



**STATE OF NEW JERSEY**  
**Board of Public Utilities**  
44 South Clinton Avenue, 1<sup>st</sup> Floor  
Post Office Box 350  
Trenton, New Jersey 08625-0350  
[www.nj.gov/bpu/](http://www.nj.gov/bpu/)

ENERGY AND CLEAN ENERGY

IN THE MATTER OF THE PETITION OF SOUTH ) ORDER ADOPTING STIPULATION  
JERSEY GAS COMPANY FOR APPROVAL OF )  
TRIENNium 2 CLEAN ENERGY PROGRAMS AND )  
ASSOCIATED COST RECOVERY PURSUANT TO )  
THE CLEAN ENERGY ACT ) DOCKET NO. QO23120870

**Parties of Record:**

**Brian O. Lipman, Esq.**, Director, New Jersey Division of Rate Counsel  
**Sheree L. Kelly, JD, MBA**, Regulatory Affairs Counsel, South Jersey Gas Company  
**John Kolesnik, Esq.**, Counsel for the Energy Efficiency Alliance of New Jersey  
**Steven S. Goldenberg, Esq.**, Counsel for the New Jersey Large Energy Users Coalition

**BY THE BOARD:**<sup>1</sup>

On December 1, 2023, South Jersey Gas Company ("SJG" or "Company") filed a petition with the New Jersey Board of Public Utilities ("Board" or "BPU") requesting approval of proposed energy efficiency ("EE"), building decarbonization start-up ("BD"), and demand response ("DR") programs (collectively, "EE programs") over a thirty (30)-month period from January 1, 2025 through June 30, 2027 ("Triennium 2") with a total budget of approximately \$425 million ("Petition"). By this Order, the Board considers a stipulation of settlement ("Stipulation") executed by SJG, Board Staff ("Staff"), the New Jersey Division of Rate Counsel ("Rate Counsel"), the Energy Efficiency Alliance of New Jersey ("EEA-NJ"), and the New Jersey Large Energy Users Coalition ("NJLEUC") (collectively, "Parties") that disposes of all issues in controversy in this matter.

**BACKGROUND AND PROCEDURAL HISTORY**

***The New Jersey Clean Energy Act of 2018***

On May 23, 2018, Governor Murphy signed the Clean Energy Act, N.J.S.A. 48:3-87.8 *et seq.* ("CEA"), into law. The CEA mandates that New Jersey's electric and gas public utilities increase their role in delivering EE and peak demand reduction ("PDR") programs. The CEA further directs the Board to require the electric and gas utilities to reduce customer use of electricity and natural gas in their respective service territories.

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<sup>1</sup> Commissioner Marian Abdou abstained from voting on this matter.

Specifically, the CEA directs the Board to require:

- (a) each electric public utility to achieve, within its territory by its customers, annual reductions of at least 2% of the average annual electricity usage in the prior three years within five years of implementation of its electric energy efficiency program; and
- (b) each natural gas public utility to achieve, within its territory by its customers, annual reductions in the use of natural gas of at least 0.75% of the average annual natural gas usage in the prior three years within five years of implementation of its gas energy efficiency program.<sup>2</sup>

### ***Triennium 1***

By Order dated June 10, 2020, the Board approved, pursuant to the CEA, utility programs that reduce the use of electricity and natural gas within the utilities' territories.<sup>3</sup> By the June 2020 Order, the Board directed the utilities to file three (3)-year program petitions by September 25, 2020 for approval by the Board by May 1, 2021 and implementation from July 1, 2021 through June 30, 2024 ("Triennium 1").

By Order dated April 7, 2021, the Board approved a stipulation of settlement authorizing SJG to implement its portfolio of EE programs.<sup>4</sup>

On November 20, 2023, SJG filed a letter petition with the Board, requesting approval to extend the term of its EE programs from July 1, 2024 through December 31, 2024. By Order dated April 30, 2024, the Board approved a stipulation of settlement to extend the term of the Company's EE programs and associated cost recovery for Triennium 1 through December 31, 2024.<sup>5</sup>

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<sup>2</sup> N.J.S.A. 48:3-87.9(a).

<sup>3</sup> In re the Implementation of P.L. 2018, c. 17 Regarding the Establishment of Energy Efficiency and Peak Demand Reduction Programs, BPU Docket Nos. QO19010040, QO19060748, and QO17091004, Order dated June 10, 2020 ("June 2020 Order").

<sup>4</sup> In re the Petition of South Jersey Gas Company for Approval of New Energy Efficiency Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket No. GO20090618, Order dated April 7, 2021.

<sup>5</sup> In re the Petition of South Jersey Gas Company for Approval of New Energy Efficiency Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket No. GO20090618, Order dated April 30, 2024.

## ***Triennium 2***

By Order dated May 24, 2023, the Board directed each electric and gas public utility to propose, for Board approval, EE programs for Triennium 2 on or before October 2, 2023, and the Board addressed certain aspects of the Triennium 2 framework.<sup>6</sup> By Order dated July 26, 2023, the Board approved the remaining aspects of the Triennium 2 framework.<sup>7</sup> By Order dated October 25, 2023, the Board updated the energy savings targets for the Triennium 2 EE programs and extended the Triennium 1 period through December 31, 2024.<sup>8</sup> By the October 2023 Order, the Board also delayed the start of Triennium 2 by six (6) months, from July 1, 2024 to January 1, 2025, and ordered that Triennium 2 would be a thirty (30)-month period covering January 1, 2025 through June 30, 2027.

By Order dated September 27, 2023, the Board extended the filing deadline for Triennium 2 petitions from October 2, 2023 to December 1, 2023 and directed that any entities seeking to intervene or participate in this matter file the appropriate application with the Board by December 8, 2023 and that entities file with the Board any responses to those motions by December 14, 2023.<sup>9</sup> By the September 2023 Order, the Board retained this matter for hearing and, pursuant to N.J.S.A. 48:2-32, designated President Guhl-Sadovy as Presiding Commissioner.

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<sup>6</sup> In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Establishment of Energy Efficiency and Peak Demand Reduction Programs; In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs; In re Electric Public Utilities and Gas Public Utilities Offering Energy Efficiency and Conservation Programs, Investing in Class I Renewable Energy Resources and Offering Class I Renewable Energy Programs in Their Respective Service Territories on a Regulated Basis, Pursuant to N.J.S.A. 48:3-98.1 and N.J.S.A. 48:3-87.9 - Minimum Filing Requirements, BPU Docket Nos. QO19010040, QO23030150, and QO17091004, Order dated May 24, 2023 (“May 2023 Order”).

<sup>7</sup> In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Establishment of Energy Efficiency and Peak Demand Reduction Programs; In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs; In re Electric Public Utilities and Gas Public Utilities Offering Energy Efficiency and Conservation Programs, Investing in Class I Renewable Energy Resources and Offering Class I Renewable Energy Programs in Their Respective Service Territories on a Regulated Basis, Pursuant to N.J.S.A. 48:3-98.1 and N.J.S.A. 48:3-87.9 - Minimum Filing Requirements, BPU Docket Nos. QO19010040, QO23030150, and QO17091004, Order dated July 26, 2023 (“July 2023 Order”).

<sup>8</sup> In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs, BPU Docket No. QO23030150, Order dated October 25, 2023 (“October 2023 Order”).

<sup>9</sup> In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Establishment of Energy Efficiency and Peak Demand Reduction Programs; In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs; In re Electric Public Utilities and Gas Public Utilities Offering Energy Efficiency and Conservation Programs, Investing in Class I Renewable Energy Resources and Offering Class I Renewable Energy Programs in Their Respective Service Territories on a Regulated Basis, Pursuant to N.J.S.A. 48:3-98.1 and N.J.S.A. 48:3-87.9 - Minimum Filing Requirements, BPU Docket Nos. QO19010040, QO23030150, and QO17091004, Order dated September 27, 2023 (“September 2023 Order”). The September 2023 Order also directed that any entity wishing to file a motion for admission of counsel, *pro hac vice*, should do so concurrently with any motion to intervene or participate. No entity filed a motion for admission *pro hac vice* in this matter.

By Order dated January 10, 2024, the Board redesignated President Guhl-Sadovy as the Presiding Commissioner for the Public Service Electric and Gas Company (“PSE&G”) filing and designated Commissioner Abdou as the Presiding Commissioner in this matter, authorized to rule on all motions that arise during the pendency of this proceeding and modify schedules that may be set as necessary to secure a just and expeditious determination of all issues.<sup>10</sup>

### **DECEMBER 2023 PETITION**

On December 1, 2023, SJG filed the Petition with the Board. In the Petition, the Company proposed a total budget of approximately \$425 million for its EE programs over a thirty (30)-month period from January 1, 2025 through June 30, 2027. The proposed programs and associated costs are summarized in the table below:

<b>Category</b>	<b>Sector</b>	<b>Program</b>	<b>Total</b>
Core	Residential	Whole Home	\$30,278,974
		Income Qualified	\$27,369,974
		EE Products	\$135,931,284
		Behavioral	\$3,463,936
	Commercial	Energy Solutions	\$32,334,649
		Prescriptive and Custom	\$12,743,893
		Direct Install	\$22,175,573
	Multifamily	Multifamily	\$28,584,098
Utility-Led		Building Decarbonization	\$7,034,351
		Demand Response	\$1,292,852
		Next Generation Savings	\$1,078,640
Other Portfolio Costs			\$1,775,000
Net Utility Transfers			\$120,938,052
<b>Total</b>			<b>\$425,001,277</b>

In addition to approval of the plan to implement the Triennium 2 Programs, the Company requested approval for recovery of costs and lost revenues associated with the Programs. Specifically, SJG requested authority to recover the revenue requirement associated with the Triennium 2 Programs through the existing Energy Efficiency Tracker (“EET”) rate mechanism as set forth in Rider “N” of the Company’s tariff. As previously approved, the proposed cost recovery mechanism consisted of two (2) parts. One part of the EET allows the Company to earn a return on the investment and recover the amortization of the regulatory asset. The second part of the EET allowed the Company to recover incremental operating and maintenance (“O&M”) expenses associated with the Triennium 2 Programs. The Company proposed to continue to recover lost revenues from reduced natural gas sales associated with the Triennium 2 Programs through its current Conservation Incentive Program (“CIP”) mechanism. The Company proposed a change

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<sup>10</sup> In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs *et al.*, BPU Docket Nos. QO23030150, QO23120868, QO23120869, QO23120870, QO23120871, QO23120872, QO23120874, and QO23120875, Order dated January 10, 2024 (“January 2024 Order”). By the January 2024 Order, the Board also redesignated Commissioner Abdou as the Presiding Commissioner for the Elizabethtown Gas Company (“ETG”), New Jersey Natural Gas (“NJNG”), and SJG filings, BPU Docket Nos. QO23120869, QO23120868, and QO23120870.

to the EET rate effective January 1, 2025, coincident with the beginning of the effective date of the proposed Triennium 2. Additionally, consistent with its currently approved EEPs and EET cost recovery mechanism, and as required by the Triennium 2 Orders, SJG proposed to continue to file with the Board, on an annual basis, a petition seeking to establish future EET rates and to adjust its EET rate to reflect over and under recoveries.

Based upon the requests in the Petition, SJG estimated that the initial monthly bill impact for a typical residential heating customer using 100 therms in a month will be an increase of \$1.24, or 0.7% as compared to then-current rates.

On December 26, 2023, Staff issued SJG a letter of administrative deficiency ("Letter") identifying administratively incomplete portions of the Petition and requesting that the Company cure any deficiencies. On January 5, 2024, SJG filed an update to the Petition to cure the deficiencies identified in the Letter ("Update"). On January 12, 2024, Staff issued a letter of administrative completeness, noting that the Update adequately cured the deficiencies identified in the Letter and that Staff therefore determined the Petition to be administratively complete. N.J.S.A. 48:3-98.1(b) provides the Board with 180 days to approve, modify, or deny the Company's requested recovery of costs for the Program. The 180-day period for the Board to review the Petition commenced on January 5, 2024.

By the January 2024 Order, the Board directed that any entity wishing to file a motion for leave to intervene or participate, or to update a previously-filed motion for leave to intervene or participate, in this proceeding had until seven (7) days following Staff's issuance of a letter of administrative completeness to the Company. The Board subsequently received no additional or updated motions seeking leave to intervene or participate.

By Order dated February 26, 2024, after considering all Motions to Intervene or Participate in this matter and responses to the Motions, Commissioner Abdou granted intervener status to NJLEUC and EEA-NJ and the motions to participate for Atlantic City Electric Company, ETG, Jersey Central Power & Light Company, NJNG, PSE&G, Rockland Electric Company, and Uplight, Inc.<sup>11</sup>

On March 19, 2024, the Parties submitted for approval a stipulation of settlement, proposing to extend the 180-day review period to October 15, 2024 ("180-Day Stipulation"). By Order dated April 23, 2024, Commissioner Abdou approved the 180-Day Stipulation, extended the 180-day review period to October 15, 2024, and established a procedural schedule for this matter.<sup>12</sup>

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<sup>11</sup> In re the Petition of South Jersey Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket No. QO23120870, Order dated February 26, 2024.

<sup>12</sup> In re the Petition of South Jersey Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket No. QO23120870, Order dated April 23, 2024.

Through a series of additional Orders, Commissioner Abdou further modified the procedural schedule, thereby granting multiple extension of time for the filing of testimony in this matter, and fully suspended the procedural schedule to allow for the continuance of fruitful settlement discussions.<sup>13</sup>

Following proper notice in newspapers of general circulation and upon affected municipalities and counties within SJG's service territory, SJG held two (2) virtual public hearings at 4:30 p.m. and 5:30 p.m. on May 21, 2024. Several members of the public made statements at the public hearings, many of whom commented in support of the Petition. Three (3) members of the public attended, and two (2) members of the public participated at the hearings. The Board received written comments dated June 5, 2024 expressing support for greater geothermal heat pump incentives for commercial EE program participants.

On October 6, 2024, the Parties submitted, for approval, a stipulation of settlement proposing to extend the 180-day review period to October 31, 2024 ("Second 180-Day Stipulation"). By Order dated October 15, 2024, Commissioner Abdou approved the Second 180-Day Stipulation and extended the 180-day period for the Board to issue a decision pursuant to N.J.S.A. 48:3-98.1 to October 31, 2024.<sup>14</sup>

### **STIPULATION**

Following discovery and settlement discussions, the Parties executed the Stipulation, which in relevant part provides for the following:<sup>15</sup>

#### **Triennium 2 Programs**

24. The Parties agree that, subject to Board approval of the Stipulation, the Company may implement Triennium 2 Programs under the terms and conditions described in the Stipulation for a term of two-and-one-half years commencing January 1, 2025 and ending June 30, 2027. Triennium 2 programs will include implementation, administration, and investment in eight (8) EE core programs. The EE core programs are comprised of four (4) residential, three (3) commercial and industrial ("C&I"), and one (1) multifamily program.
25. In addition to the programs above, the Company will also continue its workforce development ("WFD") program as required in the May 2023 Order and July 2023 Order. The Company shall develop a WFD implementation plan, community benefits plan, and evaluation plan, including performance metrics, before or within Program

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<sup>13</sup> In re the Petition of South Jersey Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket No. QO23120870, Order dated May 15, 2024; and In re the Petition of South Jersey Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket No. QO23120870, Order dated June 4, 2024.

<sup>14</sup> In re the Petition of South Jersey Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket No. QO23120870, Order dated October 15, 2024.

<sup>15</sup> Although summarized in this Order, the detailed terms of the Stipulation are controlling, subject to the findings and conclusions of this Order. Paragraphs are numbered to coincide with the Stipulation.

Year 5 of Triennium 2. The Company shall actively seek input and recommendations from the EE WFD Working Group established by the Board in the June 2020 Order and through monthly EE stakeholder meetings to develop and enhance these plans prior to implementation in coordination with the other New Jersey utilities.

26. Upon receipt of any monies received by the utility as direct funding from a State or federal governmental entity for the Company's WFD program the Company agrees to reduce its WFD budget by the corresponding dollar amount.
27. Except as set forth below, the Company will not designate any funding in its WFD program toward wraparound services. Consistent with the May 2023 Order, July 2023 Order, and Triennium 1, the Company will work with State and federal agencies to seek any opportunity to receive grants or funding specifically for the provision of wraparound services that may be available to the Company, partner community-based organizations ("CBOs"), and/or participants of the Company's WFD program for wraparound services. To the extent that programs or funding are not available or funding is insufficient, the Company may utilize Triennium 2 WFD dollars to provide these services up to the lesser of \$100,000 or 3% of its approved WFD budget and will coordinate with utilities having overlapping territory to minimize the costs to deliver these services. The utilities are encouraged to seek deeper coordination with CBOs for wraparound services in preparation for Triennium 3.
28. The Company will not utilize its WFD or O&M budget to provide contractors with WFD performance incentives.
29. WFD program funding shall not be utilized to provide training or development to the Company's own employees.
30. The Company agrees to withdraw its request to implement the following Triennium 2 Programs: Next Generation Savings, BD, and DR.
31. The Company agrees to withdraw its request to include the Comfort Partners Program as a component of its Income Qualified Program. The Comfort Partners Program will continue to be managed by the Board. The Company will continue to claim savings from the Comfort Partners Program towards its compliance with its quantitative performance indicators ("QPIs").
32. The Parties agree that the design for the Triennium 2 Programs shall be as described in the updated SJG Triennium 2 Program Plan which is Attachment 1 to the Stipulation and incorporated by reference. Attachment 1 of the Stipulation is subject to modification as permitted by the May 2023 Order and July 2023 Order or as otherwise approved by the Board.

33. The Parties anticipate that programs will continue to evolve. The Company shall continue to coordinate with the Division of Clean Energy and other utilities with whom the Company has overlapping service territories to achieve consistency where possible in the design and delivery of core programs. To the extent that the utilities jointly decide to implement programs differently than currently envisioned, the Company commits to implement – as permissible under law, the Stipulation, and within approved budgets – consistent elements of the core programs concurrently with all electric and gas utilities in the state as follows:
- Common forms for use by customers and contractors;
  - Contractor requirements, open and competitive procurement protocols where feasible, and training; procurement protocols should include policies and practices (e.g., scoring systems) that encourage supplier diversity (including contractors and subcontractors) and contractor coaching/mentoring of diverse business enterprises;
  - Customer and property eligibility requirements and processes, including alternative/automatic eligibility methods for low- to moderate-income customers (e.g., based on census tracts, environmental justice communities, Urban Enterprise Zones, etc.);
  - Eligible measures;
  - Incentive ranges;
  - Incentive payment processes and timeframes;
  - Customer and contractor engagement platforms;
  - Data platforms and database sharing among program administrators, where appropriate; and
  - Quality control standards and remediation policies.

To the extent the Company wishes to change programs in ways that conflict with the Stipulation, the Company will advise all parties to the Stipulation and seek to modify the Stipulation and obtain Board approval for those changes.

34. The Company agrees to contribute to the design and coordinate on the scope of a one-stop shop website, a platform to provide customers and contractors with a simple and easy-to-understand application process to participate in utility and State EE, BD, and DR programs. The Parties agree to work together to develop a project plan and timeline by June 30, 2025 to launch the website during Triennium 2 if feasible. Key project development milestones include, but are not limited to: initial design phase, development phase, testing and quality assurance, launch, and training. This initiative will be funded at a value not to exceed 1% of the Company's administrative budget.
35. Incentive structures associated with the core programs are described in Attachment 1 to the Stipulation, consistent with the May 2023 Order and July 2023 Order, and include any additional updates to incentives that are agreed upon as part of the Stipulation.
36. The Parties agree that the Company is authorized to offer up to \$125.4 million of principal in on-bill repayment ("OBR") to its customers which will be repaid by the participants and shall not be charged to ratepayers. The Parties agree that financing shall continue to be offered at a 0% interest rate for the duration of Triennium 2. The Company intends to work with the other utilities throughout implementation to continue



to provide comparable financing offerings to customers and deliver similar access across the coordinated programs. The Company plans to make this financing option available for customer participating across the residential, multifamily, and C&I sector programs where qualifying measures involve a sizeable cost to the customer, including major appliances, HVAC, home retrofit and multifamily projects, small business direct install projects, C&I prescriptive and custom measures, and Energy Solutions projects. The Company agrees to coordinate with the other utilities on evaluation, measurement, and verification ("EM&V") studies to review the impact of financing offerings on program participation and identify potential modifications that may be implemented in future triennia.

37. The Parties acknowledge the important role played by rebates and incentive levels in customer adoption of EE measures and that the Parties have endeavored to identify a level of rebates and incentives that will allow utilities to achieve their required energy savings targets. During the Triennium 2 period, the Parties agree to revisit specific Triennium 2 EE Plan rebate/incentive levels if customer participation is inadequate or in excess of what is required to meet the Company's Triennium 2 savings targets and to adjust rebate/incentive levels to ensure that they facilitate appropriate customer participation that will allow the Company to meet its Triennium 2 energy savings targets. Any adjustments will be consistent with the requirements enumerated at page 19 of the May 2023 Order, and any requests to increase a rebate or incentive in excess of the maximum incentive range which is shown as the "up to" amount in Appendix H to Attachment 1 to the Stipulation will require Staff's approval.
38. Customers in SJG's gas service territory who meet the criteria for the respective Triennium 2 offerings will be eligible to participate.

### **Triennium 2 Budget by Program**

39. The Parties agree to the Triennium 2 budget as follows:

<b>DIRECT BUDGET PROGRAM</b>	<b>TOTAL PROGRAM</b>
BEHAVIORAL	\$3,463,936
ENERGY EFFICIENT PRODUCTS	\$48,547,514
WHOLE HOME	\$9,534,374
INCOME QUALIFIED	\$12,247,704
MULTIFAMILY	\$15,859,741
PRESCRIPTIVE / CUSTOM	\$5,699,155
DIRECT INSTALL	\$16,155,250
ENERGY SOLUTIONS	\$19,482,326
STATEWIDE COORDINATOR	\$675,000
WORKFORCE DEVELOPMENT	\$800,000
COMMUNITY OUTREACH	\$300,000
TOTAL PROGRAMMATIC BUDGET	\$132,765,000
NET TRANSFERS TO/FROM EDCS	\$49,600,000
TOTAL DIRECT BUDGET	\$182,365,000
*Includes \$15.47M of incremental O&M expenses	

40. The Parties agree that the total programmatic budget for the Triennium 2 period shall not exceed \$132,765,000, which includes a not to exceed value of \$15.47 million in O&M expenses.
41. The Parties also agree that the budget for net transfers in utility overlapping territories is approximately \$49.6 million, resulting in a total direct budget of approximately \$182.4 million. To the extent that the net transfer budget differs from the stipulated value, SJG will manage any overage or shortfall within the approved total direct budget. The Company shall coordinate the exchange of energy savings and costs with any utility whose service territory overlaps with the Company's service territory ("Partner Utility") consistent with the net transfer process previously employed in Triennium 1, as it may be revised from time to time. The Company also agrees to report its gross inflows and outflows of transfers, the details of which will be determined by Staff, Rate Counsel, and the utilities via the group established by the Board in the June 2020 Order to facilitate and resolve issues impacting the EM&V of EE and PDR programs implemented pursuant to the CEA ("EM&V Working Group").

### **Triennium 2 Program Expenditures**

42. The Parties agree that the total programmatic budget for the Triennium 2 Programs is \$132,765,000 which includes investment and administrative expenses. Investments include all capital expenditures, direct incentives, incentive payment processing, program customer intake processing, direct marketing and outreach, health and safety, audit, installation labor, project quality assurance/quality control, administration and outside services for third-party program implementation, and evaluation,

measurement, and verification ("EM&V"). The budget for investments includes amounts that are spent or committed during Triennium 2, amounts reserved to fund projects and incentives for customers who have enrolled in programs during Triennium 2, and program EM&V costs that extend beyond the thirty (30)-month period. The Parties also agree that Triennium 2 Program funds may be utilized for a project that was enrolled during Triennium 1 and completed in the Triennium 2 program cycle.

43. The Parties agree that, in order to have programs, vendors, and systems in place to begin delivery on January 1, 2025, program spending may commence upon Board approval of the Stipulation. All Triennium 2 expenditures will be filed with the Board and submitted for prudency review in annual cost recovery filings by way of SJG's annual cost recovery proceedings.<sup>16</sup>

### **Budget Updates**

44. The Company may shift the timing of investment spending between or among program years, programs, and sectors as necessary to provide flexibility in responding to market conditions and customer demand and to ensure the achievement of program targets during the term of the Program in accordance with the limitations and procedures set forth in the May 2023 Order and July 2023 Order:
- SJG may shift program budgets within or among the residential, C&I, multifamily, and other sectors. More specifically, within any 365-day period of time, SJG may shift its budgets between programs within the same sector up to and including 25% of the Company's total Triennium 2 budget with notification to Staff and Rate Counsel, greater than 25% and up to 50% with Staff approval, and greater than 50% with Board approval.
  - Within any 365-day period of time, SJG may also shift budgets out of a sector up to and including 10% of the Company's total Triennium 2 budget with notification to Staff and Rate Counsel, greater than 10% and up to 20% with Staff approval, and greater than 20% with Board approval.
  - Requests for budget adjustments within the 2.5-year Triennium 2 period necessitating Staff approval shall be submitted to Staff and Rate Counsel with a written description of, and rationale for, the proposed transfers, and shall be responded to within 30 days. Requests for budget transfers shall identify O&M spending associated with the program(s). Transferred O&M spending shall not be used as investment. Rate Counsel may object within thirty (30) days, in which case Staff shall review within thirty (30) days of Rate Counsel's objection. If there is no response from Rate Counsel or Staff within thirty (30) days of SJG's requests, those requests shall be deemed granted.
45. The Parties agree that the Company may petition the Board to carry over energy savings in excess of annual compliance goals, from Triennium 1 into Triennium 2 and from any Triennium 2 program year to another Triennium 2 program year, in excess of the parameters established by the May 2023 Order and July 2023 Order. The

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<sup>16</sup> The Stipulation inadvertently referred to ETG instead of SJG.

Company shall notify Staff and Rate Counsel in its compliance reports the date of its waiver petition and the outcome.

46. The Parties agree that, for EE projects that commenced prior to Triennium 2 that require multiple years to complete, either between program cycles or within a program cycle, the Company will calculate energy savings based on the Technical Reference Manual ("TRM") in effect when the project commenced.
47. At the end of Triennium 1, the Company will provide a report to Staff and Rate Counsel detailing the committed and uncommitted funds left in the Triennium 1 budget, including any, and all, extensions. In the event that the Company expects to receive a return on equity ("ROE") reduction penalty as defined by the Triennium 2 Performance Incentive Mechanism, the Company may, upon notice to the Parties, utilize any Triennium 1 funding, including the funding associated with the Triennium 1 Extension period, not expended or committed in Triennium 1. If the Company elects to utilize uncommitted budget dollars from Triennium 1, it will not be permitted to earn an incentive under the established Triennium 2 Performance Incentive Mechanism within the program year or years when Triennium 1 funding is expended. During Triennium 2, when applicable, the Company will provide quarterly reports that demonstrate how the Triennium 1 funding was allocated among programs and spent. During Triennium 2, if the Company requests shifts in budget among programs and sectors, Triennium 1 funds will be reported separately in that request or notice.

### **Quantitative Performance Indicators**

48. The table below includes the Company's proposed QPIs that will be used to track and evaluate the Company's performance in Triennium 2.

<b>QPI</b>	<b>Description</b>	<b>Weight</b>	<b>Unit</b>	<b>Target – Program Total</b>
1. Annual Energy Savings	Verified first year energy savings from measures completed in the given program year	30%	Source MMBtu	740,403
2. Annual Demand Savings	Verified peak demand savings from measures completed in the given program year	10%	Peak MV or peak-day therm	6,688
3. Lifetime Energy Savings	Verified lifetime energy savings from measures completed in the given program year	20%	Source MMBtu	8,124,134
4. LMI and OBC Lifetime Energy Savings	Verified lifetime energy savings from measures completed in the given program year from LMI and OBC customers	10%	Source MMBtu	664,182
5. Small Business Lifetime Energy Savings	Verified lifetime energy savings from measures completed in the given program year for small business customers	10%	Source MMBtu	97,275
6. Cost to Achieve	Total EE portfolio costs divided by total portfolio verified lifetime energy savings	20%	Total EE Portfolio\$/Lifetime source MMBtu	14.75

49. QPI performance periods shall be those set forth in the May 2023 Order and July 2023 Order. All energy savings from projects and measures from Triennium 1 and Triennium 2 programs, and Comfort Partners in the Company's territory completed after January 1, 2025 shall be reported separately in the Company's QPI performance measurement. For the purpose of determining the Company's compliance with the QPIs and achievement of the required energy savings targets, the TRM in effect as of January 1, 2025 shall be used during the term of Triennium 2, subject to any annual TRM updates or other relevant guidance adopted in the Triennium 2 Evaluation Framework, except as noted in Paragraph 51 of the Stipulation.
50. The Company will perform EM&V for the Triennium 2 Programs in accordance with the May 2023 Order, July 2023 Order, and any recommendations of the EM&V Working Group adopted by the Board, as well as for any additional energy savings claimed by the Company toward the annual energy savings QPI and Triennium 2 targets, subject to guidance adopted in the Triennium 2 Evaluation Framework. All Triennium 1 projects and measures completed after January 1, 2025 shall also be included in the Triennium 2 EM&V plan.

51. The Company acknowledges that the EM&V Working Group will update the Triennium 2 Evaluation Framework, as needed approaching the commencement and performance of Triennium 2, with key elements including, but not limited to: (1) an annual update to the Program Year TRM, (2) removal of the distinction between Category 1 and Category 2 program metrics, (3) evaluation of financing offers, (4) enhancements of data governance and disclosure, (5) submission of EM&V milestone plans, (6) assurance of evaluability of programs, and (7) modifications to quarterly reporting. Updates to the Triennium 2 Evaluation Framework will be presented for comments at monthly EE stakeholder meetings. The Company agrees to comply with any changes resulting from the updated Triennium 2 Evaluation Framework, the terms of which shall apply throughout the whole of Triennium 2.
52. The Company further appreciates the need for enhanced evaluation rigor and shall dedicate the appropriate EM&V resources to conduct joint utility program evaluations where appropriate and to implement the EM&V implementation plans which will be developed in conjunction with New Jersey's Statewide Evaluator ("SWE") at the start of Triennium 2.
53. The Company shall continue to file required quarterly and annual reports and submit data regarding all the Triennium 2 programs, financing initiatives, and related expenses in accordance with the content, format, and timing dictated by the May 2023 Order, July 2023 Order, and any subsequent directives regarding the Triennium 2 programs from the Board, with any required adjustments from Triennium 1 to be developed by the EM&V Working Group.
54. The Parties agree that revised in-service rates, under performance of installed measures, changes in industry standard practices, building code updates, federal appliance standards, or other market events are some factors that could be reflected in the annual Program Year Update to the TRM. The TRM Committee will work collaboratively with the Company to ensure that TRM updates provide the Company with adequate time to adjust programmatic activities toward the achievement of performance targets. If a mutually agreeable outcome does not occur, the Company reserves the right to petition the Board for a waiver of the enforcement of any penalties in the event that the performance targets are not achieved as a result such changes. All Parties reserve all rights to respond to any petition seeking a waiver of any penalties filed by the Company.

#### **Customer Data and Data Sharing**

55. Customer information shall be used by the Company to deliver an effective customer experience in compliance with applicable Board regulations and statutory obligations. The Company shall enforce privacy and data handling policies and procedures for the Triennium 2 Programs that are consistent with SJG's customer data security protections, the May 2023 Order, July 2023 Order, and any applicable BPU regulations and statutory obligations. In the event of any breach of the above confidentiality by an affiliate, SJG shall remediate such breach to the full extent required by law. In the event of any breach of the above confidentiality by a vendor hired to deliver the Triennium 2 Programs or to evaluate the programs, the Company commits to enforcing the contractual confidentiality requirement to the extent allowed by the law. Any "breach of security" with respect to customers' "personal information," as those terms are defined in N.J.S.A. 56:8-161, shall be treated in accordance with the New Jersey

Identity Theft Prevention Act, N.J.S.A. 56:8-161 et seq., and Section 3b of the Board's Cybersecurity Order of March 18, 2016.<sup>17</sup>

56. SJG agrees that customer-specific data belongs to the customer, who may request or authorize SJG to share it with suppliers, and that data gathered during the operation of these programs not specific to any customer belongs to the Company and shall be used solely to support current or future regulated utility programs, including EM&V work. Such data may not be used for other purposes without Board approval, except as noted in Paragraph 57 of the Stipulation. The Company will also submit non-customer-specific data to the Board in compliance with reporting requirements, as established by the Board. Customer-specific data may be shared with the Board or its contractors for the purposes of program evaluation after the execution of Non-Disclosure Agreements ("NDAs") and Company review and approval of the Board's and/or contractor's cyber and data security protocols.
57. The Parties also agree that SJG may use customer-specific data or program data from other BPU-approved utility programs for Triennium 2, and that other utility BPU approved programs may use data from Triennium 2. The Company will not share or use customer-specific data for non-utility-specific BPU programs. Such data may not be used for other purposes without Board approval.

#### **Recovery of Costs and Lost Revenues**

58. The agreed upon budget amount includes Company O&M expenses, which shall not exceed \$15.47 million. The Company will recover its actual reasonable and prudently incurred O&M expenses through its cost recovery filings.
59. The Parties also agree that the Company should be authorized to offer OBR financing in the amount of \$125.4 million to program participants and recover the financing over time from these financing participants. As currently structured, the customer repayment periods for the OBR plans shall be five (5), seven (7), and ten (10) years, depending on the program and total OBR funds made available. SJG will retain the full OBR investment for any project where SJG is serving as the lead utility – that is, where work is commissioned on behalf of a Partner Utility who will ultimately pay for the EE measures installed. The Parties agree that the Company should be allowed to earn a return on the outstanding investment balance for financing expenditures where the Company is serving as the lead utility, through its revenue requirement and the administrative costs of providing financing consistent with the capital structure and ROE discussed below. In computing the return component of its costs, the Company shall, in addition to a reduction for the accumulated amortization of its investments, deduct the applicable deferred income taxes related to the amortization of program costs over a five (5)-year, seven (7)-year, and ten (10)-year period for book purposes and over one (1) year for tax purposes. The Company shall continue to calculate the monthly net investment balances by subtracting from the monthly net investment balances the current month-end accumulated amortization balances.

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<sup>17</sup> In re Utility Cyber Security Program Requirements, BPU Docket No. AO16030196, Order dated March 18, 2016.

60. SJG will earn a return on its net investment in Triennium 2 Programs based upon the rate of return (“ROR”) utilized to set rates in the Company’s most recent base rate case in Docket No. GR22040253. The weighted average cost of capital utilized to calculate the return on the unamortized portion of the program investments and to set rates will be 6.93%, or 8.96% on a pre-tax basis, which is the Company’s ROR set in its last base rate case effective January 1, 2022 as shown in the table below.

	<b>Percent of Total</b>	<b>Cost Rate</b>	<b>Weighted Cost</b>
Long-Term Debt	46.0%	3.81%	1.75%
Common Equity	54.0%	9.60%	5.18%
Total	100.0%		6.93%

The Parties agree that any change in the ROR authorized by the Board in a subsequent base rate case will be reflected in the subsequent monthly revenue requirement calculations.

61. The Parties further agree that the following expenditures will be collected from SJG ratepayers:
- Rebates/Direct Investments and associated return on these investments;
  - Return on outstanding balance of OBR expenditures;
  - O&M expenses; and
  - OBR bad debt expenses.
62. The Parties further agree that SJG is authorized to utilize deferred accounting and recover all reasonably incurred costs associated with the total Direct Budget, the return on the Direct Budget Program investment and the OBR Program, and the associated cost recovery mechanism. Triennium 2 Program costs will be recovered through the Company’s EET rate, as set forth in Rider “N” of the Company’s tariff. Proposed Tariff Sheets are provided in Attachment 2 to the Stipulation. Consistent with cost recovery for Triennium 1, cost recovery will consist of two (2) parts. One part will allow the Company to earn a return on the investment and recover the amortization of the regulatory asset. The second part of the EET will recover incremental O&M expenses associated with the Triennium 2 Programs.
63. The initial EET rate for Triennium 2 will be \$0.009904 per therm, inclusive of sales and use tax, and will become effective January 1, 2025. As compared to rates in effect October 1, 2024, SJG’s typical residential heating customer using 100 therms of gas per month, will see an increase in their monthly bill of \$0.99 or 0.5%, from \$183.35 to \$184.34. A typical residential heating customer using 730.7 therms annually will see an increase in their annual bill of \$7.24 or 0.5% from \$1,388.99 to \$1,396.23.
64. The total cumulative increase over the thirteen-year recovery period ending June 30, 2037 is estimated to be \$392.71, for the typical residential as heating customer using 730.7 therms annually. The maximum annual increase over the thirteen-year recovery period would occur in year three and it is estimated to be \$22.92 or 1.6% over the prior year and an increase of \$52.70 or 3.8% over the current annual bill of \$1,388.99.



65. The Triennium 2 Program investments and operating costs shall be reconciled to actual recoveries from the EET rate in the Triennium 2 True-Up filings to be submitted in July of each year for rates to become effective on October 1 of that year. Any federal or state benefits/grants, if applicable, received by the Company and associated with these programs shall be used to reduce the revenue requirement to be collected from customers.
66. The Company shall include in its annual EEP True-Up filings the Minimum Filing Requirements ("MFRs") as set forth in the May 2023 Order, July 2023 Order, and Attachment 3 to the Stipulation.
67. The Company shall provide in all future EEP True-Up filings the Rate Base/ROR/Expense presentation set forth in the same format as Schedule JGF-1, which is set forth in Attachment 4 to the Stipulation and reflects the settlement revenue requirement.
68. SJG will amortize Triennium 2 Program investments over a ten (10)-year period on a straight line basis.
69. SJG will continue to recover lost sales revenue resulting from the decrease in customer energy usage resulting from Triennium 2 Programs through its CIP Surcharge.

### **Triennium 3 Filing**

70. The Parties anticipate that in 2026, the Company will file a petition seeking approval of a Triennium 3 ("T3") program on or before a date to be set by the Board. In anticipation of that filing, the parties agree that any filing will include the following:
  - a. The Company agrees that, to include a more comprehensive set of data in its Triennium 3 petition, SJG will work with the other utilities, Staff, and Rate Counsel to develop the template reporting spreadsheet by June 30, 2025 using Attachment 5 to the Stipulation as a starting point. The Parties will schedule an initial meeting no later than December 15, 2024. Regardless of the reporting format, the Parties agree that all data will be made available in machine readable format with formulae intact, will be provided for all historical and forecasted years, will have clear units and, where appropriate, dollar years, and will use naming conventions that are common across utilities to the greatest extent possible to facilitate cross-utility comparisons. If the Parties are unable to agree upon the components of the template reporting spreadsheet by June 30, 2025, the Parties will submit, by July 15, 2025, their respective versions of the template reporting spreadsheet with supporting explanation to Staff for its consideration and decision as soon as practicable.
  - b. Consistent with the guidance from the May 2023 Order and July 2023 Order, the New Jersey Cost Test ("NJCT") should be updated prior to the start of each triennium through stakeholder input and Board approval, including the initial vetting of technical concepts by the NJCT and EM&V Committees. The Company will submit the results of the NJCT with its Triennium 3 filing consistent with the updated NJCT. Nonetheless, the Parties agree that the Company's workpapers supporting the Triennium 3 NJCT results will include a separately identified

item/column which includes, but is not limited to, the financial returns that are expected to arise from each individual energy efficiency program/measure.

- c. The Company agrees that loan principal will not appear within the NJCT but any administrative cost passed on to customers of servicing those loans will.
  - d. The Company recognizes that the SWE has identified concerns regarding the level of savings from behavioral programs. SJG commits to coordinate with the EM&V Working Group to evaluate the cost-benefit of the Behavioral program in advance of the Triennium 3 filings. The Parties agree that the Triennium 3 framework issued by the Board provide budget guidance regarding the behavioral programs based on documentable evidence demonstrating causal influence over achieved impacts, acceptable cost-to-achieve metrics, and cost-effectiveness of behavioral programming under the NJCT.
  - e. The Company agrees that incentive values proposed in its Triennium 3 petition will be filed together with clear information regarding how each incentive was calculated, its per unit savings values, and how it compares to similar incentives in other similar states.
71. The Company agrees to initiate discussion with the New Jersey Department of Banking and Insurance ("DOBI") on or before March 31, 2025 to determine DOBI's requirements, if any, for offering on bill financing at an interest rate other than zero in advance of the Triennium 3 filing. Once all requirements are understood by the Company, including those imposed by DOBI and those arising from other applicable laws and regulations, the Company agrees to schedule a joint meeting with all parties and all other gas and electric utilities by December 1, 2025 regarding the Company's understanding of the applicable laws and regulations concerning offering OBR for Triennium 3 at an interest rate other than zero. The Company reserves its right to determine to change its position on how financing may be offered, if at all, but will determine requirements to offer financing at a different interest rate. OBR may then be offered as part of the Company's Triennium 3 filings in accordance with the parameters set forth in any applicable Triennium 3 framework Order or Orders. The Company will copy and include Staff and Rate Counsel on all formal written communications with DOBI.

## **DISCUSSION AND FINDINGS**

The Board carefully reviewed the record in this matter, including the Petition, the Update, Stipulation, and comments received. The Board **HEREBY FINDS** the Stipulation to be reasonable, in the public interest, and in accordance with the law. The Board **FURTHER FINDS** that the Stipulation will benefit New Jersey's residents, energy users, and ratepayers and is consistent with the goals of the CEA and New Jersey's Energy Master Plan, as well as the requirements of the Board's Triennium 2 framework. The Board **FURTHER FINDS** that the Stipulation will bolster New Jersey's clean energy workforce and will continue to improve the ability of low- and moderate-income customers to take advantage of EE programs, initiatives, and opportunities. Accordingly, the Board **HEREBY APPROVES** the attached Stipulation in its entirety and **HEREBY INCORPORATES** its terms and conditions as though fully set forth herein.

As such, the Board **HEREBY AUTHORIZES** SJG to recover the costs associated with the EE programs through Rider N of the Company's tariff. As a result of the Stipulation, a typical

residential customer using 100 therms in a winter month would experience an initial increase in their monthly winter bill of \$0.99 or 0.5%. The Board also **HEREBY AUTHORIZES** SJG to continue its previously approved CIP to account for lost revenue resulting from the potential decrease in customer energy usage.

The Board **HEREBY RATIFIES** the decisions made by Commissioner Abdou during the pendency of this proceeding for the reasons stated in her decisions and Orders.

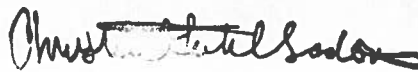
The Board **HEREBY ORDERS** the Company to file the appropriate revised tariff sheets conforming to the terms of this Order by December 16, 2024.

The Company's costs will remain subject to audit by the Board. This Decision and Order shall not preclude nor prohibit the Board from taking any actions determined to be appropriate as a result of any such audit.


The effective date of this Order is October 30, 2024.

