.53	\$1,090.67	\$187.45	\$13,945.37
715586	325502	DG85540922	KWH >	9,284	9,136	10,583	8,538	10,092	9,208	8,694	11,372	9,106	9,133	11,386	11,240	117,772
			KW >	17	20	20	14	14	15	14	14	14	19	19	19	17
			Elec Revenue >	\$1,097.43	\$1,062.82	\$1,192.07	\$937.30	\$1,161.04	\$1,087.00	\$1,020.85	\$1,251.66	\$1,044.44	\$1,091.44	\$1,229.49	\$260.04	\$12,435.58
715587	325503	DG28273183	KWH >	8,145	6,456	8,819	7,445	9,067	7,965	7,485	9,740	14,042	1,620	8,377	7,747	96,908
			KW >	18	19	12	17	18	14	12	14	14	12	19	14	15
			Elec Revenue >	\$999.41	\$817.68	\$927.24	\$876.99	\$1,114.69	\$959.57	\$879.16	\$1,101.77	\$1,496.69	\$317.33	\$972.74	\$190.48	\$10,653.75
715588	325504	DG21003269	KWH >	9,775	11,635	13,069	10,935	12,605	10,827	10,127	12,688	9,009	6,519	11,240	11,475	129,904
			KW >	20	20	22	23	18	19	19	19	18	19	18	18	19
			Elec Revenue >	\$1,178.91	\$1,274.52	\$1,428.24	\$1,262.26	\$1,447.56	\$1,296.22	\$1,216.74	\$1,443.69	\$1,084.18	\$854.35	\$1,194.00	\$240.09	\$13,920.76
715589	325505	DA16314196	KWH >	11,400	11,476	12,882	10,734	12,331	10,404	9,765	12,289	9,833	10,002	9,205	11,293	131,614
			KW >	18	23	18	18	18	19	18	19	24	18	21	18	19
			Elec Revenue >	\$1,297.15	\$1,297.88	\$1,357.91	\$1,184.03	\$1,419.94	\$1,256.14	\$1,178.42	\$1,403.96	\$1,233.63	\$1,168.70	\$1,058.18	\$247.40	\$14,103.34
715590	325506	DG21003319	KWH >	11,340	11,277	12,636	10,572	12,146	10,412	10,137	12,788	9,694	9,880	10,097	10,852	131,831
			KW >	18	23	18	18	19	20	20	29	20	19	19	18	20
			Elec Revenue >	\$1,283.17	\$1,279.86	\$1,333.05	\$1,168.68	\$1,411.63	\$1,258.56	\$1,231.02	\$1,574.31	\$1,174.28	\$1,165.43	\$1,112.21	\$247.51	\$14,239.71
715591	325507	DG21003318	KWH >	11,474	11,429	12,733	10,537	12,083	7,898	9,627	12,175	10,010	10,230	8,997	11,827	129,020
			KW >	21	18	18	21	18	18	18	19	19	19	19	19	19
			Elec Revenue >	\$1,337.47	\$1,237.92	\$1,351.20	\$1,209.59	\$1,402.69	\$1,003.12	\$1,161.19	\$1,391.95	\$1,188.54	\$1,198.68	\$1,022.00	\$258.02	\$13,762.37
715592	325508	DG57846955	KWH >	38,560	37,680	39,480	31,920	33,800	34,560	31,160	34,000	32,760	26,120	30,760	34,720	405,520
			KW >	67	73	69	65	70	63	63	70	61	56	62	70	66
			Elec Revenue >	\$4,401.20	\$4,203.00	\$4,313.44	\$3,689.10	\$4,129.13	\$4,120.74	\$3,767.02	\$4,071.12	\$3,838.89	\$3,097.37	\$3,408.74	\$923.44	\$43,963.19
715593	325509	DG17829588	KWH >	9,920	9,961	10,794	9,660	9,593	10,809	8,739	0	0	0	0	0	69,476
			KW >	16	22	17	21	17	16	17	0	0	0	0	0	18
			Elec Revenue >	\$1,145.78	\$1,165.41	\$1,163.46	\$1,120.03	\$1,129.25	\$1,251.79	\$1,065.69	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,041.41
715593	325509	DG98831379	KWH >	0	0	0	0	0	0	0	9,003	9,097	9,315	8,317	8,990	44,722
			KW >	0	0	0	0	0	0	0	17	19	16	17	17	17
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,076.62	\$1,101.40	\$1,081.15	\$946.51	\$225.05	\$4,430.73
715594	325510	DG28273065	KWH >	9,893	0	0	0	0	0	0	0	0	0	0	0	9,893
			KW >	21	0	0	0	0	0	0	0	0	0	0	0	21
			Elec Revenue >	\$1,181.26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,181.26
715594	325510	DG98831380	KWH >	0	12,035	10,449	11,226	11,273	10,230	11,011	9,005	10,152	9,482	11,352	11,145	117,360
			KW >	0	19	18	18	22	18	18	23	18	18	20	28	20
			Elec Revenue >	\$0.00	\$1,298.18	\$1,151.17	\$1,251.55	\$1,371.20	\$1,221.12	\$1,286.60	\$1,141.72	\$1,191.92	\$1,096.91	\$1,237.75	\$369.82	\$12,617.94
715595	325511	DG93489950	KWH >	10,847	9,976	10,348	10,792	10,112	9,363	9,827	9,916	9,956	8,658	9,474	9,781	119,050
			KW >	20	20	23	17	18	16	17	17	17	17	31	16	19
			Elec Revenue >	\$1,265.57	\$1,127.52	\$1,204.90	\$1,194.69	\$1,211.86	\$1,119.04	\$1,159.97	\$1,158.23	\$1,157.02	\$1,012.62	\$1,209.17	\$221.84	\$13,042.43
715596	325512	DA18997922	KWH >	9,903	11,420	11,527	10,610	12,623	9,462	10,936	9,940	10,274	9,334	10,087	10,023	126,139
			KW >	21	23	19	19	19	17	18	19	18	17	18	18	19
			Elec Revenue >	\$1,189.01	\$1,294.27	\$1,252.22	\$1,193.34	\$1,461.19	\$1,138.91	\$1,277.35	\$1,179.73	\$1,197.57	\$1,082.35	\$1,096.77	\$237.27	\$13,599.98