DATED: October 30, 2024

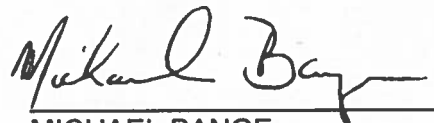
BOARD OF PUBLIC UTILITIES  
BY:



CHRISTINE GUHL-SADOVY  
PRESIDENT

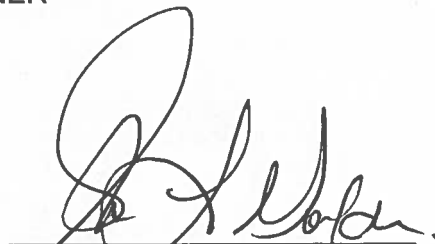


DR. ZENON CHRISTODOULOU  
COMMISSIONER



MICHAEL BANGE  
COMMISSIONER

ATTEST:



SHERRI L. GOLDEN  
SECRETARY

IN THE MATTER OF THE PETITION OF SOUTH JERSEY GAS COMPANY FOR APPROVAL OF TRIENNium 2  
CLEAN ENERGY PROGRAMS AND ASSOCIATED COST RECOVERY PURSUANT TO THE CLEAN ENERGY  
ACT

DOCKET NO. QO23120870

SERVICE LIST

**New Jersey Board of Public Utilities**

44 South Clinton Avenue, 1st Floor  
Post Office Box 350  
Trenton, NJ 08625-0350

Sherri Golden, Board Secretary  
[board.secretary@bpu.nj.gov](mailto:board.secretary@bpu.nj.gov)

Robert Brabston, Esq., Executive Director  
[robert.brabston@bpu.nj.gov](mailto:robert.brabston@bpu.nj.gov)

Stacy Peterson, Deputy Executive Director  
[stacy.peterson@bpu.nj.gov](mailto:stacy.peterson@bpu.nj.gov)

General Counsel's Office

Carol Artale, Deputy General Counsel  
[carol.artale@bpu.nj.gov](mailto:carol.artale@bpu.nj.gov)

Colin Emerle, Deputy General Counsel  
[colin.emerle@bpu.nj.gov](mailto:colin.emerle@bpu.nj.gov)

Steven Athanassopoulos  
[steven.athanassopoulos@bpu.nj.gov](mailto:steven.athanassopoulos@bpu.nj.gov)

Rachel Boylan  
[rachel.boyland@bpu.nj.gov](mailto:rachel.boyland@bpu.nj.gov)

Office of the Economist

Benjamin Witherell, Ph.D., Chief Economist  
[benjamin.witherell@bpu.nj.gov](mailto:benjamin.witherell@bpu.nj.gov)

Dianne Crilly  
[dianne.crilly@bpu.nj.gov](mailto:dianne.crilly@bpu.nj.gov)

Jackie O'Grady  
[jackie.ogradey@bpu.nj.gov](mailto:jackie.ogradey@bpu.nj.gov)

Division of State Energy Services

Sara Bluhm Gibson, Director  
[sara.bluhm@bpu.nj.gov](mailto:sara.bluhm@bpu.nj.gov)

Michelle Rossi  
[michelle.rossi@bpu.nj.gov](mailto:michelle.rossi@bpu.nj.gov)

Division of Revenue and Rates

Kyle Felton  
[kyle.felton@bpu.nj.gov](mailto:kyle.felton@bpu.nj.gov)

Cindy Bianco  
[cindy.bianco@bpu.nj.gov](mailto:cindy.bianco@bpu.nj.gov)

**NJBPU, cont'd.**

Division of Clean Energy

Stacy Ho Richardson, Deputy Director  
[stacy.richardson@bpu.nj.gov](mailto:stacy.richardson@bpu.nj.gov)

Kevin Monte de Ramos  
Bureau Chief, Energy Efficiency and Building  
Decarbonization  
[kevin.montederamos@bpu.nj.gov](mailto:kevin.montederamos@bpu.nj.gov)

Jusleen Basra  
[jusleen.basra@bpu.nj.gov](mailto:jusleen.basra@bpu.nj.gov)

Philip Chao  
[philip.chao@bpu.nj.gov](mailto:philip.chao@bpu.nj.gov)

Rupa Deshmukh  
[rupa.deshmukh@bpu.nj.gov](mailto:rupa.deshmukh@bpu.nj.gov)

Paul Heitmann  
[paul.heitmann@bpu.nj.gov](mailto:paul.heitmann@bpu.nj.gov)

Erik Lyttek  
[erik.lyttek@bpu.nj.gov](mailto:erik.lyttek@bpu.nj.gov)

Kevin Nedza  
[kevin.nedza@bpu.nj.gov](mailto:kevin.nedza@bpu.nj.gov)

Indrani Pal  
[indrani.pal@bpu.nj.gov](mailto:indrani.pal@bpu.nj.gov)

David Titus  
[david.titus@bpu.nj.gov](mailto:david.titus@bpu.nj.gov)

Alexis Trautman  
[alexis.trautman@bpu.nj.gov](mailto:alexis.trautman@bpu.nj.gov)

Dustin Wang  
[dustin.wang@bpu.nj.gov](mailto:dustin.wang@bpu.nj.gov)

NJBPU Consultants

Andrew Grant  
The Cadmus Group  
720 SW Washington St., Suite 400  
Portland, OR 97205  
[andrew.grant@cadmusgroup.com](mailto:andrew.grant@cadmusgroup.com)

Jason Meyer  
DNV Energy Insights USA Inc.  
1400 Ravello Rd  
Katy, TX 77449  
[jason.meyer@dnv.com](mailto:jason.meyer@dnv.com)

Pankaj Lal, PhD  
Cassidy Rucker  
Montclair State University  
426 Center for Environment & Life Sciences  
Montclair, NJ 07043  
[lalp@montclair.edu](mailto:lalp@montclair.edu)  
[ruckerc@montclair.edu](mailto:ruckerc@montclair.edu)

Jennifer Senick  
Rutgers Center for Green Building  
Edward J. Bloustein School of Planning & Public  
Policy  
Rutgers, The State University of New Jersey  
33 Livingston Ave #158  
New Brunswick, NJ 08901  
[jsenick@rutgers.edu](mailto:jsenick@rutgers.edu)

Lisa Skumatz  
Skumatz Economic Research Associates  
PO Box 1486  
Silverthorne, CO 80498  
[skumatz@serainc.com](mailto:skumatz@serainc.com)

**New Jersey Division of Law**  
Department of Law & Public Safety  
R.J. Hughes Justice Complex, 7<sup>th</sup> Floor West  
25 Market Street  
Post Office Box 112  
Trenton, NJ 08625-0112

Daren Eppley, Section Chief, DAG  
[daren.eppley@law.njoag.gov](mailto:daren.eppley@law.njoag.gov)

Pamela Owen, Assistant Section Chief, DAG  
[pamela.owen@law.njoag.gov](mailto:pamela.owen@law.njoag.gov)

Matko Ilic, DAG  
[matko.ilic@law.njoag.gov](mailto:matko.ilic@law.njoag.gov)

Steven A. Chaplar, DAG  
[steven.chaplar@law.njoag.gov](mailto:steven.chaplar@law.njoag.gov)

**New Jersey Division of Rate Counsel**

140 East Front Street, 4th Floor  
Post Office Box 003  
Trenton, NJ 08625-0003

Brian Lipman, Esq., Director  
[blipman@rpa.nj.gov](mailto:blipman@rpa.nj.gov)

Maura Caroselli, Esq., Managing Attorney  
[mcaroselli@rpa.nj.gov](mailto:mcaroselli@rpa.nj.gov)

Megan C. Lupo, Esq.  
[mlupo@rpa.nj.gov](mailto:mlupo@rpa.nj.gov)

Mamie W. Purnell, Esq.  
[mpurnell@rpa.nj.gov](mailto:mpurnell@rpa.nj.gov)

Andrew H. Gold, Esq.  
[agold@rpa.nj.gov](mailto:agold@rpa.nj.gov)

Carlena Morrison, Paralegal  
[cmorrison@rpa.nj.gov](mailto:cmorrison@rpa.nj.gov)

Terrence Coleman, Paralegal  
[tcoleman2@rpa.nj.gov](mailto:tcoleman2@rpa.nj.gov)

Rate Counsel Consultants

Robert J. Henkes  
Henkes Consulting  
7 Sunset Road  
Old Greenwich, CT 06870  
[rhenkes@optonline.net](mailto:rhenkes@optonline.net)

Applied Economics Clinic  
6 Liberty Square PMB 98162  
Boston, MA 02109

Elizabeth A. Stanton, PhD  
[liz.stanton@aeclinic.org](mailto:liz.stanton@aeclinic.org)

Sumera Patel  
[Sumera.patel@aeclinic.org](mailto:Sumera.patel@aeclinic.org)

Jordan M. Burt  
[jordan.burt@aeclinic.org](mailto:jordan.burt@aeclinic.org)

Tanya Stasio  
[tanya.stasio@aeclinic.org](mailto:tanya.stasio@aeclinic.org)

Elisabeth Seliga  
[elisabeth.seliga@aeclinic.org](mailto:elisabeth.seliga@aeclinic.org)

Acadian Consulting Group  
5800 One Perkins Place Drive  
Building 5, Suite F  
Baton Rouge, LA 70808

David Dismukes, Ph.D.  
[daviddismukes@acadianconsulting.com](mailto:daviddismukes@acadianconsulting.com)

**Rate Counsel, cont'd.**

Michael Deupree  
[michaeldeupree@acadianconsulting.com](mailto:michaeldeupree@acadianconsulting.com)

Melissa Firestone  
[melissa.firestone@acadianconsulting.com](mailto:melissa.firestone@acadianconsulting.com)

Nicolas Alvarez  
[nicolasalvarez@acadianconsulting.com](mailto:nicolasalvarez@acadianconsulting.com)

David Kantrow  
[davidkantrow@acadianconsulting.com](mailto:davidkantrow@acadianconsulting.com)

Taylor Deshotels  
[taylordeshotels@acadianconsulting.com](mailto:taylordeshotels@acadianconsulting.com)

Roberto Hasbun  
[robhasbun@acadianconsulting.com](mailto:robhasbun@acadianconsulting.com)

Emily Mouch  
[emilymouch@acadianconsulting.com](mailto:emilymouch@acadianconsulting.com)

Tyler French  
[tylerfrench@acadianconsulting.com](mailto:tylerfrench@acadianconsulting.com)

Jackson Gaspard  
[jacksongaspard@acadianconsulting.com](mailto:jacksongaspard@acadianconsulting.com)

**Eastern Environmental Law Center**  
One Gateway Center, Suite 2600  
Newark, NJ 07102

Kaitlin Morrison, Esq.  
[kmorrison@easternenvironmental.org](mailto:kmorrison@easternenvironmental.org)

Maggie Broughton, Esq.  
[mbroughton@easternenvironmental.org](mailto:mbroughton@easternenvironmental.org)

**South Jersey Gas Company**

Dominick DiRocco, Esq.  
VP, Rates & Regulatory Affairs  
SJL Utilities, Inc.  
One South Jersey Place  
Folsom, NJ 08037  
[ddirocco@sjindustries.com](mailto:ddirocco@sjindustries.com)

SJL Utilities, Inc.  
One South Jersey Plaza  
Atlantic City, NJ 08401

Cindy Capozzoli  
Director, Rates  
[ccapozzoli@sjindustries.com](mailto:ccapozzoli@sjindustries.com)

Carolyn A. Jacobs  
Regulatory Compliance Specialist Sr.  
[cjacobs@sjindustries.com](mailto:cjacobs@sjindustries.com)

**SJG, cont'd.**

Jennifer Weitz  
Regulatory Affairs Counsel Intermediate  
[jweitz@sjindustries.com](mailto:jweitz@sjindustries.com)

Ed McFadden  
VP, Sales & Marketing  
[emcfadden@sjindustries.com](mailto:emcfadden@sjindustries.com)

Maureen Minkel  
Senior Director, Marketing and Energy Efficiency  
[mminkel@sjindustries.com](mailto:mminkel@sjindustries.com)

Michael Savacool  
Manager, Financial Planning/Energy Efficiency  
[msavacool@sjindustries.com](mailto:msavacool@sjindustries.com)

Sheree Kelly, Esq.  
Regulatory Affairs Counsel  
SJL Utilities, Inc.  
520 Green Lane  
Union, NJ 07083  
[skelly@sjindustries.com](mailto:skelly@sjindustries.com)

South Jersey Gas Company  
One South Jersey Place  
Folsom, NJ 08037

W. Peter Druckenmiller  
Manager, Residential Energy Efficiency  
[wdruckenmiller@sjindustries.com](mailto:wdruckenmiller@sjindustries.com)

James G. Fredericks  
Rates Analyst Lead  
[jfredericks@sjindustries.com](mailto:jfredericks@sjindustries.com)

**SJG Consultants**

Gabel Associates, Inc.  
417 Denison St.  
Highland Park, NJ 08904

Isaac Gabel-Frank  
[isaac@gabelassociates.com](mailto:isaac@gabelassociates.com)

Brendon Baatz  
[brendon@gabelassociates.com](mailto:brendon@gabelassociates.com)

**Energy Efficiency Alliance of New Jersey**

John M. Kolesnik, Esq., Policy Counsel  
614 S. 4<sup>th</sup> St., #307  
Philadelphia, PA 19147  
[jcolesnik@eeaofnj.org](mailto:jcolesnik@eeaofnj.org)

**New Jersey Large Energy Users Coalition**

Steven S. Goldenberg, Esq.  
Giordano, Halleran & Ciesla, P.C.  
125 Half Mile Road, Suite 300  
Red Bank, NJ 07701-6777  
[sgoldenberg@ghclaw.com](mailto:sgoldenberg@ghclaw.com)

**Atlantic City Electric Company**

92DC42  
500 North Wakefield Drive  
P.O. Box 6066  
Newark, DE 19702-6066

Nathanael Gillespie  
[nathanael.gillespie@exeloncorp.com](mailto:nathanael.gillespie@exeloncorp.com)

Jacob B. Sneed  
[jacob.sneed@exeloncorp.com](mailto:jacob.sneed@exeloncorp.com)

Heather Hall  
[heather.hall@pepcoholdings.com](mailto:heather.hall@pepcoholdings.com)

Imran Bell  
[imran.bell@exeloncorp.com](mailto:imran.bell@exeloncorp.com)

Daniel Anderson  
[danderson@pepco.com](mailto:danderson@pepco.com)

Ruth C. Kiselewich  
[ruth.kiselewich@exeloncorp.com](mailto:ruth.kiselewich@exeloncorp.com)

Susan Marinelli  
[smarinelli@pepcoholdings.com](mailto:smarinelli@pepcoholdings.com)

Sherryl Chen  
[sherryl.chen@pepcoholdings.com](mailto:sherryl.chen@pepcoholdings.com)

Brendon Baatz  
[brendon@gabelassociates.com](mailto:brendon@gabelassociates.com)

Colleen A. Foley, Esq.  
Saul Ewing LLP  
1 Riverfront Plaza  
1037 Raymond Blvd, Suite 1520  
Newark, NJ 07102-5426  
[colleen.foley@saul.com](mailto:colleen.foley@saul.com)

**Elizabethtown Gas Company & South Jersey Gas Company**

Sheree Kelly, Esq., Regulatory Affairs Counsel  
South Jersey Industries  
520 Green Lane  
Union, NJ 07083  
[skelly@sjindustries.com](mailto:skelly@sjindustries.com)

**New Jersey Natural Gas Company**

Andrew K. Dembia, Regulatory Affairs Counsel  
1415 Wyckoff Road  
P.O. Box 1464  
Wall, New Jersey 07719  
[adembia@njng.com](mailto:adembia@njng.com)

**Jersey Central Power & Light Company**

Michael Martelo, Esq., Attorney  
300 Madison Avenue  
P.O. Box 1911

Morristown, NJ 07962-1911  
[mmartelo@firstenergycorp.com](mailto:mmartelo@firstenergycorp.com)  
**JCP&L, cont'd.**

Diane L. Rapp  
76 South Main  
Akron, Ohio 44308  
[drapp@firstenergycorp.com](mailto:drapp@firstenergycorp.com)

Edward C. Miller  
Eric R. Rundy  
800 Cabin Hill Drive  
Greensburg, Pennsylvania 15601  
[emille3@firstenergycorp.com](mailto:emille3@firstenergycorp.com)  
[erundy@firstenergycorp.com](mailto:erundy@firstenergycorp.com)

Mackenzie Klie  
14997 Park Ave Ext  
Meadville, Pennsylvania 16335  
[mklie@firstenergycorp.com](mailto:mklie@firstenergycorp.com)

Kori R. Auman-Krebs  
Viktor Lackmann  
2800 Pottsville Pike  
Reading, Pennsylvania 19605  
[kauman@firstenergycorp.com](mailto:kauman@firstenergycorp.com)  
[vlackmann@firstenergycorp.com](mailto:vlackmann@firstenergycorp.com)

**Public Service Electric and Gas Company**

Stacey M. Mickles, Associate Counsel – Regulatory  
Law Department  
PSEG Services Corporation  
80 Park Plaza – T10  
Newark, New Jersey 07102-4194  
[stacey.mickles@pseg.com](mailto:stacey.mickles@pseg.com)

**Rockland Electric Company**

Margaret Comes, Esq., Associate Counsel  
4 Irving Place  
New York, New York 10003  
[comesm@coned.com](mailto:comesm@coned.com)

**Uplight**

Norris McLaughlin, P.A.  
400 Crossing Boulevard, 8th Floor  
P.O. Box 5933  
Bridgewater, NJ 08807

James H. Laskey, Esq.  
[jlaskey@norris-law.com](mailto:jlaskey@norris-law.com)

Anthony D'Elia  
[adelia@norris-law.com](mailto:adelia@norris-law.com)

Neil Veilleux  
Uplight Inc.  
2350 Junction Pl, Ste 200  
Boulder, CO 80301  
[neil.veilleux@uplight.com](mailto:neil.veilleux@uplight.com)

Sheree L. Kelly, Esq.  
Regulatory Affairs Counsel

October 16, 2024

Sherri Golden, Secretary  
Office of the Secretary  
NJ Board of Public Utilities  
44 South Clinton Avenue, 3<sup>rd</sup> Floor  
P.O. Box 350  
Trenton, NJ 08625-0350

**Re: In the Matter of the Petition of South Jersey Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recovery Pursuant to the Clean Energy Act**  
**BPU Docket No. QO23120870**

Dear Secretary Golden:

Enclosed for filing in the above-referenced proceeding is a Stipulation executed by representatives of South Jersey Gas Company, the Staff of the Board of Public Utilities, the Division of Rate Counsel, New Jersey Large Energy Users Coalition and Energy Efficiency Alliance of New Jersey. It is respectfully requested that the Board consider the Stipulation at its next agenda meeting.

Should you have any questions, please do not hesitate to contact me.

Respectfully submitted,



Sheree L. Kelly

SLK:caj  
Enclosures

cc: See attached Service List (with enclosures)



**IN THE MATTER OF THE PETITION OF SOUTH JERSEY GAS COMPANY FOR  
APPROVAL OF TRIENNIUM 2 CLEAN ENERGY PROGRAMS AND ASSOCIATED  
COST RECOVERY PURSUANT TO THE CLEAN ENERGY ACT  
BPU DOCKET NO. QO23120870**

**SERVICE LIST**

NJ BOARD OF PUBLIC UTILITIES

Steven Athanassopoulos  
N.J. Board of Public Utilities  
44 South Clinton Avenue  
Post Office Box 350  
Trenton, NJ 08625-0350  
[Steven.Athanassopoulos@bpu.nj.gov](mailto:Steven.Athanassopoulos@bpu.nj.gov)

Kyle Fenton  
N.J. Board of Public Utilities  
44 South Clinton Avenue  
Post Office Box 350  
Trenton, NJ 08625-0350  
[kyle.fenton@bpu.nj.gov](mailto:kyle.fenton@bpu.nj.gov)

Kevin Nedza  
N.J. Board of Public Utilities  
44 South Clinton Avenue  
Post Office Box 350  
Trenton, NJ 08625-0350  
[kevin.nedza@bpu.nj.gov](mailto:kevin.nedza@bpu.nj.gov)

Stacy Peterson  
N.J. Board of Public Utilities  
44 South Clinton Avenue  
Post Office Box 350  
Trenton, NJ 08625-0350  
[Stacy.peterson@bpu.nj.gov](mailto:Stacy.peterson@bpu.nj.gov)

Stacy Richardson  
N.J. Board of Public Utilities  
44 South Clinton Avenue  
Post Office Box 350  
Trenton, NJ 08625-0350  
[stacy.richardson@bpu.nj.gov](mailto:stacy.richardson@bpu.nj.gov)

NJ BOARD OF PUBLIC UTILITIES  
CONSULTANTS

Rutgers University  
Jennifer Senick  
[Jsenick@rutgers.edu](mailto:Jsenick@rutgers.edu)

Montclair University  
Dr. Pankaj Lal  
[lalp@montclair.edu](mailto:lalp@montclair.edu)

Cassidy Rucker  
[ruckerc@montclair.edu](mailto:ruckerc@montclair.edu)

DNV  
Jason Meyer  
[Jason.meyer@dnv.com](mailto:Jason.meyer@dnv.com)

Cadmus  
Andrew Grant  
[Andrew.grant@cadmusgroup.com](mailto:Andrew.grant@cadmusgroup.com)

SWE  
Lisa Skumatz  
[skumatz@serainc.com](mailto:skumatz@serainc.com)

DIVISION OF RATE COUNSEL

Maura Caroselli, Esq.  
Division of Rate Counsel  
140 East Front Street, 4<sup>th</sup> Floor  
P.O. Box 003  
Trenton, NJ 08625  
[mcaroselli@rpa.nj.gov](mailto:mcaroselli@rpa.nj.gov)

Terrence Coleman, Paralegal  
Division of Rate Counsel  
140 East Front Street, 4<sup>th</sup> Floor  
P.O. Box 003  
Trenton, NJ 08625  
[tcoleman2@rpa.nj.gov](mailto:tcoleman2@rpa.nj.gov)

Andrew Gold, Esq.  
Division of Rate Counsel  
140 East Front Street, 4<sup>th</sup> Floor  
P.O. Box 003  
Trenton, NJ 08625  
[agold@rpa.nj.gov](mailto:agold@rpa.nj.gov)

**IN THE MATTER OF THE PETITION OF SOUTH JERSEY GAS COMPANY FOR  
APPROVAL OF TRIENNIUM 2 CLEAN ENERGY PROGRAMS AND ASSOCIATED  
COST RECOVERY PURSUANT TO THE CLEAN ENERGY ACT  
BPU DOCKET NO. QO23120870**

**SERVICE LIST**

Brian O. Lipman, Esq.  
Division of Rate Counsel  
140 East Front Street, 4<sup>th</sup> Floor  
P.O. Box 003  
Trenton, NJ 08625  
[blipman@rpa.nj.gov](mailto:blipman@rpa.nj.gov)

Mamie W. Purnell, Esq.  
Division of Rate Counsel  
140 East Front Street, 4<sup>th</sup> Floor  
P.O. Box 003  
Trenton, NJ 08625  
[mpurnell@rpa.nj.gov](mailto:mpurnell@rpa.nj.gov)

DIVISION OF RATE COUNSEL  
CONSULTANTS

Robert J. Henkes  
Henkes Consulting  
7 Sunset Road  
Old Greenwich CT 06870  
[rhenkes@optonline.net](mailto:rhenkes@optonline.net)

Acadian Consulting Group  
5800 One Perkins Place Drive  
Building 5, Suite F  
Baton Rouge, LA 70808

Michael Deupree  
[michaeldeupree@acadianconsulting.com](mailto:michaeldeupree@acadianconsulting.com)

David Dismukes, Ph.D.  
[daviddismukes@acadianconsulting.com](mailto:daviddismukes@acadianconsulting.com)

Roberto Hasbun  
[robhasbun@acadianconsulting.com](mailto:robhasbun@acadianconsulting.com)

Tyler French  
[tylerfrench@acadianconsulting.com](mailto:tylerfrench@acadianconsulting.com)

Nicolas Alvarez  
[nicolasalvarez@acadianconsulting.com](mailto:nicolasalvarez@acadianconsulting.com)

Taylor Deshotels  
[taylordeshotels@acadianconsulting.com](mailto:taylordeshotels@acadianconsulting.com)

Emily Mouch  
[emilymouch@acadianconsulting.com](mailto:emilymouch@acadianconsulting.com)

Applied Economics Clinic  
6 Liberty Square PMB 98162  
Boston, MA 02109

Jordan M. Burt  
[Jordan.burt@aeclinic.org](mailto:Jordan.burt@aeclinic.org)

Tanya Stasio  
[Tanya.stasio@aeclinic.org](mailto:Tanya.stasio@aeclinic.org)

Elizabeth A. Stanton, PhD  
[Liz.stanton@aeclinic.org](mailto:Liz.stanton@aeclinic.org)

Sumera Patel  
[Sumera.patel@aeclinic.org](mailto:Sumera.patel@aeclinic.org)

Elisabeth Seliga  
[Elisabeth.seliga@aeclinic.org](mailto:Elisabeth.seliga@aeclinic.org)

DEPT. OF LAW & PUBLIC SAFETY  
– DIVISION OF LAW

Steven Chaplar, DAG  
Dept. of Law & Public Safety  
Division of Law  
Public Utilities Section  
R.J. Hughes Justice Complex  
25 Market Street, 7<sup>th</sup> Floor West  
P.O. Box 112  
Trenton, NJ 08625  
[Steven.Chaplar@law.njoag.gov](mailto:Steven.Chaplar@law.njoag.gov)

**IN THE MATTER OF THE PETITION OF SOUTH JERSEY GAS COMPANY FOR  
APPROVAL OF TRIENNIUM 2 CLEAN ENERGY PROGRAMS AND ASSOCIATED  
COST RECOVERY PURSUANT TO THE CLEAN ENERGY ACT  
BPU DOCKET NO. QO23120870**

**SERVICE LIST**

Matko Ilic  
Dept. of Law & Public Safety  
Division of Law  
Public Utilities Section  
R.J. Hughes Justice Complex  
25 Market Street, 7<sup>th</sup> Floor West  
P.O. Box 112  
Trenton, NJ 08625  
[matko.ilic@law.njoag.gov](mailto:matko.ilic@law.njoag.gov)

**SOUTH JERSEY GAS COMPANY**

Dominick DiRocco  
VP, Rates & Regulatory Affairs  
SJI Utilities, Inc.  
One South Jersey Plaza  
Folsom, NJ 08037  
[ddirocco@sjindustries.com](mailto:ddirocco@sjindustries.com)

Cindy Capozzoli  
Director, Rates  
SJI Utilities, Inc.  
One South Jersey Place  
Atlantic City, NJ 08401  
[ccapozzoli@sjindustries.com](mailto:ccapozzoli@sjindustries.com)

W. Peter Druckenmiller  
Manager, Residential Energy Efficiency  
South Jersey Gas Company  
One South Jersey Place  
Atlantic City, NJ 08401  
[wdruckenmiller@sjindustries.com](mailto:wdruckenmiller@sjindustries.com)

James G. Fredericks  
Rates Analyst Lead  
SJG  
One South Jersey Place  
Atlantic City, NJ 08401  
[jfredericks@sjindustries.com](mailto:jfredericks@sjindustries.com)

Carolyn A. Jacobs  
Regulatory Compliance Specialist Sr.  
SJI Utilities, Inc.  
One South Jersey Place  
Atlantic City, NJ 08401  
[cjacobs@sjindustries.com](mailto:cjacobs@sjindustries.com)

Sheree Kelly, Esq.  
Regulatory Affairs Counsel  
SJI Utilities, Inc.  
520 Green Lane  
Union, NJ 07083  
[skelly@sjindustries.com](mailto:skelly@sjindustries.com)

Jennifer Weitz  
Regulatory Affairs Counsel - Intermediate  
SJI Utilities, Inc.  
520 Green Lane  
Union, NJ 07083  
[jweitz@sjindustries.com](mailto:jweitz@sjindustries.com)

Ed McFadden  
VP, Sales & Marketing  
SJI  
One South Jersey Place  
Atlantic City, NJ 08401  
[emcfadden@sjindustries.com](mailto:emcfadden@sjindustries.com)

Andrew McNally  
Senior Director,  
Government & Regulatory Affairs  
SJI Utilities, Inc.  
520 Green Lane  
Union, NJ 07083  
[amcnally@sjindustries.com](mailto:amcnally@sjindustries.com)

Maureen Minkel, Senior Director  
Marketing & Energy Efficiency  
SJI  
One South Jersey Place  
Atlantic City, NJ 08401  
[mminkel@sjindustries.com](mailto:mminkel@sjindustries.com)

**IN THE MATTER OF THE PETITION OF SOUTH JERSEY GAS COMPANY FOR  
APPROVAL OF TRIENNIUM 2 CLEAN ENERGY PROGRAMS AND ASSOCIATED  
COST RECOVERY PURSUANT TO THE CLEAN ENERGY ACT  
BPU DOCKET NO. QO23120870**

**SERVICE LIST**

Michael Savacool, Manager  
Financial Planning/Energy Efficiency  
SJI Utilities, Inc.  
One South Jersey Place  
Atlantic City, NJ 08401  
[msavacool@sjindustries.com](mailto:msavacool@sjindustries.com)

Isaac Gabel-Frank  
Gabel Associates, Inc.  
417 Denison Street  
Highland Park, NJ 08904  
[isaac@gabelassociates.com](mailto:isaac@gabelassociates.com)

Brendon Baatz  
Gabel Associates, Inc.  
417 Denison Street  
Highland Park, NJ 08904  
[brendon@gabelassociates.com](mailto:brendon@gabelassociates.com)

Energy Efficiency Alliance of NJ

John M. Kolesnik  
[Jkolesnik@eeaofnj.org](mailto:Jkolesnik@eeaofnj.org)

NJ Large Energy Users Coalition

Steven S. Goldenberg  
[sgoldenberg@ghclaw.com](mailto:sgoldenberg@ghclaw.com)

ATLANTIC CITY ELECTRIC

Philip J. Passanante\*  
Atlantic City Electric Company –  
92DC42  
500 North Wakefield Drive  
P.O. Box 6066  
Newark, Delaware 19714-6-66  
[Philip.passanante@pepcoholdings.com](mailto:Philip.passanante@pepcoholdings.com)

Nathanael Gillespie\*  
[nathanael.gillespie@exeloncorp.com](mailto:nathanael.gillespie@exeloncorp.com)

Jessica Yu\*  
[jessica.yu@exeloncorp.com](mailto:jessica.yu@exeloncorp.com)

Heather Hall\*  
[heather.hall@pepcoholdings.com](mailto:heather.hall@pepcoholdings.com)

Imran Bell\*  
[imran.bell@exeloncorp.com](mailto:imran.bell@exeloncorp.com)

Daniel Anderson\*  
[danderson@pepco.com](mailto:danderson@pepco.com)

Ruth C. Kiselewich\*  
[ruth.kiselewich@exeloncorp.com](mailto:ruth.kiselewich@exeloncorp.com)

Susan Marinelli\*  
[smarinelli@pepcoholdings.com](mailto:smarinelli@pepcoholdings.com)

Sherryl Chen\*  
[sherryl.chen@pepcoholdings.com](mailto:sherryl.chen@pepcoholdings.com)

JERSEY CENTRAL POWER &  
LIGHT

First Energy Corp.  
76 South Main  
Akron, Ohio 44308

Kurt E. Turosky\*  
[turoskyk@firstenergycorp.com](mailto:turoskyk@firstenergycorp.com)

Diane L. Rapp\*  
[drapp@firstenergycorp.com](mailto:drapp@firstenergycorp.com)

800 Cabin Hill Drive  
Greensburg, PA 15601

Edward C. Miller\*  
[emille3@firstenergycorp.com](mailto:emille3@firstenergycorp.com)

**IN THE MATTER OF THE PETITION OF SOUTH JERSEY GAS COMPANY FOR  
APPROVAL OF TRIENNIUM 2 CLEAN ENERGY PROGRAMS AND ASSOCIATED  
COST RECOVERY PURSUANT TO THE CLEAN ENERGY ACT  
BPU DOCKET NO. QO23120870**

**SERVICE LIST**

Eric R. Rundy\*  
[erundy@firstenergycorp.com](mailto:erundy@firstenergycorp.com)

14997 Park Ave Ext  
Meadville, PA 16335

Mackenzie Klie\*  
[mklie@firstenergycorp.com](mailto:mklie@firstenergycorp.com)

2800 Pottsville Pike  
Reading, Pennsylvania 19605

Kori R. Auman-Krebs\*  
[kauman@firstenergycorp.com](mailto:kauman@firstenergycorp.com)

Viktor Lackmann\*  
[vlackmann@firstenergycorp.com](mailto:vlackmann@firstenergycorp.com)

Riker Danzig, LLP  
Headquarters Plaza  
One Speedwell Avenue  
Morristown, NJ 07962-1981

James C. Meyer, Esq.\*  
[JMeyer@riker.com](mailto:JMeyer@riker.com)

Edward K. DeHope, Esq.\*  
[EDeHope@riker.com](mailto:EDeHope@riker.com)

Lauren Lepkoski, Esq.\*  
2800 Pottsville Pike  
P.O. Box 16001  
Reading, PA 19612-6001  
[Llepkoski@firstenergycorp.com](mailto:Llepkoski@firstenergycorp.com)

NEW JERSEY NATURAL GAS

Andrew K. Dembia, Esq.\*  
New Jersey Natural Gas Company  
1415 Wyckoff Road  
P.O. Box 1464  
Wall, NJ 07719  
[adembia@njng.com](mailto:adembia@njng.com)

Susan Fastuca\*  
[sfastuca@njng.com](mailto:sfastuca@njng.com)

PUBLIC SERVICE ELECTRIC &  
GAS

Public Service Electric & Gas  
80 Park Plaza, T5G  
Newark, NJ 07102

Bernard Smalls\*  
[Bernard.Smalls@pseg.com](mailto:Bernard.Smalls@pseg.com)

Stacey Mickles, Esq.\*  
[stacey.mickles@pseg.com](mailto:stacey.mickles@pseg.com)

Caitlyn White\*  
[Caitlyn.White@pseg.com](mailto:Caitlyn.White@pseg.com)

ROCKLAND ELECTRIC COMPANY

4 Irving Place Suite 1815-S  
New York, NY 10003

Margaret Comes, Esq.\*  
[comesm@coned.com](mailto:comesm@coned.com)

Jack Carley, Esq.\*  
[carleyj@coned.com](mailto:carleyj@coned.com)

**IN THE MATTER OF THE PETITION OF SOUTH JERSEY GAS COMPANY FOR  
APPROVAL OF TRIENNIUM 2 CLEAN ENERGY PROGRAMS AND ASSOCIATED  
COST RECOVERY PURSUANT TO THE CLEAN ENERGY ACT  
BPU DOCKET NO. QO23120870**

**SERVICE LIST**

Brendon Baatz\*  
Gabel Associates, Inc.  
417 Denison Street  
Highland Park, NJ 08904  
[brendon@gabelassociates.com](mailto:brendon@gabelassociates.com)

Uplight, Inc.

Jim Laskey\*  
[jlaskey@norris-law.com](mailto:jlaskey@norris-law.com)

A. Delia\*  
[adelia@norris-law.com](mailto:adelia@norris-law.com)

Neil Veilleux\*  
[Neil.veilleux@uplight.com](mailto:Neil.veilleux@uplight.com)

**STATE OF NEW JERSEY  
BOARD OF PUBLIC UTILITIES**

<b>IN THE MATTER OF THE PETITION OF</b>	<b>:</b>	<b>STIPULATION OF SETTLEMENT</b>
<b>SOUTH JERSEY GAS COMPANY FOR</b>	<b>:</b>	
<b>APPROVAL OF TRIENNium 2 CLEAN</b>	<b>:</b>	
<b>ENERGY PROGRAMS AND ASSOCIATED</b>	<b>:</b>	
<b>COST RECOVERY PURSUANT TO THE</b>	<b>:</b>	<b>BPU DOCKET NO. QO23120870</b>
<b>CLEAN ENERGY ACT</b>	<b>:</b>	

**APPEARANCES:**

**Sheree Kelly, Esq.**, Regulatory Affairs Counsel, for Petitioner, South Jersey Gas Company

**Terrence Regan, Esq.**, Cullen and Dykman, LLP for Petitioner, South Jersey Gas Company

**Maura Caroselli, Esq.**, Managing Attorney – Gas, **Mamie W. Purnell, Esq.**, **Megan C. Lupo, Esq.**, and **Andrew H. Gold, Esq.**, Assistant Deputies Rate Counsel, for the New Jersey Division of Rate Counsel (**Brian O. Lipman, Esq.**, Director)

**Steven A. Chaplar, Esq.**, Deputy Attorney General, for the Staff of the New Jersey Board of Public Utilities (**Matthew J. Platkin, Esq.**, Attorney General of New Jersey)

**John M. Kolesnik, Esq.**, Policy Counsel, Energy Efficiency Alliance of New Jersey

**Steven S. Goldenberg, Esq.**, Giordano, Halleran & Ciesla, P.C. for the New Jersey Large Energy Users Coalition

**TO: THE NEW JERSEY BOARD OF PUBLIC UTILITIES**

It is hereby AGREED, by and between South Jersey Gas Company (“South Jersey,” “SJG,” or “Company”), the Staff of the New Jersey Board of Public Utilities (“Staff”), the New Jersey Division of Rate Counsel (“Rate Counsel”), the Energy Efficiency Alliance of New Jersey (“EEA-NJ”), and the New Jersey Large Energy Users Coalition (“NJLEUC”) (collectively, “Parties”) to execute this Stipulation of Settlement (“Stipulation”) resolving South Jersey’s petition in this docket and to join in recommending that the New Jersey Board of Public Utilities (“BPU” or “Board”) issue a Final Decision and Order approving this Stipulation.

## **BACKGROUND**

1. Pursuant to the legislative authority set forth in the Regional Greenhouse Gas Initiative (“RGGI”) Act, L. 2007, c. 340 (“RGGI Act”), by Order dated May 8, 2008, the Board authorized New Jersey’s electric and gas public utilities to offer energy efficiency (“EE”) and conservation programs on a regulated basis, provided that the respective utility file a petition and obtain BPU approval for such programs and the associated mechanism for program cost recovery.<sup>1</sup> By the May 2008 Order, the Board also established minimum filing requirements (“MFRs”) that require the submission of certain information with each petition filed pursuant to the RGGI Act. The May 2008 Order also requires each utility to meet with Staff and Rate Counsel at least thirty (30) days prior to filing of a petition pursuant to the RGGI Act to discuss: (a) the nature of the program; (b) the program cost recovery mechanism to be proposed in the petition; and (c) the MFRs to be submitted along with the petition.

2. Pursuant to the Clean Energy Act, L. 2018, c. 17 (“CEA”), by Order dated June 10, 2020, the Board directed New Jersey’s electric and gas utilities to establish EE and peak demand reduction (“PDR”) programs.<sup>2</sup> By the June 2020 Framework Order, the Board revised the MFRs for EE filings and directed the State’s electric and gas public utilities to file petitions proposing three (3)-year EE programs by September 25, 2020, for approval by the Board by May 1, 2021, and implementation beginning July 1, 2021 and concluding June 20, 2024 (“Triennium 1”).

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<sup>1</sup> In re Electric Public Utilities and Gas Public Utilities Offering Energy Efficiency and Conservation Programs, Investing in Class I Renewable Energy Resources, And Offering Class I Renewable Energy Programs in Their Respective Service Territories on a Regulated Basis Pursuant to N.J.S.A. 48:3-98.1, BPU Docket No. EO08030164, Order dated May 8, 2008 (“May 2008 Order”).

<sup>2</sup> In re the Implementation of P.L. 2018, c. 17 Regarding the Establishment of Energy Efficiency and Peak Demand Reduction Programs, BPU Docket No. QO19010040, Order dated June 10, 2020 (“June 2020 Framework Order”).



3. On September 25, 2020, South Jersey filed a petition seeking approval of its Triennium 1 EE program. By Order dated April 7, 2021, the Board approved a Stipulation of Settlement authorizing South Jersey to implement its Triennium 1 program with a total program budget of \$133.266 million including operations and maintenance (“O&M”) expenses in an amount not to exceed \$11.554 million.<sup>3</sup> By the April 2021 Order, the Board also approved the Company’s implementation of a cost recovery mechanism which allows for a full return on its EE investment as a component of the Company’s Energy Efficiency Tracker (“EET”) rate mechanism.

4. By Orders dated May 24, 2023 and July 26, 2023, the Board set forth the framework for the second three (3)-year period of EE and conservation programs (“Triennium 2”) and directed the State’s public utilities to propose EE programs for Triennium 2 on or before October 2, 2023.<sup>4</sup> Additionally, by the 2023 Framework Orders, the Board further revised the MFRs for EE filings.

5. With respect to the instant petition, on August 29, 2023 and September 5, 2023, joint thirty (30)-day pre-filing meetings were conducted with Staff, Rate Counsel, and the other New Jersey utilities in accordance with the May 2008 Order.<sup>5</sup>

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<sup>3</sup> In re the Implementation of L. 2018, c. 17 Regarding the Establishment of Energy Efficiency and Peak Demand Reduction Programs and In the Matter of the Petition of South Jersey Gas Company for Approval of New Energy Efficiency Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket Nos. QO19010040 and GO20090618, Order Adopting Stipulation dated April 7, 2021 (“April 2021 Order”).

<sup>4</sup> In re the Implementation of P.L. 2018, c. 17 Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs, BPU Docket No. QO23030150, Order Directing the Utilities to Propose Second Triennium Energy Efficiency and Peak Demand Reduction Programs, Order dated May 24, 2023 (“May 2023 Framework Order”) and In re the Implementation of P.L. 2018, c. 17, Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs, BPU Docket No. QO23030150, Order Directing the Utilities to Propose Second Triennium Energy Efficiency and Peak Demand Reduction Programs dated July 26, 2023 (“July 2023 Framework Order”).

<sup>5</sup> The New Jersey utilities that participated in the thirty (30)-day meeting were the Company, Atlantic City Electric Company (“ACE”), Elizabethtown Gas Company (“ETG”), Jersey Central Power & Light Company (“JCP&L”),

6. In addition, a meeting was conducted on September 14, 2023, with ETG, SJG, Staff, and Rate Counsel specifically in connection with this matter.

7. In accordance with the Board's January 25, 2023 Order approving the merger between South Jersey Industries, Inc., South Jersey's parent company, and Boardwalk Merger Sub, Inc., a subsidiary of IIF US Holding 2 LP, South Jersey agreed to coordinate with the BPU and the other New Jersey utilities to deliver cost effective EE programs in accordance with the CEA.<sup>6</sup> The Merger Order also included a commitment from South Jersey to consider how it can expand current offers and rebates to commercial and industrial ("C&I") customers and to work collaboratively with NJLEUC to explore EE and DR offerings beneficial to C&I customers. Accordingly, South Jersey met with NJLEUC and its members on August 25, 2023 to discuss the Company's proposed C&I programs and receive feedback from NJLEUC and its members.

8. By Order dated September 27, 2023, the Board retained jurisdiction for the EE Triennium 2 petitions, designated presiding commissioners for each filing, and extended the Triennium 2 filing deadline until December 1, 2023.<sup>7</sup>

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New Jersey Natural Gas Company ("NJNG"), Public Service Electric and Gas Company ("PSE&G"), and Rockland Electric Company ("RECO").

<sup>6</sup> In re the Merger of South Jersey Industries, Inc. and Boardwalk Merger Sub, Inc., BPU Docket No. GM22040270, Order on Stipulation of Settlement, Order dated January 25, 2023 ("Merger Order").

<sup>7</sup> In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Establishment of Energy Efficiency and Peak Demand Reduction Programs; In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs; In re Electric Public Utilities and Gas Public Utilities Offering Energy Efficiency and Conservation Programs, Investing in Class I Renewable Energy Resources and Offering Class I Renewable Energy Programs in Their Respective Service Territories on a Regulated Basis, Pursuant to N.J.S.A. 48:3-98.1 and N.J.S.A. 48:3-87.9 - Minimum Filing Requirements, BPU Docket Nos. QO19010040, QO23030150, and QO17091004, Designating Commissioner, Setting Manner of Service, and Bar Dates, Order dated September 27, 2023 ("September 2023 Order").

## **PROCEDURAL HISTORY**

9. By Order dated October 25, 2023, the Board revised the Triennium 2 program period and delayed the start of Triennium 2 by six (6) months from July 1, 2024 to January 1, 2025.<sup>8</sup> By the October 2023 Order, the Board also updated the Triennium 2 energy savings targets for the Triennium 2 EE programs and ordered that Triennium 2 would be a thirty (30)-month period covering January 1, 2025 through June 30, 2027.

10. Under the RGGI Act, once a petition has been filed with the Board, Staff shall have thirty (30) days, commencing on the date the petition was filed, to determine whether the petition is administratively complete and to advise the corresponding utility in writing of any deficiency. Additionally, if Staff determines that the petition is not administratively complete, Staff shall set forth the deficiencies and the items required to remedy the deficiencies.

11. On December 26, 2023, Staff informed the Company via letter that it found the Petition to be administratively deficient with respect to the MFRs (“Deficiency Letter”). In response to the Deficiency Letter, the Company filed supplemental information on January 5, 2024 (“Supplemental Filing”). On January 12, 2024, Staff notified the Company that it reviewed the Petition for completeness and determined it to be administratively complete, thereby establishing the commencement of the Board’s 180-day review period under N.J.S.A. 48:3-98.1 on January 5, 2024, with an expiration date of July 3, 2024.

12. By Order dated January 10, 2024, the Board designated Commissioner Abdou as presiding Commissioner in this matter and extending the date for entities to file Motions seeking

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<sup>8</sup> In re the Implementation of P.L. 2018, c. 17, Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs, BPU Docket No. QO23030150, Order dated October 25, 2023 (“October 2023 Order”). The May 2023 Framework Order, July 2023 Framework Order, and October 2023 Order are collectively referred to as the “2023 Framework Orders.”

leave to intervene or participate.<sup>9</sup> NJLEUC and the EEA-NJ filed motions to intervene in this matter on December 7, 2023 and December 8, 2023, respectively. On December 8, 2023, ACE, ETG, JCP&L, NJNG, RECO, PSE&G, and Uplight, Inc. (“Uplight”) each submitted motions to participate in the proceeding.

13. On December 14, 2024, South Jersey submitted a letter indicating that it had no opposition to the motions to participate filed by ACE, JCP&L, NJNG, RECO, PSE&G, SJG, and Uplight or to the intervention of NJLEUC and EEA-NJ. Rate Counsel submitted a letter on December 14, 2024 indicating that it did not oppose the participation of by ACE, JCP&L, NJNG, RECO, PSE&G, SJG, and Uplight or to the intervention of NJLEUC in the proceeding. Rate Counsel opposed the intervention of EEA-NJ in the proceeding, arguing that EEA-NJ failed to demonstrate a legally protected right sufficient to permit intervention; however, Rate Counsel did not object to granting EEA-NJ participant status. EEA-NJ responded to Rate Counsel’s opposition by letter dated December 20, 2023, arguing that it should be granted intervenor status, as it would be substantially, specifically, and directly affected by the outcome of the case, and that its interest differed from those of any other party in the proceeding.

14. On February 26, 2024, Commissioner Abdou issued an Order on Motions to Intervene or Participate granting the motions to intervene for NJLEUC and EEA-NJ and the motions to participate for ACE, ETG, JCP&L, NJNG, RECO, PSE&G, and Uplight.

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<sup>9</sup> In re the Implementation of P.L. 2018, c. 17, the New Jersey Clean Energy Act of 2018, Regarding the Second Triennium of Energy Efficiency and Peak Demand Reduction Programs *et al.*, BPU Docket Nos. QO23030150, QO23120868, QO23120869, QO23120870, QO23120871, QO23120872, QO23120874, and QO23120875, Order dated January 10, 2024.