Prepared by Howard Skjervem on 2/17/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
715597	325513	DA02748464	KWH >	30,080	40,960	36,400	33,160	35,440	32,560	33,960	31,480	28,640	32,720	23,040	40,760	399,200
			KW >	74	94	75	77	72	75	78	67	64	65	66	76	74
			Elec Revenue >	\$3,796.49	\$4,775.49	\$4,122.45	\$3,866.91	\$4,302.22	\$4,081.47	\$4,250.83	\$3,800.65	\$3,490.22	\$3,869.50	\$2,803.29	\$999.84	\$44,159.36
715598	325514	DG28273160	KWH >	6,700	0	0	0	0	0	0	0	0	0	0	0	6,700
			KW >	22	0	0	0	0	0	0	0	0	0	0	0	22
			Elec Revenue >	\$917.55	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$917.55
715598	325514	DG98831377	KWH >	0	11,295	11,016	10,313	11,334	10,660	11,297	8,031	10,540	9,220	11,080	10,926	115,712
			KW >	0	22	21	18	17	19	18	18	18	19	17	18	19
			Elec Revenue >	\$0.00	\$1,275.21	\$1,232.63	\$1,173.67	\$1,319.39	\$1,273.41	\$1,306.22	\$993.89	\$1,227.58	\$1,087.71	\$1,174.96	\$241.75	\$12,306.42
715599	325515	DA15828840	KWH >	11,020	15,224	14,292	11,986	11,852	9,851	10,333	9,907	8,896	10,351	8,775	12,817	135,304
			KW >	26	27	27	24	24	18	17	18	17	17	17	26	22
			Elec Revenue >	\$1,382.08	\$1,679.02	\$1,592.81	\$1,351.96	\$1,450.58	\$1,190.32	\$1,219.27	\$1,161.47	\$1,064.66	\$1,191.73	\$972.59	\$350.67	\$14,607.16
715600	325516	DG28273161	KWH >	10,661	10,101	12,268	10,837	10,767	10,114	7,796	8,184	11,151	9,953	9,978	11,701	123,511
			KW >	19	17	22	37	33	32	13	13	27	18	18	29	23
			Elec Revenue >	\$1,247.00	\$1,099.97	\$1,359.43	\$1,424.92	\$1,465.37	\$1,384.92	\$919.29	\$941.73	\$1,390.75	\$1,162.82	\$1,086.24	\$381.09	\$13,863.53
715601	325517	DG87035745	KWH >	9,468	8,914	11,531	10,685	10,841	11,774	9,802	10,018	11,086	9,462	9,524	12,643	125,748
			KW >	15	15	24	27	20	20	20	19	17	18	18	28	20
			Elec Revenue >	\$1,085.81	\$974.38	\$1,321.27	\$1,284.05	\$1,306.94	\$1,392.53	\$1,203.71	\$1,188.16	\$1,262.88	\$1,116.34	\$1,048.16	\$375.10	\$13,559.33
715602	325518	DG80841493	KWH >	12,162	10,832	11,183	11,233	10,632	11,364	9,389	10,366	9,494	10,479	9,669	11,618	128,421
			KW >	25	18	20	17	18	17	17	18	20	23	20	17	19
			Elec Revenue >	\$1,472.32	\$1,178.29	\$1,239.25	\$1,209.97	\$1,254.50	\$1,318.32	\$1,127.96	\$1,204.89	\$1,152.84	\$1,274.57	\$1,084.83	\$238.20	\$13,755.94
715603	325519	DG80841491	KWH >	10,416	11,931	11,285	9,946	11,767	10,488	11,070	9,753	9,528	11,287	9,179	12,136	128,786
			KW >	19	17	19	21	26	18	18	18	18	17	20	19	
			Elec Revenue >	\$1,229.95	\$1,267.01	\$1,236.21	\$1,137.84	\$1,459.40	\$1,245.56	\$1,294.40	\$1,152.94	\$1,131.45	\$1,292.14	\$1,016.06	\$275.29	\$13,738.25
715604	325520	DG28273177	KWH >	10,567	8,118	10,052	10,296	9,727	10,039	9,190	0	0	0	0	0	67,989
			KW >	17	17	17	20	19	17	17	0	0	0	0	0	18
			Elec Revenue >	\$1,208.76	\$931.74	\$1,100.03	\$1,163.06	\$1,186.83	\$1,186.88	\$1,104.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,881.95
715604	325520	DG96178911	KWH >	0	0	0	0	0	0	0	9,742	8,793	8,727	8,850	10,604	46,716
			KW >	0	0	0	0	0	0	0	18	15	16	17	17	17
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,154.95	\$1,029.94	\$1,033.82	\$976.56	\$229.54	\$4,424.81
715605	325521	DG81548203	KWH >	12,241	10,640	10,533	10,519	10,852	10,795	10,958	9,527	9,533	8,991	10,714	0	115,303
			KW >	18	22	17	18	17	19	18	18	18	20	37	0	20
			Elec Revenue >	\$1,352.17	\$1,217.68	\$1,143.25	\$1,194.47	\$1,274.42	\$1,294.06	\$1,272.21	\$1,127.67	\$1,125.95	\$1,073.13	\$1,395.53	\$0.00	\$13,470.54
715606	325522	DG28273176	KWH >	10,368	11,335	11,561	10,303	11,904	10,389	11,119	9,792	9,520	10,888	9,305	12,018	128,502
			KW >	17	19	21	18	21	17	17	17	17	17	17	17	18
			Elec Revenue >	\$1,203.50	\$1,244.24	\$1,284.96	\$1,130.02	\$1,417.79	\$1,228.99	\$1,294.77	\$1,149.47	\$1,119.17	\$1,247.15	\$1,021.43	\$234.87	\$13,576.36
715607	325523	DG21003317	KWH >	11,294	11,373	12,270	11,194	11,362	11,137	9,890	10,972	10,481	10,615	9,717	10,429	130,734
			KW >	19	17	21	20	33	18	18	19	18	18	21	42	22
			Elec Revenue >	\$1,313.36	\$1,229.45	\$1,344.02	\$1,236.16	\$1,499.36	\$1,307.36	\$1,191.51	\$1,283.40	\$1,223.86	\$1,234.55	\$1,114.17	\$543.94	\$14,521.14
715608	325524	DD56554544	KWH >	10,540	10,624	11,637	10,474	10,505	10,276	9,323	10,489	10,007	9,894	9,218	9,377	122,364
			KW >	22	22	22	22	22	20	22	22	22	22	22	22	22
			Elec Revenue >	\$1,284.67	\$1,226.58	\$1,302.68	\$1,202.89	\$1,283.04	\$1,249.98	\$1,185.68	\$1,275.95	\$1,226.92	\$1,216.38	\$1,088.15	\$293.58	\$13,836.50
715609	325525	2000255352	KWH >	0	0	0	0	0	0	0	0	0	0	0	10,972	10,972
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	17
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$233.17	\$233.17

# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/17/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	
715609	325525	DG82661885	KWH >	12,334	11,748	10,949	11,244	10,693	10,319	11,227	11,111	10,435	9,702	0	0	109,762	
			KW >	17	35	22	24	18	18	19	21	20	29	0	0	22	
			Elec Revenue >	\$1,345.73	\$1,473.53	\$1,247.35	\$1,336.69	\$1,269.59	\$1,230.91	\$1,314.55	\$1,317.69	\$1,238.56	\$1,244.77	\$0.00	\$0.00	\$13,019.37	
715610	325526	2000255351	KWH >	0	0	0	0	0	0	0	0	0	0	0	11,551	11,551	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	21	21
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$278.18	\$278.18	
715610	325526	DG80092782	KWH >	11,931	11,925	11,846	10,520	11,114	10,858	10,035	10,911	9,076	9,856	0	0	108,072	
			KW >	17	18	18	24	18	17	17	18	17	27	0	0	19	
			Elec Revenue >	\$1,302.01	\$1,278.11	\$1,270.37	\$1,284.78	\$1,309.74	\$1,269.17	\$1,181.61	\$1,262.42	\$1,079.68	\$1,230.67	\$0.00	\$0.00	\$12,468.56	
715611	325527	2000215998	KWH >	0	0	0	0	0	0	0	0	0	0	0	10,913	10,913	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	18	18
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$247.06	\$247.06	
715611	325527	DA28860484	KWH >	12,846	10,976	11,806	11,459	8,447	10,619	11,162	9,970	10,139	9,617	0	0	107,041	
			KW >	23	18	39	22	21	25	19	18	18	18	0	0	22	
			Elec Revenue >	\$1,462.24	\$1,196.99	\$1,536.21	\$1,330.90	\$1,090.21	\$1,343.38	\$1,305.12	\$1,171.12	\$1,189.55	\$1,102.74	\$0.00	\$0.00	\$12,728.46	
715612	325528	2000232275	KWH >	0	0	0	0	0	0	0	0	0	0	0	12,040	12,040	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	23	23
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$303.84	\$303.84	
715612	325528	DG62786214	KWH >	12,196	12,003	11,928	10,612	11,348	11,333	10,397	11,194	9,333	10,160	0	0	110,504	
			KW >	18	23	23	18	19	18	22	19	18	18	0	0	20	
			Elec Revenue >	\$1,335.07	\$1,348.12	\$1,342.00	\$1,216.51	\$1,336.68	\$1,323.97	\$1,278.22	\$1,299.70	\$1,109.71	\$1,140.18	\$0.00	\$0.00	\$12,730.16	
715613	325529	2000215999	KWH >	0	0	0	0	0	0	0	0	0	0	0	10,527	10,527	
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	20	20
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$267.37	\$267.37	
715613	325529	DG28273159	KWH >	12,626	12,046	11,169	11,419	10,645	8,604	11,355	10,439	10,486	9,879	0	0	108,668	
			KW >	18	21	29	17	20	17	17	18	18	17	0	0	19	
			Elec Revenue >	\$1,379.41	\$1,322.58	\$1,344.91	\$1,268.45	\$1,289.21	\$1,057.09	\$1,307.74	\$1,217.51	\$1,221.77	\$1,113.65	\$0.00	\$0.00	\$12,522.32	
715614	325530	DG28273158	KWH >	12,634	11,101	11,026	11,135	10,775	10,459	11,497	9,181	9,725	9,172	11,482	0	118,187	
			KW >	17	22	18	18	18	20	18	18	18	18	18	0	18	
			Elec Revenue >	\$1,371.82	\$1,257.88	\$1,204.85	\$1,250.33	\$1,275.40	\$1,263.69	\$1,335.31	\$1,098.84	\$1,149.81	\$1,074.07	\$1,220.53	\$0.00	\$13,502.53	
715615	325531	DG81548204	KWH >	7,669	10,732	11,552	8,804	8,997	10,467	8,593	9,619	9,297	9,169	8,936	8,896	112,731	
			KW >	18	24	19	16	15	14	16	14	19	16	14	13	17	
			Elec Revenue >	\$965.81	\$1,267.92	\$1,254.15	\$981.82	\$1,056.70	\$1,198.42	\$1,042.72	\$1,090.83	\$1,127.39	\$1,075.02	\$961.60	\$181.63	\$12,204.01	
715616	325532	DG21003316	KWH >	10,430	8,679	8,605	7,745	10,243	11,128	9,004	9,698	9,392	9,360	8,695	8,696	111,675	
			KW >	40	23	11	19	23	39	20	17	16	16	16	16	21	
			Elec Revenue >	\$1,534.50	\$1,071.04	\$906.65	\$921.30	\$1,269.41	\$1,575.83	\$1,131.72	\$1,137.53	\$1,096.19	\$1,093.96	\$971.35	\$220.49	\$12,929.97	
Total KWH				4,620,353	4,941,440	4,628,984	4,681,451	4,433,795	4,263,711	4,278,524	5,151,703	4,791,580	3,973,582	3,929,359	5,683,534	55,378,016	
Combined Average KW				7,775	8,721	8,161	8,014	7,713	7,903	8,625	10,682	9,819	8,131	4,181	13,658	9,385	
USBC Charge				\$4,158.28	\$4,447.28	\$4,166.03	\$4,213.29	\$3,990.42	\$3,837.35	\$3,850.65	\$4,636.56	\$4,312.49	\$3,576.20	\$3,536.45	\$5,115.19	\$49,840.19	
Total Elec Revenue				249,775.05	269,383.69	249,914.13	247,092.00	250,235.74	250,747.88	247,924.05	307,374.30	279,881.90	213,160.12	204,094.22	\$38,081.80	\$2,807,664.88	



U.S. Department of Veterans Affairs

Montana VA Health Care System

February 24, 2025

Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached document as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.**
- **We did not submit any USBC Form B Large Customer Credit Request Forms (USBC Projects) for 2024.**
- **We have a current request balance of \$ 642,989.24 (shown on the attached USBC Progress Report) for a past project that was submitted in 2023 to NorthWestern Energy, and to the MDOR in our 2023 Annual Summary Report.**
- **At year-end 2024, we had a credit balance of \$ 514.97 (carried over into 2025).**