15. On April 23, 2024, Commissioner Abdou issued an Order setting a procedural schedule and approving the Parties' Stipulation to Extend the 180-Day Period for the Board to issue a decision pursuant to N.J.S.A. 48:3-98.1 to October 15, 2024.<sup>10</sup>

16. South Jersey provided public notice of the Petition, including the date, time, and place of public hearings, in newspapers having a circulation within the Company's service territory and was served on the Clerks of the municipalities, the Clerks of the Board of County Commissioners, and the County Executives within the Company's service territory. Following Proper notice, the Company held two (2) public hearings on the Petition on May 21, 2024. Several members of the public made statements at the public hearings, many of whom commented in support of the Petition. Three (3) members of the public attended, and two (2) members of the public participated at the hearings. The Board received written comments from one member of the public.

17. During the course of settlement discussions, by Orders dated May 15, 2024 and June 4, 2024, Commissioner Abdou approved several requests for extensions of the deadline to file testimony in this matter and to suspend the procedural schedule to allow for further settlement discussions.<sup>11</sup>

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<sup>10</sup> In re the Petition of South Jersey Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket No. QO23120870, Order dated April 23, 2024.

<sup>11</sup> In re the Petition of South Jersey Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recovery Pursuant to the Clean Energy Act, BPU Docket No. QO23120870, Order dated May 15, 2024; and In re the Petition of South Jersey Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recover Pursuant to the Clean Energy Act, BPU Docket No. QO23120870, Order dated June 3, 2024.

18. On October 15, 2024, Commissioner Abdou issued an Order approving the Parties' Stipulation to Extend the 180-Day Period for the Board to issue a decision pursuant to N.J.S.A. 48:3-98.1 to October 31, 2024.<sup>12</sup>

### **SOUTH JERSEY GAS EEP FILING**

19. On December 1, 2023, South Jersey Gas Company ("South Jersey," "SJG," or "Company") filed a petition with the Board proposing EE Programs ("EEPs" or "EE Programs"), BD Programs, and DR Programs (collectively referred to as "Triennium 2 Programs") in accordance with the Triennium 2 Orders ("Petition"). By the Petition, the Company proposed to spend approximately \$425.0 million (investment and expenses) on Triennium 2 Programs over a two-and-one-half (2.5) year period (January 1, 2025 through June 30, 2027). This amount included allocations to and from the electric distribution companies whose service territory overlaps with the service territory of South Jersey ("Partner Utilities"). The proposed programs and associated costs as originally proposed in the Petition are set forth in the table below:

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<sup>12</sup> In re the Petition of Elizabethtown Gas Company for Approval of Triennium 2 Clean Energy Programs and Associated Cost Recover Pursuant to the Clean Energy Act, BPU Docket No. QO23120869, Order dated October 15, 2024.

<b>Program</b>	<b>Proposed Budget (two-and-a-half Year Program)</b>
Whole Home	\$30,278,974
Income Qualified	\$27,369,974
Energy Efficient Products	\$135,931,284
Behavioral	\$3,463,936
Energy Solutions	\$32,334,649
Prescriptive and Custom	\$12,743,893
Direct Install	\$22,175,573
Multifamily	\$28,584,098
Next Generation Savings	\$1,078,640
Building Decarbonization	\$7,034,352
Demand Response	\$1,292,852
Other Portfolio Costs	\$1,775,000
<b>Portfolio Total</b>	<b>\$304,063,225</b>
<i>Net Partner Utility Transfers</i>	\$120,938,052
<b>Total Budget</b>	<b>\$425,001,277</b>

20. In addition to approval of the plan to implement the Triennium 2 Programs, the Company requested approval for recovery of costs and lost revenues associated with the Programs. Specifically, South Jersey requested authority to recover the revenue requirement associated with the Triennium 2 Programs through the existing EET rate mechanism as set forth in Rider “N” of the Company’s tariff. As previously approved, the proposed cost recovery mechanism consisted of two (2) parts. One part of the EET allows the Company to earn a return on the investment and recover the amortization of the regulatory asset. The second part of the EET allowed the Company to recover incremental O&M expenses associated with the Triennium 2 Programs. The Company proposed to continue to recover lost revenues from reduced natural gas sales associated with the Triennium 2 Programs through its current Conservation Incentive Program (“CIP”) mechanism.

21. The Company proposed a change to the EET rate effective January 1, 2025, coincident with the beginning of the effective date of the proposed Triennium 2 Programs. Additionally, consistent with its currently approved EEPs and EET cost recovery mechanism,

and as required by the Triennium 2 Orders, South Jersey proposed to continue to file with the Board, on an annual basis, a petition seeking to establish future EET rates and to adjust its EET rate to reflect over and under recoveries. South Jersey estimated that the initial monthly bill impact for a typical residential heating customer using 100 therms in a month will be an increase of \$1.24, or 0.7% as compared to then-current rates, effective upon Board approval.

22. Based upon further discussions, the Parties have reached an agreement to enter into this stipulation of settlement (“Stipulation”) finalizing the Triennium 2 Program and resolving all issues raised in or related to the Petition.

23. Specifically, based upon and subject to the terms and conditions set forth herein, the Parties **STIPULATE AND AGREE** as follows:

### **STIPULATED MATTERS**

#### **Triennium 2 Programs**

24. The Parties agree that, subject to Board approval of this Stipulation, the Company may implement Triennium 2 Programs under the terms and conditions described herein for a term of two-and-one-half years commencing January 1, 2025 and ending June 30, 2027. Triennium 2 programs will include implementation, administration, and investment in eight (8) EE core programs. The EE core programs are comprised of four (4) residential, three (3) C&I, and one (1) multifamily program.

25. In addition to the programs above, the Company will also continue its workforce development (“WFD”) program as required in the 2023 Framework Orders. The Company shall develop a WFD implementation plan, community benefits plan, and evaluation plan, including performance metrics, before or within Program Year 5 of Triennium 2. The Company shall actively seek input and recommendations from the EE WFD Working Group established by the



Board in the June 2020 Framework Order and through monthly EE stakeholder meetings to develop and enhance these plans prior to implementation in coordination with the other New Jersey utilities.

26. Upon receipt of any monies received by the utility as direct funding from a State or federal governmental entity for the Company's WFD program the Company agrees to reduce its WFD budget by the corresponding dollar amount.

27. Except as set forth below, the Company will not designate any funding in its WFD program toward wraparound services. Consistent with the May 2023 Framework Order and Triennium 1, the Company will work with State and federal agencies to seek any opportunity to receive grants or funding specifically for the provision of wraparound services that may be available to the Company, partner community-based organizations (“CBOs”), and/or participants of the Company’s WFD program for wraparound services. To the extent that programs or funding are not available or funding is insufficient, the Company may utilize Triennium 2 WFD dollars to provide these services up to the lesser of \$100,000 or 3% of its approved WFD budget and will coordinate with utilities having overlapping territory to minimize the costs to deliver these services. The utilities are encouraged to seek deeper coordination with CBOs for wraparound services in preparation for Triennium 3.

28. The Company will not utilize its WFD or O&M budget to provide contractors with WFD performance incentives.

29. WFD program funding shall not be utilized to provide training or development to the Company's own employees.

30. The Company agrees to withdraw its request to implement the following Triennium 2 Programs: Next Generation Savings, BD, and DR.

31. The Company agrees to withdraw its request to include the Comfort Partners Program as a component of its Income Qualified Program. The Comfort Partners Program will continue to be managed by the Board. The Company will continue to claim savings from the Comfort Partners Program towards its compliance with its quantitative performance indicators (“QPIs”).

32. The Parties agree that the design for the Triennium 2 Programs shall be as described in the updated South Jersey Triennium 2 Program Plan which is Attachment 1 to this Stipulation and incorporated by reference. Attachment 1 is subject to modification as permitted by the 2023 Framework Orders or as otherwise approved by the Board.

33. The Parties anticipate that programs will continue to evolve. The Company shall continue to coordinate with the Division of Clean Energy and other utilities with whom the Company has overlapping service territories to achieve consistency where possible in the design and delivery of core programs. To the extent that the utilities jointly decide to implement programs differently than currently envisioned, the Company commits to implement – as permissible under law, this Stipulation, and within approved budgets – consistent elements of the core programs concurrently with all electric and gas utilities in the state as follows:

- Common forms for use by customers and contractors;
- Contractor requirements, open and competitive procurement protocols where feasible, and training; procurement protocols should include policies and practices (e.g., scoring systems) that encourage supplier diversity (including contractors and subcontractors) and contractor coaching/mentoring of diverse business enterprises;
- Customer and property eligibility requirements and processes, including alternative/automatic eligibility methods for low- to moderate-income customers (e.g., based on census tracts, environmental justice communities, Urban Enterprise Zones, etc.);

- Eligible measures;
- Incentive ranges;
- Incentive payment processes and timeframes;
- Customer and contractor engagement platforms;
- Data platforms and database sharing among program administrators, where appropriate; and
- Quality control standards and remediation policies.

To the extent the Company wishes to change programs in ways that conflict with this Stipulation, the Company will advise all parties to this Stipulation and seek to modify the Stipulation and obtain Board approval for those changes.

34. The Company agrees to contribute to the design and coordinate on the scope of a one-stop shop website, a platform to provide customers and contractors with a simple and easy-to-understand application process to participate in utility and State EE, BD, and DR programs. The Parties agree to work together to develop a project plan and timeline by June 30, 2025 to launch the website during Triennium 2 if feasible. Key project development milestones include, but are not limited to: initial design phase, development phase, testing and quality assurance, launch, and training. This initiative will be funded at a value not to exceed 1% of the Company's administrative budget.

35. Incentive structures associated with the core programs are described in Attachment 1 to this Stipulation, consistent with the 2023 Framework Orders, and include any additional updates to incentives that are agreed upon as part of this Stipulation.

36. The Parties agree that the Company is authorized to offer up to \$125.4 million of principal in on-bill repayment ("OBR") to its customers which will be repaid by the participants and shall not be charged to ratepayers. The Parties agree that financing shall continue to be offered at a 0% interest rate for the duration of Triennium 2. The Company intends to work with

the other utilities throughout implementation to continue to provide comparable financing offerings to customers and deliver similar access across the coordinated programs. The Company plans to make this financing option available for customer participating across the residential, multifamily, and C&I sector programs where qualifying measures involve a sizeable cost to the customer, including major appliances, HVAC, home retrofit and multifamily projects, small business direct install projects, C&I prescriptive and custom measures, and Energy Solutions projects. The Company agrees to coordinate with the other utilities on evaluation, measurement, and verification (“EM&V”) studies to review the impact of financing offerings on program participation and identify potential modifications that may be implemented in future triennia.

37. The Parties acknowledge the important role played by rebates and incentive levels in customer adoption of EE measures and that the Parties have endeavored to identify a level of rebates and incentives that will allow utilities to achieve their required energy savings targets. During the Triennium 2 period, the Parties agree to revisit specific Triennium 2 EE Plan rebate/incentive levels if customer participation is inadequate or in excess of what is required to meet the Company’s Triennium 2 savings targets and to adjust rebate/incentive levels to ensure that they facilitate appropriate customer participation that will allow the Company to meet its Triennium 2 energy savings targets. Any adjustments will be consistent with the requirements enumerated at page 19 of the May 2023 Framework Order, and any requests to increase a rebate or incentive in excess of the maximum incentive range which is shown as the “up to” amount in Appendix H to Attachment 1 to this Stipulation will require Staff’s approval.

38. Customers in SJG’s gas service territory who meet the criteria for the respective Triennium 2 offerings will be eligible to participate.

### Triennium 2 Budget by Program

39. The Parties agree to the Triennium 2 budget as follows:

<b>DIRECT BUDGET PROGRAM</b>	<b>TOTAL PROGRAM</b>
BEHAVIORAL	\$3,463,936
ENERGY EFFICIENT PRODUCTS	\$48,547,514
WHOLE HOME	\$9,534,374
INCOME QUALIFIED	\$12,247,704
MULTIFAMILY	\$15,859,741
PRESCRIPTIVE / CUSTOM	\$5,699,155
DIRECT INSTALL	\$16,155,250
ENERGY SOLUTIONS	\$19,482,326
STATEWIDE COORDINATOR	\$675,000
WORKFORCE DEVELOPMENT	\$800,000
COMMUNITY OUTREACH	\$300,000
TOTAL PROGRAMMATIC BUDGET	\$132,765,000
NET TRANSFERS TO/FROM EDCS	\$49,600,000
TOTAL DIRECT BUDGET	\$182,365,000
*Includes \$15.47M of incremental O&M expenses	

40. The Parties agree that the total programmatic budget for the Triennium 2 period shall not exceed \$132,765,000, which includes a not to exceed value of \$15.47 million in O&M expenses.

41. The Parties also agree that the budget for net transfers in utility overlapping territories is approximately \$49.6 million, resulting in a total direct budget of approximately \$182.4 million. To the extent that the net transfer budget differs from the stipulated value, SJG will manage any overage or shortfall within the approved total direct budget. The Company shall coordinate the exchange of energy savings and costs with any utility whose service territory overlaps with the Company's service territory ("Partner Utility") consistent with the net transfer process previously employed in Triennium 1, as it may be revised from time to time. The Company also agrees to report its gross inflows and outflows of transfers, the details of which

will be determined by Staff, Rate Counsel, and the utilities via the group established by the Board in the June 2020 Framework Order to facilitate and resolve issues impacting the EM&V of EE and PDR programs implemented pursuant to the CEA (“EM&V Working Group”).

### **Triennium 2 Program Expenditures**

42. The Parties agree that the total programmatic budget for the Triennium 2 Programs is \$132,765,000 which includes investment and administrative expenses. Investments include all capital expenditures, direct incentives, incentive payment processing, program customer intake processing, direct marketing and outreach, health and safety, audit, installation labor, project quality assurance/quality control, administration and outside services for third-party program implementation, and evaluation, measurement, and verification (“EM&V”). The budget for investments includes amounts that are spent or committed during Triennium 2, amounts reserved to fund projects and incentives for customers who have enrolled in programs during Triennium 2, and program EM&V costs that extend beyond the thirty (30)-month period. The Parties also agree that Triennium 2 Program funds may be utilized for a project that was enrolled during Triennium 1 and completed in the Triennium 2 program cycle.

43. The Parties agree that, in order to have programs, vendors, and systems in place to begin delivery on January 1, 2025, program spending may commence upon Board approval of the Stipulation. All Triennium 2 expenditures will be filed with the Board and submitted for prudence review in annual cost recovery filings by way of Elizabethtown’s annual cost recovery proceedings.

### **Budget Updates**

44. The Company may shift the timing of investment spending between or among program years, programs, and sectors as necessary to provide flexibility in responding to market

conditions and customer demand and to ensure the achievement of program targets during the term of the Program in accordance with the limitations and procedures set forth in the 2023 Framework Orders:

- SJG may shift program budgets within or among the residential, C&I, multifamily, and other sectors. More specifically, within any 365-day period of time, SJG may shift its budgets between programs within the same sector up to and including 25% of the Company's total Triennium 2 budget with notification to Staff and Rate Counsel, greater than 25% and up to 50% with Staff approval, and greater than 50% with Board approval.
- Within any 365-day period of time, SJG may also shift budgets out of a sector up to and including 10% of the Company's total Triennium 2 budget with notification to Staff and Rate Counsel, greater than 10% and up to 20% with Staff approval, and greater than 20% with Board approval.
- Requests for budget adjustments within the 2.5-year Triennium 2 period necessitating Staff approval shall be submitted to Staff and Rate Counsel with a written description of, and rationale for, the proposed transfers, and shall be responded to within 30 days. Requests for budget transfers shall identify O&M spending associated with the program(s). Transferred O&M spending shall not be used as investment. Rate Counsel may

object within 30 days, in which case Staff shall review within 30 days of Rate Counsel's objection. If there is no response from Rate Counsel or Staff within 30 days of SJG's requests, those requests shall be deemed granted.

45. The Parties agree that the Company may petition the Board to carry over energy savings in excess of annual compliance goals, from Triennium 1 into Triennium 2 and from any Triennium 2 program year to another Triennium 2 program year, in excess of the parameters established by the 2023 Framework Orders. The Company shall notify Staff and Rate Counsel in its compliance reports the date of its waiver petition and the outcome.

46. The Parties agree that, for EE projects that commenced prior to Triennium 2 that require multiple years to complete, either between program cycles or within a program cycle, the Company will calculate energy savings based on the Technical Reference Manual ("TRM") in effect when the project commenced.

47. At the end of Triennium 1, the Company will provide a report to Staff and Rate Counsel detailing the committed and uncommitted funds left in the Triennium 1 budget, including any, and all, extensions. In the event that the Company expects to receive a return on equity ("ROE") reduction penalty as defined by the Triennium 2 Performance Incentive Mechanism, the Company may, upon notice to the Parties, utilize any Triennium 1 funding, including the funding associated with the Triennium 1 Extension period, not expended or committed in Triennium 1. If the Company elects to utilize uncommitted budget dollars from Triennium 1, it will not be permitted to earn an incentive under the established Triennium 2 Performance Incentive Mechanism within the program year or years when Triennium 1 funding is expended. During Triennium 2, when applicable, the Company will provide quarterly reports



that demonstrate how the Triennium 1 funding was allocated among programs and spent. During Triennium 2, if the Company requests shifts in budget among programs and sectors, Triennium 1 funds will be reported separately in that request or notice.

### **Quantitative Performance Indicators**

48. The table below includes the Company's proposed QPIs that will be used to track and evaluate the Company's performance in Triennium 2.

<b>QPI</b>	<b>Description</b>	<b>Weight</b>	<b>Unit</b>	<b>Target – Program Total</b>
1. Annual Energy Savings	Verified first year energy savings from measures completed in the given program year	30%	Source MMBtu	740,403
2. Annual Demand Savings	Verified peak demand savings from measures completed in the given program year	10%	Peak MV or peak-day therm	6,688
3. Lifetime Energy Savings	Verified lifetime energy savings from measures completed in the given program year	20%	Source MMBtu	8,124,134
4. LMI and OBC Lifetime Energy Savings	Verified lifetime energy savings from measures completed in the given program year from LMI and OBC customers	10%	Source MMBtu	664,182
5. Small Business Lifetime Energy Savings	Verified lifetime energy savings from measures completed in the given program year for small business customers	10%	Source MMBtu	97,275
6. Cost to Achieve	Total EE portfolio costs divided by total portfolio verified lifetime energy savings	20%	Total EE Portfolio\$/ Lifetime source MMBtu	14.75

49. QPI performance periods shall be those set forth in the 2023 Framework Orders. All energy savings from projects and measures from Triennium 1<sup>13</sup> and Triennium 2 programs, and Comfort Partners in the Company's territory completed after January 1, 2025 shall be reported separately in the Company's QPI performance measurement. For the purpose of determining the Company's compliance with the QPIs and achievement of the required energy

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<sup>13</sup> See April 2021 Order.

savings targets, the TRM in effect as of January 1, 2025 shall be used during the term of Triennium 2, subject to any annual TRM updates or other relevant guidance adopted in the Triennium 2 Evaluation Framework, except as noted in Paragraph 51 of this Stipulation.

50. The Company will perform EM&V for the Triennium 2 Programs in accordance with the 2023 Framework Orders and any recommendations of the EM&V Working Group adopted by the Board, as well as for any additional energy savings claimed by the Company toward the annual energy savings QPI and Triennium 2 targets, subject to guidance adopted in the Triennium 2 Evaluation Framework. All Triennium 1 projects and measures completed after January 1, 2025 shall also be included in the Triennium 2 EM&V plan.

51. The Company acknowledges that the EM&V Working Group will update the Triennium 2 Evaluation Framework, as needed approaching the commencement and performance of Triennium 2, with key elements including, but not limited to: (1) an annual update to the Program Year TRM, (2) removal of the distinction between Category 1 and Category 2 program metrics, (3) evaluation of financing offers, (4) enhancements of data governance and disclosure, (5) submission of EM&V milestone plans, (6) assurance of evaluability of programs, and (7) modifications to quarterly reporting. Updates to the Triennium 2 Evaluation Framework will be presented for comments at monthly EE stakeholder meetings. The Company agrees to comply with any changes resulting from the updated Triennium 2 Evaluation Framework, the terms of which shall apply throughout the whole of Triennium 2.

52. The Company further appreciates the need for enhanced evaluation rigor and shall dedicate the appropriate EM&V resources to conduct joint utility program evaluations where appropriate and to implement the EM&V implementation plans which will be developed in conjunction with New Jersey's Statewide Evaluator ("SWE") at the start of Triennium 2.

53. The Company shall continue to file required quarterly and annual reports and submit data regarding all the Triennium 2 programs, financing initiatives, and related expenses in accordance with the content, format, and timing dictated by the 2023 Framework Orders and any subsequent directives regarding the Triennium 2 programs from the Board, with any required adjustments from Triennium 1 to be developed by the EM&V Working Group.

54. The Parties agree that revised in-service rates, under performance of installed measures, changes in industry standard practices, building code updates, federal appliance standards, or other market events are some factors that could be reflected in the annual Program Year Update to the TRM. The TRM Committee will work collaboratively with the Company to ensure that TRM updates provide the Company with adequate time to adjust programmatic activities toward the achievement of performance targets. If a mutually agreeable outcome does not occur, the Company reserves the right to petition the Board for a waiver of the enforcement of any penalties in the event that the performance targets are not achieved as a result such changes. All Parties reserve all rights to respond to any petition seeking a waiver of any penalties filed by the Company.

#### **Customer Data and Data Sharing**

55. Customer information shall be used by the Company to deliver an effective customer experience in compliance with applicable Board regulations and statutory obligations. The Company shall enforce privacy and data handling policies and procedures for the Triennium 2 Programs that are consistent with SJG's customer data security protections, the 2023 Framework Orders, and any applicable BPU regulations and statutory obligations. In the event of any breach of the above confidentiality by an affiliate, SJG shall remediate such breach to the full extent required by law. In the event of any breach of the above confidentiality by a vendor

hired to deliver the Triennium 2 Programs or to evaluate the programs, the Company commits to enforcing the contractual confidentiality requirement to the extent allowed by the law. Any “breach of security” with respect to customers’ “personal information,” as those terms are defined in N.J.S.A. 56:8-161, shall be treated in accordance with the New Jersey Identity Theft Prevention Act, N.J.S.A. 56:8-161 et seq., and Section 3b of the Board’s Cybersecurity Order of March 18, 2016.<sup>14</sup>

56. SJG agrees that customer-specific data belongs to the customer, who may request or authorize SJG to share it with suppliers, and that data gathered during the operation of these programs not specific to any customer belongs to the Company and shall be used solely to support current or future regulated utility programs, including EM&V work. Such data may not be used for other purposes without Board approval, except as noted in Paragraph 57 of this Stipulation. The Company will also submit non-customer-specific data to the Board in compliance with reporting requirements, as established by the Board. Customer-specific data may be shared with the Board or its contractors for the purposes of program evaluation after the execution of Non-Disclosure Agreements (“NDAs”) and Company review and approval of the Board’s and/or contractor’s cyber and data security protocols.

57. The Parties also agree that SJG may use customer-specific data or program data from other BPU-approved utility programs for Triennium 2, and that other utility BPU approved programs may use data from Triennium 2. The Company will not share or use customer-specific data for non-utility-specific BPU programs. Such data may not be used for other purposes without Board approval.

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<sup>14</sup> In re Utility Cyber Security Program Requirements, BPU Docket No. AO16030196, Order dated March 18, 2016.

### **Recovery of Costs and Lost Revenues**

58. The agreed upon budget amount includes Company O&M expenses, which shall not exceed \$15.47 million. The Company will recover its actual reasonable and prudently incurred O&M expenses through its cost recovery filings.

59. The Parties also agree that the Company should be authorized to offer OBR financing in the amount of \$125.4 million to program participants and recover the financing over time from these financing participants. As currently structured, the customer repayment periods for the OBR plans shall be five (5), seven (7), and ten (10) years, depending on the program and total OBR funds made available. SJG will retain the full OBR investment for any project where SJG is serving as the lead utility – that is, where work is commissioned on behalf of a Partner Utility who will ultimately pay for the EE measures installed. The Parties agree that the Company should be allowed to earn a return on the outstanding investment balance for financing expenditures where the Company is serving as the lead utility, through its revenue requirement and the administrative costs of providing financing consistent with the capital structure and ROE discussed below. In computing the return component of its costs, the Company shall, in addition to a reduction for the accumulated amortization of its investments, deduct the applicable deferred income taxes related to the amortization of program costs over a five (5)-year, seven (7)-year, and ten (10)-year period for book purposes and over one (1) year for tax purposes. The Company shall continue to calculate the monthly net investment balances by subtracting from the monthly net investment balances the current month-end accumulated amortization balances.

60. South Jersey will earn a return on its net investment in Triennium 2 Programs based upon the rate of return (“ROR”) utilized to set rates in the Company’s most recent base rate case in Docket No. GR22040253. The weighted average cost of capital utilized to calculate

the return on the unamortized portion of the program investments and to set rates will be 6.93%, or 8.96% on a pre-tax basis, which is the Company's ROR set in its last base rate case effective January 1, 2022 as shown in the table below.

	<b>Percent</b>	<b>Cost</b>	<b>Weighted</b>
	<b>of Total</b>	<b>Rate</b>	<b>Cost</b>
Long-Term Debt	46.0%	3.81%	1.75%
Common Equity	54.0%	9.60%	5.18%
Total	100.0%		6.93%

The Parties agree that any change in the ROR authorized by the Board in a subsequent base rate case will be reflected in the subsequent monthly revenue requirement calculations.

61. The Parties further agree that the following expenditures will be collected from SJG ratepayers:

- Rebates/Direct Investments and associated return on these investments;
- Return on outstanding balance of OBR expenditures;
- O&M expenses; and
- OBR bad debt expenses.

62. The Parties further agree that SJG is authorized to utilize deferred accounting and recover all reasonably incurred costs associated with the total Direct Budget, the return on the Direct Budget Program investment and the OBR Program, and the associated cost recovery mechanism. Triennium 2 Program costs will be recovered through the Company's EET rate, as set forth in Rider "N" of the Company's tariff. Proposed Tariff Sheets are provided in Attachment 2 to this Stipulation. Consistent with cost recovery for Triennium 1, cost recovery will consist of two parts. One part will allow the Company to earn a return on the investment

and recover the amortization of the regulatory asset. The second part of the EET will recover incremental O&M expenses associated with the Triennium 2 Programs.

63. The initial EET rate for Triennium 2 will be \$0.009904 per therm, inclusive of sales and use tax, and will become effective January 1, 2025. As compared to rates in effect October 1, 2024, SJG's typical residential heating customer using 100 therms of gas per month, will see an increase in their monthly bill of \$0.99 or 0.5%, from \$183.35 to \$184.34. A typical residential heating customer using 730.7 therms annually will see an increase in their annual bill of \$7.24 or 0.5% from \$1,388.99 to \$1,396.23.

64. The total cumulative increase over the thirteen-year recovery period ending June 30, 2037 is estimated to be \$392.71, for the typical residential as heating customer using 730.7 therms annually. The maximum annual increase over the thirteen-year recovery period would occur in year three and it is estimated to be \$22.92 or 1.6% over the prior year and an increase of \$52.70 or 3.8% over the current annual bill of \$1,388.99.

65. The Triennium 2 Program investments and operating costs shall be reconciled to actual recoveries from the EET rate in the Triennium 2 True-Up filings to be submitted in July of each year for rates to become effective on October 1 of that year. Any federal or state benefits/grants, if applicable, received by the Company and associated with these programs shall be used to reduce the revenue requirement to be collected from customers.

66. The Company shall include in its annual EEP True-Up filings the Minimum Filing Requirements ("MFRs") as set forth in the 2023 Framework Orders and Attachment 3 to this Stipulation.

67. The Company shall provide in all future EEP True-Up filings the Rate Base/ROR/Expense presentation set forth in the same format as Schedule JGF-1, which is set forth in Attachment 4 to this Stipulation and reflects the settlement revenue requirement.

68. South Jersey will amortize Triennium 2 Program investments over a ten (10)-year period on a straight line basis.

69. South Jersey will continue to recover lost sales revenue resulting from the decrease in customer energy usage resulting from Triennium 2 Programs through its CIP Surcharge.

### **Triennium 3 Filing**

70. The Parties anticipate that in 2026, the Company will file a petition seeking approval of a Triennium 3 (“T3”) program on or before a date to be set by the Board. In anticipation of that filing, the parties agree that any filing will include the following:

- a. The Company agrees that, to include a more comprehensive set of data in its Triennium 3 petition, SJG will work with the other utilities, Staff, and Rate Counsel to develop the template reporting spreadsheet by June 30, 2025 using Attachment 5 to this Stipulation as a starting point. The Parties will schedule an initial meeting no later than December 15, 2024. Regardless of the reporting format, the Parties agree that all data will be made available in machine readable format with formulae intact, will be provided for all historical and forecasted years, will have clear units and, where appropriate, dollar years, and will use naming conventions that are common across utilities to the greatest extent possible to facilitate cross-utility comparisons. If the Parties are unable to agree upon the



components of the template reporting spreadsheet by June 30, 2025, the Parties will submit, by July 15, 2025, their respective versions of the template reporting spreadsheet with supporting explanation to Staff for its consideration and decision as soon as practicable.

- b. Consistent with the guidance from the May 2023 Framework Order, the New Jersey Cost Test (“NJCT”) should be updated prior to the start of each triennium through stakeholder input and Board approval, including the initial vetting of technical concepts by the NJCT and EM&V Committees. The Company will submit the results of the NJCT with its Triennium 3 filing consistent with the updated NJCT. Nonetheless, the Parties agree that the Company’s workpapers supporting the Triennium 3 NJCT results will include a separately identified item/column which includes, but is not limited to, the financial returns that are expected to arise from each individual energy efficiency program/measure.
- c. The Company agrees that loan principal will not appear within the NJCT but any administrative cost passed on to customers of servicing those loans will.
- d. The Company recognizes that the SWE has identified concerns regarding the level of savings from behavioral programs. SJG commits to coordinate with the EM&V Working Group to evaluate the cost-benefit of the Behavioral program in advance of the Triennium 3 filings. The Parties agree that the Triennium 3 framework issued by the Board provide budget guidance regarding the behavioral programs based on documentable

evidence demonstrating causal influence over achieved impacts, acceptable cost-to-achieve metrics, and cost-effectiveness of behavioral programming under the NJCT.

- e. The Company agrees that incentive values proposed in its Triennium 3 petition will be filed together with clear information regarding how each incentive was calculated, its per unit savings values, and how it compares to similar incentives in other similar states.

71. The Company agrees to initiate discussion with the New Jersey Department of Banking and Insurance (“DOBI”) on or before March 31, 2025 to determine DOBI’s requirements, if any, for offering on bill financing at an interest rate other than zero in advance of the Triennium 3 filing. Once all requirements are understood by the Company, including those imposed by DOBI and those arising from other applicable laws and regulations, the Company agrees to schedule a joint meeting with all parties and all other gas and electric utilities by December 1, 2025 regarding the Company’s understanding of the applicable laws and regulations concerning offering OBR for Triennium 3 at an interest rate other than zero. The Company reserves its right to determine to change its position on how financing may be offered, if at all, but will determine requirements to offer financing at a different interest rate. OBR may then be offered as part of the Company’s Triennium 3 filings in accordance with the parameters set forth in any applicable Triennium 3 framework Order or Orders. The Company will copy and include Staff and Rate Counsel on all formal written communications with DOBI.

#### **Further Provisions**

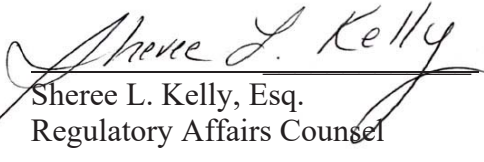
72. This Stipulation represents a mutual balancing of interests, contains interdependent provisions and, therefore, is intended to be accepted and approved in its entirety.

In the event any particular aspect of this Stipulation is not accepted and approved in its entirety by the Board, any Party aggrieved thereby shall not be bound to proceed with this Stipulation and shall have the right to litigate all issues addressed herein to a conclusion. More particularly, in the event this Stipulation is not adopted in its entirety by the Board, in any applicable Order, then any Party hereto is free to pursue its then available legal remedies with respect to all issues addressed in this Stipulation as though this Stipulation had not been signed.

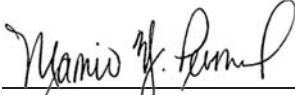
73. It is the intent of the Parties that the provisions hereof be approved by the Board as being in the public interest. The Parties further agree that they consider the Stipulation to be binding on them for all purposes herein.

74. It is specifically understood and agreed that this Stipulation represents a negotiated agreement and has been made exclusively for the purpose of these proceedings. Except as expressly provided herein, the Parties shall not be deemed to have approved, agreed to, or consented to any principle or methodology underlying or supposed to underlie any agreement provided herein, in total or by specific item. The Parties further agree that this Stipulation is in no way binding upon them in any other proceeding, except to enforce the terms of this Stipulation.

**SOUTH JERSEY GAS COMPANY**


By:   
Sheree L. Kelly, Esq.  
Regulatory Affairs Counsel

**BRIAN O. LIPMAN, ESQ.  
DIRECTOR,  
DIVISION OF RATE COUNSEL**


By:   
Mamie W. Purnell, Esq.  
Assistant Deputy Rate Counsel

**MATTHEW J. PLATKIN, ESQ.  
ATTORNEY GENERAL OF NEW  
JERSEY**


Attorney for the Staff of the New  
Jersey Board of Public Utilities

By:   
Steven A. Chaplar, Esq.  
Deputy Attorney General

**NEW JERSEY LARGE ENERGY  
USERS COALITION**

By:   
Steven S. Goldenberg, Esq.  
Giordano, Halleran & Ciesla

**NEW JERSEY ENERGY  
EFFICIENCY ALLIANCE**

By:   
John Kolesnik, Esq.  
Policy Counsel

# Program Plan

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10/7/2024

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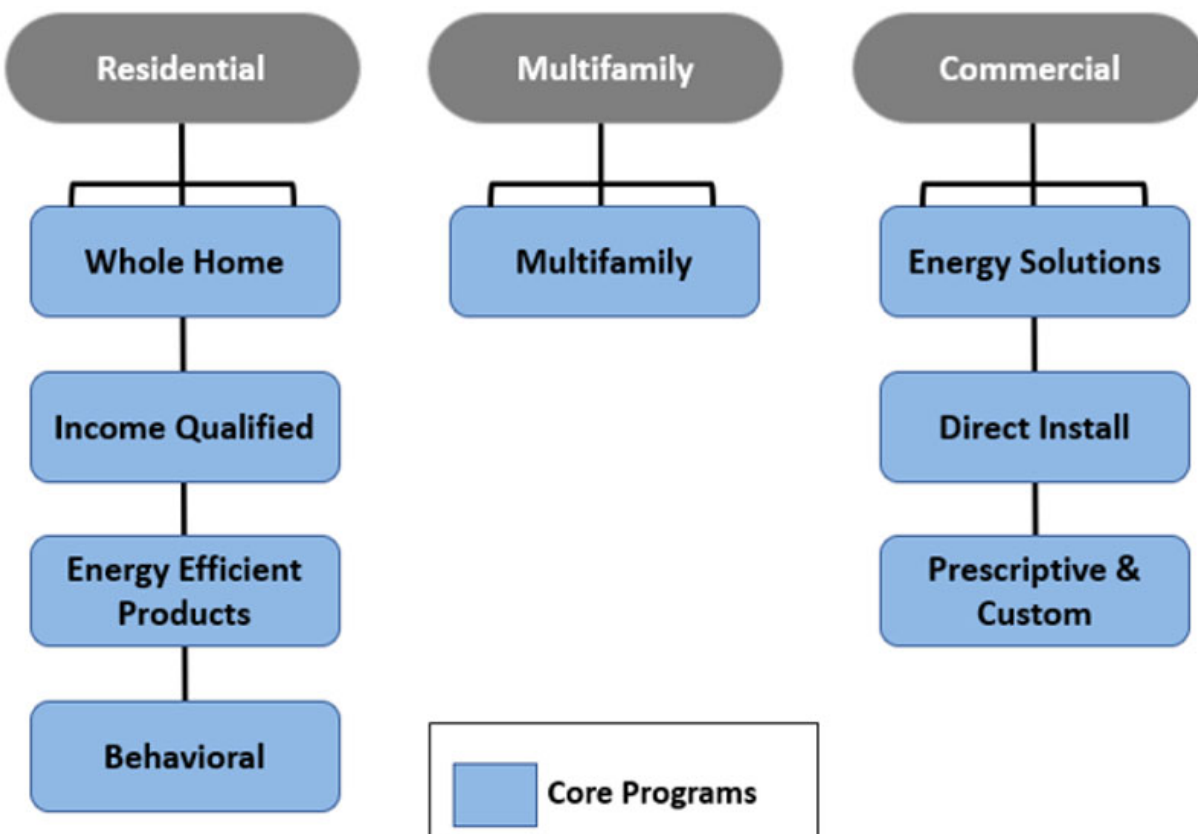
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## **2. Introduction:**

This Program Plan was developed to address South Jersey Gas Company (“South Jersey Gas”) plan for the delivery of Energy Efficiency programs that South Jersey Gas proposes to offer for Triennium Two which will cover the thirty-month period from January 1, 2025 to June 30, 2027.

Due to the coordinated nature of the core energy efficiency programs, South Jersey Gas, along with the other New Jersey investor-owned Utilities, have developed consistent Program Descriptions (MFR II.) that cover the program-specific MFRs (MFR II.a.i - II.a.vi) for all of the core programs. Accordingly, all of the information presented in Section 3a (Core Programs) is consistent information across all of the Utility filings. Utility specific information regarding those programs, which aligns with the requirements of MFRs II.a.vii - II.a.x, is presented in the associated supporting Appendices, which match in format, but provide different information for each Utility.

The graphic below demonstrates the organization of the programs. As discussed above, all programs noted in blue as core have consistent Program Descriptions within each Utility’s program plan.





In addition, some information contained in the Portfolio Information section (Section 4) is consistent, while the remaining subsections are Utility specific. The following subsections contain consistent information across all of the Utilities:

- 4e: Evaluation, Measurement and Verification (MFR VI.)
- 4f: Reporting Plan (MFR VIII.)
- 4g: Overburdened Community Standardization

Sections 4a-4d and Section 4h each present information specific to each Utility. If provided, additional sections within Section 4 are Utility specific.

Additionally, Section 5: Consistent Delivery in Overlapping Territories (MFR II.c.) is consistent among the Utilities.

As noted above, all of the appendices are formatted similarly and in the same order. Appendix H: Incentive Ranges is formatted similarly, but has some variation due to differences in Utility specific program proposals.

## **3. Program Descriptions**

### **3a. Core Programs**

As discussed in the introduction, all core Program Descriptions (covering MFR II.a.i - II.a.vi) are consistent among each Utility's Program Plan.

#### **3a.i Residential Sector**

The core Residential sector programs are described below and include:

- Whole Home
- Income Qualified
- Energy Efficient Products
- Behavioral

##### **3a.i.1 Whole Home Program**

#### **Program Description (MFR II.a.i)**

The Whole Home Program consists of two main components:

1. A home energy assessment
2. Incentives and financing options to encourage the customer to pursue the recommended upgrades

The home energy assessment is intended to provide residential customers with an understanding of opportunities to save energy. The home energy assessment will serve as a comprehensive review and may combine the direct installation of standard energy saving measures with the identification of a full-range of potential additional opportunities. The assessment may include various diagnostic testing such as blower door testing and provide the option to have assessors install a smart thermostat during the visit.

The home energy assessment may be in person or may leverage videoconferencing software and therefore be virtual or hybrid. The home energy assessments may also target the identification of specific opportunities that may align with other Utility programs, including those measures identified in Additional Utility-Led Initiatives.

All assessors will have the necessary qualifications, although these may vary based on the technical needs of the assessment type.

Utilities will strive to prescreen interested customers to determine if they appear to be eligible for the Income Qualified Program which can provide substantial energy efficiency improvements at no additional cost to participants. Customers that are identified as eligible for the Income Qualified program will be served directly through that program. However, the Utilities recognize that this income eligibility may be determined at a later point and will work to ensure those customers move to treatment under that program to access the no-cost benefits.

During the visit, the assessor will perform a walk-through of the customer's home with the customer to identify opportunities to save energy. The assessors may identify health and safety issues observed and may perform more detailed diagnostic tests on the home. The program will offer energy education to participants to better understand usage patterns and practices, along with behavioral suggestions to improve the way they use energy in their home. The assessment will prioritize deeper energy saving opportunities such as weatherization and space heating over lower cost upgrades. Other opportunities for energy savings may also be offered including making referrals to other energy efficiency programs and for program opportunities based on the needs for that premise and the customer's interest in pursuing additional upgrades. This may also include directly proceeding to address weatherization needs and other opportunities, referring to trade allies who are able to support measures offered in other programs, including Additional Utility-Led Initiatives, or sharing information about the products and incentives available under other programs.

Although the program may provide a variety of types of assessment options and additional opportunities in order to best suit the varying needs of its customers, it will promote a holistic approach for customers to explore and invest in the efficiency and comfort of their homes. All participants in this program must have an initial home energy assessment. To ensure the upgrades are accessible to customers, there will be financing available to eligible customers through either an On-Bill Repayment ("OBR") or access to financing with similar terms. In addition, the customers will be informed of relevant federal tax credits.

This program is designed to review the entire status of a home, including equipment and building envelope to achieve deeper energy savings.

#### **Target Market or Segment (MFR II.a.ii)**

The Whole Home program will be available to all single-family and single-family attached (1 to 4 unit properties)<sup>1</sup> electric and/or natural gas customers served by at least one of the participating investor-owned Utilities in New Jersey. Utilities will focus marketing efforts on homes that may have a greater opportunity for energy savings, including both annual and lifetime energy savings. The program will seek to use metered data to target homes where there is potential to save 20% and more in energy.

Standard energy efficiency measures installed during that visit may include but not be limited to LED bulbs, energy and water saving showerheads, kitchen faucet aerators, bathroom faucet aerators, gaskets, power strips and other energy saving measures. All participants will receive a

report that outlines the findings during the appointment and summarizes the measures received, the recommendations made, and the incentives available.

In addition, some Utilities may implement an online portal for contractors for cases where the assessments do not directly identify a specific scope of work. Should the customer choose, their assessment can be posted on their lead Utility's contractor portal. This portal allows contractors to view customers' assessments and provide an estimate on recommended upgrades and provides customers easy access to participating contractors.

Potential measures incentivized through this program include but are not limited to insulation, air sealing, smart thermostats, HVAC, and water heating. If the customer proceeds with follow-up work within this Whole Home program, the scope of work is required to include air sealing and any necessary building envelope improvements (e.g. insulation) and any required health and safety repairs.

#### **Existing and Proposed Incentive Ranges (MFR.II.a.iii and MFR II.a.iv)**

The Utilities will provide the home energy assessment to their interested customers; Utilities may provide the home energy assessment at no additional cost or for a fee, which may be discounted for certain customers or for promotional periods to drive activity. The home energy assessment may include the direct installation of standard energy efficiency measures that are appropriate for their home. Participating customers may also benefit from receiving energy efficiency conservation tips, recommendations for additional opportunities and referrals to other energy efficiency programs based upon the opportunities identified for their home.

Utilities will provide incentives to encourage customers to implement the measures recommended during their assessment. Incentives will be designed to optimize participation through the program and facilitate an easy participation process. The Utilities may also provide incentives to contractors related to job completion.

Refer to Appendix H for the Summary of the Existing and Proposed Incentive Ranges for this program. The Utilities and/or third-party implementation contractors will strive to complete consumer or contractor payments within 60 days following completion of contractor work, submission of complete and required paperwork, and completion of program requirements such as necessary field inspections (if required).

#### **Customer Financing Options (MFR II.a.v)**

There is no need for a financing component for the home energy assessment. OBR or access to financing with similar terms will be available to eligible customers for recommended measures installed.

Refer to Section 4h of this Program Plan for the Summary of Proposed Financing for the comprehensive solutions pursued under this program.

#### **Contractor Requirements & Role (MFR II.a.vi)**

The Utilities will administer and oversee this program and may select a third-party implementation contractor to manage delivery of this program. Customers who are already working with an approved Whole Home contractor can have the home energy assessment performed directly by that contractor.

The Utilities' staff and/or their implementers will oversee all aspects of the program, including training, engagement, and quality assurance/quality control ("QA/QC"). There will be a significant focus on developing, training, and growing a qualified trade ally network. This will include trade ally training sessions, workshops, and opportunities to become approved contractors and participate in Utility-led workforce development initiatives. Utility staff and/or third-party implementation contractors may maintain a close relationship with trade allies to ensure consistent program delivery experience and high customer satisfaction.

Trade allies will consist of companies employing trained professionals to complete whole home and a wide range of energy-saving projects. In order to facilitate trade ally access to participants, Utilities or the third-party implementation contractor will maintain a list of companies and professional services where customers can find local trade allies based on geography and other criteria.

The Utilities will encourage all participating trade allies to also look for opportunities to promote measures from the Residential Efficient Products program, such as home appliances (e.g., clothes washers) and other Utility programs to increase energy savings and leverage those incentives. Contractor outreach and training will also include information on the availability of financing and tax credits.

**Projected Participants (MFR II.a.vii) and Energy Savings Relative to QPIs (MFR II.a.viii)**

Refer to Appendix A for the information on these MFRs.

**Program budget, by year (MFR II.a.ix) and Projected program costs, by year, broken down into the specified categories (MFR II.a.x)**

Refer to Appendix B for the information on these MFRs.

### **3a.i.2 Income Qualified Program**

#### **Program Description (MFR II.a.i)**

The Income-Qualified Program provides an opportunity for moderate-income customers to receive energy efficiency measures and upgrades at no cost to participate.