If you have any questions, please contact me at [gregory.riccaldova.gov](mailto:gregory.riccaldova.gov)

Sincerely,

Greg Riccaldo  
Healthcare Energy Engineer  
Engineering & Facilities Management  
VISN 19 | Montana VA Health Care System  
3687 Veterans Drive | Fort Harrison, MT 59636  
Office | 406-447-7404

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
[rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)



Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

US DEPT VETERANS AFFAIRS

Account Summary			
2023 Carryover Reservation:	\$6,999.98	YTD Elec Revenue:	\$745,665.12
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$649,829.23	Total Payment Requests:	\$649,829.23
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$642,989.24
2023 Carryover USBC Credit:	\$491.81	Total USBC Credit:	\$7,354.96
USBC Credit YTD:	\$6,863.15	Payments Issued YTD:	\$6,839.99
Average Monthly Credit Earned:	\$571.93	USBC Credit Balance:	\$514.97
		Payment Pending:	\$514.97

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$2,095.89
			07/09/2024	\$1,634.42
			10/08/2024	\$2,013.50
			12/17/2024	\$1,096.18

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
710151	321147	DG82661964	KWH >	714	2,281	-596	426	2,881	5,414	5,773	10,212	3,582	61	319	565	31,632
			KW >	2	2	2	2	55	30	55	29	29	1	1	2	18
			Elec Revenue >	\$105.07	\$243.07	(\$10.86)	\$74.32	\$982.34	\$916.93	\$1,255.01	\$1,340.06	\$721.74	\$27.25	\$56.74	\$30.55	\$5,742.22
710210	321199	DA29137747	KWH >	590,088	623,094	566,745	595,587	569,308	642,413	686,925	803,938	726,798	632,877	584,726	571,621	7,594,120
			KW >	1,007	1,089	1,015	1,117	1,123	1,225	1,447	1,503	1,348	1,326	1,164	1,004	1,197
			Elec Revenue >	\$60,154.02	\$61,443.95	\$56,071.01	\$61,166.24	\$62,128.72	\$69,790.78	\$75,045.48	\$85,213.88	\$76,960.24	\$66,254.41	\$57,746.35	\$7,947.82	\$739,922.90
			Total KWH	590,802	625,375	566,149	596,013	572,189	647,827	692,698	814,150	730,380	632,938	585,045	572,186	7,625,752
			Combined Average KW	1,009	1,091	1,017	1,119	1,178	1,255	1,502	1,532	1,377	1,327	1,165	1,006	1,215
			USBC Charge	\$531.72	\$562.83	\$509.53	\$536.41	\$514.97	\$583.04	\$623.43	\$732.73	\$657.34	\$569.64	\$526.54	\$514.97	\$6,863.15
			Total Elec Revenue	\$60,259.09	\$61,687.02	\$56,060.15	\$61,240.56	\$63,111.06	\$70,707.71	\$76,300.49	\$86,553.94	\$77,681.98	\$66,281.66	\$57,803.09	\$7,978.37	\$745,665.12

**Rec'd MT DOR**

**MAR 04 2025**



177 Garden Dr.  
Bozeman, MT 59718  
REVELYST.COM  
@REVELYSTOUTDOOR

Feb 27, 2025  
Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

RE: 2024 USBC Annual Summary Report  
Mr. Schafer,

Please accept this letter and the attached document as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.
- We did not submit any USBC Form B Large Customer Credit Request Forms (USBC Projects) for 2024.
- We had a current request balance of \$ 5,625.81 (shown on the attached USBC Progress Report) for a past project that was submitted in 2023 to NorthWestern Energy, and to the MDOR in our 2023 Annual Summary Report.
- At year-end 2024, we had a credit balance of \$1,864.17.

A handwritten signature in black ink, appearing to read 'Chris Rivenbark'.

Chris Rivenbark  
Facilities Manager Simms, Blackhawk, Stone Glacier, Bushnell



# Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/10/2025

## VISTA OUTDOOR SALES, LLC

Account Summary			Payment Requests Made			Payments Issued		
			Submitted By	Date	Amount	Date	Amount	
2023 Carryover Reservation:	\$5,761.24	YTD Elec Revenue:	Chris Rivenbark	11/27/2024	\$5,625.81	12/17/2024	\$5,625.81	
Reservations Made YTD:	\$1,805.54							
2023 Carryover Payment Request:	\$0.00	Total Payment Requests:						
Payment Requests Made YTD:	\$5,625.81	Current Request Balance:						
2023 Carryover USBC Credit:	\$5,625.81	Total USBC Credit:						
USBC Credit YTD:	\$1,864.17	Payments Issued YTD:						
Average Monthly Credit Earned:	\$155.35	USBC Credit Balance:						
		Payment Pending:						

Account Detail															
Account	Premise	Meter	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3628777	602473	DA30278153	233,132	178,536	177,301	163,814	158,576	183,683	160,469	177,680	171,745	151,595	161,600	153,175	2,071,306
		KWH >	725	553	524	492	457	574	441	496	513	512	499	398	515
		KW >													
		Elec Revenue >	\$30,216.16	\$22,494.92	\$22,020.35	\$21,345.78	\$20,969.67	\$24,854.18	\$20,702.26	\$22,861.79	\$22,523.85	\$19,840.08	\$20,079.25	\$5,181.75	\$253,090.04
		Total KWH	233,132	178,536	177,301	163,814	158,576	183,683	160,469	177,680	171,745	151,595	161,600	153,175	2,071,306
		Combined Average KW	725	553	524	492	457	574	441	496	513	512	499	398	515
		USBC Charge	\$209.82	\$160.68	\$159.57	\$147.43	\$142.72	\$165.31	\$144.42	\$159.91	\$154.57	\$136.44	\$145.44	\$137.86	\$1,864.17
		Total Elec Revenue	\$30,216.16	\$22,494.92	\$22,020.35	\$21,345.78	\$20,969.67	\$24,854.18	\$20,702.26	\$22,861.79	\$22,523.85	\$19,840.08	\$20,079.25	\$5,181.75	\$253,090.04

Date 2/17/ 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Western Sugar Cooperative**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Western Sugar Cooperative's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Western Sugar Cooperative's 2024 USBC account activities.**
- **At year-end 2024, Western Sugar Cooperative had a credit balance of \$13,357.22. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.**
- **Attached is our Form B – USB Large USB Customer Credit Request forms that we submitted to NorthWestern Energy in 2024.**

If you have any questions, please contact me at (406) 247-8033.