As a part of this program, eligible customers will have a comprehensive energy assessment of their home, which may include direct install measures (such as showerheads, faucet aerators, LED bulbs, power strips, etc.) and/or weatherization measures (insulation, air sealing and duct sealing), and energy education. Customers may also be eligible to receive installation, repairs or replacement of water heating, heating and/or cooling systems. Health and safety measures may also be addressed to enable energy efficiency improvements.

During the assessment, in addition to the installation of measures, the program will offer energy education to better understand participants' usage patterns and practices, along with behavioral suggestions to improve the way they use energy in their home. The assessment may include various diagnostic testing such as blower door testing. Based on the assessment recommendations, the participant may also be given the opportunity for additional building envelope measures (such as air sealing and building insulation) to be installed. The assessment will prioritize deeper energy saving opportunities such as weatherization and space heating over lower cost upgrades.

The home energy assessment may also target the identification of specific opportunities that may align with other Utility programs, including those measures identified in Additional Utility-Led Initiatives.

#### **Target Market or Segment (MFR II.a.ii)**

The Income-Qualified Program will be available to income-qualified customers served by at least one (1) investor-owned Utility in New Jersey. Eligibility for these enhanced incentives may be determined based on screening an individual customer, categorical eligibility for moderate-income customers, or special screening if the physical location is within the boundaries of a Low or Moderate census tract, an Overburdened Community ("OBC"), or any other agreed upon designation by the Board. Please refer to Section 4g of this Program Plan for more information on special treatment for OBC customers. Qualifying guidelines may be adjusted based on updates to federal or state guidelines. Utilities will focus marketing efforts on homes that may have a greater opportunity for energy savings, including both annual and lifetime energy savings. Where possible, the program will seek to use metered data to target homes where there is potential to save 20% and more in energy.

In addition to single family dwellings, the Income Qualified Program can serve multifamily buildings between 2-8 units. Furthermore, all 9 unit or larger multifamily buildings will be directed to the Utilities' multifamily program.

#### **Existing and Proposed Incentive Ranges (MFR.II.a.iii and MFR II.a.iv)**

The customer may receive no-cost energy efficiency measures and upgrades with a per project guideline and health and safety expense protocol. The program may include design components that provide benefits to low-income customers where participation or services are deferred by the NJ Comfort Partners program. Refer to Appendix H for the Summary of Proposed Incentive Ranges for this program.

The Utilities and/or the third-party implementation contractors will strive to complete contractor payments within 60 days following completion of contractor work, submission of complete and required paperwork, and completion of program requirements, such as necessary field inspections (if required).

### **Customer Financing Options (MFR II.a.v)**

All services provided under this program are at no cost to the customer to participate, so financing is not relevant.

### **Contractor Requirements & Role (MFR II.a.vi)**

Utility staff and/or third-party implementation contractors will oversee all aspects of the program, including contractor training and engagement, quality assurance and fulfillment of program services. Contractor outreach and training will include information on other Utility programs, as well as the availability of financing and tax credits. The home energy assessment and efficiency improvements will be conducted by Utility staff, third-party implementation contractors and/or program contractors. The Utilities and/or third-party implementation contractors will oversee their staff and subcontractors and engage contractors to educate them on the program benefits to reliably complete the home assessments and install energy efficient equipment and improvements for participating customers. The Utilities and/or third-party implementation contractors will also verify the eligibility of customers and will maintain a close relationship with contractors to ensure a consistent program delivery experience.

Contractors will consist of companies employing qualified professionals who are able to complete assessments and energy-saving projects.

### **Projected Participants (MFR II.a.vii) and Energy Savings Relative to QPIs (MFR II.a.viii)**

Refer to Appendix A for the information on these MFRs.

### **Program budget, by year (MFR II.a.ix) and Projected program costs, by year, broken down into the specified categories (MFR II.a.x)**

Refer to Appendix B for the information on these MFRs.

## **3a.i.3 Energy Efficient Products Program**

### **Program Description (MFR II.a.i)**

This program will promote the installation/replacement of energy efficient electric and natural gas equipment by residential customers by offering a broad range of energy efficient equipment and appliances through a variety of channels, which may include an online marketplace, downstream rebates to customers (including but not limited to in-store or online, up-front rebates, and reduced point of sale costs), a midstream or upstream component and a network of trade allies. These sales channels may also be leveraged to promote Additional Utility-Led Initiatives. may provide incentives for energy efficient heating and cooling equipment, water heating equipment, appliances, smart thermostats, as well as other energy efficiency products and for appliance recycling. On-bill repayment or access to financing with similar terms will be available for select products.

The program may:

- Provide incentives for products that reduce energy use in the home and information about other programs that encourage the installation of high efficiency equipment. Provide upstream and/or midstream incentives to retailers and/or distributors.
- Continue to support and/or provide downstream approaches for certain measures.
- Provide online or other channels for customers that include but are not limited to online and in-store eligibility options to acquire select energy efficient products.
- Ensure the participation process is clear, easy to understand and simple for the customer and contractor.
- Recognize unique barriers that income-qualified customers face and employ strategies to address those barriers, including no cost measures and/or enhanced incentives where appropriate.
- Encourage customers to recycle inefficient appliances.

This program will increase adoption of energy efficient equipment and products by harnessing the unique Utility-customer relationship to positively impact the entire sales process surrounding efficient equipment, from customer education and awareness, engagement with trade ally contractors and equipment distributors and retailers, to on-bill repayment or access to financing with similar terms for select products.

Utility staff and/or a third-party implementation contractor(s) may assist with the administration, oversight, and delivery of the program. Activities may include efforts to raise awareness of the program, ongoing refinements to the list of eligible measures, validating customer eligibility and processing incentives, and conducting outreach to and securing partnerships with retailers, wholesalers, distributors, manufacturers and trade allies to ensure all customers are able to easily purchase energy efficient products and equipment through the program. Customer engagement and sales channels may include:

- **Post-Purchase (Downstream) Rebates:** Rebates made available to customers after they have made their purchase. Applications may be available online or in stores to submit either electronically or in hard copy with proof-of-purchase.
- **Midstream or Upstream Rebates:** The Utilities may pursue a midstream or upstream rebate component to encourage the purchase of certain efficient equipment. The Utilities



may work with retail partners (such as Home Depot, Lowes, etc.), distributors or manufacturers to ensure that measures are available throughout the state.

- **Point of Sale Rebates:** Prescriptive rebates made available at the point of sale for select products.
- **Online Marketplace:** The online marketplace is an easy-to-use source for the purchase of efficient products and services. Participants can browse energy efficient equipment and appliances and purchase through the marketplace which will offer instant rebates. The marketplace may also include non-incentivized items that can help drive traffic, increase uptake in incentivized measures, and expose customers to other Utility and/or state offered clean energy programs.
- **Appliance Recycling:** Rebates will be provided to customers for recycling qualifying, inefficient, operating appliances<sup>1</sup>. Offering an incentive for the drop off or pick-up and removal of an appliance prevents the appliance from being maintained as a second unit or transferred to another customer. In addition, periodic events may be offered at centralized drop off locations where customers can drop off qualified inefficient operating appliances. The program may also target appliance retailers for participation or offer bulk appliance recycling.
- **Trade Allies:** A network of trade allies created to promote the program. The trade ally network may consist of qualified installation contractors, plumbers, electricians and other trade service professionals who meet all applicable statewide requirements for performing the respective service (e.g., HVAC license, insurance requirements). Trade allies will be able to leverage the program and offer customers rebates through their normal course of business.
- **Efficient Product Kits:** Kits to introduce and promote energy efficiency technologies with high in-service rates that can be easily installed in a customers' home. Similar to the Online Marketplace, the kits can act as a gateway to other programs by including energy efficiency and conservation education and promotional materials for other program opportunities. Where appropriate, the Utilities may partner with foodbanks, schools, and community organizations and participate in energy assistance outreach events to offer the kits. Kits may be requested physically picked up by the customer. No unsolicited kits will be sent to new or existing customers.

Regardless of the delivery mechanism, the Utilities will take steps to ensure customers are made aware of Utility engagement in helping to offset upfront costs of the efficient products, including relevant federal tax credits.

### **Target Market or Segment (MFR II.a.ii)**

The target market for this program will be all electric and/or natural gas customers served by at least one investor-owned Utility in New Jersey. The program focuses on promoting the sale and installation of efficient electric and natural gas equipment across all major residential end-use categories, and can be easily promoted to program allies, trade allies and customers via rebates. Examples of technologies incentivized through this program include heating/cooling equipment, water heating equipment, electronics, appliances, smart thermostats, water saving measures, weatherization items, pre-packaged kits, and other efficient products. The program will also

promote the retirement, recycling and replacement of old refrigerators, freezers, and other inefficient appliances.

The Utilities may offer enhanced incentives for Low-to-Moderate income (“LMI”) customers. Eligibility for these enhanced incentives may be determined based on screening an individual customer, categorical eligibility (which may vary for low- and moderate-income customers), or special screening if the physical location is within the boundaries of a low-income or moderate-income census tract, an Overburdened Community (“OBC”), or any other agreed upon designation by the Board. Please refer to Section 4g of this Program Plan, for more information on special treatment for OBC customers. Qualifying guidelines may be adjusted based on updates to federal or state guidelines.

#### **Existing and Proposed Incentive Ranges (MFR.II.a.iii and MFR II.a.iv)**

The Utilities propose to provide a range of incentives depending on the measure, subject to changes based upon customer response and marketplace changes over the plan period. Incentives will vary depending on the specific product, the incremental cost of the high-efficiency technology and the product maturity in the marketplace. Refer to Appendix H for the Summary of Existing and Proposed Incentive Ranges for this program.

Incentives will be available in several ways. Strategies may include:

- Mail-in applications available from the retailer, the program website, or directly from contractors;
- Online rebate forms;
- Point of Sale, Marketplace or In-store at the time of purchase;
- Special sale events in retail stores;
- Manufacturer buy down to retailer;
- Midstream or upstream incentives to retailers, distributors or manufacturers; and
- Partnerships with community groups, schools, and/or non-profit organizations.

In instances where incentives are not immediate, the Utilities will strive to complete consumer or contractor payments within 60 days following completion of contractor work, submission of complete and required paperwork, and completion of program requirements, such as necessary field inspections (if required).

#### **Customer Financing Options (MFR II.a.v)**

On-Bill Repayment (OBR) or access to financing with similar terms will be available to eligible customers for select measures.

Refer to Section 4h of this Program Plan for the Summary of Proposed Financing for this program.

#### **Contractor Requirements & Role (MFR II.a.vi)**

The Utilities and/or third-party implementation contractors will be responsible for identifying and engaging retail and wholesale entities dealing in energy efficient equipment to on-board them with the program vision, eligible efficient products, rebates, and ways to participate. Additionally, the Utility and/or third-party implementation contractors may engage trade allies, including local HVAC, electrical, plumbing and other contractors to educate them on program benefits and build a trade ally network which will install energy efficient equipment for participating customers. The electric Utility and/or third-party implementation contractors may engage with transportation services to pick-up and provide recycling services for old, working appliances. The Utility and/or third-party implementation contractors will also monitor participation to assess the effectiveness of outreach efforts, incentive levels, delivery methods and both program ally and trade ally availability. The Utility and/or third-party implementation contractors will be responsible for the management of the online marketplace.

By allowing participants to select a trade ally they are comfortable with for select products, the program reduces barriers to entry related to knowledge of energy efficiency confidence in assessments and measure installation. The Utilities will perform customer satisfaction and other quality assurance and quality control activities to monitor and verify that quality standards are met.

**Projected Participants (MFR II.a.vii) and Energy Savings Relative to QPIs (MFR II.a.viii)**

Refer to Appendix A for the information on these MFRs.

**Program budget, by year (MFR II.a.ix) and Projected program costs, by year, broken down into the specified categories (MFR II.a.x)**

Refer to Appendix B for the information on these MFRs.

### **3a.i.4 Behavioral Program**

#### **Program Description (MFR II.a.i)**

The Residential Behavioral program educates and provides customers with easy-to-understand information about their energy use, the usage of their peers, and suggested actionable steps to generate awareness and motivate customers to achieve energy savings through behavioral changes and engagement with other energy efficiency programs. Direct mailed and/or electronic home energy reports (“HERs” and “eHERs” collectively) will be the cornerstone of the program and will provide participants with customized, easy to implement action steps and recommendations to reduce energy consumption and support behavior modification for improved energy efficiency. The HERs will present participants with a view of their historical energy consumption compared to peer group customers. Depending upon the availability of metering data and their program design, the Utilities may issue usage and/or other bill alerts by email or other means.

The program may also offer an internet-based home energy self-audit to all residential customers. This audit assists customers to better understand their energy usage and opportunities for energy savings.

An online portal may be used to provide customers with usage information, recommendations, tips, and links to other available energy-efficiency programs. The Utilities may utilize the information gathered from various program offerings to not only gain a better understanding of the residential customer base, but also assist in making smart decisions moving forward with the energy-efficiency programs.

The Utilities may share other energy efficiency program participation information with their respective Behavioral vendor. Incorporating participation feedback into the program on a prospective basis can improve the customer experience and potentially lead to higher engagement (e.g., build higher confidence in relevance of energy saving advice) and participation in other energy saving programs.

#### **Target Market or Segment (MFR II.a.ii)**

The program will provide HERs to residential customers to whom sufficient usage data is available and the vendor can cost effectively provide the service and maintain an appropriate control group. This number will be reviewed periodically and may be modified to enhance cost-effective energy savings. The online energy audit may be available to all residential customers per Utility. The HERs and online audit may offer tailored recommendations to reduce their energy consumption.

The program targets residential customers potentially including market rate, low and moderate income, and multifamily customers. These customers receive customized energy saving tips and other program opportunities available to them, including income-qualified programs.

#### **Existing and Proposed Incentive Ranges (MFR.II.a.iii and MFR II.a.iv)**

There is no cost to participate for customers. Customer incentives to increase engagement may be explored by some Utilities.

**Customer Financing Options (MFR II.a.v)**

Since there is no cost for participating customers, there is no need for a financing component.

**Contractor Requirements & Roles (MFR II.a.vi)**

The Utilities will utilize a third-party provider and/or Utility staff to provide the services under this program. The Utilities' HER vendors will distribute HERs to residential customers at no charge to the participants. Customers will also have access to online functionality provided under the program that all customers can easily utilize to update their profile, see additional tips on how to save energy, complete the online audit tool, and review their usage over a period of time.

**Projected Participants (MFR II.a.vii) and Energy Savings Relative to QPIs (MFR II.a.viii)**

Refer to Appendix A for the information on these MFRs.

**Program budget, by year (MFR II.a.ix) and Projected program costs, by year, broken down into the specified categories (MFR II.a.x)**

Refer to Appendix B for the information on these MFRs.

### **3.a.ii Commercial & Industrial Sector**

The core Commercial & Industrial sector programs are described below and include:

- Energy Solutions
- Prescriptive & Custom
- Direct Install

### **3.a.ii.1 Energy Solutions Program**

#### **Program Description (MFR II.a.i)**

The Energy Solutions program is designed to address the needs of commercial or industrial customers that are interested in comprehensive energy efficiency solutions. This program recognizes that a broad range of approaches is needed to help commercial and industrial customers identify, develop and complete multiple measures to comprehensive projects to save energy and meet other business objectives based on their unique circumstances. Accordingly, this program will include three distinct pathways to help the customers assess their opportunities, provide financial incentives, and provide technical assistance services to encourage and support them to take actions. These three pathways include:

1. Engineered Solutions Tier 1 will provide tailored comprehensive energy-efficiency support on projects that require significant auditing, technical support, and engineering work. Incentives will be offered to encourage these customers to invest in energy efficiency. Engineered Solutions Tier 1 will provide guided consultative service throughout delivery to support customers in identifying and undertaking large energy-efficiency projects, while requiring no up-front funding from the customer.

Through Tier 1, customers will be provided with an in-depth audit of their facilities as well as a detailed assessment and recommendation of energy-efficiency measures that could be economically installed. Customer incentives are determined on a project-by-project basis. In addition to the calculated project-by-project incentive, participants will have the option to pay back the non-incentive portion of the project costs through a repayment plan. Through this pathway, larger participants in market segments that have typically been underserved such as but not limited to Municipal, University, School, and Hospital (“MUSH”) customers are able to achieve greater energy savings.

2. The Engineered Solutions Tier 2 pathway will provide tailored energy-efficiency assistance to commercial and industrial customers in identifying and undertaking larger energy-efficiency projects.

Through Tier 2, customers may be provided with an in-depth audit of their facilities to identify cost effective energy-efficiency measures that could be economically installed. Customers would also have the option of using contractors who are familiar with the facilities to initiate projects. Under Tier 2, customers have the option to utilize their own engineering & installation contractors. This program will also be open to approved trade allies that meet the program participation requirements. Utilities or their implementor will complete a detailed review of the project to ensure it meets program requirements. In addition to the calculated project-by-project incentive, participants will have the option to pay back the non-incentive portion of the project costs through a repayment plan.

Tailored assistance services may include audits and additional technical support which will be made available and included in the project cost on an as needed basis.

3. The Energy Management pathway will target energy savings for existing commercial and industrial facilities by providing a holistic approach to improving building energy performance through maintenance, tune-up, retro-commissioning, monitoring based commissioning, and virtual commissioning services and through the implementation of energy savings measures and strategies that improve the overall operation and energy performance of buildings and building systems. Strategic energy management engagement may be utilized to establish ongoing relationships with customers that can be leveraged to introduce other applicable energy efficiency programs in order to achieve more energy savings for the customer. This pathway complements the Prescriptive and Custom program and the other pathways within this program which target capital equipment replacement or process improvement investments by improving the energy performance of a building through maintenance, tune-up, adjustment, and optimization of the systems within the building and the implementation of complementary energy savings measures. This pathway supports ongoing building energy performance by using retro-commissioning and strategic energy management strategies, which supports continued energy performance. By implementing these measures, customers also receive ancillary benefits, including improved occupant comfort, lower maintenance costs, and extended equipment life. This pathway includes focus on specific energy efficiency measures and management practices that can be categorized as follows:

### **Building Operations**

Building Operations measures provide multiple services for a customer to implement building tune-up and maintenance services. These measures are designed to focus on midsize commercial and industrial customers and include the following:

- HVAC Tune-Up: Provides for a tune-up of HVAC systems and includes but is not limited to the following services;
  - Refrigeration charge correction (if needed);
  - Cleaning evaporator and condenser coils;
  - Filter changes;
  - Boiler Tune-Up
  - Furnace Tune-Up
  - Verification of proper operation of fans and motors; and
  - Other minor repairs to refrigerant lines and coils.
- Building Tune-Up: Provides a path for customers to implement a Building Tune-Up that will focus on the adjustment and calibration of building systems and controls, diagnostic testing and the installation of other complimentary measures that enhance building energy performance and



savings. Also includes application of controls to optimize operation of building systems, and building operation training for applicable personnel.

### **Retro-Commissioning**

Retro-Commissioning (“RCx”) measures provide a comprehensive assessment of a customer’s commercial/industrial building by using a prescribed planning process that includes a building audit, development of an action plan for the building and development of a Measurement and Verification (“M&V”) plan to ensure the optimum ongoing performance of the building and building systems. The comprehensive assessment of a commercial/industrial building using a prescribed planning and implementation process will include:

1. Audit Phase – Customer confirms intent to participate in the pathway and registers with one of the Utilities. Customer and/or the customer’s consultant completes the required level of an American Society of Heating, Refrigerating, and Air Conditioning Engineers (“ASHRAE”) audit based on the complexity of the facility and develops a retro-commissioning implementation plan, including project timelines and plan to implement audit-identified operation and maintenance measures. There may be opportunities to complete this phase without a full ASHRAE-level audit.
2. Setup Phase - Contracted services to implement the plan are verified, long-term monitoring and reporting is developed and initiated, and a project plan is implemented by the customer.
3. M&V Phase - Savings verification and rebate payment from implementation of the plan is completed.

Typical RCx services include, but are not limited to:

- Optimizing chiller and boiler operations to better match building load conditions;
- Reducing ventilation in over-ventilated areas;
- Fixing ventilation dampers that are open when they should be closed or vice versa;
- Decreasing supply air pressure setpoint and system rebalancing;
- Aligning zone temperature setpoints to match the building’s actual operating schedule; and

### **Monitoring Based Commissioning (MBCx)**

Monitoring-Based Commissioning (MBCx) offers monitoring software paired with a building’s energy management system to identify energy savings opportunities and optimize building performance and energy efficiency. Contracted services will alert the customer when equipment is not operating as expected using fault parameters and will work with the customer to correct ongoing issues and make improvements wherever possible. Planning and implementation typically includes, but is not limited to;

1. Assessment and qualification of a building energy management system. Assess Utility bills and facility to recognize potential for energy savings.
2. Customer agrees to have contracted services utilize eligible software with diagnostics and other functionality through a monitoring service contract.
3. Monitoring-based Commissioning (MBCx) is designed to:
  - Maximize potential incentives with a deeper dive into a building's overall performance
  - Monitor and identify cost savings opportunities
  - Benefit from a continuous process to improve comfort and optimize energy usage
  - Maximize the operational efficiency of buildings

### **Virtual Commissioning (VCx)**

VCx provides eligible customers with an initial analysis of their building's energy performance by using interval meter and or advanced metering infrastructure ("AMI") usage data, and modeling to identify and recommend potential energy efficiency measures and behavioral and/or operational changes to improve a building's overall energy performance. A unique benefit of VCx is the ability to perform analytical prospecting and target customers remotely using data driven analysis, modelling, and/or artificial intelligence ("AI"). Targeted customers are engaged, and individually reviewed to verify the opportunity, develop customized recommendations, and quantify savings potential. The analysis can also foster participation in the Utility's other programs by identifying and encouraging customers to implement other energy efficiency opportunities. The VCx process can also utilize benchmarking and peer comparison metrics to help determine energy performance to identify facilities that are underperforming. This offering uses continuous engagement, monitoring, reporting, and periodic reviews of customer's energy usage to ensure that implemented measures or changes have been successfully completed.

### **Strategic Energy Management**

The Strategic Energy Management ("SEM") component of this program is designed to optimize energy consumption for larger C&I customers through long-term management of major energy using systems. SEM provides a holistic approach that is focused on management of existing systems and processes (including behavior), as well as tracking and benchmarking performance to identify and evaluate energy optimization efforts. SEM is a long-term effort typically focused on developing and executing an energy management strategy. This strategy is formulated through a series of site and/or remote visits and interviews with building owners and staff to specifically develop a Strategic Energy Management Plan ("SEMP") for the customer's facility. The SEMP will be reviewed with the customer by the Utility and/or its third-party implementation contractor on a scheduled basis. This plan may include:

- Revisions or improvements to an existing Building Automation System or the addition and initiation of the use of a Building Automation System to monitor and control the buildings components and systems. The implementation or improvements to a system or the review of an existing system can include the proper training for building operators to achieve maximum efficiency.
- Development of a maintenance plan for existing building components and/or systems to identify best practices in building performance and an interactive monitoring of system components by both staff and sponsoring Utilities.
- Ongoing engagement to track energy usage and performance, assist with planning energy efficiency projects, and interact with facility personnel to adopt energy efficiency strategies and behaviors.
- Utilizing other program offerings, including Prescriptive/Custom measures, Building Operations, RCx, and VCx.
- Using building modeling and benchmarking to compare customer's usage and performance to cohort of similar facilities and VCx to track energy usage and performance over time.
- Application of whole building energy modeling tools that can model buildings for both operational and capital improvements.
- Scheduling of attendance of customer personnel to attend educational workshops, webinars, and group/individual training sessions with cohorts of facility managers (e.g. Building operations training).

Customers can participate by application to the program or may be contacted directly by program personnel. Customers can participate individually or in a cohort with other customers in the same industry. The cohort would allow customers to share best practices amongst each other as each customer goes through the SEM program lifecycle. A customer would still be treated as an individual unique project within the cohort. The program will retrieve customer demographics and obtain customer agreement for the services to be provided and facilitate ongoing customer engagement. The Utilities and/or a third-party implementation contractor will develop application forms for this program that will guide applicants through eligibility guidelines, terms and conditions, and general program information requirements. In addition, the program will provide applications in web-ready formats to ensure participants and potential customers have easy access to the forms.

The Utilities recognize that public entities have unique procurement requirements which could result in barriers to participation. The Utilities will work with the State to develop and implement an approach that may offer a streamlined experience for these entities that meets their unique requirements.

#### **Target Market or Segment (MFR II.a.ii)**

C&I customers who are seeking comprehensive advisory, operational, technical and data analysis engagement-based energy solutions located within the Utilities' service territories are eligible to participate in this program. The measures included in this program may include, but are not limited

to, HVAC, building envelope, lighting controls, and other building systems, energy efficiency and energy consuming equipment.

Engineered Solutions, Tier 1 and 2 targets customers who need tailored energy-efficiency support to help identify, develop, and undertake energy-efficiency projects.

Regarding the Energy Management pathway, these strategies are generally appropriate for specific segments as described below:

- Building Operations and VCx measures target existing commercial buildings and may be particularly relevant for small to medium building types that utilize traditional building systems and controls.
- RCx and MBCx target existing commercial buildings and are particularly relevant for medium to large building types utilizing a building energy management system.
- SEM targets existing large to very large commercial and industrial customers and building types and is particularly relevant to customers with significant energy use who commit to on-going participation and engagement across the organization including various levels of management and decision making.

#### **Existing and Proposed Incentive Ranges (MFR.II.a.iii and MFR II.a.iv)**

Incentives for the Engineered Solutions Tier 1 pathway will provide a 100% incentive for an up-front audit; the specific audit level will be determined on a project-by-project basis based on the complexity of the facility and the potential energy efficiency measures. In addition, the Utilities will buy-down the simple payback of the recommended energy-efficiency project cost for approved measures by up to six (6) years, with the resulting payback not less than three (3) years. After the project incentive buy-down, the remaining project costs may be funded by the program with participants repaying the balance of the project costs through a repayment plan.

Incentives for the Engineered Solutions Tier 2 pathway will provide incentives for both technical assistance services and other project costs determined on a project-by-project basis using a cost effectiveness tool up to 60% of project cost.

In addition to the calculated project-by-project incentive, participants will have the option to pay back the non-incentive portion of the project costs through a repayment plan.

Tailored assistance support services may include Design, Construction Administration, Commissioning, and M&V and other technical support which will be made available and included in the project cost on an as needed basis.

Incentives for the Energy Management pathway are structured around the measure categories that focus on specific energy efficiency measures and management practices as follows:

- **HVAC Tune-Up:** Fixed incentives for the implementation of the tune-up measures based on the size of the HVAC units.
- **Building Tune-Up:** Incentives that cover up to 80% of the project cost and up to 70% of the cost to attend qualified BOC training up to \$1000 per person.

- **Retro-Commissioning:** Incentives to cover up to 100% of the initial cost to perform the required ASHRAE level audit. The total project incentive will be capped at up to 70% of the project cost. The customer may also be paid a custom incentive for the implementation of the energy efficiency measures determined through the audit.
- **Monitoring-based Commissioning, Virtual Commissioning:** Incentives to cover up to 100% of the cost of integration of third-party hardware and software. Utilities may also implement a performance-based model with an implementation contractor where the Utility only pays for delivered and verified energy savings.
- **Strategic Energy Management:** The Utility or third-party implementation contractor may perform an engineering assessment of the customer's facility to develop a SEMP, or the customer may choose to utilize a consultant of their choosing to perform an engineering assessment to develop the SEMP. Customers who utilize a consultant will receive an incentive to cover up to 100% of the initial cost of the engineering assessment. A tiered incentive structure for customer engineering assessment may be utilized based upon square footage of a customer's facility. The SEMP will identify short, medium, and long-term goals for the customer and will set identifiable metrics for mapping to the plan. For the implementation of the energy efficiency measures determined by the SEMP, the customer will be paid an incentive that is commensurate with the applicable Commercial & Industrial Program offering to which the measures are attributed.

Refer to Appendix H for the Summary of the Existing and Proposed Incentive Ranges for this program.

The Utilities will strive to complete customer contractor payments within 60 days following completion of contractor work, submission of complete and required paperwork and completion of program requirements, such as necessary field inspections (if required).

#### **Customer Repayment Options (MFR II.a.v)**

Refer to Section 4h of this Program Plan for the Summary of Proposed Repayment for this program.

#### **Contractor Requirements & Role (MFR II.a.vi)**

The Utilities will administer the Energy Solutions program and may also choose to select a third-party to manage delivery of this program. The Utilities will oversee and coordinate on the program offering. The Utilities may utilize qualified trade allies and/or contractors to undertake the services required to deliver this program. The Utilities may also utilize the qualified trade allies to assist in the outreach, marketing and trade ally coordination. Participants may contract with the installation trade allies selected through a competitive solicitation process, or their own preferred contractors if allowed by the pathway, to provide program services.

The Engineered Solutions pathway delivery will typically occur in the following steps (the Engineered Solutions Tier 2 pathway may provide selected services, but not all, as determined on a project-by-project basis):

- **Audit:** The Utilities shall assess the required level of an ASHRAE audit to perform, based on the complexity of the facility and the potential energy efficiency measures; an investment

grade audit may not be required for all facilities. The Utilities will then select a program trade ally to perform the appropriate level energy audit and prepare a customized audit report that includes a list of recommended energy efficiency upgrades. The lead Utility will then review the recommended energy efficiency upgrades with the customer to determine whether to proceed with a project.

- **Engineering Analysis of Project:** Based on the audit results and customer feedback, an engineering analysis may be required. The lead Utility will conduct a screening of the payback and project cost effectiveness and recommend the selected energy-efficiency measures for the project. The lead Utility will review the project with the customer for customer agreement on the approved project and coordinate as necessary.
- **Engineering Design and Bid Package preparation:** The engineering trade ally hired by the lead Utility will initiate the design of the selected energy-efficiency measures for the approved project. In addition, this trade ally will also prepare a Scope of Work and bid package documents which the customer could use to put out a Request for Proposal (RFP) to obtain installation cost estimates for the approved project.
- **Scope of Work/Contractor Bids:** The customer will issue a Scope of Work and the bid package documents to obtain competitive bids to install selected energy-efficiency measures for the approved project. The lead Utility, the program engineering trade ally, and the customer will review and evaluate the bids/costs received, and the customer will make the final decision on bid selection. Following bid selection, the proposed project is again screened for cost effectiveness.
- **Measures Installation and Inspections:** The partnering Utilities and the program engineering trade ally, acting as construction administration agent, will monitor project progress and will release project funds based on the following payment structure:
  - **Stage 1: Project Contracting Stage** - The first progress payment of up to 30% of the installation cost can be issued to the customer to initiate the project.
  - **Stage 2: Construction Stage** - A pre-defined series of monthly progress payments totaling up to 50% of total project commitment can be issued.
  - **Stage 3: Project Completion and Commissioning** - When the project is 100% complete, a final inspection and final project true-up will be performed; remaining progress payments will be issued.

The final payment based on the results of project true-up is determined and issued only if the final inspection is successfully completed and approved. If the final costs are less than the estimated project commitment, the final payment will be adjusted down to reflect the actual costs. If the final costs are greater than the estimated project commitment, the final payment will not be adjusted and will be paid according to the executed agreements and contracts specifying original costs.

The progress payment schedule described above is designed to ensure that customers can pay their installation contractors on a timely basis. Project progress and the project cash flow will be monitored and verified by the lead Utility and the trade ally engineering firm with updates to the partner Utility as appropriate.

The Utilities will select qualified program trade allies to undertake all services associated with the program. The Utilities will also monitor participation to assess the effectiveness of outreach efforts, incentive levels, delivery methods, and program trade ally and installation contractor availability and provide suggestions for improvement. The installation contractor(s) will adhere to

the project specifications recommended by the Utilities and the program engineering trade ally and set forth between the installation contractor and the customer.

For Energy Management, the Utilities will perform overall administration and oversight of the pathway and may also choose to select third-party implementation contractors to manage delivery of this pathway. The Utilities' staff and/or third-party implementation contractors will oversee all aspects of the pathway. The Utilities and/or third-party implementation contractors will be responsible for administering, promoting and providing the pathway to customers, including staffing, processes ensuring quality, and other controls supporting successful program implementation. The Utilities' staff and/or third-party implementation contractors will conduct the marketing, management, and implementation aspects of this pathway.

The Utilities' staff and/or third-party implementation contractors will select qualified program trade ally and/or contractors to undertake all program services, as required. Installation and maintenance trade allies must adhere to the project specifications developed by the Utility and/or third-party implementation contractors. The Utilities will leverage their existing and/or develop a network of engaged trade allies, including local construction, electrical, plumbing, and other contractors, to educate them on program benefits and assist with building an approved trade ally network which will reliably maintain and install energy-efficient equipment for participating customers.

The Utilities' staff and/or third-party implementation contractors will also monitor participation to assess the effectiveness of outreach efforts, incentive levels, delivery methods, and program trade ally availability and provide suggestions for improvement.

**Projected Participants (MFR II.a.vii) and Energy Savings Relative to QPIs (MFR II.a.viii)**

Refer to Appendix A for the information on these MFRs.

**Program budget, by year (MFR II.a.ix) and Projected program costs, by year, broken down into the specified categories (MFR II.a.x)**

Refer to Appendix B for the information on these MFRs.

### **3a.ii.2 Prescriptive & Custom Program**

#### **Program Description (MFR II.a.i)**

The Prescriptive and Custom Measures program will promote the installation of high-efficiency electric and/or natural gas equipment by the Utilities' C&I customers, either via the installation of prescriptive or custom measures or projects. The program provides prescriptive-based incentives to commercial and industrial customers to purchase and install energy efficient products. The program will continue to support and/or provide downstream approaches to ensure the market is properly supported. The program may also provide midstream or upstream incentives or buydowns and support to manufacturers, distributors, contractors, and retailers that sell select energy efficient products. These measures will incentivize energy efficient lighting, appliances, heating and cooling equipment, and food service equipment, among other efficiency measures. Type and value of incentive provided will range and will include electric and/or natural gas technologies that improve energy efficiency. Up-front rebates will be offered to reduce initial costs, and some purchases may qualify for a repayment plan to further reduce upfront costs. Prescriptive measures are designed to provide easy and cost-effective access to energy efficient measures through customers' preferred channels.

Prescriptive rebates are designed to:

- Provide incentives to facility owners and operators for the installation of high efficiency equipment and controls;
- Promote the marketing of high efficiency measures by trade allies such as electrical contractors, mechanical contractors, and their distributors to increase market demand; and
- Ensure the participation process is clear and simple.

Prescriptive incentives will increase adoption of energy efficient equipment by harnessing the Utilities' unique customer relationships to positively impact the entire sales process surrounding efficient equipment. The process includes education and awareness with customers, engagement with trade ally contractors and equipment distributors, and repayment plan opportunities for the high efficiency equipment.

The program also includes custom measures that provide calculated or performance-based incentives for electric and/or natural gas efficiency opportunities for commercial, industrial, and other non-residential customers that are non-standard, variable or not captured by prescriptive incentives. Calculated or performance-based incentives are designed to reduce the customer's capital investment for qualifying energy efficient equipment to retrofit or upgrade specialized processes and applications and/or to implement qualifying high efficiency building shell or systems improvements. Typical custom measures that are eligible for incentives are either less common measures or efficiency opportunities in variable or specialized applications that may include manufacturing or industry-specific processes, or non-traditional use cases. In many cases, custom efficiency measures are more variable or complex than prescriptive equipment.

Potential participants may be required to submit an application for pre-approval to confirm measure or project eligibility and reserve funding. The Utilities and/or implementation contractors



will develop electronic rebate application forms that will guide applicants through eligibility guidelines, program requirements, terms and conditions, and general information. In addition, the Utilities and/or implementation contractors will provide applications in web-ready formats to ensure participants have easy access to the forms. The pre-approval process provides for the review of the customer's proposed project to confirm measure eligibility and incentive budget availability. This also supports the Utilities' program management because it communicates projects that are in the pipeline. If accepted and pre-approved by the Utilities, a timeline is established for project completion to qualify for a rebate. The typical lead time for completing a custom project is 90 to 120 days but can be longer depending on the complexity of the project. Large projects, or subsets of projects, may be required to undergo pre-and post-inspection to validate energy savings. Approved measures or projects may also be eligible for a repayment plan.

#### **Target Market or Segment (MFR II.a.ii)**

The Prescriptive and Custom Measures program will be available to all commercial, industrial and other non-residential customers located within the Utilities' service territories. This program is focused on promoting the sale and installation of efficient electric and/or natural gas equipment across all major end-use categories and can be easily promoted to trade allies and customers via straightforward prescriptive rebates or more complex custom rebates. Potential technologies incentivized through prescriptive measures include energy efficient lighting, appliances, heating and cooling equipment, and food service equipment, among other efficiency measures. Customers pursuing custom incentives will generally be customers with more complex needs and non-standard or variable efficiency opportunities and typically include building types such as light/heavy industrial, manufacturing, and data centers and distribution centers, among others.

#### **Existing and Proposed Incentive Ranges (MFR.II.a.iii) (MFR II.a.iv)**

The Utilities propose to provide a range of incentives depending on the measure type, subject to changes based upon customer response and economic and market conditions over the plan period. Incentives will vary depending on factors including, but not limited to, the specific product, the incremental cost of the high-efficiency technology, and the product maturity in the marketplace.

Refer to Appendix H for the Summary of the Existing and Proposed Incentive Ranges for this program.

In instances where incentives are not immediate, the Utilities will strive to complete consumer or contractor payments within 60 days following completion of contractor work, submission of complete and required paperwork, and completion of program requirements such as necessary field inspections (if required).

#### **Customer Repayment Options (MFR II.a.v)**

The participating customer will repay the balance not covered through the incentive either in a lump sum or through a repayment plan. Refer to Section 4h of this Program Plan for the Summary of Proposed Repayment for this program.

### **Contractor Requirements & Role (MFR II.a.vi)**

The Utilities may outsource some or all of the implementation of this program to an implementation contractor who would be responsible for defined functions, which could include administration, marketing, application processing and documentation regarding purchased products, and processing incentives and rebates. The Utilities will perform overall administration and oversight of the program. To maximize customer participation and streamline the customer experience, the Utilities will use their strong customer and marketplace relationships to support multiple implementation strategies to achieve program goals.

- **Trade Allies:** The Utilities and/or the implementation contractor will target trade allies to promote the energy efficiency opportunities and incentives to their clients. Preserving this downstream approach will ensure that customers and trade allies are properly supported. Trade allies will be able to leverage the program and offer customers rebates through their normal course of business. By developing relationships with trade allies, the program will develop a broad reach across the marketplace and solicit feedback to ensure incentives and measures are impacting the market as designed. Examples of targeted trade ally firms may include:
  - Design, engineering, and controls firms;
  - Building energy managers
  - HVAC distributors, contractors, and retail providers;
  - Food service retailers and service providers;
  - Commercial lighting retailers, distributors, and wholesalers; and
  - Electricians and Electrical contractors
- **Retail:** The Utilities' program staff and/or the implementation contractor field representatives may work with retailers and distributors that directly target C&I customers to inform them of the participation process and available equipment incentives. The Utilities and/or implementation contractor may also provide support and assistance to retailers or distributors to support identification and promotion of qualifying energy efficient products. This may also include training and instruction to participating retailers and distributors about the Utilities' application forms.  
The Utilities may provide opportunities for commercial customers to purchase energy efficient equipment through an online marketplace.
- **Midstream:** The Utilities and/or the implementation contractors may promote a midstream component for specific equipment types to encourage purchase of efficient equipment via directly marking down the cost of the efficient equipment at the point of sale. Midstream rebates encourage market transformation and wider availability of efficient equipment. The Utilities anticipate offering midstream point of sale discounts across numerous equipment types, which may include, but are not limited to LED lighting, HVAC, and food service equipment. Efficient products that are rebated via a midstream approach will not be eligible for incentives in any other Utility energy efficiency program. The Utilities and/or implementation contractor will also provide support and assistance to distributors to support identification and promotion of qualifying energy efficient products. This will also include training and instruction to participating distributors, as well as enrollment of distributors to participate in midstream program offerings.

- **Digital:** The program will be marketed directly to C&I customers on the Utilities' websites where customers will have easy access to information regarding eligible equipment and savings opportunities, how to participate, rebate applications, and incentives across all efficient equipment types and end-uses. The Utility may also offer the direct purchase of eligible equipment through their website or an online marketplace.
- **Targeted Customer Outreach:** Utility staff may choose to reach out directly to large business and commercial customers to develop relationships with energy and facilities managers, operations staff and procurement personnel. Program staff can help facilitate completion of rebate applications and serve as a direct resource to these customers, providing technical support and assisting customers in identifying efficiency opportunities.
- **Technical Customer Assistance:** An important element of the Prescriptive and Custom program is the availability of technical support. The Utilities and/or implementation contractor will provide technical support to customers on the application of the energy efficiency measures and technologies included in this program, including supporting measure or project identification, developing energy savings calculations and assessing measure or project economics as required.

Measurement & Verification ("M&V") for measures or projects that do not have reliable information to accurately forecast energy savings may require energy monitoring before and after measure or project implementation to determine savings and incentive amounts.

A comprehensive contractor agreement, containing information about equipment certification (such as DLC lighting, etc.), licensing, insurance requirements, etc. will be developed and provided to all participating contractors.

#### **Projected Participants (MFR II.a.vii) and Energy Savings Relative to QPIs (MFR II.a.viii)**

Refer to Appendix A for the information on these MFRs.

#### **Program budget, by year (MFR II.a.ix) and Projected program costs, by year, broken down into the specified categories (MFR II.a.x)**

Refer to Appendix B, for the information on these MFRs.

### **3a.ii.3 Direct Install Program**

#### **Program Description (MFR II.a.i)**

The Direct Install Program is focused on providing the installation of efficiency measures for small to medium sized businesses, non-profit organizations, municipalities, schools and faith-based organizations (“eligible customers”) that typically lack the time, knowledge, or financial resources necessary to investigate and pursue energy efficiency. The program is designed to provide eligible customers with easy investment decisions for the direct installation of multiple measures to comprehensive energy efficiency projects. The program will pay a percentage of the up-front cost to install the recommended energy efficiency measures, with the participating customer contributing the balance of the project not covered by the incentive. The program will also provide a repayment plan to the customer. The no-cost energy assessment mitigates the time constraints and knowledge barriers while the reduced project costs and repayment options mitigate cost barriers and assist participants in making decisions which otherwise would be time-consuming and potentially difficult to justify. The Direct Install program plays an important role in the marketplace because private providers of energy efficiency services typically do not target smaller customers due to the lower overall profit for their services when compared with larger non-residential customers. For these reasons, small to medium sized businesses, non-profit organizations, municipalities, schools, and faith-based organizations are often underserved, and the program fills an important gap by targeting, promoting, and delivering efficiency services to these customers directly.

The energy assessment will be provided to customers free of charge and will offer recommendations on energy efficiency measures to reduce the customer’s energy usage and costs. Standard energy savings measures may also be provided or installed at no cost at the time of the energy assessment to support customer engagement, participation, and energy savings.

The program will also focus on the smaller customers within the eligible customer segments. The Utilities anticipate portions of the program to be directed at restaurants, small offices, convenience stores, and other small independent businesses that often are left behind in energy efficiency programs. Through a number of delivery mechanisms, the Utilities will ensure that all eligible business types are able to participate in this program.

The Utilities recognize that public entities have unique procurement requirements which could result in barriers to participation. The Utilities will work with the State to develop and implement an approach that offers a streamlined experience for these entities that meets their unique requirements. More specifically, the Utilities will offer a Public Sector Direct Install program pathway for public entities subject to Local Public Contracts Law at N.J.S.A. 40A:11-5(1)(f) and Public School Contracts Law at N.J.S.A. 18A:18A-5a(7) that employs a direct contracting model and includes a standardized approach to and pricing for assessments, recommendations, and installations. The Utilities will work with the State to ensure that this program pathway includes minimum requirements for contractors and subcontractors, includes local and diverse hiring requirements, and encourages participation by union labor.

The Utilities will also work with the State to offer a Direct Install program pathway for all eligible customers that employs a trade ally model and includes a standardized approach to assessments, recommendations, and installations.

The Utilities will work with the State to develop and implement an approach to serve State facilities.

### **Target Market or Segment (MFR II.a.ii)**

The Utilities will seek to address the most cost-effective measures but will also address all measure retrofits that would comprise a cost-effective project. Examples of end-use categories covered by the program include lighting, HVAC, controls, refrigeration, food service, motors, low-flow devices, building envelope improvements, pipe wrap, and domestic hot water equipment. The program will be divided into three tiers of eligibility, determined by the customer's individual facility peak electrical demand over the last 12 months.

- Tier 1
  - Will serve the smallest of the eligible customer base: all customers with an average annual individual facility peak electrical demand of up to 100 kW and an average annual natural gas load of up to 5,000 therms;
- Tier 2
  - All customers with an average annual individual facility peak demand of up to 300 kW or average annual natural gas load of 40,000 therms that are located within an Urban Enterprise Zone (“UEZ”), Opportunity Zone, Overburdened Community (“OBC”); or
  - All customers with an average annual individual facility peak demand of up to 300 kW or an average annual natural gas load of 40,000 therms that are owned or operated by a local government, K-12 public schools, or that are non-profits categorized as 501(c)3
- Tier 3
  - All customers with an average annual individual facility peak electrical demand of 101 - 300 kW or an average annual natural gas load of 5,001 therms to 40,000 therms.

The eligibility requirements listed above may be adjusted in coordination among the Utilities to improve customer access, participation and program performance based on economic and market conditions.

### **Existing and Proposed Incentive Ranges (MFR.II.a.iii and MFR II.a.iv)**

Each tier of the program will encompass many of the same benefits, including a turnkey solution for eligible customers, which requires no up-front investment. The initial site visit, energy

assessment, and installation of recommended energy efficiency measures are provided at no initial cost to participants. The Utilities propose to provide an incentive level of up to 80% of the project costs to promote the completion of comprehensive projects while maintaining overall program cost effectiveness.

For Tier 1 customers the program will offer to pay up to 80% of the project cost to install the recommended energy efficiency measures with the participating customer (and/or landlord) repaying the balance not covered through the incentive either in a lump sum or through a repayment plan.

For Tier 2 customers, program will offer to pay up to 80% of the project cost to install the recommended energy efficiency measures with the participating customer (and/or landlord) repaying the balance not covered through the incentive either in a lump sum or through a repayment plan. Customers located in an Urban Enterprise Zone (“UEZ”), Opportunity Zone, Overburdened Community (“OBC”), or other geographic area as designated by the Board of Public Utilities may also qualify, as will those owned or operated by a local government, K-12 public school, or non-profit categorized as 501(c)3 or 501(c)19.

Tier 3 will serve the larger segment of eligible customers, with an individual facility average annual peak electrical demand of 101 - 300 kW or 5,001 therms to 40,000 therms over the past 12 months. Incentives up to 70% of the total project cost will be offered with the participating customer repaying the balance not covered through the incentive either in a lump sum or through a repayment plan.

Utilities may impose a dollar cap on the incentives for all tiers.

Refer to Appendix H for the Summary of Existing and Proposed Incentives for this program.

### **Customer Repayment Options (MFR II.a.v)**

The participating customer will repay the balance not covered through the incentive either in a lump sum or through a repayment plan.

Refer to Section 4h of this Program Plan for the Summary of Proposed Repayment for this program.

### **Contractor Requirements & Role (MFR II.a.vi)**

The Direct Install Program interfaces with customers via either direct solicitation or upon customer request. All participants receive a site visit, including a free on-site energy assessment to identify energy efficiency retrofit opportunities. Standard energy savings measures may also be installed at no cost at the time of the energy assessment for eligible Tier 1 customers, to support customer engagement, participation, and energy savings. Following the energy assessment, participants are provided with a report assessing the site and recommending additional measures that could further improve the energy efficiency of the facility.

Based on the results of the energy assessment report, the program will offer to pay a percentage of the project cost to install the recommended energy efficiency measures. The program may also

provide a repayment plan to the customer (and/or landlord) for their portion of the project cost. Utility staff and/or third-party implementation contractors will provide turnkey solutions to eligible customers with the initial site visit, energy assessment, and installation of recommended efficiency measures at no initial cost to participants. The Utility will ensure this completed on time and to specifications. This approach frees up the participant, who may not have the time or resources to dedicate to project identification, development, and implementation. The distinction between Tier 1, 2, and 3 eligibility criteria will ensure that eligible customers, even those that are the smallest and often overlooked, receive ample focus.

The participating contractors will perform the energy assessments and installations, working with the Utilities and/or the implementation contractors oversight to undertake all construction and installation work identified in the energy assessment process.

To support public entity participation in the Public Sector Direct Install pathway, the Utilities will work with the State to establish minimum requirements for contractors and subcontractors, including the following:

- Compliance with public work project requirements
- Public Works Contractor registration (with the NJ Department of Labor and Workforce Development)
- Submission of certified payroll records
- Affirmation that none is debarred, suspended, or disqualified by the NJ Department of the Treasury or Federal agencies
- Confirmation of no business with State prohibited entities

Division of Property Management and Construction (DPMC) classifications (with the NJ Department of the Treasury)

**Projected Participants (MFR II.a.vii) and Energy Savings Relative to QPIs (MFR II.a.viii)**

Refer to Appendix A for the information on these MFRs.

**Program budget, by year (MFR II.a.ix) and Projected program costs, by year, broken down into the specified categories (MFR II.a.x)**

Refer to Appendix B for the information on these MFRs.

### **3a.iii Multifamily Sector**

The core Multifamily sector program is described below and includes:

- Multifamily



### **3a.iii.1 Multifamily Program**

#### **Program Description (MFR II.a.i)**

This program addresses multifamily structures with three or more units. As such, there can be significant variation in the types of structures served under this program, ranging from residential type dwellings with three units to large garden apartment complexes to multi-story high rise buildings. To meet the specific needs of each customer, the Multifamily Program will provide, in conjunction with the customer, a structured screening review to identify and develop the project plan for the customer. Potential program services include customer engagement with energy efficiency education through energy assessments and a suite of efficiency offerings ranging from simple to deep energy retrofits targeting all end uses. In addition, the Multifamily Program may provide On-Bill Repayment (OBR) or access to financing with similar terms and enhanced incentives for income-qualified customers and affordable housing properties.

The Multifamily Program will seek to work with each customer to determine and package the best energy savings opportunities based on the needs and interests of the customer, with an emphasis on encouraging more comprehensive projects wherever possible. Customers will begin participation in the Multifamily Program with a screening to identify and develop a project plan. The initial screening may include an energy assessment and installation of standard energy savings measures where possible to help encourage program participation. The assessment will also identify additional energy savings opportunities and develop the project plan that is the best fit for each specific customer and building.

Applications to this program will be reviewed to determine the project plan depending on the type of housing stock and ownership structure. The screening process will consider various factors to create a project plan that will deliver a high level of energy savings in a cost-effective manner. Examples of these factors include, but are not limited to:

- Building size;
- Number of units;
- If the facility is being served by a central plant;
- If there are individual heating and cooling units;
- If there are building envelope/weatherization opportunities;
- Application review with a potential virtual site inspection or telephone interview with property management; and
- An on-site pre-scoping audit may be performed.

Depending upon the screening results and the customer's interests, a customer's project plan could include direct installation of standard and comprehensive energy saving measures, comprehensive building wide efficiency, and other possible measures. The measures within the project plan may align with the terms and conditions of the Utilities' respective applicable residential and/or commercial and industrial program offerings, where appropriate, and may include multifamily-specific terms, conditions, incentives, and offerings. Therefore, the project plan can include prescriptive measures with set energy-savings and/or custom projects with savings on a project basis. The incentives for the measures may not match the incentives in other programs, as the multifamily sector has higher barriers to overcome. Discussions with customers may also target

the identification of specific opportunities that may align with other Utility programs, including measures provided in Additional Utility-Led Initiatives.

### **Target Market or Segment (MFR II.a.ii)**

All multifamily buildings with three or more units that are served by at least one investor-owned Utility are eligible to participate. The program targets multifamily property owners, property managers, and residents who, because of the building owner – tenant relationship, have always had difficulty investing in energy efficiency equipment. The Utilities will also target outreach to income-qualified occupants and owners of multifamily buildings who are eligible for enhanced incentives.

Eligibility for these enhanced incentives can be automatic based upon the type of property that can be identified as serving income-qualified customers, such as those with an affordable housing designation (e.g., New Jersey Housing and Mortgage Financing Agency qualified, Housing Authorities) or identifiable by a physical location (e.g., census tract, Overburdened Communities with a low-income characteristic). The Utilities reserve the right to align with categorical eligibility of federal and state energy efficiency programs for income eligibility. The program may refer prospective customers to income-qualified program(s) as appropriate.

### **Existing and Proposed Incentive Ranges (MFR.II.a.iii and MFR II.a.iv)**

The measures of the Multifamily Program are a comprehensive combination of potential program components. Depending on the needs of the customer, different program components may be provided to them. Incentives for some measures may align with the existing incentive offerings for other program offerings; however, the program has the flexibility to offer different incentive levels.

See Appendix H for existing and proposed incentive ranges for each of the potential program components that Utilities may offer as part of their Multifamily program.

### **Customer Financing Options (MFR II.a.vi)**

Refer to Section 4h of this Program Plan, for the Summary of Proposed Financing.

The Multifamily Program may provide On-Bill Repayment (OBR) or access to financing with similar terms and enhanced incentives for income-qualified customers and affordable housing properties.

### **Contractor Requirements & Roles (MFR II.a.vi)**

The Multifamily Program will be delivered in coordination between both the Lead Utility and the Partner Utility (where applicable) and/or qualified third-party implementation contractor(s) with experience delivering similar programs. Because of the unique and varied nature of the multifamily market program representatives will build relationships with property management companies, owners, associations and their members to recruit participation in the program. The program will assist customers as necessary to coordinate scheduling of the Energy Assessment and direct

installations and will provide program and technical support to complete program and rebate application requirements.

Delivery of energy-saving measures will depend on the project plan and may include direct installation of standard and comprehensive energy savings measures, installation of prescriptive measures, and/or custom projects. It may be necessary to schedule appointments for the installation of energy saving measures in the individual living units and common areas. In-unit HVAC tune-ups may also be offered to the property owner or tenant. The installation crews are trained on the technical and educational aspects of the measures installed and leave educational materials in each unit describing the work performed and explaining the energy-saving benefits.

**Projected Participants (MFR II.a.vii) and Energy Savings Relative to QPIs (MFR II.a.viii)**

Refer to Appendix A for the information on these MFRs.

**Program budget, by year (MFR II.a.ix.) and Projected program costs, by year, broken down into the specified categories (MFR II.a.x)**

Refer to Appendix B for the information on these MFRs.





## **4. Portfolio Information**

As discussed above, some information contained in the Portfolio Information section (Section 4) is consistent, while the remaining subsections are Utility specific. The following subsections contain consistent information across all of the Utilities:

- 4e: Evaluation, Measurement and Verification (MFR VI.)
- 4f: Reporting Plan (MFR VIII.)
- 4g: Overburdened Community Standardization

Sections 4a-4d and Section 4h each present information specific to each Utility. If provided, additional sections within Section 4 are Utility specific.

## **4a. Quality Control and Customer Complaint Resolution**

### **(MFR II.b.ii and DR MFR II.c.i)**

South Jersey Gas will deploy routine quality assurance and quality control measures to ensure its internal and vendor processes are meeting the goals and objectives of the program. Such measures may include routine program performance reviews, vendor meetings, customer participation surveys, and project inspections. South Jersey Gas may use a third-party vendor to perform random on-site inspections for work associated with the residential, multifamily and commercial programs. The vendor may assess the quality of the energy conservation measure installations performed by the program implementation contractors, report findings, and identify recommended remedial activity as required. Additionally, any Trade Ally or Participating Contractor will undergo a thorough onboarding review to ensure that participating contractors are licensed, insured, and that they fully understand program requirements before performing any work on behalf of South Jersey Gas and program. Further, routine review periods to ensure consistent program deployment and execution. South Jersey Gas will take corrective actions for non-compliance and conformance with program objectives or Company standards.

South Jersey Gas' various customer contact personnel/departments, including South Jersey Gas' toll-free customer service number, will handle customer complaints relating to the design, delivery, and/or administration of any South Jersey Gas program. South Jersey Gas' customer contact personnel will refer customer complaints regarding the Triennium 2 Program to the most appropriate program management personnel to investigate and resolve the issue. If South Jersey Gas is unable to resolve a complaint to the customer's satisfaction, the customer can subsequently direct their complaint to the Board for resolution through the BPU's existing process for customer complaints within the appropriate Division or the Office of Administrative Law.

## **4b. Workforce Development and Job Training**

**(MFR II.b.ii and DR MFR II.c.ii)**

South Jersey Gas recognizes the importance of developing and supporting strong Workforce Development Programs. There needs to be a strong pool of qualified candidates ready for companies to hire to meet the increased demand for the energy efficiency programs and projects as the Utilities continue to implement programs to strive to meet the new energy savings targets required by the Clean Energy Act. This overview will address thoughts on training needs and career paths, trade ally needs, and contracting provisions.

SJG continues to be an active participant in the Workforce Development Working Group to collaborate with the other Utilities regarding program details and share anticipated program hiring needs while working to understand the interests, feedback and concerns of the other stakeholders. The Utilities anticipate that this work group will continue to provide significant input that will shape the recommended slate of programs and policies to develop a robust pipeline of workers able to meet the needs of a growing energy efficiency industry in New Jersey and to ensure that local, underrepresented, and disadvantaged workers are included in those opportunities.

### **Training Needs and Career Paths**

In order for the Utility to reach the aggressive energy efficiency goals established by the Clean Energy Act, New Jersey will need to significantly increase the number of trained professionals and skilled trade persons who are proficient in meeting the needs of residential, commercial and multifamily projects, such as:

- Auditors
- HVAC technicians
- Plumbers
- Electricians
- Seal-up and insulation contractors
- Engineers
- Analysts (energy modeling and evaluation, customer service, financial tracking, cost-benefit analysis, demographic analysis)
- Program staff with a strong understanding of the approved energy efficiency programs and supporting administrative staff
- Outreach specialists

To support the Workforce Development Program, SJG may partner with a third party to offer any of the below courses.

- Building Science Principles (“BSP”) - designed for new entrants to the energy efficiency industry, as well as back-office personnel who support industry work. The BSP is now the starting point for the professional Building Performance Institute (BPI) certifications. It provides an overview of the energy efficiency industry, residential construction and building systems, the field of Building Science and the basics of energy conservation. Upon completion of the program, participants will need to pass a 100-question BPI test to earn a Building Science Principles Certificate.



- Building Analyst Technician - prepares workers for the field of weatherization, including as energy auditors or weatherization technicians. Building on the BSP, this course provides detailed learning and practice of building inspection, data gathering, diagnostic testing, energy conservation measures, HVAC systems and health and safety concerns. Upon completion of this training class, students will need to pass a 4-hour proctored field exam in order to gain the BPI Building Analyst Technician certification.
- Building Analyst Professional - upsills existing professionals with work scope development, energy modeling, HVAC systems, best practices, and on-site management. Upon completion of this training class, students will need to pass a 2-hour proctored online exam in order to gain the BPI Building Analyst Professional certification.
- OSHA 40-Hour Certification - teaches a wide range of health and safety topics relevant to hazardous waste operations, including: Types of Hazards; Personal Protective Equipment (PPE); and Levels of Protection.
- Soft Skills Training – training that focuses on the development of abilities such as communication, teamwork and problem-solving skills.

We recognize that these positions require a broad range of technical training and educational experience and that it is in our interest to partner with New Jersey-based vocational institutions, community colleges, universities, community-based organizations, and non-profits. We anticipate that most of these entities will have some level of representation with either the Workforce Development Working Group or the Equity Working Group and look forward to hearing their input.

In addition to providing workforce development trainings, the Utility will work with interested participants by connecting them with our Trade Ally network and our implementation vendors for consideration regarding employment opportunities. We hope that this effort completes the circle of identifying and training candidates to then identifying and securing employment once candidates successfully complete their training, bolstering the energy efficiency workforce in New Jersey.

### **Trade Ally Needs**

While ensuring there is trained staff available is a critical path, the Utility also recognizes there must be a pool of employers interested in hiring these individuals. We recognize that we must engage the open market to understand the needs of contractors and other firms. Organizations like the New Jersey Air Conditioning Contractors Association (NJACCA), the New Jersey Association of Plumbing, Heating, and Cooling Contractors (NJPHCC) and the New Jersey Association of Energy Engineers (NJAEI) provide industry leadership and guidance to energy businesses and should be included in the Working Group to guide policies and program designs that will meet the needs of existing and new contractors.

We expect the Working Groups to continue to explore paths that can help Women and Minority Owned Businesses grow and thrive in the Clean Energy Economy. The potential for coaching or

incubator programs could ensure that underrepresented individuals have a greater chance to share in management and ownership opportunities.

### **Contracting Provisions**

South Jersey Gas' will be following internal procurement protocols for the services that will be secured to implement our programs. We are willing to include the amount of business placed with minority, women, veteran and service-disabled veteran owned businesses ("MWVBEs") as part of our rating criteria when evaluating contract proposals.

### **Budget Considerations for Workforce Development Programs**

Proposed budgets for Workforce Development Programs are referenced in Appendix B. These budgets were established to ensure that there is adequate funding to maintain programs during this second triennium. In the event that the State identifies adequate funding from other sources to support these types of programs, South Jersey Gas may be able to reduce their planned expenditures.

## **4c. Customer Access to Usage Data**

**(MFR II.b.iii and DR MFR II.c.iv)**

South Jersey Gas' residential and commercial customers have access to usage data through My Account, the online customer service portal, where they can view and download up to 36 months of usage data. Residential customers will be also able to access 36 months historic usage data through the South Jersey Gas' behavioral program portal.

## **4d. Marketing Plan**

**(MFR II.b.vii and DR MFR II.c.viii)**

South Jersey will continue to implement a multi-faceted direct and indirect marketing campaigns to promote our residential, multifamily and C&I energy efficiency programs to all eligible customers within our service territory. This plan could include broad-based energy efficiency awareness campaigns, web-based engagement and information, digital advertising, social media, email, direct mail and hard-copy materials to promote program awareness. Marketing will emphasize the energy and cost savings advantages associated with program participation, as well as tie-ins amongst the programs. South Jersey will also consider avenues to work closely with retailers, wholesalers, distributors, manufacturers and trade allies to further develop networks and promote involvement in the programs where applicable. Additionally, South Jersey will leverage our Behavioral program for “warm leads” into other programs.

South Jersey may engage community partners, like the chambers of commerce and other local organizations, including those comprised of underrepresented and socially or economically disadvantaged communities and individuals, to assist in raising awareness regarding our program offerings, particularly those available to residential and small business customers. Educating building owners and operators about the benefits of energy efficiency improvements and improved systems performance will also be key to promoting the commercial & industrial (“C&I”) and multifamily programs. Such education material could include educational brochures, customer and market provider seminars, program promotional materials, and website content. South Jersey will also consider the potential to utilize customer information analytics or other targeted energy education outreach to identify and target customers best suited for participation in the program. The collective marketing plan strategy is useful for enrolling eligible customers that may be interested in participating but have not heard of the program and do not have the time or resources to prioritize investigating energy efficiency opportunities or reaching out to SJG. SJG will also leverage existing relationships with municipalities, universities, schools, and other public agencies to promote programs relevant to those facilities.

South Jersey’s programs are designed to lower barriers to participation, including addressing issues of customer awareness, split incentives resulting from landlord/tenant arrangements, supply chain constraints on the availability of energy-efficient products, the upfront costs of energy efficiency upgrades, and health and safety barriers, among others. The marketing efforts will further attempt to overcome participation barriers by specifically marketing programs in a way that addresses a variety of known market barriers. The program implementation teams and the marketing team will work closely to identify, anticipate, and address those barriers to participation on an ongoing basis in order to align marketing strategies to identified market barriers and encourage and increase access to customers in all sectors.

Further, South Jersey will continue to explore marketing opportunities and employ a combination of strategic methods, such as point-of-purchase displays, brochures, customer bill inserts and more

to maximize program awareness; as well as design program implementation to address how to lower known market barriers to accessibility and participation.

#### **Residential:**

- **Upfront costs of efficient equipment:** Advertise incentives and on-bill repayment options as a way to reduce concerns about upfront costs
- **Availability of efficient products:** Promote the marked down cost of efficient equipment at the point of sale. Partner with retail and wholesale entities to advertise offerings
- **Landlord/tenant arrangements:** Segment outreach to both landlords and tenants with tailored and applicable messaging
- **Customer awareness and engagement:** Initiate targeted marketing campaigns, as well as distribute marketing materials in Spanish and consider translation to other languages on an ongoing and as needed basis. Prioritization will be placed on a customer-friendly approach to communicating information, while ensuring that incentives are easily accessible and understandable. Customers will be equipped with educational resources and tools, such as intuitive web and appointment scheduling features

#### **C&I:**

- **Customer awareness and engagement:** Initiate targeted marketing campaigns with a focus on the business and operational benefits of improving energy efficiency. Market materials in Spanish and provide consideration to translation in other languages. Prioritize a customer-friendly approach to communicating information, while ensuring that incentives are easily accessible and understandable. Conduct outreach and communicate to trade allies as a means to increase awareness and knowledge of program developments and offerings
- **Upfront costs of efficient investments:** Advertise incentives and on-bill repayment options as a way to reduce concerns about upfront project costs
- **Landlord/tenant arrangements:** Segment outreach to both landlords and tenants with tailored and applicable messaging

#### **Multifamily:**

- **Split Incentives:** In addition to program designs targeted to multifamily facilities meant to combat the challenges of split incentives, SJG will focus efforts on engagement with multifamily building owners and managers and educate them regarding South Jersey Gas' program offerings and the benefits of participation
- Strategies outlined for both the residential and C&I sectors will be employed

South Jersey will continue to review these strategies and tactics to address market barriers and modify and/or supplement them as needed to support the success of its programs.

South Jersey will seek to overcome all barriers to residential, C&I and multifamily program success through its commitment to applying best practices in program design, delivery, outreach, and marketing/advertising. SJG's established customer communication channels, data, and brand in the marketplace will all be leveraged to deliver best-practice programs that identify and confront market barriers on an ongoing basis. To the extent possible, SJG will cross-promote programs to spread awareness of the range of efficiency opportunities proposed in this plan.

South Jersey will also continue our efforts initiated in our first triennium energy efficiency programs to promote program awareness to all customer segments, particularly underserved customers and/or overburdened communities throughout our service territory, through various community partnerships, community canvassing, outreach events and sponsorships, and other innovative approaches.

## **4e. Evaluation, Measurement and Verification**

### **Evaluation, Measurement & Verification (MFR VI.a)**

The Utilities recognize the importance of incorporating Evaluation, Measurement and Verification (“EM&V”) into the energy efficiency programs. EM&V can help assess whether program objectives are being achieved, document energy and non-energy benefits and inform both future program modifications and development. PJM Interconnection, L.L.C. (PJM) specific EM&V will also be needed to support Utility EE Offers into PJM’s Capacity Market.<sup>1</sup>

The Utilities will continue to work with the State-Wide Evaluator (“SWE”) and contribute to the EM&V working group. Evaluation activities, products and processes will be completed consistent with the New Jersey Energy Efficiency Triennium 2 Evaluation Framework and subsequent guidance documents by Staff and the SWE. Further, each Company has included funding to support the anticipated evaluation work within their respective filings. Proposed budgets for evaluation are reflected in Appendix B.

### **Common Definitions and Objectives**

The State and Local Energy Efficiency Action Network (“SEE Action”) offers resources, discussion forums, and technical assistance to state and local policymakers as they seek to advance energy efficiency. Their EE Program Impact Evaluation Guide from December 2012 identified three primary objectives for evaluations.

- **Document the benefits** (i.e., impacts) of a program and determine whether the subject program (or portfolio of programs) met its goals.
- **Identify ways to improve current and future programs** through determining why program-induced impacts occurred.
- **Support energy demand forecasting and resource planning** by understanding the historical and future resource contributions of EE as compared to other energy resources.

That same guide provides the following standard categories of evaluations:

- **Impact evaluations:** assessments that determine and document the direct and indirect benefits of an energy efficiency program. Impact evaluation involves real-time and/or retrospective assessments of the performance and implementation of an efficiency program or portfolio of programs. Program benefits, or impacts, can include energy and demand savings and non-energy benefits (sometimes called co-benefits or non-energy impacts, with examples being avoided emissions, and water savings). Impact evaluations can also include cost-effectiveness analyses aimed at identifying relative program costs and benefits of EE as compared to other energy resources, including both demand- and supply-side options.
- **Process evaluations:** formative, systematic assessments of an EE program from both

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<sup>1</sup> Does not apply to GDCs.

- a customer and program administrator viewpoint. Process evaluations document program operations and identify and recommend improvements that are likely to increase the program's efficiency or effectiveness for acquiring EE resources and improve the customer experience with the program.
- **Market evaluations:** assessments of structure or functioning of a market, the behavior of market participants, and/or market changes that result from one or more program efforts. Market evaluation studies may include estimates of the current market role of energy-efficiency (market baselines), as well as the potential role of efficiency in a local, state, regional, or national market (potential studies). Market evaluation studies indicate how the overall supply chain and market for EE products works and how they have been affected by a program(s). These evaluations can also include assessments of other societal, customer, or Utility benefits of EE programs, such as the economic and job creation impacts of the programs, health benefits to society, or T&D benefits to Utilities. And finally, these studies can also be used to inform changes to the portfolio of efficiency measures to be offered to customers, or the savings achieved by the measures.

#### Monitoring and Improving Program and Portfolio Performance

There is a feedback loop among program design and implementation, impact evaluation, and process evaluation. Program design and implementation, and evaluation are elements in a cyclical feedback process. Initial program design is informed by prior baseline and market potential studies. Ongoing impact evaluation quantifies whether a program is meeting its goals and may raise questions related to program processes and design. Process evaluation tells the story behind how the impact was achieved and points the way toward improving program impacts by providing insight into program operations. Thus, the three elements work together to create a better, more effective program.

#### Budget Considerations for EM&V Work

As noted, proposed budgets for EM&V are reflected in Appendix B. These budgets were established at or below the industry standard for this type of work<sup>2</sup>, excluding the cost of financing and any anticipated costs associated with additional studies performed at direction of the BPU Staff or the EM&V Working Group.

#### TRM Considerations

The Utilities will utilize the TRM applicable to determining CEA savings compliance at the time when a project is committed to calculate energy savings for that project, regardless of when the project is complete.

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<sup>2</sup> <https://www.aceee.org/toolkit/2017/06/evaluation-measurement-verification>



## **4f. Reporting Plan**

### **Reporting (MFR VIII.)**

The Utilities will continue to comply with the reporting requirements for energy efficiency programs as outlined in the BPU's May 24 and July 26 Energy Efficiency Framework Orders, as well as related guidance by Staff and the Board of Public Utilities.

If the impact of interactive effects would cause a Utility to miss a QPI target due to a change in the measure mix implemented by customers when compared to Plan assumptions, the Utility should not be penalized. If the overall QPI would result in an ROE penalty under this scenario, the Utility reserves the right to remove negative savings in order to avoid incurring a penalty.

## **4g. Overburdened Community Standardization**

Utilities will focus their efforts to provide equitable access to energy efficiency for residential customers residing in an Overburdened Community (“OBC”) that is defined by a low-income designation. In accordance with treatment during the First Triennial and guidance from BPU Staff, only customers in the following OBC categories, as defined by the New Jersey Department of Environmental Protection (“DEP”) will be tracked and reported:

- Low Income
- Low Income & Limited English
- Low Income & Minority
- Low Income, Minority, & Limited English

Additionally, in order to ensure consistent reporting across the Utilities and throughout Triennium 2, the Utilities will utilize the dataset available 8/31/2023 on the NJ Department of Environmental Protection website (data created and last updated on 4/10/23) to track and report OBC participating in the programs, including for the purposes of establishing and evaluating the quantitative performance indicators (“QPIs”).

Consistent with Triennium 1, Utilities will deploy approaches to target market or pre-screen customers based on the location of their primary residence within the boundaries of census tracts Federally recognized as low or moderate income and a self-attestation for income qualified programs or enhanced incentives under other programs (E.g. Energy Efficient Products program).

Utilities plan to report actual performance of low and moderate income (“LMI”) customers and customers within OBCs, as defined above, and are committed to strengthening the infrastructure to support enhancements for customer screening for LMI customers and reporting equity metrics for both LMI and OBC customers.

As noted in the New Jersey Utilities Association (“NJUA”) comments filed in response to the Straw Proposals within this docket, the Utilities continue to believe there is an opportunity to further streamline administration and eliminate a barrier to participation by allowing any applicant from a qualifying OBC community to access the enhanced level of benefits. The Utilities recognize that the May 24th Board Order called for continued self-attestation in those areas but believe this decision is worth reconsideration within these cases.

## **4h. Financing/ On-Bill Repayments Description**

SJG intends to provide on-bill repayment options for residential, multi-family, and commercial programs.

The following table provides the financing terms for all programs.

<b>SJG Summary of Financing Terms</b>				
<b>Sector</b>	<b>Program</b>	<b>Pathway</b>	<b>Measure /Project</b>	<b>Available Financing Terms</b>
Residential	Whole Home		Single Family Homes	Less than \$10,000 eligible for a 7-year term OBR at 0% APR. Greater than \$10,000 and up to \$25,000 eligible for a 10-year term OBR at 0% APR.  Low-to-Moderate Income customers will be offered an extended OBR for a 10-year term, regardless of principal.
	Income Qualified		N/A	No financing component needed due to nature of the program.
	Efficient Products		HVAC (natural gas heating equipment, water heaters, AC system and heat pumps when paired with qualifying gas equipment)	Up to \$25,000 for a 7 year term OBR at 0% APR.  Low-to-Moderate Income customers will be offered an extended OBR for a 10-year term.
	Behavioral		N/A	No financing component needed due to nature of the program.
C&I <sup>1</sup>	Energy Solutions		Project	Projects up to \$250K at 0% APR for 5-year term. Above \$250K, financing will cover
	Prescriptive & Custom			

	Direct Install			<p>80% of balance of project cost at 0% APR for a 5-year term.</p> <p>Financing available for balance of project cost for MUSH customers, OBC customers at 0% APR for 5-year term.</p>
Multifamily	Multifamily	Multifamily HPwES	Project	Balance of the project cost up to \$3,000 per unit for a 7-year term at 0% APR.
		Multifamily Prescriptive and Custom		Balance of the project cost (per terms below) after rebate at 0% APR for a 5-year term.
		Direct Install		For non-OBC and non-LMI multifamily, financing will be available up to \$250k. Above \$250k, financing will cover 80% of balance of project cost.
		Energy Solutions		For OBC or LMI multifamily, financing available for balance of project cost after incentives.
			Special Features to Support Inclusion:	Properties supporting LMI customers are eligible for a 10-year repayment term.

1 Energy Solutions & Prescriptive/Custom project financing over \$1,000,000 and DI project financing over \$250,000 reported in quarterly reports.

## **5. Consistent Delivery in Overlapping Territories**

(MFR II.c and DR MFR II.c.ix)

In response to the New Jersey Board of Public Utilities' Framework Orders<sup>1</sup> directing each electric public Utility and gas public Utility in the State of New Jersey to establish energy efficiency ("EE") and peak demand reduction ("PDR") programs for the second triennium of programs implemented pursuant to the Clean Energy Act of 2018, the New Jersey investor-owned electric and gas Utilities are collaborating in order to implement programs in a consistent manner and develop supportive processes, procedures, requirements, and forms.

### Coordinated Program Offerings

To support the coordinated delivery of core programs and certain additional program offerings in situations that involve gas and electric savings opportunities in overlapping Utility territories, the Utilities have established a framework that will align key program elements through use of Interconnected Tracking Systems supported by use of a Statewide Coordinator System, aligned Utility Responsibilities, and Coordinated Program Elements as further described below. This structure will support the coordinated delivery of appropriate energy efficiency measures, if offered, in the following Programs:

### Core Offerings<sup>2</sup>

- Whole Home
- Income Qualified<sup>3</sup>
- Energy Efficient Products
- Energy Solutions
- Direct Install
- Prescriptive & Custom
- Multifamily

### Interconnected Tracking Systems

To support consistency across the state and to align the above coordinated program offerings, the Utilities will continue to utilize a single third-party entity to serve as a Statewide Coordinator ("SWC") for measures and costs that impact more than one Utility in situations where gas and electric service territories overlap. This entity provides a software platform to validate the local gas and electric company serving the customer and perform independent allocations of energy savings and costs for coordinated program offerings.

These costs and savings will be allocated between the Utility that provides the program services (i.e., "Lead Utility") and the Utility with whom the services were coordinated (i.e., "Partner

Utility”).

In areas where gas and electric service territories overlap, the Utilities will design program elements that support consistent delivery of the above coordinated program offerings among all the Utilities to enable the SWC to allocate shared costs and energy savings appropriately based on the fuel types impacted by EE measures.

#### Statewide Coordinator System Responsibilities

- Serve as a central platform to ensure data minimums required for coordinated data elements, exchange protocols, and serve as a repository for shared measure costs and shared savings for applicable programs.
- Track participation specific to Utility programs that require coordination (e.g., screen prior participation in coordinated program offerings).
- Serve as a clearing house for pre-determined data formats and exchanges.
- Perform allocation of dual-fuel or partner-fuel savings and cost for customers with separate gas and electric Utilities, to facilitate sharing of costs and investments.
- Determine and provide supporting reports respective to Utility invoice balances for allocation of shared measure costs (e.g., costs of respective measures and share of costs).
- Provide monthly reports of coordinated program activity so that customer participation and program results may be tracked.

#### Utility Responsibilities

The Utilities will implement certain program operations through either internal resources, or under contract with third-party implementation contractor(s) (“TPIC”), outside of the Statewide Coordinator system. By retaining these functions, the Utilities can maintain a strong line of sight to program operations and still work collaboratively with the other Utilities in offering coordinated programs to New Jersey customers. These functions may include, where appropriate:

- Customer enrollment
- Developing consistent enrollment forms to collect agreed-upon customer information to share between the Utilities
- Screening and qualifying contractors for Utility programs
- Customer care functions
- Marketing of programs
- Providing in-home/business auditing or direct-install of efficiency measures
- Communicating availability of customer financing options
- Integrating with other Utility programs

- Sponsoring EE program applications including paying incentives to customers and contractors
- Invoicing peer Utility partners for coordinated program costs

### Coordinated Program Elements

As envisioned by the Board's direction on coordinated program offerings, the Utilities' programs are designed in a way to minimize customer confusion and present consistent opportunities for customer participation with access to both electric and gas measures, where appropriate. The Utilities recognize that programs will continue to evolve and commit to ongoing collaborative efforts among the Utilities to continue program alignment. Ongoing efforts may include a focus by the Utilities to standardize the following wherever possible where appropriate:

- Common forms for contractors and customers with uniform field requirements
- Contractor minimum requirements and credentials for applicable programs
- Eligible customers and property requirements
- Eligible measures
- Incentive structures through use of an agreed-upon standard incentive range
- Software platforms or interfaces to be used by contractors
- Targeted bonus approaches for customers that meet specific policy priorities (e.g., income qualified, targeted geographic locations)

### Program Assumptions

The Utilities have standing sector specific committees (Residential, Commercial and Industrial), as well as specialized committees (e.g., Evaluation, Measurement & Verification Working Group), which have been active since early 2020. They routinely meet to address coordination issues, share feedback regarding program activity, and plan for future modifications/enhancements. As part of planning for this filing, the Utilities have reviewed assumptions on average project size and related energy efficiency measures but did not mandate identical assumptions. Comparisons have shown that there can be variations in market activity across service territories. The flexibility in the approach to offer incentives within approved incentive ranges enables Utilities to remain responsive to the market conditions within their respective service territories.

### Budgeting

The Utilities recognize the importance of creating a solution that allows a Lead Utility to pursue their approved program portfolio to ensure they are able to meet their Clean Energy Act obligations and to be in a position to support any shared or cross-fuel energy savings from their Partner Utility. It is critical that such a structure minimizes the potential for any disruption to the

market and provides customers with equitable access to the programs, regardless of their geographic location. The Utilities have included in their plans a net transfer amount that represents the Utilities' best efforts to predict the net effect of sales of energy saving between lead and partner Utilities.



## **6. Appendices**

As noted above, all of the appendices are formatted similarly and in the same order, but present Utility-specific information. Appendix H: Incentive Ranges is formatted similarly, but has some variation due to differences in Utility specific program proposals

## 6a. Appendix A: Program Participants, Energy Savings, By Year for EE, BD, and DR

Appendix A: Program Participants & Energy Savings by Program Year (MFRs II.a.vii & II.a.viii)

Program	PY4 Participants	PY4 Net Annual Energy Savings (kwh)	PY4 Net Annual Energy Savings (therms)	PY5 Participants	PY5 Net Annual Energy Savings (kwh)	PY5 Net Annual Energy Savings (therms)	PY6 Participants	PY6 Net Annual Energy Savings (kwh)	PY6 Net Annual Energy Savings (therms)	Total Participants	Total Net Annual Energy Savings (kwh)	Total Net Annual Energy Savings (therms)
Behavioral	160,000	-	568,773	160,000	-	947,956	160,000	-	947,956	480,000	-	2,464,685
EE products	12,372	959,678	523,667	37,876	3,256,659	1,520,712	39,062	3,410,273	1,512,241	89,310	7,626,611	3,556,620
Whole Home	245	143,548	31,171	866	503,539	110,736	923	522,424	114,521	2,034	1,169,511	256,427
Income Qualified (Moderate)	60	51,231	7,559	309	278,486	41,089	294	279,256	41,203	664	608,973	89,851
Income Qualified (Low Income)	-	-	-	-	-	-	-	-	-	-	-	-
Multifamily	140	96,463	27,520	324	193,581	73,866	332	418,622	100,081	796	708,666	201,467
Prescriptive / Custom	697	51,140	108,216	1,147	83,863	176,078	1,224	90,047	188,133	3,068	225,051	472,428
Direct Install	25	455,602	42,240	71	1,316,660	121,960	71	1,299,589	120,421	166	3,071,852	284,622
Energy Solutions	3	130,491	2,092	14	459,468	8,982	16	1,247,128	66,858	34	1,837,088	77,932
Next Gen Savings	-	-	-	-	-	-	-	-	-	-	-	-
Demand Response	-	-	-	-	-	-	-	-	-	-	-	-
Building Decarbonization	-	-	-	-	-	-	-	-	-	-	-	-
Statewide Coordinator	-	-	-	-	-	-	-	-	-	-	-	-
Workforce Development	-	-	-	-	-	-	-	-	-	-	-	-
Community Outreach	-	-	-	-	-	-	-	-	-	-	-	-
Portfolio Total		1,888,155	1,311,239		6,092,257	3,001,380		7,267,339	3,091,414		15,247,751	7,404,033

\* Excludes any impacts beyond PY6.

\*\* Net annual energy savings presented at site-level includes both electric and natural gas savings for coordinated programs delivered by the lead utility

## 6b. Appendix B: Program Budgets and Costs, By Year for All Programs

Appendix B: Program Budgets and Costs by Program Year (MFRs II.a.ix & II.a.x)

TOTAL Program Years 4-6	Capital Cost	Utility Administration	Marketing and Outreach	Outside Services	Incentives - Rebates and Loans	Inspections and QC	Evaluation	Health & Safety	Workforce Development	Outreach to Community-Based Organizations	Total Budget
Behavioral	-	158,809	-	-	3,176,175	-	128,953				3,463,936
EE products	-	2,001,979	2,200,392	7,909,011	34,602,214	415,227	1,418,691				48,547,514
Whole Home	-	326,837	326,837	2,000,442	6,536,743	78,441	265,074				9,534,374
Income Qualified (Moderate Income)	-	719,383	359,691	3,596,914	4,030,713	86,326	291,561	3,163,115			12,247,704
Income Qualified (Low Income)	-	-	-	-	-	-	-	-			-
Multifamily	-	534,493	500,853	4,280,967	10,017,058	120,205	406,165				15,859,741
Prescriptive / Custom	-	270,600	415,414	2,164,801	2,706,001	32,472	109,866				5,699,155
Direct Install	-	709,699	639,305	6,093,625	8,277,430	99,329	335,862				16,155,250
Energy Solutions	-	416,758	277,839	4,167,580	13,891,934	166,703	561,512				19,482,326
Next Gen Savings	-	-	-	-	-	-	-				-
Demand Response	-	-	-	-	-	-	-				-
Building Decarbonization	-	-	-	-	-	-	-				-
Statewide Coordinator	-	-	-	675,000	-	-	-				675,000
Workforce Development									800,000		800,000
Community Outreach										300,000	300,000
Portfolio Total	-	5,138,557	4,720,332	30,888,340	83,238,268	998,703	3,517,685	3,163,115	800,000	300,000	132,765,000

Program Year 4	Capital Cost	Utility Admin- istration	Marketing and Outreach	Outside Services	Incentives - Rebates and Loans	Inspections and QC	Evaluation	Health & Safety	Workforce Development	Outreach to Community- Based Organizations	Total Budget
Behavioral	-	31,762	-	-	635,235	-	26,045				693,041
EE products	-	313,035	365,208	1,304,314	5,217,255	62,607	213,907				7,476,327
Whole Home	-	39,419	39,419	275,933	788,379	9,461	32,324				1,184,933
Income Qualified (Moderate Income)	-	57,680	28,840	288,401	336,091	6,922	23,649	240,710			982,293
Income Qualified (Low Income)	-	-	-	-	-	-	-	-			-
Multifamily	-	78,949	65,791	592,120	1,315,822	15,790	53,949				2,122,421
Prescriptive / Custom	-	62,199	124,398	497,593	621,991	7,464	25,502				1,339,146
Direct Install	-	110,107	110,107	978,724	1,223,406	14,681	50,160				2,487,184
Energy Solutions	-	6,252	4,168	62,522	208,405	2,501	8,545				292,393
Next Gen Savings	-	-	-	-	-	-	-				-
Demand Response	-	-	-	-	-	-	-				-
Building Decarbonization	-	-	-	-	-	-	-				-
Statewide Coordinator	-	-	-	225,000	-	-	-				225,000
Workforce Development	-	-	-	-	-	-	-		266,667		266,667
Community Outreach	-	-	-	-	-	-	-			100,000	100,000
Portfolio Total	-	699,403	737,931	4,224,606	10,346,584	119,425	434,079	240,710	266,667	100,000	17,169,404

Program Year 5	Capital Cost	Utility Admin- istration	Marketing and Outreach	Outside Services	Incentives - Rebates and Loans	Inspections and QC	Evaluation	Health & Safety	Workforce Development	Outreach to Community- Based Organizations	Total Budget
Behavioral	-	63,524	-	-	1,270,470	-	52,089				1,386,083
EE products	-	877,618	950,753	3,656,742	14,626,968	175,524	599,706				20,887,310
Whole Home	-	140,792	140,792	844,749	2,815,832	33,790	115,449				4,091,403
Income Qualified (Moderate Income)	-	323,135	161,567	1,615,674	1,839,858	38,776	132,485	1,391,489			5,502,984
Income Qualified (Low Income)	-	-	-	-	-	-	-	-			-
Multifamily	-	233,098	211,908	1,907,169	4,238,153	50,858	173,764				6,814,950
Prescriptive / Custom	-	100,441	150,662	803,530	1,004,413	12,053	41,181				2,112,281
Direct Install	-	301,043	283,334	2,656,260	3,541,679	42,500	145,209				6,970,025
Energy Solutions	-	168,794	112,529	1,687,941	5,626,469	67,518	230,685				7,893,936
Next Gen Savings	-	-	-	-	-	-	-				-
Demand Response	-	-	-	-	-	-	-				-
Building Decarbonization	-	-	-	-	-	-	-				-
Statewide Coordinator	-	-	-	225,000	-	-	-				225,000
Workforce Development	-	-	-	-	-	-	-		266,667		266,667
Community Outreach	-	-	-	-	-	-	-			100,000	100,000
Portfolio Total	-	2,208,444	2,011,545	13,397,065	34,963,842	421,018	1,490,569	1,391,489	266,667	100,000	56,250,639

Program Year 6	Capital Cost	Utility Administration	Marketing and Outreach	Outside Services	Incentives - Rebates and Loans	Inspections and QC	Evaluation	Health & Safety	Workforce Development	Outreach to Community-Based Organizations	Total Budget
Behavioral	-	63,524	-	-	1,270,470	-	50,819				1,384,812
EE products	-	811,486	885,258	2,950,859	14,754,297	177,052	604,926				20,183,878
Whole Home	-	146,627	146,627	879,760	2,932,533	35,190	117,301				4,258,038
Income Qualified (Moderate Income)	-	338,568	169,284	1,692,840	1,854,763	40,628	135,427	1,530,916			5,762,426
Income Qualified (Low Income)	-	-	-	-	-	-	-	-			-
Multifamily	-	223,014	223,014	1,784,116	4,460,289	53,523	178,412				6,922,369
Prescriptive / Custom	-	107,960	140,348	863,680	1,079,601	12,955	43,184				2,247,728
Direct Install	-	298,549	245,864	2,458,641	3,512,345	42,148	140,494				6,698,041
Energy Solutions	-	241,712	161,141	2,417,118	8,057,060	96,685	322,282				11,295,998
Next Gen Savings	-	-	-	-	-	-	-				-
Demand Response	-	-	-	-	-	-	-				-
Building Decarbonization	-	-	-	-	-	-	-				-
Statewide Coordinator	-	-	-	225,000	-	-	-				225,000
Workforce Development	-	-	-	-	-	-	-		266,667		266,667
Community Outreach	-	-	-	-	-	-	-			100,000	100,000
Portfolio Total	-	2,231,440	1,971,536	13,272,014	37,921,357	458,182	1,592,845	1,530,916	266,667	100,000	59,344,957

\* Budgets include commitments for projects that may be paid in future years.

\*\* Other portfolio costs includes: State Wide Coordinator, Workforce Development, Community Outreach

\* SJG's Total Budget Summary excludes approximately \$49.6 million in net Utility transfers. Please refer to Section 5 of the Plan for more information regarding the approach to budgeting.