Sincerely,

Joe Bladecki  
Plant Manager

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





## FORM A – UNIVERSAL SYSTEMS BENEFITS (USB) LARGE USB CREDIT RESERVATION TO CARRY OVER CREDITS

Complete and mail or scan as a PDF and email to:

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

<b>DATE:</b>	<b>11/26/24</b>
<b>NAME OF BUSINESS:</b>	<b>Western Sugar Cooperative</b>
<b>PROJECT CITY LOCATION:</b>	<b>Billings</b>
<b>MAILING ADDRESS:</b>	<b>3020 State Avenue</b>
<b>MAILING CITY, STATE, ZIP:</b>	<b>Billings, MT 59101</b>

<b>CONTACT PERSON:</b>	<b>Joe bladecki</b>
<b>PHONE NUMBER:</b>	<b>(406) 247-8023</b>
<b>CELL PHONE:</b>	
<b>FAX NUMBER:</b>	
<b>E-MAIL ADDRESS:</b>	<b>jbladecki@westernsugar.com</b>

BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY OR UNDER CONSIDERATION THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. CURRENT YEAR USB CREDITS REMAINING AT YEAR-END CAN ONLY BE CARRIED FORWARD WITH THIS RESERVATION FOR ONE ADDITIONAL CALENDAR YEAR.

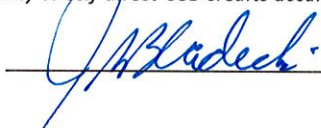
Upgrades planned for 2025- reserve estimate for 2025 \$7,760

<b>ESTIMATED USB CREDITS TO RESERVE AT YEAR END:</b>	<b>\$7,760</b>
<b>ESTIMATED COMPLETION DATE NEXT YEAR:</b>	<b>By year end 2025</b>

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

LARGE CUSTOMER:

Signature:



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



Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

WESTERN SUGAR COOPERATIVE

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$1,344,408.20
Reservations Made YTD:	\$7,760.00		
2023 Carryover Payment Request:	\$2,638.54	Total Payment Requests:	\$2,638.54
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$2,307.01	Total USBC Credit:	\$15,995.76
USBC Credit YTD:	\$13,688.75	Payments Issued YTD:	\$2,638.54
Average Monthly Credit Earned:	\$1,140.73	USBC Credit Balance:	\$13,357.22
		Payment Pending:	\$0.00

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$2,638.54

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
100615	1619	DA28691784	KWH >	2,588,430	2,250,834	345,797	330,273	279,521	237,537	205,149	233,949	588,356	2,642,760	2,573,814	2,689,386	14,965,806
			KW >	3,946	4,387	752	693	629	570	525	499	4,225	4,879	4,620	5,054	2,565
			Elec Revenue >	260,896.23	225,238.41	\$35,204.39	\$34,287.08	\$31,092.78	\$26,689.35	\$23,151.07	\$25,273.24	\$85,498.36	273,141.27	250,363.10	\$39,827.02	\$1,310,662.30
256632	81098	DG90055876	KWH >	49,280	34,680	6,800	280	5,760	7,240	360	360	11,520	9,920	25,960	47,760	199,920
			KW >	72	68	9	71	52	50	40	40	56	56	67	68	54
			Elec Revenue >	\$5,412.24	\$3,882.09	\$714.81	\$936.11	\$1,218.71	\$1,345.08	\$559.91	\$559.32	\$1,792.54	\$1,617.95	\$3,071.74	\$909.82	\$22,020.32
256633	81099	2000205698	KWH >	0	0	0	1,080	1,060	1,020	840	880	1,000	1,120	1,040	2,000	10,040
			KW >	0	0	0	9	9	7	6	6	7	7	9	9	8
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$230.66	\$226.43	\$202.86	\$176.60	\$178.95	\$192.95	\$199.49	\$213.18	\$121.95	\$1,743.07
256633	81099	DG28604727	KWH >	1,660	2,460	1,360	0	0	0	0	0	0	0	0	0	5,480
			KW >	7	10	8	0	0	0	0	0	0	0	0	0	8
			Elec Revenue >	\$259.00	\$358.82	\$235.58	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$853.40
601371	257960	2000484646	KWH >	382	260	159	151	162	188	159	140	1,041	2,937	2,021	139	7,739
			KW >	1	1	0	0	0	0	0	1	51	52	47	0	13
			Elec Revenue >	\$65.43	\$53.42	\$26.03	\$26.42	\$27.75	\$31.87	\$27.27	\$42.55	\$756.41	\$930.06	\$787.89	\$2.80	\$2,777.90
631744	276485	2000522671	KWH >	0	0	0	0	0	0	0	0	70	69	0	57	196
			KW >	0	0	0	0	0	0	0	0	0	12	0	0	4
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$16.75	\$171.10	\$0.00	\$0.94	\$188.79
631744	276485	DD38311215	KWH >	73	118	62	66	62	15	107	65	0	0	0	0	568
			KW >	0	1	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$22.41	\$38.70	\$15.35	\$15.72	\$15.91	\$11.40	\$20.19	\$16.03	\$0.00	\$0.00	\$0.00	\$0.00	\$155.71

# Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
663805	293906	2000395642	KWH >	0	0	0	0	0	0	0	0	30	17	70	331	448
			KW >	0	0	0	0	0	0	0	0	3	0	1	2	2
			Elec Revenue >	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$51.04	\$10.65	\$33.16	\$30.58	\$125.43
663805	293906	DG95164865	KWH >	250	407	152	19	7	11	17	12	0	0	0	0	875
			KW >	2	6	4	0	0	0	0	1	0	0	0	0	2
			Elec Revenue >	\$70.01	\$123.57	\$79.04	\$22.32	\$9.62	\$10.00	\$11.21	\$25.16	\$0.00	\$0.00	\$0.00	\$0.00	\$350.93
697878	312011	DG83043449	KWH >	21	0	0	0	0	0	0	0	0	0	0	0	21
			KW >	15	0	0	0	0	0	0	0	0	0	0	0	15
			Elec Revenue >	\$230.20	\$8.70	\$8.70	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$247.60
757033	99299	DA17237123	KWH >	400	800	680	400	40	80	80	80	120	1,400	7,360	120	11,560
			KW >	64	64	64	6	0	0	0	0	0	48	72	1	27
			Elec Revenue >	\$954.16	\$889.14	\$878.72	\$124.71	\$12.53	\$16.35	\$16.34	\$26.29	\$30.02	\$757.27	\$1,556.83	\$20.39	\$5,282.75
Total KWH			2,640,496	2,289,559	355,010	332,269	286,612	246,091	206,712	235,486	602,137	2,658,223	2,610,265	2,739,793	15,202,653	
Combined Average KW			4,107	4,537	837	779	690	627	571	547	4,342	5,054	4,816	5,134	2,697	
USBC Charge			\$2,376.45	\$2,060.60	\$319.51	\$299.05	\$257.96	\$221.48	\$186.04	\$211.93	\$541.93	\$2,392.40	\$2,349.23	\$2,465.82	\$13,682.40	
Total Elec Revenue			267,909.68	230,592.85	\$37,162.62	\$35,643.02	\$32,603.73	\$28,306.91	\$23,962.59	\$26,121.54	\$88,338.07	276,827.79	256,025.90	\$40,913.50	\$1,344,408.20	