## **6c. Appendix C: Total Budget Summary, Including Annual Budget Summary and Joint Budgets with Partner Utilities**

### **Appendix C: Total Budget Summary, Including Annual Budget Summary and Joint Budgets with Partner Utilities (MFR II.b.iv)**

<b>Program Year</b>	<b>Total Budget Summary</b>	<b>Lead Program Budget 1,2</b>
<b>Program Year 4</b>	<b>16,859,925</b>	<b>15,575,217</b>
<b>Program Year 5</b>	<b>56,340,231</b>	<b>54,362,482</b>
<b>Program Year 6</b>	<b>59,564,844</b>	<b>57,588,365</b>
<b>Portfolio Total</b>	<b>132,765,000</b>	<b>127,526,064</b>

\* Budgets include commitments for projects that may be paid in future years

\*\* Total includes investment & administrative costs

<sup>1</sup> The Lead Program Budget in Column D includes only the budgets for coordinated programs in which costs are shared. Shared programs: Whole Home, Income Qualified, EE Products, Energy Solutions, Direct Install, Prescriptive & Custom, Multifamily

<sup>2</sup> SJG's Total Budget Summary excludes approximately \$49.6 million in net Utility transfers. Please refer to Section 5 of the Plan for more information regarding the approach to budgeting

## **6d. Appendix D: Forecasted Average Costs to Achieve Each Unit of Energy Savings in Each Sector**

Appendix D: Forecasted Average Cost to Achieve Each Unit of Energy Savings in Each Sector (MFR II.b.vi)

Sector	Energy Efficiency Programs		Demand Response Program	Building Decarbonization Program
	Total \$/ Lifetime kWh	Total \$/ Lifetime Therms	Total \$/ Lifetime therm	Total \$/ Lifetime MMBtu
Residential		1.00		
C&I		3.38		
Multifamily		5.25		
Building Decarbonization				n/a
Demand Response			n/a	

\* Only include lead fuel budgets and savings.

\*\* Cost to Achieve include health & safety costs; excludes financing principal, Next Generation Savings

## 6e. Appendix E: Benefit Cost Analysis

Total Resource Cost Test (TRC)	Rsr	CB1	MF	LMI	Total Portfolio	Behavioral	EE products	Whole Home	Income Qualified	Income Qualified (Low)	Multifamily	Prescription # Outcomes	Direct Install	Energy Solutions	Next Gen Savings	Demand Response	Building Decarbonization	Statewide Coordinator	Workforce Development	Community Outreach	
BENEFITS																					
1. Lifeline Avoided Wholesale Electric Energy and Ancillary Costs	\$ 3,766,008	\$ 2,091,022	\$ 893,319	\$ 273,704	\$ 2,332,447	\$ -	\$ 3,179,037	\$ 708,761	\$ 273,704	\$ -	\$ 993,319	\$ 99,899	\$ 1,372,991	\$ 1,343,310	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
2. Lifeline Avoided Wholesale Electric Capacity Costs	\$ 1,099,004	\$ 205,962	\$ 71,430	\$ 27,230	\$ 1,244,326	\$ -	\$ 999,003	\$ 99,900	\$ 27,230	\$ -	\$ 71,430	\$ 9,187	\$ 129,421	\$ 129,421	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
3. Lifeline Avoided Wholesale Natural Gas Costs	\$ 21,631,411	\$ 3,021,423	\$ 1,099,324	\$ 434,247	\$ 27,044,604	\$ 1,100,834	\$ 19,072,914	\$ 1,449,943	\$ 434,247	\$ -	\$ 1,099,324	\$ 1,764,291	\$ 1,200,726	\$ 199,446	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
4. Lifeline DRPE Benefits (E&G)	\$ 1,310,766	\$ 343,100	\$ 19,763	\$ 36,719	\$ 1,710,329	\$ 95,427	\$ 1,162,897	\$ 101,702	\$ 36,719	\$ -	\$ 119,763	\$ 91,440	\$ 126,969	\$ 114,297	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
5. Lifeline Avoided EPP/FREC Purchase Costs (E&G)	\$ 204,169	\$ 204,169	\$ 35,502	\$ 20,963	\$ 84,794	\$ -	\$ 244,033	\$ 40,124	\$ 20,963	\$ -	\$ 35,502	\$ 6,231	\$ 99,202	\$ 93,960	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
6. Lifeline Avoided Wholesale Volatility Costs (E&G)	\$ 2,439,832	\$ 433,421	\$ 177,927	\$ 73,979	\$ 3,074,209	\$ 110,893	\$ 2,325,114	\$ 202,969	\$ 73,979	\$ -	\$ 177,927	\$ 102,897	\$ 272,130	\$ 223,894	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
7. Lifeline Avoided TSD Costs (E&G)	\$ 2,702,841	\$ 720,131	\$ 290,101	\$ 99,172	\$ 3,712,345	\$ -	\$ 2,407,100	\$ 210,793	\$ 99,172	\$ -	\$ 290,101	\$ 20,310	\$ 414,300	\$ 219,443	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Benefits	\$ 33,345,148	\$ 8,794,259	\$ 2,327,322	\$ 944,293	\$ 45,426,162	\$ 1,274,815	\$ 29,449,951	\$ 2,596,182	\$ 944,293	\$ -	\$ 2,327,322	\$ 2,129,939	\$ 3,723,074	\$ 2,937,437	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
COSTS																					
8. Lifeline Incremental Costs	\$ 49,647,076	\$ 7,727,529	\$ 1,740,094	\$ 1,680,795	\$ 16,710,194	\$ 2,197,449	\$ 31,934,249	\$ 4,209,051	\$ 1,696,795	\$ -	\$ 1,740,094	\$ 2,119,942	\$ 2,231,467	\$ 3,377,529	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
9. Lifeline Administration Costs	\$ 19,478,295	\$ 14,701,125	\$ 5,231,959	\$ 4,800,944	\$ 40,322,332	\$ 281,996	\$ 12,835,192	\$ 2,611,146	\$ 450,944	\$ -	\$ 5,231,959	\$ 2,699,771	\$ 7,072,242	\$ 4,929,112	\$ -	\$ -	\$ -	\$ -	\$ 410,729	\$ 727,343	\$ 272,769
Total Costs	\$ 69,125,371	\$ 22,428,654	\$ 7,972,053	\$ 6,481,739	\$ 57,032,526	\$ 2,479,445	\$ 44,769,441	\$ 6,820,197	\$ 2,147,739	\$ -	\$ 7,272,281	\$ 4,819,713	\$ 9,303,709	\$ 8,306,641	\$ -	\$ -	\$ -	\$ -	\$ 613,729	\$ 727,343	\$ 272,769
Benefit Cost Ratio	(192/140)=1.37	0.5	0.4	0.3	0.2	0.4	0.5	0.4	0.2	n/a	0.3	0.4	0.4	0.4	n/a	n/a	n/a	n/a	0.6	0.6	0.6
Participant Cost Test (PCT)																					
BENEFITS																					
10. Lifeline Avoided Retail Electric Costs	\$ 19,041,814	\$ 12,149,247	\$ 2,440,640	\$ 1,401,619	\$ 35,493,320	\$ -	\$ 16,340,626	\$ 2,694,969	\$ 1,401,619	\$ -	\$ 2,440,640	\$ 210,969	\$ 6,249,197	\$ 5,619,015	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
11. Lifeline Avoided Retail Natural Gas Costs	\$ 4,310,910	\$ 9,727,371	\$ 3,627,871	\$ 1,392,204	\$ 13,150,456	\$ 3,971,993	\$ 46,103,497	\$ 4,863,993	\$ 1,392,204	\$ -	\$ 3,627,871	\$ 3,689,610	\$ 3,841,929	\$ 2,962,090	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
12. Lifeline Program Incentive Costs	\$ 39,702,351	\$ 22,903,109	\$ 1,954,100	\$ 1,404,612	\$ 77,167,581	\$ 2,197,449	\$ 31,003,762	\$ 5,040,440	\$ 6,406,612	\$ -	\$ 1,954,100	\$ 2,438,316	\$ 7,417,246	\$ 12,240,197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
13. Lifeline Time Value of Loan Repayment	\$ 16,710,464	\$ 3,206,057	\$ 1,940,942	\$ -	\$ 22,857,463	\$ -	\$ 12,855,169	\$ 3,222,299	\$ -	\$ -	\$ 1,940,942	\$ 1,069,641	\$ 763,945	\$ 1,472,457	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Benefits	\$143,445,218	\$ 47,332,440	\$ 17,371,959	\$ 9,201,435	\$ 88,888,888	\$ 6,229,562	\$ 121,999,914	\$ 16,328,783	\$ 9,201,435	\$ -	\$ 17,371,959	\$ 7,369,335	\$ 17,971,566	\$ 21,992,439	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
COSTS																					
14. Lifeline Participation Costs	\$ 49,647,076	\$ 7,727,529	\$ 1,740,094	\$ 1,680,795	\$ 16,710,194	\$ 2,197,449	\$ 31,934,249	\$ 4,209,051	\$ 1,696,795	\$ -	\$ 1,740,094	\$ 2,119,942	\$ 2,231,467	\$ 3,377,529	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Costs	\$ 49,647,076	\$ 7,727,529	\$ 1,740,094	\$ 1,680,795	\$ 16,710,194	\$ 2,197,449	\$ 31,934,249	\$ 4,209,051	\$ 1,696,795	\$ -	\$ 1,740,094	\$ 2,119,942	\$ 2,231,467	\$ 3,377,529	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Benefit Cost Ratio	(100/101)=0.99	0.5	0.4	0.3	0.2	0.4	0.5	0.4	0.2	n/a	0.3	0.4	0.4	0.4	n/a	n/a	n/a	n/a	0.6	0.6	0.6
Program Administrator Cost Test (PAC)																					
BENEFITS																					
15. Lifeline Avoided Wholesale Electric Energy and Ancillary Costs	\$ 3,766,008	\$ 2,091,022	\$ 893,319	\$ 273,704	\$ 2,332,447	\$ -	\$ 3,179,037	\$ 708,761	\$ 273,704	\$ -	\$ 993,319	\$ 99,899	\$ 1,372,991	\$ 1,343,310	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
16. Lifeline Avoided Wholesale Electric Capacity Costs	\$ 1,099,004	\$ 205,962	\$ 71,430	\$ 27,230	\$ 1,244,326	\$ -	\$ 999,003	\$ 99,900	\$ 27,230	\$ -	\$ 71,430	\$ 9,187	\$ 129,421	\$ 129,421	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
17. Lifeline Avoided Wholesale Natural Gas Costs	\$ 21,631,411	\$ 3,021,423	\$ 1,099,324	\$ 434,247	\$ 27,044,604	\$ 1,100,834	\$ 19,072,914	\$ 1,449,943	\$ 434,247	\$ -	\$ 1,099,324	\$ 1,764,291	\$ 1,200,726	\$ 199,446	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
18. Lifeline DRPE Benefits (E&G)	\$ 1,310,766	\$ 343,100	\$ 19,763	\$ 36,719	\$ 1,710,329	\$ 95,427	\$ 1,162,897	\$ 101,702	\$ 36,719	\$ -	\$ 119,763	\$ 91,440	\$ 126,969	\$ 114,297	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
19. Lifeline Avoided EPP/FREC Purchase Costs (E&G)	\$ 204,169	\$ 204,169	\$ 35,502	\$ 20,963	\$ 84,794	\$ -	\$ 244,033	\$ 40,124	\$ 20,963	\$ -	\$ 35,502	\$ 6,231	\$ 99,202	\$ 93,960	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
20. Lifeline Avoided Wholesale Volatility Costs (E&G)	\$ 2,439,832	\$ 433,421	\$ 177,927	\$ 73,979	\$ 3,074,209	\$ 110,893	\$ 2,325,114	\$ 202,969	\$ 73,979	\$ -	\$ 177,927	\$ 102,897	\$ 272,130	\$ 223,894	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
21. Lifeline Avoided TSD Costs (E&G)	\$ 2,702,841	\$ 720,131	\$ 290,101	\$ 99,172	\$ 3,712,345	\$ -	\$ 2,407,100	\$ 210,793	\$ 99,172	\$ -	\$ 290,101	\$ 20,310	\$ 414,300	\$ 219,443	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Benefits	\$ 33,345,148	\$ 8,794,259	\$ 2,327,322	\$ 944,293	\$ 45,426,162	\$ 1,274,815	\$ 29,449,951	\$ 2,596,182	\$ 944,293	\$ -	\$ 2,327,322	\$ 2,129,939	\$ 3,723,074	\$ 2,937,437	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
COSTS																					
22. Lifeline Administration Costs	\$ 19,478,295	\$ 14,701,125	\$ 5,231,959	\$ 4,800,944	\$ 40,322,332	\$ 281,996	\$ 12,835,192	\$ 2,611,146	\$ 450,944	\$ -	\$ 5,231,959	\$ 2,699,771	\$ 7,072,242	\$ 4,929,112	\$ -	\$ -	\$ -	\$ -	\$ 410,729	\$ 727,343	\$ 272,769
23. Lifeline Program Incremental Costs	\$ 39,702,351	\$ 22,903,109	\$ 1,954,100	\$ 1,404,612	\$ 77,167,581	\$ 2,197,449	\$ 31,003,762	\$ 5,040,440	\$ 6,406,612	\$ -	\$ 1,954,100	\$ 2,438,316	\$ 7,417,246	\$ 12,240,197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
24. Lifeline Time Value of Loan Repayment	\$ 16,710,464	\$ 3,206,057	\$ 1,940,942	\$ -	\$ 22,857,463	\$ -	\$ 12,855,169	\$ 3,222,299	\$ -	\$ -	\$ 1,940,942	\$ 1,069,641	\$ 763,945	\$ 1,472,457	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Costs	\$ 75,891,114	\$ 20,810,291	\$ 9,127,324	\$ 6,205,556	\$ 51,033,955	\$ 2,479,445	\$ 44,769,441	\$ 6,820,197	\$ 2,147,739	\$ -	\$ 7,272,281	\$ 4,819,713	\$ 9,303,709	\$ 8,306,641	\$ -	\$ -	\$ -	\$ -	\$ 613,729	\$ 727,343	\$ 272,769
Benefit Cost Ratio	(100/147)=0.68	0.5	0.4	0.3	0.2	0.4	0.5	0.4	0.2	n/a	0.3	0.4	0.4	0.4	n/a	n/a	n/a	n/a	0.6	0.6	0.6



Ratepayer Impact Measure Test (RIM)		Bar	C&I	MF	LMI	Total Portfolio	Behavioral	EE products	Whole Home	Income Qualified	Income Qualified (Low)	Multifamily	Prescriptive / Custom	Direct Install	Energy Solutions	Next Gen Savings	Demand Response	Building Decarbonization	Statewide Coordinator	Workforce Development	Community Outreach	
BENEFITS																						
25	Lifeline Avoided @Wholesale Electric Energy and Ancillary Costs	\$	2,704,895	\$	2,195,932	\$	953,219	\$	273,794	\$	7,233,447	\$	-	\$	2,179,907	\$	925,749	\$	273,794	\$	-	\$
26	Lifeline Avoided @Wholesale Electric Capacity Costs	\$	1,059,104	\$	2,055,962	\$	71,430	\$	27,330	\$	1,343,254	\$	-	\$	999,189	\$	59,916	\$	71,430	\$	-	\$
27	Lifeline Avoided @Wholesale Natural Gas Costs	\$	21,631,411	\$	3,828,423	\$	1,950,924	\$	434,247	\$	27,444,044	\$	-	\$	1,950,284	\$	1,764,281	\$	434,247	\$	-	\$
28	Lifeline DRPE @Wholesale (E&S)	\$	1,819,744	\$	244,039	\$	102,763	\$	36,794	\$	1,717,029	\$	-	\$	1,582,287	\$	134,742	\$	36,794	\$	-	\$
29	Lifeline Avoided @P&S REC Purchase Costs	\$	234,169	\$	239,000	\$	35,932	\$	26,433	\$	549,794	\$	-	\$	244,039	\$	40,724	\$	26,433	\$	-	\$
30	Lifeline Avoided @Wholesale Volatility Costs	\$	2,639,532	\$	433,421	\$	177,827	\$	73,879	\$	3,874,283	\$	-	\$	177,827	\$	102,197	\$	73,879	\$	-	\$
31	Lifeline Avoided @T&D Costs	\$	2,702,441	\$	720,031	\$	259,911	\$	99,172	\$	3,772,549	\$	-	\$	2,407,969	\$	239,159	\$	99,172	\$	-	\$
Total Benefits		\$	33,245,449	\$	7,749,359	\$	2,327,282	\$	944,287	\$	45,456,180	\$	1,274,815	\$	29,465,951	\$	2,594,882	\$	944,287	\$	2,327,282	\$
COSTS																						
32	Lifeline Incremental Costs	\$	16,475,235	\$	14,711,028	\$	9,234,359	\$	4,509,944	\$	40,927,652	\$	-	\$	12,835,192	\$	4,806,944	\$	-	\$	-	\$
33	Lifeline Program Incremental Costs	\$	29,702,291	\$	22,102,349	\$	1,954,009	\$	4,496,432	\$	77,187,259	\$	-	\$	2,893,449	\$	21,002,762	\$	5,449,140	\$	-	\$
34	Lifeline Fuel/Dispatch Distribution Costs	\$	84,639,441	\$	10,132,401	\$	2,341,599	\$	1,439,214	\$	69,425,672	\$	-	\$	2,816,000	\$	40,804,077	\$	4,976,423	\$	-	\$
35	Lifeline Time-Value of Loan Payments	\$	16,746,463	\$	3,248,053	\$	1,948,962	\$	-	\$	22,033,493	\$	-	\$	-	\$	13,915,169	\$	3,221,299	\$	-	\$
Total Costs		\$	150,562,430	\$	109,193,831	\$	22,475,929	\$	16,945,390	\$	122,573,076	\$	1,274,815	\$	40,927,652	\$	29,465,951	\$	944,287	\$	2,327,282	\$
Net Savings		\$	18,183,019	\$	6,955,528	\$	2,327,282	\$	2,499,890	\$	22,883,104	\$	0.00	\$	18,538,303	\$	2,594,882	\$	0.00	\$	0.00	\$
Societal Cost Test (SCT)																						
BENEFITS																						
25	Lifeline Avoided @Wholesale Electric Energy and Ancillary Costs	\$	4,146,587	\$	3,315,370	\$	435,819	\$	394,621	\$	9,229,379	\$	-	\$	2,849,779	\$	999,579	\$	394,621	\$	-	\$
26	Lifeline Avoided @Wholesale Electric Capacity Costs	\$	1,212,923	\$	2,055,962	\$	71,430	\$	27,330	\$	1,343,254	\$	-	\$	1,462,722	\$	70,204	\$	27,330	\$	-	\$
27	Lifeline Avoided @Wholesale Natural Gas Costs	\$	24,917,230	\$	4,334,011	\$	2,199,977	\$	491,850	\$	30,840,225	\$	-	\$	2,199,977	\$	1,449,943	\$	491,850	\$	-	\$
28	Lifeline DRPE @Wholesale (E&S)	\$	1,819,744	\$	244,039	\$	102,763	\$	36,794	\$	1,717,029	\$	-	\$	1,582,287	\$	134,742	\$	36,794	\$	-	\$
29	Lifeline Avoided @P&S REC Purchase Costs	\$	234,169	\$	239,000	\$	35,932	\$	26,433	\$	549,794	\$	-	\$	244,039	\$	40,724	\$	26,433	\$	-	\$
30	Lifeline Avoided @Wholesale Volatility Costs	\$	2,639,532	\$	433,421	\$	177,827	\$	73,879	\$	3,874,283	\$	-	\$	177,827	\$	102,197	\$	73,879	\$	-	\$
31	Lifeline Avoided @T&D Costs	\$	2,702,441	\$	720,031	\$	259,911	\$	99,172	\$	3,772,549	\$	-	\$	2,407,969	\$	239,159	\$	99,172	\$	-	\$
32	Lifeline Incremental Costs	\$	16,475,235	\$	14,711,028	\$	9,234,359	\$	4,509,944	\$	40,927,652	\$	-	\$	12,835,192	\$	4,806,944	\$	-	\$	-	\$
33	Lifeline Program Incremental Costs	\$	29,702,291	\$	22,102,349	\$	1,954,009	\$	4,496,432	\$	77,187,259	\$	-	\$	2,893,449	\$	21,002,762	\$	5,449,140	\$	-	\$
34	Lifeline Fuel/Dispatch Distribution Costs	\$	84,639,441	\$	10,132,401	\$	2,341,599	\$	1,439,214	\$	69,425,672	\$	-	\$	2,816,000	\$	40,804,077	\$	4,976,423	\$	-	\$
35	Lifeline Time-Value of Loan Payments	\$	16,746,463	\$	3,248,053	\$	1,948,962	\$	-	\$	22,033,493	\$	-	\$	-	\$	13,915,169	\$	3,221,299	\$	-	\$
Total Benefits		\$	51,245,449	\$	33,245,449	\$	7,749,359	\$	2,327,282	\$	45,456,180	\$	1,274,815	\$	29,465,951	\$	2,594,882	\$	944,287	\$	2,327,282	\$
COSTS																						
36	Lifeline Incremental Costs	\$	4,775,535	\$	7,423,549	\$	1,715,409	\$	1,546,812	\$	9,177,192	\$	-	\$	1,735,440	\$	2,167,403	\$	2,215,242	\$	3,470,940	\$
37	Lifeline Administrative Costs	\$	15,441,474	\$	15,441,474	\$	5,343,229	\$	4,435,801	\$	41,570,053	\$	-	\$	5,343,229	\$	2,764,373	\$	7,229,904	\$	5,044,126	\$
Total Costs		\$	62,617,009	\$	22,999,502	\$	7,164,709	\$	6,289,256	\$	99,641,127	\$	3,119,134	\$	52,279,423	\$	7,144,779	\$	4,928,226	\$	8,525,150	\$
Net Savings		\$	17,417,019	\$	10,815,947	\$	6,424,650	\$	16,966,924	\$	35,814,053	\$	0.00	\$	17,726,528	\$	5,434,103	\$	3,537,664	\$	271,452	\$
New Jersey Cost Test (NJCT)																						
BENEFITS																						
25	Lifeline Avoided @Wholesale Electric Energy and Ancillary Costs	\$	4,146,587	\$	3,315,370	\$	435,819	\$	394,621	\$	9,229,379	\$	-	\$	2,849,779	\$	999,579	\$	394,621	\$	-	\$
26	Lifeline Avoided @Wholesale Electric Capacity Costs	\$	1,212,923	\$	2,055,962	\$	71,430	\$	27,330	\$	1,343,254	\$	-	\$	1,462,722	\$	70,204	\$	27,330	\$	-	\$
27	Lifeline Avoided @Wholesale Natural Gas Costs	\$	24,917,230	\$	4,334,011	\$	2,199,977	\$	491,850	\$	30,840,225	\$	-	\$	2,199,977	\$	1,449,943	\$	491,850	\$	-	\$
28	Lifeline DRPE @Wholesale (E&S)	\$	1,819,744	\$	244,039	\$	102,763	\$	36,794	\$	1,717,029	\$	-	\$	1,582,287	\$	134,742	\$	36,794	\$	-	\$
29	Lifeline Avoided @P&S REC Purchase Costs	\$	234,169	\$	239,000	\$	35,932	\$	26,433	\$	549,794	\$	-	\$	244,039	\$	40,724	\$	26,433	\$	-	\$
30	Lifeline Avoided @Wholesale Volatility Costs	\$	2,639,532	\$	433,421	\$	177,827	\$	73,879	\$	3,874,283	\$	-	\$	177,827	\$	102,197	\$	73,879	\$	-	\$
31	Lifeline Avoided @T&D Costs	\$	2,702,441	\$	720,031	\$	259,911	\$	99,172	\$	3,772,549	\$	-	\$	2,407,969	\$	239,159	\$	99,172	\$	-	\$
32	Lifeline Incremental Costs	\$	16,475,235	\$	14,711,028	\$	9,234,359	\$	4,509,944	\$	40,927,652	\$	-	\$	12,835,192	\$	4,806,944	\$	-	\$	-	\$
33	Lifeline Program Incremental Costs	\$	29,702,291	\$	22,102,349	\$	1,954,009	\$	4,496,432	\$	77,187,259	\$	-	\$	2,893,449	\$	21,002,762	\$	5,449,140	\$	-	\$
34	Lifeline Fuel/Dispatch Distribution Costs	\$	84,639,441	\$	10,132,401	\$	2,341,599	\$	1,439,214	\$	69,425,672	\$	-	\$	2,816,000	\$	40,804,077	\$	4,976,423	\$	-	\$
35	Lifeline Time-Value of Loan Payments	\$	16,746,463	\$	3,248,053	\$	1,948,962	\$	-	\$	22,033,493	\$	-	\$	-	\$	13,915,169	\$	3,221,299	\$	-	\$
Total Benefits		\$	51,245,449	\$	33,245,449	\$	7,749,359	\$	2,327,282	\$	45,456,180	\$	1,274,815	\$	29,465,951	\$	2,594,882	\$	944,287	\$	2,327,282	\$
COSTS																						
36	Lifeline Incremental Costs	\$	4,775,535	\$	7,423,549	\$	1,715,409	\$	1,546,812	\$	9,177,192	\$	-	\$	1,735,440	\$	2,167,403	\$	2,215,242	\$	3,470,940	\$
37	Lifeline Administrative Costs	\$	15,441,474	\$	15,441,474	\$	5,343,229	\$	4,435,801	\$	41,570,053	\$	-	\$	5,343,229	\$	2,764,373	\$	7,229,904	\$	5,044,126	\$
Total Costs		\$	62,617,009	\$	22,999,502	\$	7,164,709	\$	6,289,256	\$	99,641,127	\$	3,119,134	\$	52,279,423	\$	7,144,779	\$	4,928,226	\$	8,525,150	\$
Net Savings		\$	17,417,019	\$	10,815,947	\$	6,424,650	\$	16,966,924	\$	35,814,053	\$	0.00	\$	17,726,528	\$	5,434,103	\$	3,537,664	\$	271,452	\$

Sector/Program	New Jersey Cost Test (NJCT)	Societal Cost Test (SCT)	Total Resource Cost Test (TRC)	Participant Cost Test (PCT)	Program Administrator Cost (PACT)	Ratepayer Impact Measure Test (RIM)
Res	1.3	1.1	0.5	3.1	0.5	0.3
C&I	1	0.8	0.4	6.1	0.2	0.2
MF	0.9	0.7	0.3	10	0.1	0.1
LMI	0.4	0.3	0.2	5.6	0.1	0.1
Total Portfolio	1.1	1	0.5	3.8	0.3	0.2
Behavioral	0.8	0.8	0.4	2.2	0.4	0.2
EE products	1.4	1.2	0.6	3.1	0.5	0.3
Whole Home	0.9	0.8	0.4	3.8	0.2	0.2
Income Qualified (Moderate Income)	0.4	0.3	0.2	5.6	0.1	0.1
Income Qualified (Low Income)	n/a	n/a	n/a	n/a	n/a	n/a
Multifamily	0.9	0.7	0.3	10	0.1	0.1
Prescriptive / Custom	1	1	0.4	3.5	0.3	0.2
Direct Install	1	0.8	0.4	8.1	0.2	0.2
Energy Solutions	1	0.7	0.4	6.5	0.2	0.1
Next Gen Savings	n/a	n/a	n/a	n/a	n/a	n/a
Demand Response	n/a	n/a	n/a	n/a	n/a	n/a
Building Decarbonization	n/a	n/a	n/a	n/a	n/a	n/a
Statewide Coordinator	0.0	0	0	n/a	0	0
Workforce Development	0.0	0	0	n/a	0	0
Community Outreach	0.0	0	0	n/a	0	0

## 6f. Appendix F: Quantitative Performance Indicators

Appendix F: Quantitative Performance Indicators by Program Year (MFR VII.a & MFR VII.b)

	Net Annual Energy Savings (Source MMBtu)	Net Annual Demand Savings (Peak MW)	Net Annual Demand Savings (Peak-day therm)	Net Lifetime Energy Savings (Source MMBtu)	LMI and OBC Net Lifetime Energy Savings (Source MMBtu)	Small Business Net Lifetime Energy Savings (Source MMBtu)	Cost to Achieve (\$/ Lifetime Source MMBtu)
Program Year 4	131,124		969	1,257,426	90,146	14,656	12.65
Program Year 5	300,138		2,860	3,383,835	287,737	41,395	15.01
Program Year 6	309,141		2,859	3,482,873	286,298	41,223	15.25
Portfolio Total	740,403		6,688	8,124,134	664,182	97,275	14.75

*\*QPIs based only on lead fuel and include only energy efficiency*

*\*Legacy savings included in QPI savings, but legacy costs not included because they are accounted for in prior Triennia*

## h. Appendix H: Incentive Ranges

Residential Sector Prescriptive Incentives (not including repayment plans)					
Program	Measure <sup>1</sup>	Rebate Up To Value (\$) GDC/EDC Consensus Rebate Strategy <sup>2</sup>	Unit Basis	Multifamily Income-Eligible Rebate Up To Value (\$)	Existing Up To Value (\$) Rebate Strategy
Efficient Products – Natural Gas	Smart Thermostats <sup>3</sup>	\$150	Per thermostat	Same	\$125
	Reset controls for boiler	\$250	Per control	30% Incentive Adder	\$125
	HVAC Maintenance	\$250	Per furnace	30% Incentive Adder	\$250
	HVAC Quality Install	\$500	Per unit	Same	\$450
	Gas Furnace ( $\geq 95\%$ ) Non-Condensing to Condensing	\$900	Per furnace	Up to 100% incentive adder	\$1,000
	Gas Combi Heat Tier 2 (AFUE $\geq$ to 97%)	\$1,750	Per boiler	Up to 100% incentive adder	\$1,750
	Gas Combi Heat Tier 1 (AFUE $\geq$ or equal to 95%)	\$1,300	Per boiler	Up to 100% incentive adder	\$1,300
	Gas Boiler ( $\geq 90\%$ ) Non-Condensing to Condensing	\$900	Per boiler	Up to 100% incentive adder	\$1,000
	Gas Boiler ( $\geq 95\%$ ) Non-Condensing to Condensing	\$1,000	Per boiler	Up to 100% incentive adder	\$1,200
	Furnace Fans (ECM motor install)	\$125	Per ECM motor	Same	N/A
	Tankless WH, UEF $\geq 0.87$	\$500	Per Water Heater	Up to full cost of measure	\$1,000

	Tankless WH, Energy Star	\$750	Per Water Heater	Up to full cost of measure	\$1,000
	Indirect - Fired Storage Tank Water Heater* (must be attached to at least a 90% AFUE Boiler)	\$250	Per Water Heater	Up to 100% of incremental cost, plus a 100% adder	\$250
	Gas Storage Tank Water Heater - Power Vented >55 gallons,UEF>.85 Medium Draw Pattern UEF $\geq 0.78$ High Draw Pattern UEF $\geq 0.80$	\$400	Per Water Heater	Up to 100% of incremental cost, plus a 100% adder	\$750
	Gas Storage Tank Water Heater - Power Vented <55 gallons,UEF>.64 Medium Draw Pattern UEF $\geq 0.64$ High Draw Pattern UEF $\geq 0.68$	\$400	Per Water Heater	up to 100% of incremental cost, plus a 100% adder	\$500
	Supplemental incentive for LMI customers (limited to qualifying HVAC equipment)	\$300	per qualifying unit		\$200
	Marketplace Products other than thermostat	Up to 50% discount	Per Unit		Up to 50% discount

### Notes

- 1 - The utilities reserve the right to seek the addition of new measures and incentives within the annual update of the Program Year TRM ("PY TRM"). The utility will provide justification for their specific measure request for consideration by the TRM Committee. Where sufficient evidence is demonstrated, the TRM Committee may add the new measures and incentives as a proposed change to the next PY TRM, which shall follow the annual PY TRM update process before the measure is added to the PY TRM. The exact annual PY TRM update process is being drafted within the EM&V Working Group for consideration by the BPU for adoption in Triennium 2.
- 2 - All rebates will be offered equal to or less than the "Up To" value. Rebate value should not exceed the full measure cost. Tiered rebate amounts may be offered within the incentive ranges listed above for qualified measures that have varying applications or characteristics (e.g. size, features, etc.)

3 - The total rebate value for a smart thermostat will be up to \$125 total between both fuel Utilities.

4

Comprehensive Residential Programs (not including repayment plans)			
Program	Subprogram	Description	Existing Rebate Strategy
Whole Home <sup>1</sup>	Home Energy Assessment	Utilities may provide the home energy assessment at no additional cost or for a fee, which may be discounted for certain customers or for promotional periods to drive activity. The home energy assessment may include the direct installation of standard energy efficiency measures that are appropriate for their home	Under Quick Home Energy Checkup, no cost to customer for walk through audit with no cost or low cost measures installed at time of audit

	Whole House Projects	<p>The following incentive structures may be used:</p> <p>Option A: Customer must have a minimum savings percentage of 5% based on modeled reduction of consumption.  Rebate is \$2,000 + \$200 for each percentage point of savings above 5%, \$6,000 + \$200 per % savings <math>\geq 20\%</math>  Rebate Cap = \$7,500</p> <p>OR</p> <p>Option B: Customer incentive will be based on the measures installed:  <i>Weatherization Measures</i> -  Up to 75% of costs for weatherization measures covered  <i>Other EE Measures</i> -  Based on list of prescriptive measures  100% of weatherization costs for savings <math>\geq 20\%</math>  Rebate Cap = \$7,500</p> <p>* Initially, ACE, ETG, JC, NJNG, RECO and SJG used Option A and PSE&amp;G used Option B.</p>	<p>Under Home Performance with Energy Star, customer must have a minimum savings percentage of 5% based on modeled reduction of consumption.  Rebate is \$2,000 + \$200 for each percentage point of savings above 5%, up to \$6,000.</p>
	Contractor Incentive	Up to \$500	Up to \$500

Income-Qualified	Income-Qualified Projects	<p>The customer may receive no-cost energy efficiency measures and upgrades with an average project spending guideline (\$14,000 + \$1,000 with Utility approval) and health and safety expense protocol (\$2,500 or higher with Utility approval). The program will be designed to provide a greater level of benefits for low-income customers.</p> <p>Same average project spending guideline and H&amp;S expense protocol as Comfort Partners additional measure costs eligible for financing.</p>	<p>Under Moderate-Income Weatherization, no up-front cost to customer for BPI-certified audit with up to \$6,000 of direct install and weatherization measures and up to \$1,500 on health and safety expenses.</p> <p>Under Low-Income (Comfort Partners) customers may receive no-cost energy efficiency measures and upgrades within project spending guideline and health and safety expense protocol.</p>
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**Notes**

1 - Multifamily Whole Building is shown on the Multifamily Schedule.

Commercial Sector Incentives (not including repayment plans)					
Program	Prescriptive Measure <sup>1</sup>	Rebate Up To Value (\$) EDC/GDC Consensus Rebate Strategy <sup>2</sup>	Unit Basis	Multifamily Income-Eligible Rebate Up to Value (\$)	Existing Up to Rebate Values <sup>4</sup>
Energy Solutions for Businesses- Prescriptive Measures	<b>COOKING EQUIPMENT</b>				
	Commercial Rack Oven	\$3,000	Per oven	Same	
	<b>COMBINATION and CONVECTION OVENS</b>				
	Convection Ovens	\$600	Per Unit	Same	\$400
	Commercial Conveyor Oven	\$1,700	Per Unit	Same	N/A
	<b>STEAM COOKERS</b>				
	Commercial Steam Cooker	\$150	Per Pan	Same	\$150
	<b>COMMERCIAL APPLIANCES</b>				
	<b>CLOTHES WASHER</b>		Per Unit	Same	
	CEE Tier 1	\$200	Per Unit	Same	\$100
	CEE Tier 2	\$350	Per Unit	Same	\$200
	<b>RESIDENTIAL APPLIANCES in C&amp;I BUILDING – Non Commercial Duty</b>				
	<b>Commercial Kitchen Equipment (Natural Gas)</b>				
	Demand Controlled Kitchen Ventilation (DCKV) (Only for units > 5,000 CFM)	\$1,500	Per HP of ventilation fan	Same	N/A
	Commercial Rack Oven (Gas)	\$3,000	Per oven	Same	\$1,000



	Commercial Modulating Gas Dryer Valve	\$500	Per modulating gas dryer valve retrofit	Same	\$150
	Commercial Griddle (Gas)	\$1,500	Per griddle	Same	\$500
	Commercial Fryer (Gas)	\$1,000	Per fryer	Same	\$750
	Commercial Dishwashers, Under Counter Low Temp	\$400	Per dishwasher	Same	\$400
	Commercial Dishwashers, Under Counter High Temp	\$400	Per dishwasher	Same	\$400
	Commercial Dishwashers, Single Tank Conveyor, Low Temp	\$1,000	Per dishwasher	Same	\$1,000
	Commercial Dishwashers, Single Tank Conveyor, High Temp	\$1,500	Per dishwasher	Same	\$1,500
	Commercial Dishwashers, Multiple Tank Conveyor, Low Temp	\$1,500	Per dishwasher	Same	\$1,500
	Commercial Dishwashers, Multiple Tank Conveyor, High Temp	\$1,500	Per dishwasher	Same	\$1,500
	Commercial Dishwashers, Door Type Low Temp	\$700	Per dishwasher	Same	\$700
	Commercial Dishwashers, Door Type High Temp	\$750	Per dishwasher	Same	\$750
	Ventilation with Heat Recovery Gas HRV	\$8	Per CFM	Same	N/A
	Ventilation with Heat Recovery Gas ERV	\$8	Per CFM	Same	N/A
	<b>Boilers &amp; Water Heaters (Natural Gas)</b>				
	Stack Economizer for Boilers	\$11	Per MBH	Up to 30% incentive adder	Up to full cost of measure

	Non-Condensing-to-Condensing Gas Furnace > 97% AFUE	\$1,500	Per furnace	Up to 30% incentive adder	\$1,500
	Non-Condensing-to-Condensing Gas Furnace > 95% AFUE	\$1,150	Per furnace	Up to 30% incentive adder	\$1,000
	Gas Fired Low Intensity Infrared Heating >100MBH	\$2,000	Per infrared heater	Up to 30% incentive adder	\$500
	Gas Fired Low Intensity Infrared Heating <100MBH	\$2,000	Per infrared heater	Up to 30% incentive adder	\$750
	Gas Engine Driven Chillers	\$400	Per ton	Up to 30% incentive adder	\$350
	Gas Absorption Chillers, 100 to 400 tons	\$400	Per ton	Up to 30% incentive adder	\$230
	Gas Absorption Chillers, > 400 tons	\$400	Per ton	Up to 30% incentive adder	\$185
	Gas Absorption Chillers, < 100 tons	\$450	Per ton	Up to 30% incentive adder	\$450

	Furnace Tune-up	\$250	per MBH	Up to 30% incentive adder	\$250
	Other Gas Heat >+97%	\$3,000	Per unit	Up to 100% incentive adder	new
	Demand Control Ventilation	\$2,500	Per system installed	Up to 30% incentive adder	N/A
	Condensing Unit Heater 90% AFUE	\$750	Per MBH	Up to 30% incentive adder	\$36
	Commercial Gas Heat Pumps	\$3,000	Per gas heat pump	Up to 30% incentive adder	N/A
	Boiler, Steam Natural Draft, > 2,500 MBH (81% TE)	\$3	Per MBH	Up to 30% incentive adder	\$1
	Boiler, Steam Natural Draft, < 300 to 2,500 MBH (81% TE)	\$2	Per MBH	Up to 30% incentive adder	\$1
	Boiler, Steam All Except Natural Draft, 300 to 2,500 MBH (81% TE)	\$2	Per MBH	Up to 30% incentive adder	\$2

	Boiler, Steam All Except Natural Draft, > 2,500 MBH (81% TE)	\$3	Per MBH	Up to 30% incentive adder	\$2
	Boiler, Steam < 300 MBH Input (82% AFUE)	\$3	Per MBH	Up to 30% incentive adder	\$2
	Boiler, HW Condensing - Tier 2, 300 to 2,500 MBH (>94% TE)	\$9	Per MBH	Up to 30% incentive adder	\$4
	Boiler, HW Condensing - Tier 2, > 2,500 MBH (>81%TE)	\$9	Per MBH	Up to 30% incentive adder	\$4
	Non-Condensing-to-Condensing Boiler, HW Condensing - Tier 2, < 300 MBH (>95% AFUE)	\$9	Per MBH	Up to 30% incentive adder	\$1200 per Boiler
	Boiler, HW Condensing - Tier 1, 300 to 2,500 MBH (88%TE)	\$4	Per MBH	Up to 30% incentive adder	\$4
	Boiler, HW Condensing - Tier 1, > 2,500 MBH (88% TE)	\$5	Per MBH	Up to 30% incentive adder	\$4
	Non-Condensing-to-Condensing Boiler, HW Condensing - Tier 1, < 300 MBH (>90% AFUE)	see residential value - \$1,000	Per boiler	Up to 30% incentive adder	\$1000 per Boiler

	Boiler w/Reset Controls	\$1	Per control	Up to 30% incentive adder	\$1
	Boiler Tune-up	\$1	per MBH	Up to 30% incentive adder	\$1
	Boiler HW Non-condensing, 300 to 2,500 MBH (85% TE)	\$5	Per MBH	Up to 30% incentive adder	\$2
	Boiler HW Non-condensing, > 2,500 MBH (85% TE)	\$3	Per MBH	Up to 30% incentive adder	\$2
	Boiler HW Non-condensing, < 300 MBH (85% AFUE)	\$6	Per MBH	Up to 30% incentive adder	\$2
	Boiler Economizer Controls, > 4 MMBtu	\$2,700	Per MBH	Up to 30% incentive adder	\$2,700
	Boiler Economizer Controls, 3.5 to 4 MMBtu	\$2,400	Per MBH	Up to 30% incentive adder	\$2,400
	Boiler Economizer Controls, 3 to 3.5 MMBtu	\$2,100	Per MBH	Up to 30% incentive adder	\$2,100

	Boiler Economizer Controls, 1.6 to 3 MMBtu	\$1,800	Per MBH	Up to 30% incentive adder	\$1,800
	Boiler Economizer Controls, 0.8 to 1.6 MMBtu	\$1,500	Per MBH	Up to 30% incentive adder	\$1,500
	Boiler Economizer Controls, < 800,000 Btu	\$1,200	Per MBH	Up to 30% incentive adder	\$1,200
Energy Solutions for Businesses- Prescriptive Measures	<b>OTHER HVAC EQUIPMENT (Natural Gas)</b>				
	Thermostat - Smart	\$150	Per thermostat	Up to 30% incentive adder	\$125
	SBDI - Stand Alone Storage Water Heaters	N/A	Per Water Heater	N/A	N/A
	SBDI - Pipe Insulation	N/A	Per foot	N/A	N/A
	SBDI - Low Flow Pre-rinse Spray Valves	N/A	Per valve	N/A	N/A
	SBDI - Instantaneous Water Heaters	N/A	Per Water Heater	N/A	N/A
	Pre-Rinse Spray Valve	\$100	Per valve	Up to 30% incentive adder	\$75
	HW Recirculating System with demand control	\$2,800	Per Water Heater	Up to 30% incentive adder	\$100

	DHW, Instant, Gas-Fired, > 200,000 Btuh, > 90% TE (Should be TE Thermal Efficiency)	\$2,000	Per Water Heater	Up to 30% incentive adder	\$1,000
	DHW, Instant, Gas-Fired, < 200,000 Btuh, > 90% TE (Should be TE Thermal Efficiency)	\$750	Per MBH	Up to 30% incentive adder	\$750
	DHW Storage, Gas-Fired, 75,000 to 105,000 Btuh, > 94% TE (Should be TE Thermal Efficiency)	\$750	Per Water Heater	Up to 30% incentive adder	\$500
	DHW Storage, Gas-Fired, 75,000 to 105,000 Btuh, > 82% TE (Should be TE Thermal Efficiency)	\$500	Per Water Heater	Up to 30% incentive adder	\$750
	DHW Storage, Gas-Fired, > 105,000 Btuh (105 MBH), > 94% TE (Should be TE Thermal Efficiency)	\$800	Per MBH	Up to 30% incentive adder	\$750
	DHW Storage, Gas-Fired, > 105,000 Btuh (105 MBH), > 82% TE (Should be TE Thermal Efficiency)	\$500		Up to 30% incentive adder	\$500
	DHW Storage, Gas-Fired, < 75,000 Btuh, (>55gallons) (75 MBH) > 0.81 UEF	\$1,000		Up to 30% incentive adder	\$500
	DHW Storage, Gas-Fired, < 75,000 Btuh, (<55gallons), (75 MBH) > 0.67 EF or 0.64 UEF	\$600		Up to 30% incentive adder	\$350

	Condensing Integrated Boiler and Water Heater (<300MBH,90 AFUE)	\$2,500		Up to 30% incentive adder	\$2,500
	Condensing Integrated Boiler and Water Heater (>300MBH, 94TE)	\$2,500		Up to 30% incentive adder	\$2,500
	<b>CUSTOM PROJECTS</b>				
Custom	For example: Compressed Air, Refrigeration, Data Center Equipment/Servers, HVAC/Chillers, HVAC Controls, Motors/VFD - Large, Building Improvements, Process Improvements, Agricultural Lighting/Process, Custom Lighting, Demand Controlled Ventilation, Energy Recovery Ventilator, Heat Recovery Ventilator	75% of total project(s) cost as identified in a final energy efficiency plan (FEEP) or equivalent. Total project costs may include pre-engineering costs, soft costs, and other costs associated with the preparation of the FEEP; and  For all lighting measures: \$0.16/kWh per projected kWh saved annually; for all other measures: \$0.33 per projected	per kWh	Up to 30% incentive adder	Incentives are calculated based on the lesser of two factors. 50% of project cost, or \$0.35/kWh saved in the first year.



		<p>kWh saved annually; \$3.75 per projected therms saved annually, all as identified in the FEEP(s); and</p> <p>\$4,000,000 per entity per fiscal year, determined by summing the commitments associated with each FEEP approval made during the applicable fiscal year.</p> <p>or</p> <p>The amount necessary to buy down to no less than a two-year payback.</p>			
Energy Solutions for Businesses- Prescriptive Measures	<b>ENERGY MANAGEMENT</b>				
	<b>Bldg. - Tune-Up</b>	<b>Consensus EDC/GDC Incentive Strategy</b>	<b>% of Project Cost</b>		<b>Existing Incentive Up to Value</b>
	Gas Optimization	\$10.00 / therm	Up to 80%		

	Boiler Tuneup	\$10.00 / therm	Up to 80%		Up to 70% of Project Cost w project cap of \$75,000
	Furnace Tuneup	\$600	Up to 80%		
	<b>HVAC Tune-Up</b>				
	Boiler Tuneup	\$10.00 / Therm	Up to 80%		\$1 per MBH
	Furnace Tuneup	\$600	Up to 80%		\$250
	<b>Retro-comissioning</b>				
	RCx Services (Audit, Implementation, M&V) (for trade ally services only)	-	Up to 100%		N/A
	Customer/Trade Ally Incentive for verified energy savings	\$0.64 / kWh and \$10.00 / therm	Up to 70%		Up to \$0.35 per kWh
	<b>BOC Training</b>				
	Building Operations Training	Up to 70%	\$1,000 / Applicant cap		Up to 70% of the cost to attend qualified BOC training up to \$1000 per person.
	<b>Strategic Energy Mgmt.</b>				
	SEM Services (Audit, Implementation, M&V)	-	Up to 100%		N/A
	Customer Incentive for verified energy savings	\$0.64 / kWh and \$10.00 / therm	Up to 70%		Up to \$0.35 / kWh
	<b>Virtual Commissioning VCx</b>				
		\$0.30 / kWh			Up to \$0.35 per kWh
	<b>Monitoring Based Commissioning</b>				
	MBCx (Audit, Implementation, M&V)		Up to 100%		N/A

	Customer Incentive for verified energy savings	\$0.64 / kWh	Up to 70%		Up to \$0.35 per kWh
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### Notes

1 - The utilities reserve the right to seek the addition of new measures and incentives within the annual update of the Program Year TRM ("PY TRM"). The utility will provide justification for their specific measure request for consideration by the TRM Committee. Where sufficient evidence is demonstrated, the TRM Committee may add the new measures and incentives as a proposed change to the next PY TRM, which shall follow the annual PY TRM update process before the measure is added to the PY TRM. The exact annual PY TRM update process is being drafted within the EM&V Working Group for consideration by the BPU for adoption in Triennium 2.

2 - All rebates will be offered equal to or less than the "Up to" value. Rebate value should not exceed the full measure cost.

3 - The total rebate value for a smart thermostat will be up to \$150 total between both fuel Utilities

4 - Existing up-to rebate values may vary by program administrator.

Comprehensive Commercial Programs (not including repayment plans)			
Program	Category	Description of Approach to Incentives <sup>1</sup> & 2	Existing Incentives <sup>3</sup>
Direct Install	Tier 1	For Tier 1 customers the program will offer to pay up to 80% of the project cost to install the recommended energy efficiency measures with the participating customer (and/or landlord) repaying the balance not covered through the incentive either in a lump sum or through a repayment plan. Tier 1 will serve all customers with an average annual individual facility peak electrical demand of up to 100 kW and an average annual natural gas load of up to 5,000 therms.	For Tier 1 customers, standard basic energy savings measures may be installed at no cost during the time of the energy assessment. The program will offer to pay up to 80% of the project cost to install the recommended energy efficiency measures with the participating customer (and/or landlord) repaying the balance not covered through the incentive either in a lump sum or through an available repayment option. Customers located in an Urban Enterprise Zone, Opportunity Zone, owned or operated by a local government, or K-12 public schools. may also qualify for Tier 1 status, up to an average individual facility peak electrical demand of 200 kW .
	Tier 2	For Tier 2 customers, program will offer to pay up to 80% of the project cost to install the recommended energy efficiency measures with the participating customer (and/or landlord) repaying the balance not covered through the incentive either in a lump sum or through a repayment plan.  Tier 2 will serve all customers with an average annual individual facility peak demand of up to 300 kW or average annual natural gas load of 40,000 therms located	Tier 2 will serve the larger segment of eligible customers, with an average individual facility peak electrical demand of 101 - 200 kW over the past 12 months. Incentives up to 70% of the total project cost will be offered.

		within an Urban Enterprise Zone (“UEZ”), Opportunity Zone, Overburdened Community (“OBC”). Also eligible are customers with an average annual individual facility peak demand of up to 300 kW or an average annual natural gas load of 40,000 therms that are owned or operated by a local government, K-12 public schools, or that are non-profits categorized as 501(c)3.	
	Tier 3	Tier 3 will serve the larger segment of eligible customers, with an individual facility average annual peak electrical demand of 101 - 300 kW or 5,001 therms to 40,000 therms over the past 12 months. Incentives up to 70% of the total project cost will be offered with the participating customer repaying the balance not covered through the incentive either in a lump sum or through a repayment plan.	N/A - new
Energy Solutions	Engineered Solutions - Tier 1	Will provide a 100% incentive for an up-front audit, the specific audit level will be determined on a project-by-project basis based on the complexity of the facility and the potential energy efficiency measures. In addition, the Utilities will buy-down the simple payback of the recommended energy-efficiency project cost for approved measures by up to six years, with the resulting payback not less than three years. After the project incentive buy-down, the remaining project costs may be	The subprogram will provide a 100% incentive for an up-front ASHRAE audit, the specific audit level will be determined on a project by project basis based on the complexity of the facility and the potential energy efficiency measures. In addition, ETG will buy-down the simple payback of the recommended energy-efficiency project cost for approved measures by up to six years, with the resulting payback not less than three years. After the project incentive buy-down, the remaining project

		funded by the program with participants repaying the balance of the project costs through a repayment plan.	costs may be funded by the subprogram with participants repaying the balance of the project costs through OBRP or access to financing with similar terms.
	Engineered Solutions - Tier 2	Incentives for the Engineered Solutions Tier 2 pathway will provide incentives for both technical assistance services and other project costs determined on a project-by-project basis using a cost effectiveness tool up to 60% of project cost.	

	Energy Management	<p>Incentives for the Energy Management pathway are structured around the measure categories that focus on specific energy efficiency measures and management practices as follows:</p> <p><b>HVAC Tune-Up:</b> Fixed incentives for the implementation of the tune-up measures based on the size of the HVAC units.</p> <p><b>Building Tune-Up:</b> Incentives that cover up to 80% of the project cost and up to 70% of the cost to attend qualified BOC training up to \$1000 per person.</p> <p><b>Retro-Commissioning:</b> Incentives to cover up to 100% of the initial cost to perform the required ASHRAE level audit. The total project incentive will be capped at up to 70% of the project cost. The customer may also be paid a custom incentive for the implementation of the energy efficiency measures determined through the audit.</p> <p><b>Monitoring-based Commissioning, Virtual Commissioning:</b> Incentives to cover up to 100% of the cost of integration of third-party hardware and software. Utilities may also implement a performance-based model with an implementation contractor where the Utility only pays for delivered and verified energy savings.</p>	<p>Incentives for the Energy Management pathway are structured around the measure categories that focus on specific energy efficiency measures and management practices as follows:</p> <p><b>HVAC Tune-Up:</b> Fixed incentives for the implementation of the tune-up measures based on the size of the HVAC units up to \$250 value.</p> <p><b>Building Tune up:</b> Incentives that cover up to 70% of the project cost with a project cap of \$75,000 and up to 70% of the cost to attend qualified BOC training up to \$1,000 per person.</p> <p><b>Retro-Commissioning:</b> Incentives to cover up to 50% of the initial cost to perform the required ASHRAE level audit, and the remaining cost upon the customer commitment to implementation of energy efficiency measures defined by the audit. The customer will also be paid a custom incentive for the implementation of the energy efficiency measures determined through the audit. The total audit and project incentive will be capped at up to 70% of the project cost.</p> <p><b>Strategic Energy Management:</b> Customers who utilize a consultant will receive an incentive to cover up to 50% of the initial cost of the engineering</p>
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	<p><b>Strategic Energy Management:</b> The Utility or third-party implementation contractor may perform an engineering assessment of the customer's facility to develop a SEMP or the customer may choose to utilize a consultant of their choosing to perform an engineering assessment to develop the SEMP. Customers who utilize a consultant will receive an incentive to cover up to 100% of the initial cost of the engineering assessment. A tiered incentive structure for customer engineering assessment may be utilized based upon square footage of a customer's facility. The SEMP will identify short, medium and long-term goals for the customer and will set identifiable metrics for mapping to the plan. For the implementation of the energy efficiency measures determined by the SEMP, the customer will be paid an incentive that is commensurate with the applicable Commercial &amp; Industrial Program offering that the measures are attributed.</p>	<p>assessment, with the remaining cost upon the customer commitment to implementation of energy efficiency measures defined by the SEMP process. A tiered incentive structure for Customer engineering assessment will be utilized based upon square footage of Customer's facility. The SEMP will identify short, medium, and long-term goals for the customer and will set identifiable metrics for mapping to the plan. For the implementation of the energy efficiency measures determined by the SEMP, the customer will be paid an incentive that is commensurate with the applicable Commercial &amp; Industrial Program offering that the measures are attributed.</p>
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### Notes

1 - The utilities reserve the right to seek the addition of new measures and incentives within the annual update of the Program Year TRM ("PY TRM"). The utility will provide justification for their specific measure request for consideration by the TRM Committee. Where sufficient evidence is demonstrated, the TRM Committee may add the new measures and incentives as a proposed change to the next PY TRM, which shall follow the annual PY TRM update process before the measure is added to the PY TRM. The exact annual PY TRM update process is being drafted within the EM&V Working Group for consideration by the BPU for adoption in Triennium 2.

2 - All rebates will be offered equal to or less than the "Up To" value.



3 - Represents current incentives and does not including financing incentives. See Section 4H.

Multifamily Incentives (not including repayment plans)				
Program	Pathway	Measure <sup>1</sup>	Rebate Strategy <sup>2</sup>	Existing Rebate Strategy
Multifamily	N/A	Prescriptive	Please refer to the Residential and Commercial Schedules. Note the additional column for income eligible projects	Energy Assessment with the equipment and installation costs for the standard energy savings measures will be provided to eligible properties with “Up to 100%” of the cost provided by the program.
		MF Whole Building (successor to current MF HPwES Program)	Tiered incentive cash rebate not to exceed 50% of the costs of the measures used to calculate Total Energy Savings, up to \$1,750 per unit. - Contractor production incentive of up to \$50 per unit. (Will stay with the lead Utility.)	- Tiered incentive cash rebate not to exceed 50% of the costs of the measures used to calculate Total Energy Savings, up to \$1,500 per unit - Up to \$50 contractor production incentive per unit
		MF Direct Install	Provide incentives consistent with proposed Tiers within Small Business Direct Install Program	N/A
		MF Energy Solutions (ES)- regular customers	Follow structure of C&I Energy Solutions	- Program will buy-down the simple payback of the recommended energy-efficiency project cost for approved measures by up to six years, with the resulting payback not less than three years.

		MF Energy Solutions - special Income Eligible treatment	For Engineered Solutions Tier 1 – Keep to 6 year buydown. For Engineered Solutions Tier 2 – Increase the incentive up to 80% of project costs.	N/A- No special treatment
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### Notes

1 - The utilities reserve the right to seek the addition of new measures and incentives within the annual update of the Program Year TRM ("PY TRM"). The utility will provide justification for their specific measure request for consideration by the TRM Committee. Where sufficient evidence is demonstrated, the TRM Committee may add the new measures and incentives as a proposed change to the next PY TRM, which shall follow the annual PY TRM update process before the measure is added to the PY TRM. The exact annual PY TRM update process is being drafted within the EM&V Working Group for consideration by the BPU for adoption in Triennium 2.

2 - All rebates will be offered equal to or less than the "Up to" value.



**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 6  
Superseding Seventh Revised Sheet No. 6**

**RESIDENTIAL SERVICE (RSG)**

**APPLICABLE TO USE OF SERVICE FOR:**

All residential purposes. Customer may elect Firm Sales Service or Firm Transportation Service. To be eligible for Firm Transportation Service RSG, a customer must hold clear and marketable title to gas that is made available for delivery to the customer's residence on the Company's system.

**CHARACTER OF SERVICE** Firm Sales Service and Firm Transportation Service.

**MONTHLY RATE:** <sup>(1)</sup>

**Customer Charge:** \$10.502563 per month

**Delivery Charge:**

(a) Residential Non-Heating Customers  
Firm Sales Service and Firm Transportation Service \$1.~~220155~~-230059 per therm

(b) Residential Heating Customers  
Firm Sales Service and Firm Transportation Service \$1.~~331774~~-341678 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

All consumption for customers who elect Firm Sales Service. See Rider "A" of this Tariff.

**APPLICABLE RIDERS:**

Basic Gas Supply Service Clause: BGSS charges are depicted in Rider "A" of this Tariff.

Infrastructure Investment Program The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "B" of this Tariff.

Transportation Initiation Clause: The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "C" of this Tariff.

Societal Benefits Clause: The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "E" of this Tariff.

Temperature Adjustment Clause: The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "F" of this Tariff.

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates and Price to Compare

**Issued** \_\_\_\_\_  
**by South Jersey Gas Company,**  
**B. Schomber, President**

**Effective with service rendered**  
**on and after** \_\_\_\_\_

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**Public Utilities, State of New Jersey, dated** \_\_\_\_\_

**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 10  
Superseding Seventh Revised Sheet No. 10**

**GENERAL SERVICE (GSG)**

**APPLICABLE TO USE OF SERVICE FOR:**

All Commercial and Industrial Customers who would not qualify for any other Rate Schedule. A customer qualifying for service under Rate Schedule GSG may elect either Firm Sales Service or Firm Transportation Service. To be eligible for Firm Transportation Service under this Rate Schedule GSG, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service or Firm Transportation Service.

**MONTHLY RATE: <sup>(1)</sup>**

**Customer Charge:**

\$40.496175 per month

**Delivery Charges:**

Firm Sales Service and Firm Transportation Service

\$1.~~090122~~-100026 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

All consumption for customers who elect  
Firm Sales Service

See Rider "A" of this Tariff.

**LINE LOSS:**

Line Loss shall be 1.43% as provided in Special Provision (o).

**APPLICABLE RIDERS:**

Basic Gas Supply Service Clause:	BGSS charges are depicted in Rider "A" of this Tariff.
Infrastructure Investment Program	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "B" of this Tariff.
Transportation Initiation Clause:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "C" of this Tariff.
Societal Benefits Clause:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "E" of this Tariff.
Temperature Adjustment Clause:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "F" of this Tariff.

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates and Price to Compare.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 14  
Superseding Seventh Revised Sheet No. 14**

**GENERAL SERVICE – LARGE VOLUME (GSG-LV)**

**APPLICABLE TO USE OF SERVICE FOR:**

All Commercial and Industrial Customers who would not qualify for any other Rate Schedule (other than Rate Schedule GSG), and who has an annualized usage of 100,000 therms or more,. A customer qualifying for service under Rate Schedule GSG-LV may elect either Firm Sales Service or Firm Transportation Service. To be eligible for Firm Transportation Service under this Rate Schedule GSG-LV, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service or Firm Transportation Service.

**MONTHLY RATE: <sup>(1)</sup>**

**Customer Charge:**

\$264.003500 per month

**Delivery Charges:**

Firm Sales Service and Firm Transportation Service<sup>(2)</sup>

Demand Charge:

D-1FT: \$14.199998 per Mcf of Contract Demand

Volumetric Charge:

\$~~.665352~~ .675256 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

All consumption for customers who elect  
Firm Sales Service

See Rider "A" of this Tariff.

**LINE LOSS:**

Line Loss shall be 1.43% as provided in Special Provision (o).

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates and Price to Compare.

<sup>(2)</sup> See Special Provision (p) of this Rate Schedule GSG-LV, regarding appropriate balancing charges.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Sixth Revised Sheet No. 18  
Superseding Fifth Revised Sheet No. 18**

**COMPREHENSIVE TRANSPORTATION SERVICE (CTS)**

**APPLICABLE TO USE OF SERVICE FOR:**

All customers having a Firm Contract Demand, and an average annual daily Firm usage of 100 Mcf per day or more. To be eligible for service under this Rate Schedule CTS, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system. Provided, however, that any customer receiving service under this Rate Schedule CTS prior to August 29, 2003 shall continue to be eligible to receive service under this Rate Schedule CTS, notwithstanding the foregoing, if said customers continues to have a Firm Contract Demand of 100 Mcf per day or more. Further provided, however, that if a customer ceases to receive service under this Rate Schedule CTS, and seeks to return to service under this Rate Schedule CTS, said customer must meet all requirements for eligibility as though applying for service in the first instance.

**CHARACTER OF SERVICE:**

Firm Transportation Service and Limited Firm Transportation Service

**MONTHLY RATE: <sup>(1)</sup>**

**Firm:**

**Customer Charge:** \$874.996738 per month

**Delivery Charges:**

**Demand Charge:** D-1FT: \$37.000048 per Mcf of Contract Demand

**Volumetric Charges:**

All consumption for customers who elected to  
transfer from Sales Service to Firm Transportation Service \$~~258071~~ 267975  
per therm

**Limited Firm:**

**Customer Charge:** \$533.125000per month

**Delivery Charges:**

**Volumetric Charges:**

All consumption for customers who elected to  
transfer from Sales Service to Firm Transportation Service \$~~216827~~ 226731  
per therm

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Seventh Revised Sheet No. 25  
Superseding Sixth Revised Sheet No. 25**

**LARGE VOLUME SERVICE (LVS)**

**APPLICABLE TO USE OF SERVICE FOR:**

Firm Sales Service and Firm Transportation Service pursuant to this Rate Schedule LVS, shall be available to all Industrial Customers with a Contract Demand and a minimum annualized average use of 200 Mcf per day. To be eligible for Firm Transportation Service under this Rate Schedule LVS, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service, Limited Firm Sales Service, Firm Transportation Service, and Limited Firm Transportation Service.

**MONTHLY RATE: <sup>(1)</sup>**

**Firm:**

**Customer Charge:**

\$1,225.003963 per month

**Delivery Charge:**

**Firm Sales Service and Firm Transportation Service**

Demand Charge:

D-1FT: \$22.000043 per Mcf of Contract Demand

Volumetric Charge:

\$~~.223099~~ .233003 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

Demand Charge:

D-2: \$16.494513 per Mcf of Contract Demand.

Volumetric Charge:

See Rider "A" of this Tariff.

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Sixth Revised Sheet No. 26  
Superseding Fifth Revised Sheet No. 26**

**LARGE VOLUME SERVICE (LVS)**  
(Continued)

**Limited Firm:**

**Customer Charge:**

\$533.125000 per month

**Delivery Charge:**

**Firm Sales Service and Firm Transportation**

Volumetric Charge:

\$~~.316277~~ .326181 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

Applicable to customers who elect Firm Sales Service

Volumetric Charge:

See Rider "A" of this Tariff.

**PRICE TO COMPARE:**

The Company will provide the Price to Compare for an LVS customer, at said customer's request.

**LINE LOSS:**

Line Loss shall be 1.43% as provided in Special Provision (h).

**MINIMUM BILL:**

Sum of monthly Customer Charge and monthly Demand Charges, irrespective of use.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 31**  
**Superseding Seventh Revised Sheet No. 31**

**FIRM ELECTRIC SERVICE (FES)**

**APPLICABLE TO USE OF SERVICE FOR:**

All gas that is purchased or transported to generate electricity. Provided, however, that in order to qualify for this Rate Schedule FES, a customer must have a Winter Daily Contract Demand of 1,000 Mcf per day or more, or a Summer Daily Contract Demand of 2,000 Mcf per day or more, or both. To be eligible for Firm Transportation Service under this Rate Schedule FES, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service and Firm Transportation Service.

**MONTHLY RATE <sup>(1)</sup> <sup>(2)</sup>**

**WINTER (November – March):**

**Demand Charge:**

- D-1 \$3.089100 per Mcf of Winter Daily Contract Demand
- D-2 \$8.247257 per Mcf of Daily Billing Determinant or \$0 for Firm Transportation customers

**Volumetric Charge:**

- C-1: \$.~~154527~~ 164431 per therm of consumption
  - C-2: FES Monthly Commodity Rate, pursuant to Rider "A" and Special Provision (x), OR Customer Owned Gas Clause, Rider "D"
  - C-3: \$.173700 per therm of consumption
  - C-4: Escalator Rate – Charge may change monthly pursuant to Standard Gas Service Addendum.
- Minimum Bill:** The monthly D-1 and D-2 charges, irrespective of use.

**SUMMER (April – October):**

**Demand Charge:**

- D-1 \$3.089100 per Mcf of Summer Daily Contract Demand
- D-2 \$8.247257 per Mcf of Daily Billing Determinant or \$0 for Firm Transportation customers

**Volumetric Charge:**

- C-1: \$.~~154527~~ 164431 per therm of consumption
- C-2: FES Monthly Commodity Rate, pursuant to Rider "A" and Special Provision (x), OR Customer Owned Gas Clause, Rider "D"
- C-3: \$.173700 per therm of consumption
- C-4: Escalator Rate – Charge may change monthly pursuant to Standard Gas Service Addendum.

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

<sup>(2)</sup> Please refer to Special Provision (p)

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 38**  
**Superseding Seventh Revised Sheet No. 38**

**ELECTRIC GENERATION SERVICE (EGS)**

**APPLICABLE TO USE OF SERVICE FOR:**

Residential, commercial and industrial uses for electric generation facilities (excluding back-up generator equipment); all Prime Movers; and all engine driven equipment (whether or not used for electric generation). Provided, however, that in order to be eligible for this Rate Schedule EGS, a customer must have a Firm Daily Contract Demand of less than 200 Mcf per day; provided, however, that a residential EGS customer will have no Firm Daily Contract Demand. To be eligible for Firm Transportation Service under this Rate Schedule EGS, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service and Firm Transportation Service

**MONTHLY RATE:** <sup>(1)(2)</sup>

**Residential Customer Charge:**

\$10.502563 per month

**Residential Delivery Charge**

**Residential Volumetric Charge:**

\$~~.419966~~429870 per therm

**Commercial and Industrial Customer Charge:**

\$91.996050 per month

**Commercial and Industrial Delivery Charge:**

**Commercial and Industrial Demand Charge:**

D-1 Charge:

\$9.750003 per Mcf of contract

**Volumetric Charges:**

Winter Season (effective during billing months of November through March):

All Consumption for Firm Sales Service and Firm Transportation Service

\$~~.406834~~416738 per therm

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

<sup>(2)</sup> See Special Provision (k) of this Rate Schedule EGS, regarding appropriate balancing charges.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 39**  
**Superseding Seventh Revised Sheet No. 39**

**ELECTRIC GENERATION SERVICE (EGS)**  
(Continued)

Summer Season (effective during billing months of April through October):

All Consumption for Firm Sales Service and Firm Transportation Service

\$~~374846~~384750 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

Applicable to customers who elect Firm Sales Service

See Rider "A" of this Tariff.

**LINE LOSS:**

Line Loss shall be 1.43% as provided in Special Provision (p).

**APPLICABLE RIDERS:**

Basic Gas Supply Service Clause:	BGSS charges are depicted in Rider "A" of this Tariff.
Infrastructure Investment Program	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "B" of this Tariff.
Societal Benefits Clause:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "E" of this Tariff.
Balancing Service Clause	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "J" of this Tariff. However, also see Special Provision (k) regarding Rider "I".
Energy Efficiency Tracker:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "N" of this Tariff.

**TERMS OF PAYMENT:**

Payment of all bills must be received in full at the Company's designated office within fifteen (15) days of the billing date; provided however, the Company shall take into account any postal service delays of which the Company is advised. If the fifteenth (15th) day falls on a non-business day, the due date shall be extended to the next business day. Should the customer fail to make payment as specified, the Company may, beginning on the twenty-sixth (26th) day, assess simple interest at a rate equal to the prime rate as published in the Money Rates column in The Wall Street Journal. A late payment charge shall not be assessed on a residential customer, or on State, county or municipal government entities.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 43  
Superseding Seventh Revised Sheet No. 43**

**ELECTRIC GENERATION SERVICE – LARGE VOLUME (EGS-LV)**

**APPLICABLE TO USE OF SERVICE FOR:**

All commercial and industrial electric generation facilities; all Prime Movers and all engine driven equipment (whether or not used for electric generation). Provided, however, that in order to be eligible for this Rate Schedule EGS-LV, a customer must have a Firm Daily Contract Demand of 200 Mcf per day or more. To be eligible for Firm Transportation Service under this Rate Schedule EGS-LVS, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service, Firm Transportation Service, Limited Firm Sales Service and Limited Firm Transportation Service.

**MONTHLY RATE:** <sup>(1)</sup>

**Customer Charge:**

\$874.996738 per month

**FIRM:**

**Demand Charges:** <sup>(2)</sup>

D-1 \$29.441185 per Mcf of Firm Daily Contract Demand.

D-2 \$16.575946 per Mcf of Firm Daily Contract Demand or \$0 for Firm Transportation customers.

**Volumetric Charge:**

C-1: \$.~~455094~~164998 per therm of consumption

C-2: As depicted in the Monthly BGSS Subrider of Rider "A" of this Tariff, OR Customer Owned Gas Clause, Rider "D"

**Minimum Bill:** Monthly D-1 and D-2 charges, irrespective of use.

**LIMITED FIRM:**

**Demand Charge:**

D-2 \$8.247257 per Mcf of Limited Firm Daily Contract Demand or \$0 for Limited Firm Transportation customers

**Volumetric Charge:** <sup>(2)</sup>

C-1: \$.~~454527~~164431 per therm of consumption

C-2: As depicted in the Monthly BGSS Subrider of Rider "A" of this Tariff, OR Customer Owned Gas Clause, Rider "D"

C-3 \$.173700 per therm for all consumption within Limited Firm Contract Demand level.<sup>1</sup>

**Minimum Bill:** Monthly D-2 charge, irrespective of use.

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

<sup>(2)</sup> Please refer to Special Provision (j).

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Sixth Revised Sheet No. 60  
Superseding Fifth Revised Sheet No. 60**

**NATURAL GAS VEHICLE (NGV)**

**APPLICABLE TO:**

This service will be available to Commercial and Industrial customers who will utilize natural gas, for the purpose of providing vehicle fuel at Company-operated fueling stations or at separately metered customer-operated fueling stations.

**CHARACTER OF SERVICE:**

Firm Sales Service or Firm Transportation Service

**COMPRESSED NATURAL GAS VEHICLE SERVICE AT COMPANY OPERATED FUELING STATIONS**

This part of the service is available for refueling vehicles with compressed natural gas to customers who refuel at Company operated fueling stations. All service at Company operated fueling stations shall be Firm Sales Service. Provided, however, that in the Company's sole discretion, it may allow for Firm Transportation service for a Customer-specific dedicated dispenser or time fill system (separately metered) at a Company operated fueling station.

**Rate for Monthly Consumption**

**Volumetric Charge**

C-1: \$0.~~462458~~ 172362 per therm (\$0.~~203073~~ 215453 GGE\*)

Distribution Charge: \$0.257866 per therm (\$0.322333 GGE\*)

Compression Charge: \$0.700000 per therm (\$0.875000 GGE\*)

**Commodity Charges**

All consumption for customers who elected Firm Sales Service

**Basic Gas Supply Service ("BGSS") Charge:**

See Rider "A" of this Tariff.

BGSS rate \* GGE Factor 1.25 = GGE

GGE indicates Gasoline Gallon Equivalent. The gasoline gallon equivalent shall be determined in accordance with local standards. The point of sale price to the Customer shall be displayed in gasoline gallon equivalents at public access dispensers at Company operated fueling stations, and shall be calculated as C-1 + Distribution Charge + Compression Charge + New Jersey Motor Vehicle Fuel Tax + Federal Excise Tax + BGSS.

Commodity charges do not include State of New Jersey Motor vehicle fuel tax and Federal Excise Tax. As of January 1, 2020 these taxes were \$0.105 and \$0.1830 per gallon, respectively and shall be charged at the prevailing rate when applicable. The Company is under no obligation to determine if a customer is exempt from taxation.

Issued \_\_\_\_\_  
by South Jersey Gas Company,  
B. Schomber, President

Effective with service rendered  
on and after \_\_\_\_\_

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Public Utilities, State of New Jersey, dated \_\_\_\_\_

**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Sixth Revised Sheet No. 61  
Superseding Fifth Revised Sheet No. 61**

**NATURAL GAS VEHICLE (NGV)  
(Continued)**

**NATURAL GAS VEHICLE SERVICE AT CUSTOMER OPERATED FUELING STATIONS**

This part of the service is available for the sale of separately metered uncompressed gas for the use of the customer solely as a vehicle fuel as follows:

The customer agrees to obtain and maintain, at its expense, all necessary certificates, licenses and regulatory approvals and pay all taxes levied on the gas compressed for refueling the customer's vehicles;

If the customer provides natural gas for resale as a motor fuel, the customer will be responsible for collecting and paying all applicable taxes on the gas compressed for resale and on the sale thereof and for the metering of such sale in accordance with local standards and regulations; and

The customer must execute a Standard Gas Service Agreement (NGV) for not less than 12 months and must produce evidence of Land Rights.

**Rate for Monthly Consumption**

**Monthly Customer Charge**

The monthly customer charge shall be determined in accordance with the maximum delivery capability requested by the customer.

0-999 Cf/hour	\$39.984400
1,000-4,999 Cf/hour	\$79.968800
5,000-24,999 Cf/hour	\$258.000500
25,000 and greater Cf/hour	\$986.281250

**Volumetric Charges**

C-1: \$0.~~162458~~-172362 per therm (\$0.~~203073~~-215453 GGE)

Distribution Charge: \$0.257866 per therm (\$0.322333 GGE)

**Basic Gas Supply Service ("BGSS") Charge:**

All consumption for customers who elect Firm Sales Service See Rider "A" of this Tariff.

**Facilities Charge**

All consumption for Customers that elect to have the Company construct Compressed Natural Gas ("CNG") fueling facilities located on Customer's property:

C-2: \$0.294445 (\$0.368056 GGE)

The customer shall pay all related motor vehicle taxes directly to the taxing entity. Such taxes shall be incremental to charges paid to the Company for the cost of receiving service under this rate schedule.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 – GAS**

**Sixth Revised Sheet No. 62  
Superseding Fifth Revised Sheet No. 62**

**NATURAL GAS VEHICLE (NGV)  
(Continued)**

**DELIVERY SERVICE FOR NATURAL GAS VEHICLES**

This part of service is available for delivery of customer owned natural gas for use in compression and dispensing equipment at the Customer's premises, as follows:

The customer must purchase under a contract with an initial term of not less than one year an adequate supply of natural gas of a quality acceptable to the Company, and must make arrangements by which such volumes of natural gas can be delivered into the Company's distribution system at the Customer's expense.

By taking service under this part, the Customer warrants that it has good and legal title to all gas supplied to the Company, and agrees to indemnify, defend and hold the Company harmless from any loss, claims or damages in regard to such title.

**Rate for Delivery Service**

**Monthly Customer Charge**

The monthly customer charge shall be determined in accordance with the maximum delivery capability requested by the customer.

0-999 Cf/hour	\$39.984400
1,000-4,999 Cf/hour	\$79.968800
5,000-24,999 Cf/hour	\$258.000500
25,000 and greater Cf/hour	\$986.281250

**Volumetric Charge**

C-1: \$0.~~162458~~-172362 per therm (\$0.~~203073~~-215453 GGE)

Distribution Charge: \$0.257866 per therm (\$0.322333 GGE)

**Facilities Charge**

All consumption for Customers that elect to have the Company construct CNG fueling facilities located on Customer's property:

C-2: \$0.294445 per therm (\$0.368056 GGE)

Sales taxes are not included in the above basic charges. The Company is under no obligation to determine if a customer is exempt from taxation. Customers seeking tax exemption must file verification with the Company.

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## SOUTH JERSEY GAS COMPANY

Third Revised Sheet No. 105

B.P.U.N.J. No. 14 - GAS

Superseding Second Revised Sheet No. 105

RIDER "N"  
ENERGY EFFICIENCY TRACKER ("EET")

## APPLICABLE TO:

Rate Schedule RSG	-	Residential
Rate Schedule GSG	-	General Service
Rate Schedule GSG-LV	-	General Service- Large Volume
Rate Schedule CTS	-	Comprehensive Transportation Service
Rate Schedule LVS	-	Large Volume Service
Rate Schedule FES	-	Firm Electric Service
Rate Schedule EGS	-	Electric Generation Service
Rate Schedule EGS-LV	-	Electric Generation Service- Large Volume
Rate Schedule IGS	-	Interruptible Gas Service
Rate Schedule ITS	-	Interruptible Transportation Service
Rate Schedule NGV	-	Natural Gas Vehicle

This Rider "N" shall be known as the Energy Efficiency Tracker ("EET"). For financial accounting purposes the Company shall record a return on and a return of investments in energy efficiency programs, as approved by the Board at Docket No. GO09010059, in an Order dated July 24, 2009, Docket No. GO12050363, in an Order dated June 21, 2003, Docket No. GR15010090, in an Order dated August 19, 2015, Docket No. GO18030350, in an Order dated October 29, 2018, ~~and~~ Docket No. GR20060436 dated January 27, 2021, and Docket No. GO23120870 dated \_\_\_\_\_, 2024 and recover all incremental operating and maintenance expenses of the programs, subject to the EET. Docket No. GO23120870 was filed in accordance with the Clean Energy Act of 2018 ("CEA") and the Board's Order dated May 24, 2023 in Docket Nos. QO1901040, QO23030150 and QO17091004. Docket No. GO20090618 was filed in accordance with the Clean Energy Act of 2018 ("CEA") and the Board's Order dated June 10, 2020 in Docket Nos. QO19010040, QO19060748 and QO171091004. The calculation will use the rate of return weighted average cost of capital as identified in the respective Orders referenced above.

The EET rate will be calculated annually using projected data and subject to a true-up at the end of the EET year with simple interest on net over/under recoveries. Interest associated with over recoveries will be credited against the EET, while interest associated with under recoveries will be charged to the EET. The interest on monthly EET under and over recoveries shall be the interest rate based on the Company's weighted interest rate for the corresponding month obtained on its commercial paper and bank credit lines but shall not exceed the Company's weighted average cost of capital utilized to set rates in its most recent base rate case.

This EET will be effectuated through a volumetric rate applied to customers' bills. The Company shall make an annual EET rate filing in July of each year with a proposed implementation of the revised EET rate in October. Included in the filing will be a list of efficiency programs offered and eligible for recovery under the EET.

The Company shall have the discretion to implement a bill credit or a refund at any time during the EET Year with five (5) days notice to the BPU Staff and the Division of Rate Counsel. The Company shall have the discretion to file a self-implementing EET rate reduction at any time with two (2) weeks notice to the BPU Staff and the Division of Rate Counsel.

Rate Schedules subject to this Rider will be charged the following volumetric rate:

	EEP <u>Legacy Rate</u>	EEP Extension <u>Rate</u>	<u>EEP T2</u> <u>Rate</u>	Total <u>Tariff Rate</u>
EET Rate per therm	\$0.011894	\$0.026639	<u>\$0.009289</u>	<u>\$0.038533047822</u>
Applicable NJ Sales Tax	<u>\$0.000788</u>	<u>\$0.001765</u>	<u>\$0.000615</u>	<u>\$0.002553003168</u>
EET Rate per therm with NJ Sales Tax	<u>\$0.012682</u>	<u>\$0.028404</u>	<u>\$0.009904</u>	<u>\$0.041086-050990</u>

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 6  
Superseding Seventh Revised Sheet No. 6**

**RESIDENTIAL SERVICE (RSG)**

**APPLICABLE TO USE OF SERVICE FOR:**

All residential purposes. Customer may elect Firm Sales Service or Firm Transportation Service. To be eligible for Firm Transportation Service RSG, a customer must hold clear and marketable title to gas that is made available for delivery to the customer's residence on the Company's system.

**CHARACTER OF SERVICE** Firm Sales Service and Firm Transportation Service.

**MONTHLY RATE:** <sup>(1)</sup>

**Customer Charge:** \$10.502563 per month

**Delivery Charge:**

(a) Residential Non-Heating Customers  
Firm Sales Service and Firm Transportation Service \$1.230059 per therm

(b) Residential Heating Customers  
Firm Sales Service and Firm Transportation Service \$1.341678 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

All consumption for customers who elect Firm Sales Service. See Rider "A" of this Tariff.

**APPLICABLE RIDERS:**

Basic Gas Supply Service Clause: BGSS charges are depicted in Rider "A" of this Tariff.

Infrastructure Investment Program The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "B" of this Tariff.

Transportation Initiation Clause: The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "C" of this Tariff.

Societal Benefits Clause: The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "E" of this Tariff.

Temperature Adjustment Clause: The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "F" of this Tariff.

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates and Price to Compare

**Issued \_\_\_\_\_  
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B. Schomber, President**

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 10  
Superseding Seventh Revised Sheet No. 10**

**GENERAL SERVICE (GSG)**

**APPLICABLE TO USE OF SERVICE FOR:**

All Commercial and Industrial Customers who would not qualify for any other Rate Schedule. A customer qualifying for service under Rate Schedule GSG may elect either Firm Sales Service or Firm Transportation Service. To be eligible for Firm Transportation Service under this Rate Schedule GSG, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service or Firm Transportation Service.

**MONTHLY RATE: <sup>(1)</sup>**

**Customer Charge:**

\$40.496175 per month

**Delivery Charges:**

Firm Sales Service and Firm Transportation Service                      \$1.100026 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

All consumption for customers who elect  
Firm Sales Service                      See Rider "A" of this Tariff.

**LINE LOSS:**

Line Loss shall be 1.43% as provided in Special Provision (o).

**APPLICABLE RIDERS:**

Basic Gas Supply Service Clause:	BGSS charges are depicted in Rider "A" of this Tariff.
Infrastructure Investment Program	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "B" of this Tariff.
Transportation Initiation Clause:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "C" of this Tariff.
Societal Benefits Clause:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "E" of this Tariff.
Temperature Adjustment Clause:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "F" of this Tariff.

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<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates and Price to Compare.

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B. Schomber, President**

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 14  
Superseding Seventh Revised Sheet No. 14**

**GENERAL SERVICE – LARGE VOLUME (GSG-LV)**

**APPLICABLE TO USE OF SERVICE FOR:**

All Commercial and Industrial Customers who would not qualify for any other Rate Schedule (other than Rate Schedule GSG), and who has an annualized usage of 100,000 therms or more,. A customer qualifying for service under Rate Schedule GSG-LV may elect either Firm Sales Service or Firm Transportation Service. To be eligible for Firm Transportation Service under this Rate Schedule GSG-LV, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service or Firm Transportation Service.

**MONTHLY RATE: <sup>(1)</sup>**

**Customer Charge:**

\$264.003500 per month

**Delivery Charges:**

Firm Sales Service and Firm Transportation Service<sup>(2)</sup>

Demand Charge:

D-1FT: \$14.199998 per Mcf of Contract Demand

Volumetric Charge:

\$.675256 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

All consumption for customers who elect  
Firm Sales Service

See Rider "A" of this Tariff.

**LINE LOSS:**

Line Loss shall be 1.43% as provided in Special Provision (o).

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<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates and Price to Compare.

<sup>(2)</sup> See Special Provision (p) of this Rate Schedule GSG-LV, regarding appropriate balancing charges.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Sixth Revised Sheet No. 18  
Superseding Fifth Revised Sheet No. 18**

**COMPREHENSIVE TRANSPORTATION SERVICE (CTS)**

**APPLICABLE TO USE OF SERVICE FOR:**

All customers having a Firm Contract Demand, and an average annual daily Firm usage of 100 Mcf per day or more. To be eligible for service under this Rate Schedule CTS, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system. Provided, however, that any customer receiving service under this Rate Schedule CTS prior to August 29, 2003 shall continue to be eligible to receive service under this Rate Schedule CTS, notwithstanding the foregoing, if said customers continues to have a Firm Contract Demand of 100 Mcf per day or more. Further provided, however, that if a customer ceases to receive service under this Rate Schedule CTS, and seeks to return to service under this Rate Schedule CTS, said customer must meet all requirements for eligibility as though applying for service in the first instance.

**CHARACTER OF SERVICE:**

Firm Transportation Service and Limited Firm Transportation Service

**MONTHLY RATE: <sup>(1)</sup>**

**Firm:**

**Customer Charge:** \$874.996738 per month

**Delivery Charges:**

**Demand Charge:** D-1FT: \$37.000048 per Mcf of Contract Demand

**Volumetric Charges:**

All consumption for customers who elected to  
transfer from Sales Service to Firm Transportation Service \$0.267975 per therm

**Limited Firm:**

**Customer Charge:** \$533.125000 per month

**Delivery Charges:**

**Volumetric Charges:**

All consumption for customers who elected to  
transfer from Sales Service to Firm Transportation Service \$0.226731 per therm

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<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Seventh Revised Sheet No. 25  
Superseding Sixth Revised Sheet No. 25**

**LARGE VOLUME SERVICE (LVS)**

**APPLICABLE TO USE OF SERVICE FOR:**

Firm Sales Service and Firm Transportation Service pursuant to this Rate Schedule LVS, shall be available to all Industrial Customers with a Contract Demand and a minimum annualized average use of 200 Mcf per day. To be eligible for Firm Transportation Service under this Rate Schedule LVS, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service, Limited Firm Sales Service, Firm Transportation Service, and Limited Firm Transportation Service.

**MONTHLY RATE: <sup>(1)</sup>**

**Firm:**

**Customer Charge:**

\$1,225.003963 per month

**Delivery Charge:**

**Firm Sales Service and Firm Transportation Service**

Demand Charge:

D-1FT: \$22.000043 per Mcf of Contract Demand

Volumetric Charge:

\$.233003 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

Demand Charge:

D-2: \$16.494513 per Mcf of Contract Demand.

Volumetric Charge:

See Rider "A" of this Tariff.

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<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Sixth Revised Sheet No. 26  
Superseding Fifth Revised Sheet No. 26**

**LARGE VOLUME SERVICE (LVS)**  
(Continued)

**Limited Firm:**

**Customer Charge:**

\$533.125000 per month

**Delivery Charge:**

**Firm Sales Service and Firm Transportation**

Volumetric Charge:

\$.326181 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

Applicable to customers who elect Firm Sales Service

Volumetric Charge:

See Rider "A" of this Tariff.

**PRICE TO COMPARE:**

The Company will provide the Price to Compare for an LVS customer, at said customer's request.

**LINE LOSS:**

Line Loss shall be 1.43% as provided in Special Provision (h).

**MINIMUM BILL:**

Sum of monthly Customer Charge and monthly Demand Charges, irrespective of use.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 31**  
**Superseding Seventh Revised Sheet No. 31**

**FIRM ELECTRIC SERVICE (FES)**

**APPLICABLE TO USE OF SERVICE FOR:**

All gas that is purchased or transported to generate electricity. Provided, however, that in order to qualify for this Rate Schedule FES, a customer must have a Winter Daily Contract Demand of 1,000 Mcf per day or more, or a Summer Daily Contract Demand of 2,000 Mcf per day or more, or both. To be eligible for Firm Transportation Service under this Rate Schedule FES, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service and Firm Transportation Service.

**MONTHLY RATE <sup>(1)</sup> <sup>(2)</sup>**

**WINTER (November – March):**

**Demand Charge:**

- D-1 \$3.089100 per Mcf of Winter Daily Contract Demand
- D-2 \$8.247257 per Mcf of Daily Billing Determinant or \$0 for Firm Transportation customers

**Volumetric Charge:**

- C-1: \$.164431 per therm of consumption
  - C-2: FES Monthly Commodity Rate, pursuant to Rider "A" and Special Provision (x), OR Customer Owned Gas Clause, Rider "D"
  - C-3: \$.173700 per therm of consumption
  - C-4: Escalator Rate – Charge may change monthly pursuant to Standard Gas Service Addendum.
- Minimum Bill:** The monthly D-1 and D-2 charges, irrespective of use.

**SUMMER (April – October):**

**Demand Charge:**

- D-1 \$3.089100 per Mcf of Summer Daily Contract Demand
- D-2 \$8.247257 per Mcf of Daily Billing Determinant or \$0 for Firm Transportation customers

**Volumetric Charge:**

- C-1: \$.164431 per therm of consumption
- C-2: FES Monthly Commodity Rate, pursuant to Rider "A" and Special Provision (x), OR Customer Owned Gas Clause, Rider "D"
- C-3: \$.173700 per therm of consumption
- C-4: Escalator Rate – Charge may change monthly pursuant to Standard Gas Service Addendum.

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<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

<sup>(2)</sup> Please refer to Special Provision (p)

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 38  
Superseding Seventh Revised Sheet No. 38**

**ELECTRIC GENERATION SERVICE (EGS)**

**APPLICABLE TO USE OF SERVICE FOR:**

Residential, commercial and industrial uses for electric generation facilities (excluding back-up generator equipment); all Prime Movers; and all engine driven equipment (whether or not used for electric generation). Provided, however, that in order to be eligible for this Rate Schedule EGS, a customer must have a Firm Daily Contract Demand of less than 200 Mcf per day; provided, however, that a residential EGS customer will have no Firm Daily Contract Demand. To be eligible for Firm Transportation Service under this Rate Schedule EGS, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service and Firm Transportation Service

**MONTHLY RATE:** <sup>(1)(2)</sup>

**Residential Customer Charge:**

\$10.502563 per month

**Residential Delivery Charge**

**Residential Volumetric Charge:**

\$.429870 per therm

**Commercial and Industrial Customer Charge:**

\$91.996050 per month

**Commercial and Industrial Delivery Charge:**

**Commercial and Industrial Demand Charge:**

D-1 Charge:

\$9.750003 per Mcf of contract

**Volumetric Charges:**

Winter Season (effective during billing months of November through March):

All Consumption for Firm Sales Service and Firm Transportation Service

\$.416738 per therm

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<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

<sup>(2)</sup> See Special Provision (k) of this Rate Schedule EGS, regarding appropriate balancing charges.