100 Sarpy Creek Rd.  
Hardin, MT 59034  
406.226.2250  
[www.westmoreland.com](http://www.westmoreland.com)

March 25, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Westmoreland Absaloka Mining**

Dear Mr. Schafer:

Please accept this letter and the attached document as the Absaloka Mine's official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of the Absaloka Mine's 2024 USBC account activities.**
- **The Absaloka Mine did not submit any Form B -- USB Form Large USB Customer Credit Request Forms (USB Projects) for 2024.**
- **The Absaloka Mine has a current request balance of \$59,670.72 (shown on the attached USBC Progress Report) for a past project that was submitted in 2018 to NorthWestern Energy, and to the DOR in our 2018 Annual Summary Report.**

Sincerely,

Wes Sessions  
Site Manager, Absaloka Mine  
406-749-6019  
[gsessions@westmoreland.com](mailto:gsessions@westmoreland.com)

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



## Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

### WESTMORELAND ABSALOKA MINING LLC

#### Account Summary

2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$1,118,247.95
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$72,720.24	Total Payment Requests:	\$72,720.24
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$59,670.72
2023 Carryover USBC Credit:	\$2,249.94	Total USBC Credit:	\$13,501.74
USBC Credit YTD:	\$11,251.80	Payments Issued YTD:	\$13,049.52
Average Monthly Credit Earned:	\$937.65	USBC Credit Balance:	\$452.22
		Payment Pending:	\$452.22

#### Payment Requests Made

Submitted By	Date	Amount
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#### Payments Issued

Date	Amount
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04/19/2024	\$7,219.39
07/09/2024	\$3,619.21
10/08/2024	\$1,675.00
12/17/2024	\$535.92

#### Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3764012	1599	DA31446899	KWH >	2,482,452	2,083,067	956,091	2,008,648	894,676	1,118,023	861,399	763,812	235,900	242,563	352,904	502,472	12,502,007
			KW >	6,955	7,308	2,507	5,796	6,023	5,229	5,557	6,010	706	693	895	1,323	4,084
			Elec Revenue >	221,287.22	181,986.25	\$81,831.10	171,925.55	\$95,096.78	111,864.57	\$90,913.01	\$82,133.60	\$23,002.62	\$23,518.32	\$30,420.36	\$4,268.57	\$1,118,247.95
			<b>Total KWH</b>	2,482,452	2,083,067	956,091	2,008,648	894,676	1,118,023	861,399	763,812	235,900	242,563	352,904	502,472	12,502,007
			<b>Combined Average KW</b>	6,955	7,308	2,507	5,796	6,023	5,229	5,557	6,010	706	693	895	1,323	4,084
			<b>USBC Charge</b>	\$2,234.21	\$1,874.76	\$860.48	\$1,807.78	\$805.21	\$1,006.22	\$775.26	\$687.43	\$212.31	\$218.31	\$317.61	\$452.22	\$11,251.80
			<b>Total Elec Revenue</b>	221,287.22	181,986.25	\$81,831.10	171,925.55	\$95,096.78	111,864.57	\$90,913.01	\$82,133.60	\$23,002.62	\$23,518.32	\$30,420.36	\$4,268.57	\$1,118,247.95



# WESTMORELAND ROSEBUD MINING LLC

A Subsidiary of WESTMORELAND MINING HOLDING LLC

P.O. Box 99 • 138 ROSEBUD LANE • Colstrip, MT 59323 • Phone: (406) 748-5100

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February 20, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, Email: [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USB Annual Summary Report – Westmoreland Rosebud Mine**

Dear Mr. Schafer:

Please accept this letter and the attached documents as Westmoreland Rosebud Mines' official 2024 USB Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of Westmoreland Rosebud Mines' 2024 USBC account activities.
- Attached is our Form A- At year-end 2024, the Westmoreland Rosebud Mine had a credit balance of \$34,643.22 vs the \$30,825 estimate. We have submitted a Form A – Universal Systems Benefit (USB) Large USB Credit Reservation form to NorthWestern Energy to carryover these credits into 2025.

If you have any questions, please contact me at (406) 748-5194.

Sincerely,

Dustin Martens  
Engineer III-Permitting

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





Self-Directed USBC Progress Report for 2024

Prepared by Molly Schwend on 2/10/2025

WESTMORELAND ROSEBUD MINING LLC

Account Summary			
2023 Carryover Reservation:	\$0.00	YTD Elec Revenue:	\$4,831,368.78
Reservations Made YTD:	\$30,825.00		
2023 Carryover Payment Request:	\$15,904.56	Total Payment Requests:	\$15,904.56
Payment Requests Made YTD:	\$0.00	Current Request Balance:	\$0.00
2023 Carryover USBC Credit:	\$4,047.82	Total USBC Credit:	\$50,547.78
USBC Credit YTD:	\$46,499.96	Payments Issued YTD:	\$15,904.56
Average Monthly Credit Earned:	\$3,875.00	USBC Credit Balance:	\$34,643.22
		Payment Pending:	\$0.00

Payment Requests Made			Payments Issued	
Submitted By	Date	Amount	Date	Amount
			04/19/2024	\$15,904.56

Account Detail																
Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
3722417	1596	DA28691782	KWH >	3,358,766	2,592,230	2,513,508	2,055,586	1,852,823	2,082,860	2,203,077	3,177,199	3,857,200	3,339,338	3,769,561	2,851,709	33,653,857
			KW >	7,815	7,374	6,363	5,793	8,138	6,013	5,987	9,577	8,488	8,812	9,020	7,594	7,581
			Elec Revenue >	323,663.94	251,819.24	239,169.51	208,140.88	214,610.88	221,256.52	229,078.96	332,549.78	383,685.88	328,023.67	349,096.64	\$34,952.19	\$3,116,048.09
3722545	1687	DA31446931	KWH >	1,418,650	2,303,277	2,006,428	2,071,795	1,261,637	1,488,631	1,563,883	1,287,274	847,525	1,324,887	1,164,770	1,274,004	18,012,761
			KW >	3,396	5,741	5,521	5,391	5,391	4,523	4,756	4,769	2,164	4,834	2,721	3,032	4,353
			Elec Revenue >	137,519.46	218,619.57	193,788.20	206,932.23	145,267.16	159,650.12	165,918.57	140,564.45	\$86,432.86	138,830.86	107,649.10	\$14,078.51	\$1,715,251.09
3722552	268994	DD38809259	KWH >	0	0	0	0	0	0	0	0	0	0	0	0	0
			KW >	0	0	0	0	0	0	0	0	0	0	0	0	0
			Elec Revenue >	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$0.00	\$0.00	\$0.00	\$0.00
Total KWH				4,777,416	4,895,507	4,519,936	4,127,381	3,114,460	3,571,491	3,766,960	4,464,473	4,704,725	4,664,225	4,934,331	4,125,713	51,666,618
Combined Average KW				11,211	13,115	11,884	11,184	13,529	10,536	10,743	14,346	10,652	13,646	11,741	10,626	11,934
USBC Charge				\$4,299.68	\$4,405.96	\$4,067.95	\$3,714.65	\$2,803.01	\$3,214.34	\$3,390.26	\$4,018.03	\$4,234.25	\$4,197.80	\$4,440.89	\$3,713.14	\$46,499.96
Total Elec Revenue				461,192.10	470,447.51	432,966.41	415,081.81	359,886.74	380,915.34	395,006.23	473,122.93	470,118.74	466,854.53	456,745.74	\$49,030.70	\$4,831,368.78



## FORM A – UNIVERSAL SYSTEMS BENEFITS (USB) LARGE USB CREDIT RESERVATION TO CARRY OVER CREDITS

Complete and mail or scan as a PDF and email to:

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

<b>DATE:</b>	<b>11/26/2024</b>
<b>NAME OF BUSINESS:</b>	<b>Westmoreland</b>
<b>PROJECT CITY LOCATION:</b>	<b>Colstrip</b>
<b>MAILING ADDRESS:</b>	<b>PO BOX 99</b>
<b>MAILING CITY, STATE, ZIP:</b>	<b>Colstrip, MT 59323</b>

<b>CONTACT PERSON:</b>	<b>Dustin Martens</b>
<b>PHONE NUMBER:</b>	
<b>CELL PHONE:</b>	<b>406-748-5194</b>
<b>FAX NUMBER:</b>	
<b>E-MAIL ADDRESS:</b>	<b>dmartens@westmoreland.com</b>

BRIEF DESCRIPTION OF PROJECT(S) UNDER WAY OR UNDER CONSIDERATION THAT YOU WOULD LIKE TO RESERVE USB CREDITS TO CARRY OVER INTO THE FOLLOWING YEAR. CURRENT YEAR USB CREDITS REMAINING AT YEAR-END CAN ONLY BE CARRIED FORWARD WITH THIS RESERVATION FOR ONE ADDITIONAL CALENDAR YEAR.

Please reserve the remaining estimate of 2024 USB Credits- \$30,825 in to the 2025 year

<b>ESTIMATED USB CREDITS TO RESERVE AT YEAR END:</b>	<b>\$30,825</b>
<b>ESTIMATED COMPLETION DATE NEXT YEAR:</b>	<b>Year end</b>

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

**LARGE CUSTOMER:**

Signature:

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



2/28/2025

Weyerhaeuser NR Company

Weyerhaeuser NR Co.  
105 Mills Drive  
Columbia Falls, MT 59912

Large Customer Team  
Department of Revenue  
P. O. Box 5805  
Helena, MT 59604-5805

**RE: USBP Progress Report for 2024**

Weyerhaeuser NR Co. has recently completed the 2024 USBP program year. This letter will complete the requirement of reporting the USBP (year-end) figures on 2024 USBP credits. We have received the figures from Flathead Electric and you will find that attached. The letter written to FEC was closed by: Russ Christenson, Unit Manager, Miscellaneous Tax Unit.

Sincerely,

Leanne Buzzell  
Warehouse Specialist  
Weyerhaeuser NR Co.

**Buzzell, Leanne**

**From:** Andy Masa <A.Masa@flathead.coop>  
**Sent:** Monday, February 3, 2025 1:55 PM  
**To:** Buzzell, Leanne  
**Subject:** [EXTERNAL] Flathead Electric 2024 USBP State of Montana

Below is your 2024 USBP report to be filed with the State of Montana.

Filing information.  
Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
Questions call 1-866-859-2254  
Jim McKeon  
Unit Manager, Miscellaneous Tax Unit.

Flathead Electric Cooperative, Inc.					
2024 USBP Report					
Industrial Member Eligible Credits via Power Purchases					
Member	Conservation	Low Income	Renewable	Totals	kWh
Weyerhaeuser Company	\$155,615	\$16,406	\$72,186	\$244,207	164,059,500

Please feel free to contact me if you have any questions.

Sincerely,

Andy Masa  
Flathead Electric Co-op Inc  
406-253-0379



GOVERNOR GREG GIANFORTE  
DIRECTOR BRENDAN BEATTY

Weyerhaeuser NR Company  
Leanne Buzzell  
105 Mills Drive  
Columbia Falls, MT 59912

2/10/2025

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

**USB Program Summary Reports are due by March 1, 2025**

Public Utilities and large customers claiming universal system benefit (USB) credits for calendar year 2024 are required to submit an annual summary to the Montana Department of Revenue. The statewide cooperative utility office shall submit an annual summary report to the Montana Department of Revenue of the activities of individual cooperative utilities, including a summary of the pooling of statewide credits.

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

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

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

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

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

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

**Please send the annual report to:**

Montana Department of Revenue  
PO Box 5805  
Helena, MT 59604-5805  
or:  
Email to [DORUCP\\_CGR@mt.gov](mailto:DORUCP_CGR@mt.gov)

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

Sincerely,

Russ Christenson  
Unit Manager

February 27, 2025

Mr. Jon Schafer  
UCP/CGR Tax Examiner  
Montana Department of Revenue - USB Reports  
PO Box 5805  
Helena, MT 59604-5805  
(406) 444-3808, [Jon.Schafer@mt.gov](mailto:Jon.Schafer@mt.gov)

**RE: 2024 USBC Annual Summary Report**

Dear Mr. Schafer:

Please accept this letter and the attached documents as our official 2024 USBC Annual Summary Report.

**2024 Activities and Expenditures Summary:**

- **The attached Self-Directed USBC Progress Report for 2024 (provided to us by NorthWestern Energy) is a summary of our 2024 USBC account activities.**
- **The attached USBC Large Customer Form B Credit Request form that we submitted to NorthWestern Energy in 2024.**

If you have any questions, please contact me at (406)-577-4936.

Sincerely,

Tanner Marsh  
Yellowstone Club Development  
Utility Manager

CC: Rick Edwards, NorthWestern Energy, 11 East Park, Butte, MT 59701  
[rick.edwards@northwestern.com](mailto:rick.edwards@northwestern.com)



Self-Directed USBC Progress Report for 2024

Prepared by Howard Skjervem on 2/13/2025

YELLOWSTONE DEVELOPMENT

Account Summary

2023 Carryover Reservation:	\$11,691.00	YTD Elec Revenue:	\$3,021,941.26
Reservations Made YTD:	\$0.00		
2023 Carryover Payment Request:	\$0.00	Total Payment Requests:	\$54,120.00
Payment Requests Made YTD:	\$54,120.00	Current Request Balance:	\$17,319.43
2023 Carryover USBC Credit:	\$11,690.33	Total USBC Credit:	\$39,801.41
USBC Credit YTD:	\$28,111.08	Payments Issued YTD:	\$36,800.57
Average Monthly Credit Earned:	\$2,342.59	USBC Credit Balance:	\$3,000.84
		Payment Pending:	\$3,000.84

Payment Requests Made

Submitted By	Date	Amount
Brian Ashe	11/20/2024	\$54,120.00

Payments Issued

Date	Amount
12/17/2024	\$36,800.57

Account Detail

Account	Premise	Meter		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total
1746115	309876	DA31423616	KWH >	4,060,209	3,882,700	3,533,974	3,253,067	2,188,464	1,755,696	1,558,272	1,807,127	1,693,926	1,616,938	2,549,904	3,334,265	31,234,542
			KW >	12,870	13,091	12,476	12,001	10,082	8,354	6,436	6,731	5,797	5,857	10,757	11,845	9,691
			Elec Revenue >	421,870.61	390,064.69	358,622.73	338,038.04	256,425.31	207,466.38	177,336.83	197,441.36	181,830.00	173,464.00	265,869.85	\$53,511.46	\$3,021,941.26
			Total KWH	4,060,209	3,882,700	3,533,974	3,253,067	2,188,464	1,755,696	1,558,272	1,807,127	1,693,926	1,616,938	2,549,904	3,334,265	31,234,542
			Combined Average KW	12,870	13,091	12,476	12,001	10,082	8,354	6,436	6,731	5,797	5,857	10,757	11,845	9,691
			USBC Charge	\$3,654.19	\$3,494.43	\$3,180.58	\$2,927.76	\$1,969.62	\$1,580.13	\$1,402.44	\$1,626.41	\$1,524.53	\$1,455.24	\$2,294.91	\$3,000.84	\$28,111.08
			Total Elec Revenue	421,870.61	390,064.69	358,622.73	338,038.04	256,425.31	207,466.38	177,336.83	197,441.36	181,830.00	173,464.00	265,869.85	\$53,511.46	\$3,021,941.26



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

Complete and mail or scan as a PDF and email to:

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

DATE REQUESTED:	5/7/24	CONTACT PERSON:	Tanner Marsh
NAME OF BUSINESS:	Yellowstone Club	PHONE NUMBER:	406-577-4936
PROJECT CITY LOCATION:	Big Sky, MT	CELL PHONE:	
MAILING ADDRESS:	1 Yellowstone Club Trl	FAX NUMBER:	
MAILING CITY, STATE, ZIP:	Bozeman, MT 59716	E-MAIL ADDRESS:	Tanner.marsh@yellowstoneclub.com

<b>A. AMOUNT OF CREDIT REQUESTED FOR ENERGY EFFICIENCY PROJECT(S):</b>		<b>\$ 54,120.00</b>
<b>DESCRIPTION OF ENERGY EFFICIENCY PROJECT(S)</b> (if more space is needed, please attach): During the year of 2024, we will be making several upgrades to our Lower Pioneer Pump Station. Of the most impactful upgrades will be our purchase and installation of four ABB Variable Frequency Drives. The purchased VFDs will be for four 30 HP vertical turbine pumps which take our domestic water supply to their holding reservoirs. The improvements will take the pump station from approximately ~320,018 kWh annually to ~160,009 kWh. With this large kWh reduction, we will also be saving ~\$14,011 per year. Additionally, it will take 11.59 months per pump to pay for itself and become economically sustainable.		
ESTIMATED ANNUAL KWH SAVINGS:	160,009	
ESTIMATED KW DEMAND SAVINGS:		

OUR BUSINESS INTENDS TO DIRECT ALL OR A PORTION OF OUR CREDITS FOR A DONATION TO A QUALIFIED ENERGY ASSISTANCE ORGANIZATION. (Specify organization, i.e Energy Share, etc.)

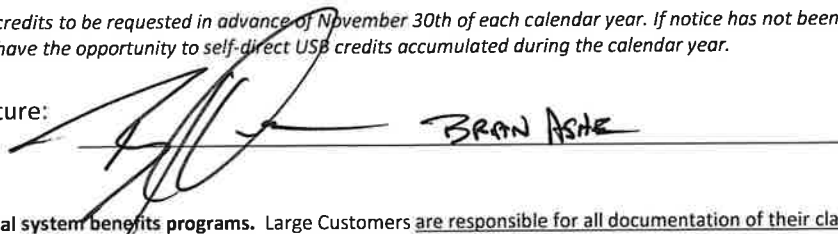
<b>B. AMOUNT OF CREDIT REQUESTED FOR DONATION:</b>	<b>\$</b>
<b>NAME OF ORGANIZATION TO RECEIVE DONATION:</b>	

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

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

**LARGE CUSTOMER:**

Signature:



BRIAN ASHE

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