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B. Schomber, President

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 39**  
**Superseding Seventh Revised Sheet No. 39**

**ELECTRIC GENERATION SERVICE (EGS)**  
(Continued)

Summer Season (effective during billing months of April through October):

All Consumption for Firm Sales Service and Firm Transportation Service

\$.384750 per therm

**Basic Gas Supply Service ("BGSS") Charge:**

Applicable to customers who elect Firm Sales Service

See Rider "A" of this Tariff.

**LINE LOSS:**

Line Loss shall be 1.43% as provided in Special Provision (p).

**APPLICABLE RIDERS:**

Basic Gas Supply Service Clause:	BGSS charges are depicted in Rider "A" of this Tariff.
Infrastructure Investment Program	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "B" of this Tariff.
Societal Benefits Clause:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "E" of this Tariff.
Balancing Service Clause	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "J" of this Tariff. However, also see Special Provision (k) regarding Rider "I".
Energy Efficiency Tracker:	The rates set forth above have been adjusted, as is appropriate, pursuant to Rider "N" of this Tariff.

**TERMS OF PAYMENT:**

Payment of all bills must be received in full at the Company's designated office within fifteen (15) days of the billing date; provided however, the Company shall take into account any postal service delays of which the Company is advised. If the fifteenth (15th) day falls on a non-business day, the due date shall be extended to the next business day. Should the customer fail to make payment as specified, the Company may, beginning on the twenty-sixth (26th) day, assess simple interest at a rate equal to the prime rate as published in the Money Rates column in The Wall Street Journal. A late payment charge shall not be assessed on a residential customer, or on State, county or municipal government entities.

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**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Eighth Revised Sheet No. 43  
Superseding Seventh Revised Sheet No. 43**

**ELECTRIC GENERATION SERVICE – LARGE VOLUME (EGS-LV)**

**APPLICABLE TO USE OF SERVICE FOR:**

All commercial and industrial electric generation facilities; all Prime Movers and all engine driven equipment (whether or not used for electric generation). Provided, however, that in order to be eligible for this Rate Schedule EGS-LV, a customer must have a Firm Daily Contract Demand of 200 Mcf per day or more. To be eligible for Firm Transportation Service under this Rate Schedule EGS-LVS, a customer must hold clear and marketable title to gas that is made available for delivery to customer's facility on the Company's system.

**CHARACTER OF SERVICE:**

Firm Sales Service, Firm Transportation Service, Limited Firm Sales Service and Limited Firm Transportation Service.

**MONTHLY RATE:** <sup>(1)</sup>

**Customer Charge:**

\$874.996738 per month

**FIRM:**

**Demand Charges:** <sup>(2)</sup>

D-1 \$29.441185 per Mcf of Firm Daily Contract Demand.

D-2 \$16.575946 per Mcf of Firm Daily Contract Demand or \$0 for Firm Transportation customers.

**Volumetric Charge:**

C-1: \$.164998 per therm of consumption

C-2: As depicted in the Monthly BGSS Subrider of Rider "A" of this Tariff, OR  
Customer Owned Gas Clause, Rider "D"

**Minimum Bill:** Monthly D-1 and D-2 charges, irrespective of use.

**LIMITED FIRM:**

**Demand Charge:**

D-2 \$8.247257 per Mcf of Limited Firm Daily Contract Demand or \$0 for Limited Firm Transportation customers

**Volumetric Charge:** <sup>(2)</sup>

C-1: \$.164431 per therm of consumption

C-2: As depicted in the Monthly BGSS Subrider of Rider "A" of this Tariff, OR  
Customer Owned Gas Clause, Rider "D"

C-3 \$.173700 per therm for all consumption within Limited Firm Contract Demand level.<sup>1</sup>

**Minimum Bill:** Monthly D-2 charge, irrespective of use.

<sup>(1)</sup> Please refer to Appendix A for components of Monthly Rates.

<sup>(2)</sup> Please refer to Special Provision (j).

Issued \_\_\_\_\_  
by South Jersey Gas Company,  
B. Schomber, President

Effective with service rendered  
on and after \_\_\_\_\_

Filed pursuant to Order in Docket No. \_\_\_\_\_ of the Board of  
Public Utilities, State of New Jersey, dated \_\_\_\_\_

**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Sixth Revised Sheet No. 60  
Superseding Fifth Revised Sheet No. 60**

**NATURAL GAS VEHICLE (NGV)**

**APPLICABLE TO:**

This service will be available to Commercial and Industrial customers who will utilize natural gas, for the purpose of providing vehicle fuel at Company-operated fueling stations or at separately metered customer-operated fueling stations.

**CHARACTER OF SERVICE:**

Firm Sales Service or Firm Transportation Service

**COMPRESSED NATURAL GAS VEHICLE SERVICE AT COMPANY OPERATED FUELING STATIONS**

This part of the service is available for refueling vehicles with compressed natural gas to customers who refuel at Company operated fueling stations. All service at Company operated fueling stations shall be Firm Sales Service. Provided, however, that in the Company's sole discretion, it may allow for Firm Transportation service for a Customer-specific dedicated dispenser or time fill system (separately metered) at a Company operated fueling station.

**Rate for Monthly Consumption**

**Volumetric Charge**

C-1: \$0.172362 per therm (\$0.215453 GGE\*)

Distribution Charge: \$0.257866 per therm (\$0.322333 GGE\*)

Compression Charge: \$0.700000 per therm (\$0.875000 GGE\*)

**Commodity Charges**

All consumption for customers who elected Firm Sales Service

**Basic Gas Supply Service ("BGSS") Charge:**

See Rider "A" of this Tariff.

BGSS rate \* GGE Factor 1.25 = GGE

GGE indicates Gasoline Gallon Equivalent. The gasoline gallon equivalent shall be determined in accordance with local standards. The point of sale price to the Customer shall be displayed in gasoline gallon equivalents at public access dispensers at Company operated fueling stations, and shall be calculated as C-1 + Distribution Charge + Compression Charge + New Jersey Motor Vehicle Fuel Tax + Federal Excise Tax + BGSS.

Commodity charges do not include State of New Jersey Motor vehicle fuel tax and Federal Excise Tax. As of January 1, 2020 these taxes were \$0.105 and \$0.1830 per gallon, respectively and shall be charged at the prevailing rate when applicable. The Company is under no obligation to determine if a customer is exempt from taxation.

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**Issued \_\_\_\_\_  
by South Jersey Gas Company,  
B. Schomber, President**

**Effective with service rendered  
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Public Utilities, State of New Jersey, dated \_\_\_\_\_**

**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Sixth Revised Sheet No. 61  
Superseding Fifth Revised Sheet No. 61**

**NATURAL GAS VEHICLE (NGV)  
(Continued)**

**NATURAL GAS VEHICLE SERVICE AT CUSTOMER OPERATED FUELING STATIONS**

This part of the service is available for the sale of separately metered uncompressed gas for the use of the customer solely as a vehicle fuel as follows:

The customer agrees to obtain and maintain, at its expense, all necessary certificates, licenses and regulatory approvals and pay all taxes levied on the gas compressed for refueling the customer's vehicles;

If the customer provides natural gas for resale as a motor fuel, the customer will be responsible for collecting and paying all applicable taxes on the gas compressed for resale and on the sale thereof and for the metering of such sale in accordance with local standards and regulations; and

The customer must execute a Standard Gas Service Agreement (NGV) for not less than 12 months and must produce evidence of Land Rights.

**Rate for Monthly Consumption**

**Monthly Customer Charge**

The monthly customer charge shall be determined in accordance with the maximum delivery capability requested by the customer.

0-999 Cf/hour	\$39.984400
1,000-4,999 Cf/hour	\$79.968800
5,000-24,999 Cf/hour	\$258.000500
25,000 and greater Cf/hour	\$986.281250

**Volumetric Charges**

C-1: \$0.172362 per therm (\$0.215453 GGE)

Distribution Charge: \$0.257866 per therm (\$0.322333 GGE)

**Basic Gas Supply Service ("BGSS") Charge:**

All consumption for customers who elect Firm Sales Service See Rider "A" of this Tariff.

**Facilities Charge**

All consumption for Customers that elect to have the Company construct Compressed Natural Gas ("CNG") fueling facilities located on Customer's property:

C-2: \$0.294445 (\$0.368056 GGE)

The customer shall pay all related motor vehicle taxes directly to the taxing entity. Such taxes shall be incremental to charges paid to the Company for the cost of receiving service under this rate schedule.

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**Issued \_\_\_\_\_  
by South Jersey Gas Company,  
B. Schomber, President**

**Effective with service rendered  
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Public Utilities, State of New Jersey, dated \_\_\_\_\_**

**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 – GAS**

**Sixth Revised Sheet No. 62  
Superseding Fifth Revised Sheet No. 62**

**NATURAL GAS VEHICLE (NGV)  
(Continued)**

**DELIVERY SERVICE FOR NATURAL GAS VEHICLES**

This part of service is available for delivery of customer owned natural gas for use in compression and dispensing equipment at the Customer's premises, as follows:

The customer must purchase under a contract with an initial term of not less than one year an adequate supply of natural gas of a quality acceptable to the Company, and must make arrangements by which such volumes of natural gas can be delivered into the Company's distribution system at the Customer's expense.

By taking service under this part, the Customer warrants that it has good and legal title to all gas supplied to the Company, and agrees to indemnify, defend and hold the Company harmless from any loss, claims or damages in regard to such title.

**Rate for Delivery Service**

**Monthly Customer Charge**

The monthly customer charge shall be determined in accordance with the maximum delivery capability requested by the customer.

0-999 Cf/hour	\$39.984400
1,000-4,999 Cf/hour	\$79.968800
5,000-24,999 Cf/hour	\$258.000500
25,000 and greater Cf/hour	\$986.281250

**Volumetric Charge**

C-1: \$0.172362 per therm (\$0.215453 GGE)

Distribution Charge: \$0.257866 per therm (\$0.322333 GGE)

**Facilities Charge**

All consumption for Customers that elect to have the Company construct CNG fueling facilities located on Customer's property:

C-2: \$0.294445 per therm (\$0.368056 GGE)

Sales taxes are not included in the above basic charges. The Company is under no obligation to determine if a customer is exempt from taxation. Customers seeking tax exemption must file verification with the Company.

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B. Schomber, President

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Public Utilities, State of New Jersey, dated \_\_\_\_\_

**SOUTH JERSEY GAS COMPANY**

**B.P.U.N.J. No. 14 - GAS**

**Third Revised Sheet No. 105  
Superseding Second Revised Sheet No. 105**

**RIDER "N"  
ENERGY EFFICIENCY TRACKER ("EET")**

**APPLICABLE TO:**

Rate Schedule RSG	-	Residential
Rate Schedule GSG	-	General Service
Rate Schedule GSG-LV	-	General Service- Large Volume
Rate Schedule CTS	-	Comprehensive Transportation Service
Rate Schedule LVS	-	Large Volume Service
Rate Schedule FES	-	Firm Electric Service
Rate Schedule EGS	-	Electric Generation Service
Rate Schedule EGS-LV	-	Electric Generation Service- Large Volume
Rate Schedule IGS	-	Interruptible Gas Service
Rate Schedule ITS	-	Interruptible Transportation Service
Rate Schedule NGV	-	Natural Gas Vehicle

This Rider "N" shall be known as the Energy Efficiency Tracker ("EET"). For financial accounting purposes the Company shall record a return on and a return of investments in energy efficiency programs, as approved by the Board at Docket No. GO09010059, in an Order dated July 24, 2009, Docket No. GO12050363, in an Order dated June 21, 2003, Docket No. GR15010090, in an Order dated August 19, 2015, Docket No. GO18030350, in an Order dated October 29, 2018, Docket No. GR20060436 dated January 27, 2021, and Docket No. GO23120870 dated \_\_\_\_\_, 2024 and recover all incremental operating and maintenance expenses of the programs, subject to the EET. Docket No. GO23120870 was filed in accordance with the Clean Energy Act of 2018 ("CEA") and the Board's Order dated May 24, 2023 in Docket Nos. QO1901040, QO23030150 and QO17091004. Docket No. GO20090618 was filed in accordance with the CEA and the Board's Order dated June 10, 2020 in Docket Nos. QO19010040, QO19060748 and QO171091004. The calculation will use the rate of return as identified in the respective Orders referenced above.

The EET rate will be calculated annually using projected data and subject to a true-up at the end of the EET year with simple interest on net over/under recoveries. Interest associated with over recoveries will be credited against the EET, while interest associated with under recoveries will be charged to the EET. The interest on monthly EET under and over recoveries shall be the interest rate based on the Company's weighted interest rate for the corresponding month obtained on its commercial paper and bank credit lines but shall not exceed the Company's weighted average cost of capital utilized to set rates in its most recent base rate case.

This EET will be effectuated through a volumetric rate applied to customers' bills. The Company shall make an annual EET rate filing in July of each year with a proposed implementation of the revised EET rate in October. Included in the filing will be a list of efficiency programs offered and eligible for recovery under the EET.

The Company shall have the discretion to implement a bill credit or a refund at any time during the EET Year with five (5) days notice to the BPU Staff and the Division of Rate Counsel. The Company shall have the discretion to file a self-implementing EET rate reduction at any time with two (2) weeks notice to the BPU Staff and the Division of Rate Counsel.

Rate Schedules subject to this Rider will be charged the following volumetric rate:

	EEP <u>Legacy Rate</u>	EEP Extension <u>Rate</u>	EEP T2 <u>Rate</u>	Total <u>Tariff Rate</u>
EET Rate per therm	\$0.011894	\$0.026639	\$0.009289	\$0.047822
Applicable NJ Sales Tax	\$0.000788	\$0.001765	\$0.000615	\$0.003168
EET Rate per therm with NJ Sales Tax	<u>\$0.012682</u>	<u>\$0.028404</u>	<u>\$0.009904</u>	<u>\$0.050990</u>

**Issued \_\_\_\_\_  
by South Jersey Gas Company,  
B. Schomber, President**

**Effective with service rendered  
on and after \_\_\_\_\_**

**Filed pursuant to Order in Docket No. \_\_\_\_\_ of the Board of  
Public Utilities, State of New Jersey, dated January 10, 2024**

SOUTH JERSEY GAS COMPANY  
Schedule of Rate Components  
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<b>RESIDENTIAL GAS SERVICE (RSG) - NONHEAT CUSTOMER</b>					
	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b>CUSTOMER CHARGE</b>		9.850000		0.652563	<b>10.502563</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
Base Rate		0.897170		0.059438	0.956608
IIP	B	0.021494	0.000000	0.001424	0.022918
TIC	C	0.000728	0.000000	0.000048	0.000776
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
CIP	M	0.015703	0.000000	0.001040	0.016743
EET	N	0.047822	0.000000	0.003168	0.050990
Balancing Service Charge BS-1	J	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BUY-OUT PRICE (Applicable to Transportation Customers Only)	J				Rate Set Monthly
<b>TOTAL DELIVERY CHARGE</b>		1.153646	0.000000	0.076413	<b>1.230059</b>
<b><u>BGSS: (Applicable To Sales Customers Only)</u></b>	A	0.372009	0.000000	0.024646	<b>0.396655</b>



SOUTH JERSEY GAS COMPANY  
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<b>RESIDENTIAL GAS SERVICE (RSG) - HEAT CUSTOMER</b>					
	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b>CUSTOMER CHARGE</b>		9.850000		0.652563	<b>10.502563</b>
<b>DELIVERY CHARGE (per therm):</b>					
Base Rate		0.897170		0.059438	0.956608
IIP	B	0.021494	0.000000	0.001424	0.022918
TIC	C	0.000728	0.000000	0.000048	0.000776
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
CIP	M	0.120386	0.000000	0.007976	0.128362
EET	N	0.047822	0.000000	0.003168	0.050990
Balancing Service Charge BS-1	J	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BUY-OUT PRICE (Applicable to Transportation Customers Only)	J				Rate Set Monthly
<b>Total Delivery Charge</b>		1.258329	0.000000	0.083349	<b>1.341678</b>
<b>BGSS: (Applicable To Sales Customers Only)</b>	A	0.372009	0.000000	0.024646	<b>0.396655</b>

SOUTH JERSEY GAS COMPANY  
Schedule of Rate Components  
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<b>GENERAL SERVICE (GSG)</b>					
	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b>CUSTOMER CHARGE</b>		37.980000		2.516175	<b>40.496175</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
Base Rate		0.723187		0.047911	0.771098
IIP	B	0.017131	0.000000	0.001135	0.018266
TIC	C	0.000728	0.000000	0.000048	0.000776
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
CIP	M	0.072096	0.000000	0.004776	0.076872
EET	N	0.047822	0.000000	0.003168	0.050990
Balancing Service Charge BS-1	J	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BUY-OUT PRICE (Applicable to Transportation Customers Only)	J				Rate Set Monthly
<b>Total Delivery Charge</b>		1.031693	0.000000	0.068333	<b>1.100026</b>
<b><u>BGSS: (Applicable To Sales Customers Only using less than 5,000 therms annually)</u></b>	A	0.372009	0.000000	0.024646	<b>0.396655</b>
<b><u>BGSS: (Applicable To Sales Customers Only using 5,000 therms annually or greater)</u></b>	A				<b>RATE SET MONTHLY</b>

SOUTH JERSEY GAS COMPANY  
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<b>GENERAL SERVICE-LV (GSG-LV)</b>					
	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b>CUSTOMER CHARGE</b>		247.600000		16.403500	<b>264.003500</b>
<b>D-1 Demand Charge (Mcf)</b>		13.317700		0.882298	<b>14.199998</b>
<b>DELIVERY CHARGE (per therm):</b>					
Base Rate		0.359109		0.023791	0.382900
IIP	B	0.009657	0.000000	0.000640	0.010297
TIC	C	0.000728	0.000000	0.000048	0.000776
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
CIP	M	0.045270	0.000000	0.002999	0.048269
EET	N	0.047822	0.000000	0.003168	0.050990
Balancing Service Charge BS-1	J	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BUY-OUT PRICE (Applicable to Transportation Customers Only)	J				Rate Set Monthly
<b>Total Delivery Charge</b>		0.633315	0.000000	0.041941	<b>0.675256</b>
<b>BGSS: (Applicable Sales Customers Only)</b>	A				<b>RATE SET MONTHLY</b>

SOUTH JERSEY GAS COMPANY  
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**COMPREHENSIVE TRANSPORTATION SERVICE (CTS)**

	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b><u>FIRM</u></b>					
<b><u>CUSTOMER CHARGE</u></b>		820.630000		54.366738	<b>874.996738</b>
<b><u>D-1 Demand Charge (Mcf)</u></b>		34.701100		2.298948	<b>37.000048</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
Base Rate		0.091136		0.006038	0.097174
IIP	B	0.005974	0.000000	0.000396	0.006370
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
<b>Total Delivery Charge</b>		0.251339	0.000000	0.016636	<b>0.267975</b>
Balancing Service Charge BS-1	I	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BS-1 (Opt Out Provision)	I	0.002276	0.000000	0.000151	0.002427
BUY-OUT PRICE					RATE SET MONTHLY
<b><u>LIMITED FIRM</u></b>					
<b><u>CUSTOMER CHARGE</u></b>		500.000000		33.125000	<b>533.125000</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
Base Rate		0.058400		0.003900	0.062300
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
<b>Total Delivery Charge</b>		0.212629	0.000000	0.014102	<b>0.226731</b>
Balancing Service Charge BS-1	I	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BS-1 (Opt Out Provision)	I	0.002276	0.000000	0.000151	0.002427
BUY-OUT PRICE					RATE SET MONTHLY

SOUTH JERSEY GAS COMPANY  
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**LARGE VOLUME SERVICE (LVS)**

	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b><u>FIRM</u></b>					
<b><u>CUSTOMER CHARGE</u></b>		1,148.890000		76.113963	<b>1,225.003963</b>
<b><u>D-1 Demand Charge (Mcf)</u></b>		20.633100		1.366943	<b>22.000043</b>
<b><u>D-2 DEMAND BGSS(Applicable to Sales Customers Only)</u></b>	A	15.469649	0.000000	1.024864	<b>16.494513</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
Base Rate		0.061199		0.004054	0.065253
IIP	B	0.003113	0.000000	0.000206	0.003319
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
<b>Total Delivery Charge</b>		0.218541	0.000000	0.014462	<b>0.233003</b>
Balancing Service Charge BS-1	I	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BS-1 (Opt Out Provision) (Applicable to Transportation Customers Only)	I	0.002276	0.000000	0.000151	0.002427
Balancing Service Charge CASH OUT CHARGE (CREDIT) (Applicable Transportaton Customers Only)	I				RATE SET MONTHLY
<b><u>BGSS: (Applicable Sales Customers Only)</u></b>	A				<b>RATE SET MONTHLY</b>
<b><u>LIMITED FIRM</u></b>					
<b><u>CUSTOMER CHARGE</u></b>		500.000000		33.125000	<b>533.125000</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
Base Rate		0.148587		0.009844	0.158431
IIP	B	0.003113	0.000000	0.000206	0.003319
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
<b>Total Delivery Charge</b>		0.305929	0.000000	0.020252	<b>0.326181</b>
Balancing Service Charge BS-1	I	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BS-1 (Opt Out Provision) (Applicable to Transportation Customers Only)	I	0.002276	0.000000	0.000151	0.002427
BUY-OUT PRICE	I				RATE SET MONTHLY

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<b>FIRM ELECTRIC SALES (FES)</b>					
	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b>WINTER</b>					
<b><u>D-1 DEMAND (MCF) (Rate is negotiated. Shown here is the benchmark rate.)</u></b>		2.897200		0.191900	<b>3.089100</b>
<b><u>D-2 DEMAND BGSS(MCF) (Applicable to Sales Customers Only)</u></b>	A	7.734825	0.000000	0.512432	<b>8.247257</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
Total Delivery Charge		0.154229	0.000000	0.010202	<b>0.164431</b>
<b><u>C-3 All Therms (Rate is negotiated. Shown here is the benchmark rate.)</u></b>		0.162900		0.010800	<b>0.173700</b>
<b><u>C-4 Escalator Rate (To be determined as prescribed in the Company's Tariff)</u></b>					<b>RATE SET MONTHLY</b>
Balancing Service Charge CASH OUT CHARGE (CREDIT) (Applicable to Firm Transportatin Customers Only)	I				RATE SET MONTHLY
<b><u>BGSS: (Applicable To Sales Customers Only)</u></b>	A				<b>RATE SET MONTHLY</b>
<b>SUMMER</b>					
<b><u>D-1 DEMAND (MCF) (Rate is negotiated. Shown here is the benchmark rate.)</u></b>		2.897200		0.191900	<b>3.089100</b>
<b><u>D-2 DEMAND BGSS(MCF) (Applicable to Sales Customers Only)</u></b>	A	7.734825	0.000000	0.512432	<b>8.247257</b>
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	0.025900	0.000000	0.001700	0.027600
EET	N	0.047822	0.000000	0.003168	0.050990
Total Delivery Charge		0.154229	0.000000	0.010202	<b>0.164431</b>
<b><u>C-3 All Therms (Rate is negotiated. Shown here is the benchmark rate.)</u></b>		0.162900		0.010800	<b>0.173700</b>
<b><u>C-4 Escalator Rate (To be determined as prescribed in the Company's Tariff)</u></b>					<b>RATE SET MONTHLY</b>
Balancing Service Charge CASH OUT CHARGE (CREDIT) (Applicable to Firm Transportatin Customers Only)	I				RATE SET MONTHLY
<b><u>BGSS: (Applicable To Sales Customers Only)</u></b>	A				<b>RATE SET MONTHLY</b>

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**ELECTRIC GENERATION SERVICE (EGS) - RESIDENTIAL**

	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b><u>CUSTOMER CHARGE</u></b>		9.850000		0.652563	<b>10.502563</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
Base Rate		0.180446		0.011955	0.192401
IIP	B	0.004178	0.000000	0.000277	0.004455
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
Balancing Service Charge BS-1	J	0.064322	0.000000	0.004261	0.068583
<b>Total Delivery Charge</b>		0.403175	0.000000	0.026695	<b>0.429870</b>
<b><u>BGSS: (Applicable To Sales Customers Only)</u></b>	A	0.372009	0.000000	0.024646	<b>0.396655</b>

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<u>ELECTRIC GENERATION SERVICE (EGS) - COMMERCIAL/INDUSTRIAL</u>					
	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b><u>CUSTOMER CHARGE</u></b>		86.280000		5.716050	<b>91.996050</b>
<b><u>D-1 DEMAND (MCF)</u></b>		9.144200		0.605803	<b>9.750003</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
Base Rate - Winter Season (Nov - Mar)		0.168130		0.011139	0.179269
Base Rate - Summer Season (Apr - Oct)		0.138130		0.009151	0.147281
IIP	B	0.004178	0.000000	0.000277	0.004455
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
Balancing Service Charge BS-1	J	0.064322	0.000000	0.004261	0.068583
<b>Total Delivery Charge - Winter Season</b>		0.390859	0.000000	0.025879	<b>0.416738</b>
<b>Total Delivery Charge - Summer Season</b>		0.360859	0.000000	0.023891	<b>0.384750</b>
<b><u>BGSS: (Applicable To Sales Customers Only)</u></b>	A				<b>RATE SET MONTHLY</b>



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<b><u>ELECTRIC GENERATION SERVICE-LV (EGS-LV)</u></b>					
<b><u>FIRM</u></b>	<b><u>RIDER</u></b>	<b><u>RATE</u></b>	<b><u>PUA</u></b>	<b><u>NJ SALES TAX</u></b>	<b><u>TARIFF RATE</u></b>
<b><u>CUSTOMER CHARGE</u></b>		820.630000		54.366738	<b>874.996738</b>
<b><u>D-1 DEMAND (MCF) (Rate is negotiated. Shown here is the benchmark rate.)</u></b>		27.611897		1.829288	<b>29.441185</b>
<b><u>D-2 DEMAND BGSS (MCF) (Applicable to Sales Customers Only)</u></b>	A	15.546022	0.000000	1.029924	<b>16.575946</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
IIP	B	0.000532	0.000000	0.000035	0.000567
SBC:					
RAC	E, G	0.055318	0.000000	0.003665	0.058983
CLEP	E, K	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
<b>Total Delivery Charge</b>		0.154761	0.000000	0.010237	<b>0.164998</b>
Balancing Service Charge BS-1	I	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BS-1 (Opt Out Provision)	I	0.002276	0.000000	0.000151	0.002427
Balancing Service Charge CASH OUT CHARGE (CREDIT) (Applicable to Firm Transportatin Customers Only)	I				RATE SET MONTHLY
<b><u>BGSS: (Applicable To Sales Customers Only)</u></b>	A				<b>RATE SET MONTHLY</b>
<b><u>LIMITED FIRM</u></b>					
<b><u>D-2 DEMAND BGSS(MCF) (Applicable to Sales Customers Only)</u></b>	A	7.734825	0.000000	0.512432	<b>8.247257</b>
<b><u>DELIVERY CHARGE (per therm):</u></b>					
SBC:					
RAC	E, K	0.055318	0.000000	0.003665	0.058983
CLEP	E, G	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
<b>Total Delivery Charge</b>		0.154229	0.000000	0.010202	<b>0.164431</b>
<b><u>C-3 (Rate is negotiated. Shown here is the benchmark rate.)</u></b>		0.162900		0.010800	<b>0.173700</b>
Balancing Service Charge BS-1	I	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BS-1 (Opt Out Provision)	I	0.002276	0.000000	0.000151	0.002427
Balancing Service Charge CASH OUT CHARGE (CREDIT) (Applicable to Firm Transportatin Customers Only)	I				RATE SET MONTHLY
<b><u>BGSS: (Applicable To Sales Customers Only)</u></b>	A				<b>RATE SET MONTHLY</b>

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<u>YARD LIGHTING SERVICE (YLS)</u>					
	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
MONTHLY CHARGE / INSTALL		15.910065		1.054042	<b>16.964107</b>
<u>STREET LIGHTING SERVICE (SLS)</u>					
MONTHLY CHARGE / INSTALL		19.107938		1.265901	<b>20.373839</b>
<u>INTERRUPTIBLE GAS SALES (IGS)</u>					
Commodity					Rate Set Monthly
SBC:					
RAC	E, K	0.055318	0.000000	0.003665	0.058983
USF	E	0.025900	0.000000	0.001700	0.027600
Total SBC:		0.081218	0.000000	0.005365	0.086583
EET	N	0.047822	0.000000	0.003168	0.050990

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<u>INTERRUPTIBLE TRANSPORTATION (ITS)</u>					
	<u>RIDER</u>	<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<b><u>CUSTOMER CHARGE</u></b>		<b>500.000000</b>		<b>33.125000</b>	<b>533.125000</b>
<b><u>TRANSPORTATION CHARGE A</u></b>		<b>0.078400</b>		<b>0.005200</b>	<b>0.083600</b>
SBC:					
RAC	E, K	0.055318	0.000000	0.003665	0.058983
CLEP	E, G	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC:		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
<b><u>TRANSPORTATION CHARGE B</u></b>		<b>0.143200</b>		<b>0.009500</b>	<b>0.152700</b>
SBC:					
RAC	E, K	0.055318	0.000000	0.003665	0.058983
CLEP	E, G	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC:		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
<b><u>TRANSPORTATION CHARGE C</u></b>		<b>0.203200</b>		<b>0.013500</b>	<b>0.216700</b>
SBC:					
RAC	E, K	0.055318	0.000000	0.003665	0.058983
CLEP	E, G	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC:		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990

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<u>NATURAL GAS VEHICLE (NGV)</u>					
		<u>RATE</u>	<u>PUA</u>	<u>NJ SALES TAX</u>	<u>TARIFF RATE</u>
<u>COMPANY OPERATED FUELING STATIONS</u>					
<u>DELIVERY CHARGE (per therm):</u>					
IIP	B	0.007438	0.000000	0.000493	0.007931
SBC					
RAC	E, K	0.055318	0.000000	0.003665	0.058983
CLEP	E, G	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC:		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
Total Delivery Charge		0.161667	0.000000	0.010695	<b>0.172362</b>
<u>DISTRIBUTION CHARGE</u>		0.241844	0.000000	0.0160220	<b>0.257866</b>
<u>COMPRESSION CHARGE</u>		0.656506	0.000000	0.043494	<b>0.700000</b>
Balancing Service Charge BS-1	I	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BS-1 (Opt Out Provision) (Applicable for Transportation Customers Only)	I	0.002276	0.000000	0.000151	0.002427
Balancing Service Charge BS-1	J	0.064322	0.000000	0.004261	0.068583
<u>BGSS: (Applicable To Sales Customers Only)</u>	A				<b>RATE SET MONTHLY</b>
<u>CUSTOMER OPERATED FUELING STATIONS</u>					
<u>CUSTOMER CHARGE</u>					
0 - 999 CF/hour		37.500000		2.484400	<b>39.984400</b>
1,000 - 4,999 CF/hour		75.000000		4.968800	<b>79.968800</b>
5,000 - 24,999 CF/hour		241.970000		16.030500	<b>258.000500</b>
25,000 or Greater CF/hour		925.000000		61.281250	<b>986.281250</b>
<u>DELIVERY CHARGE (per therm):</u>					
IIP	B	0.007438	0.000000	0.000493	0.007931
SBC					
RAC	E, K	0.055318	0.000000	0.003665	0.058983
CLEP	E, G	0.025189	0.000000	0.001669	0.026858
USF	E	<u>0.025900</u>	<u>0.000000</u>	<u>0.001700</u>	<u>0.027600</u>
Total SBC:		0.106407	0.000000	0.007034	0.113441
EET	N	0.047822	0.000000	0.003168	0.050990
Total Delivery Charge		0.161667	0.000000	0.010695	<b>0.172362</b>
<u>DISTRIBUTION CHARGE</u>		0.241844	0.000000	0.016022	<b>0.257866</b>
Balancing Service Charge BS-1	I	0.064322	0.000000	0.004261	0.068583
Balancing Service Charge BS-1 (Opt Out Provision) (Applicable for Transportation Customers Only)	I	0.002276	0.000000	0.000151	0.002427
Balancing Service Charge BS-1	J	0.064322	0.000000	0.004261	0.068583
<u>BGSS: (Applicable To Sales Customers Only)</u>	A				<b>RATE SET MONTHLY</b>
<u>Facilities Charge (Applicable only to Customers that elect the Company construct Compressed Natural Gas ("CNG") fueling Facilities located on Customer's property)</u>		0.276150		0.018295	<b>0.294445</b>

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**Heat Residential Rate Schedule:**

	<i>RSG FSS</i>	<i>RSG-FTS</i>	<i>Difference</i>
BGSS	0.396655	0.000000	0.396655
Base Rate	0.956608	0.956608	0.000000
IIP	0.022918	0.022918	0.000000
CLEP	0.026858	0.026858	0.000000
RAC	0.058983	0.058983	0.000000
CIP	0.128362	0.128362	0.000000
USF	0.027600	0.027600	0.000000
TIC	0.000776	0.000776	0.000000
EET	0.050990	0.050990	0.000000
BSC "J" BS-1	0.068583	0.068583	0.000000
<b>Price to Compare</b>	<b>1.738333</b>	<b>1.341678</b>	<b>0.396655</b>

**NonHeat Residential Rate Schedule:**

	<i>RSG FSS</i>	<i>RSG-FTS</i>	<i>Difference</i>
BGSS	0.396655	0.000000	0.396655
CIP	0.016743	0.016743	0.000000
Base Rate	0.956608	0.956608	0.000000
IIP	0.022918	0.022918	0.000000
CLEP	0.026858	0.026858	0.000000
RAC	0.058983	0.058983	0.000000
USF	0.027600	0.027600	0.000000
TIC	0.000776	0.000776	0.000000
EET	0.050990	0.050990	0.000000
BSC "J" BS-1	0.068583	0.068583	0.000000
<b>Price to Compare</b>	<b>1.626714</b>	<b>1.230059</b>	<b>0.396655</b>

**GSG**  
(Under 5,000 therms annually)

	<i>GSG FSS</i>	<i>GSG-FTS</i>	<i>Difference</i>
BGSS	0.396655	0.000000	0.396655
CIP	0.076872	0.076872	0.000000
Base Rates	0.771098	0.771098	0.000000
IIP	0.018266	0.018266	0.000000
CLEP	0.026858	0.026858	0.000000
RAC	0.058983	0.058983	0.000000
USF	0.027600	0.027600	0.000000
TIC	0.000776	0.000776	0.000000
EET	0.050990	0.050990	0.000000
BSC "J" BS-1	0.068583	0.068583	0.000000
<b>Price to Compare</b>	<b>1.496681</b>	<b>1.100026</b>	<b>0.396655</b>

**GSG**  
(5,000 therms annually or greater)

	<i>GSG FSS</i>	<i>GSG-FTS</i>	<i>Difference</i>
BGSS	0.454703	0.000000	0.454703
CIP	0.076872	0.076872	0.000000
Base Rates	0.771098	0.771098	0.000000
IIP	0.018266	0.018266	0.000000
CLEP	0.026858	0.026858	0.000000
RAC	0.058983	0.058983	0.000000
USF	0.027600	0.027600	0.000000
TIC	0.000776	0.000776	0.000000
EET	0.050990	0.050990	0.000000
BSC "J" BS-1	0.068583	0.068583	0.000000
<b>Price to Compare</b>	<b>1.554729</b>	<b>1.100026</b>	<b>0.454703</b>

**GSG-LV***Prior to 7/15/97*

	<i>GSG-LV FSS</i>	<i>GSG-LV-FTS</i>	<i>Difference</i>
BGSS	0.454703	0.000000	0.454703
CIP	0.048269	0.048269	0.000000
Base Rates	0.382900	0.382900	0.000000
IIP	0.010297	0.010297	0.000000
CLEP	0.026858	0.026858	0.000000
RAC	0.058983	0.058983	0.000000
USF	0.027600	0.027600	0.000000
TIC	0.000776	0.000776	0.000000
EET	0.050990	0.050990	0.000000
BSC "J" BS-1	0.068583	0.068583	0.000000
<b>Price to Compare</b>	<b>1.129959</b>	<b>0.675256</b>	<b>0.454703</b>

SJG Energy Efficiency Program Minimum  
Filing Requirements for Rate Filing  
Minimum Filing Requirements (MFRs)

1. Information on direct FTE employment impacts, including a breakdown by each of the Board approved SJG EE programs. The Company will not be responsible for addressing the level of employment activity for HVAC and/or HPES contractors that are hired by customers unless those contractors are hired by SJG.
2. A monthly revenue requirement calculation based on EE Program expenditures, including the investment and cost components showing the actual monthly revenue requirement for each of the past 12 months or clause-review period, as well as supporting calculations, including the information related to the tax rate and revenue multiplier used in the revenue requirement calculation. The utility shall provide electronic copies of such supporting information, with all inputs and formulae intact, where applicable.
3. For the review period, actual clause revenues, by month and by rate class recorded under the EE Program.
4. Monthly beginning and ending clause deferred balances related to the EE Program, as well as the average deferred balance, net of tax, for the actual 12-month period and forecast period.
5. The interest rate used each month for over/under deferred balance recoveries related to the EE Program, and all supporting documentation and calculations for the interest rate.
6. The interest expense to be charged or credited to ratepayers each month.
7. A schedule showing budgeted versus actual EE Program costs by the following categories: administrative (all utility costs); marketing/sales; training; rebates/incentives, including inspections and quality control; program implementation (all contract costs); evaluation; and any other costs. To the extent that the Board directs New Jersey's Clean Energy Program to report additional categories, the utility shall provide additional categories, as applicable.
8. A schedule showing budgeted versus actual EE Program revenues.
9. The monthly journal entries utilized (including the accounts and account numbers) relating to regulatory asset and deferred O&M expenses related to the EE Program for the actual 12-month review period.
10. Supporting details for all administrative costs related to the EE Program included in the revenue requirement.
11. Information supporting the carrying cost used for the unamortized costs of the EE program.
12. Number of program participants for each of the Board approved SJG EE programs, including a breakdown by sub-program, if applicable.

13. Estimated demand and energy savings for each of the Board approved SJG EE programs, including a breakdown by sub-program, if applicable.
14. Estimated emissions reductions for each of the Board approved SJG EE programs, including a breakdown by sub-program, if applicable.
15. Testimony supporting the annual true-up petition.
16. If the Company is filing for an increase in rates, the Company shall include a draft public notice with the annual true-up petition and proposed publication dates.
17. For programs that provide incentives for conversion of energy utilization to natural gas from other energy sources (e.g., converting from electric to gas furnaces), the Company shall identify:
  - i. the number of such projects;
  - ii. an estimate of the increase in annual gas demand and energy associated with these projects; and
  - iii. the avoided use of electricity and/or other fuels.
18. In areas where gas and electric service territories overlap, the Company shall provide:
  - i. The number of projects in progress and completed.
    - a. For each project, identify which utility is the lead utility providing the program services and the partner utility with whom the services were coordinated.
19. Tariff pages in clean and redline versions.
20. Net impact of the proposed rate changes.
21. The impact of the proposed rate changes on the bill of a typical residential customer with workpapers supporting this calculation.

	<b>Total Program Budget</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
	<b>\$ 307,791,324</b>			
<b><u>DIRECT PROGRAM INVESTMENTS</u></b>				
	<u>Sum of Years 1-3</u>			
Annual Investment	\$ 166,889,578	\$ 23,032,634	\$ 70,669,695	\$ 73,187,249
Cumulative Investment		\$ 23,032,634	\$ 93,702,329	\$ 166,889,578
Less Accumulated Amortization		\$ (671,785)	\$ (6,802,990)	\$ (20,137,533)
Less Accumulated Deferred Tax		\$ (6,285,635)	\$ (24,427,404)	\$ (41,252,000)
Net Investment		\$ 16,075,214	\$ 62,471,934	\$ 105,500,046
Rate of Return (Pre Tax)		8.96%	8.96%	8.96%
Required Net Operating Income		\$ 423,104	\$ 3,729,797	\$ 7,724,796
	<u>Sum of Years 1-3</u>			
Incremental O&M Pre Tax	\$ 2,844,723	\$ 541,564	\$ 1,138,243	\$ 1,164,916
Pre Tax Amortization		\$ 671,785	\$ 6,131,205	\$ 13,334,542
Operating Income		\$ 1,636,453	\$ 10,999,245	\$ 22,224,254
Revenue Factor		1.01643	1.01643	1.01643
Revenue Requirement Excluding SUT		\$ 1,663,337	\$ 11,179,941	\$ 22,589,354
<b><u>OBR PROGRAM INVESTMENTS</u></b>				
	<u>Sum of Years 1-3</u>			
Annual Investment	\$ 125,426,325	\$ 23,080,623	\$ 49,480,552	\$ 52,865,150
Less OBR Repayments		\$ (950,603)	\$ (7,039,869)	\$ (14,278,464)
OBR Write-Off		\$ -	\$ -	\$ -
Net Investment		\$ 22,130,020	\$ 42,440,682	\$ 38,586,686
Cumulative Investment		\$ 22,130,020	\$ 64,570,702	\$ 103,157,388
Rate of Return (Pre Tax)		8.96%	8.96%	8.96%
Required Net Operating Income		\$ 584,246	\$ 4,094,391	\$ 7,713,573
	<u>Sum of Years 1-3</u>			
Incremental O&M Pre Tax	\$ 12,630,698	\$ 1,784,277	\$ 5,369,578	\$ 5,476,843
Operating Income		\$ 2,368,523	\$ 9,463,969	\$ 13,190,415
Revenue Factor		1.01643	1.01643	1.01643
Revenue Requirement Excluding SUT		<u>\$ 2,407,434</u>	<u>\$ 9,619,443</u>	<u>\$ 13,407,108</u>
<b><u>RATE CALCULATION</u></b>				
Revenue Requirement For Direct Investments Excluding SUT		\$ 1,663,337	\$ 11,179,941	\$ 22,589,354
Revenue Requirement For OBRs Programs Excluding SUT		\$ 2,407,434	\$ 9,619,443	\$ 13,407,108
OBR Write-Off Recovery		\$ -	\$ -	\$ -
Prior Year (Over)/Under Recovered Deferred Balance Including Carrying Costs		\$ -	\$ 582,599	\$ 1,845,316
Total Revenue Requirements		\$ 4,070,770	\$ 21,381,983	\$ 37,841,777
Therms		438,214,235	559,523,915	559,523,915
Rate Per Therm, Excluding SUT		\$ 0.009289	\$ 0.038215	\$ 0.067632
Rate Per Therm, Including SUT		<u>\$ 0.009904</u>	<u>\$ 0.040747</u>	<u>\$ 0.072113</u>



	Year 4	Year 5	Year 6	Year 7	Year 8
<b><u>DIRECT PROGRAM INVESTMENTS</u></b>					
Annual Investment	\$ -	\$ -	\$ -	\$ -	\$ -
Cumulative Investment	\$ 166,889,578	\$ 166,889,578	\$ 166,889,578	\$ 166,889,578	\$ 166,889,578
Less Accumulated Amortization	\$ (36,826,490)	\$ (53,515,448)	\$ (70,204,406)	\$ (86,893,364)	\$ (103,582,322)
Less Accumulated Deferred Tax	\$ (36,560,734)	\$ (31,869,468)	\$ (27,178,202)	\$ (22,486,936)	\$ (17,795,670)
Net Investment	\$ 93,502,354	\$ 81,504,662	\$ 69,506,970	\$ 57,509,279	\$ 45,511,587
Rate of Return (Pre Tax)	8.96%	8.96%	8.96%	8.96%	8.96%
Required Net Operating Income	\$ 8,870,516	\$ 7,795,523	\$ 6,720,530	\$ 5,645,537	\$ 4,570,543
Incremental O&M Pre Tax	\$ -	\$ -	\$ -	\$ -	\$ -
Pre Tax Amortization	\$ 16,688,958	\$ 16,688,958	\$ 16,688,958	\$ 16,688,958	\$ 16,688,958
Operating Income	\$ 25,559,474	\$ 24,484,481	\$ 23,409,488	\$ 22,334,494	\$ 21,259,501
Revenue Factor	1.01643	1.01643	1.01643	1.01643	1.01643
Revenue Requirement Excluding SUT	\$ 25,979,365	\$ 24,886,712	\$ 23,794,059	\$ 22,701,405	\$ 21,608,752
<b><u>OBR PROGRAM INVESTMENTS</u></b>					
Annual Investment	\$ -	\$ -	\$ -	\$ -	\$ -
Less OBR Repayments	\$ (17,696,566)	\$ (17,696,566)	\$ (17,696,566)	\$ (17,696,566)	\$ (16,752,160)
OBR Write-Off	\$ (109,994)	\$ (109,994)	\$ (109,994)	\$ (109,994)	\$ (109,994)
Net Investment	\$ (17,806,560)	\$ (17,806,560)	\$ (17,806,560)	\$ (17,806,560)	\$ (16,862,155)
Cumulative Investment	\$ 85,350,828	\$ 67,544,268	\$ 49,737,708	\$ 31,931,148	\$ 15,068,994
Rate of Return (Pre Tax)	8.96%	8.96%	8.96%	8.96%	8.96%
Required Net Operating Income	\$ 8,378,690	\$ 6,783,223	\$ 5,187,755	\$ 3,592,287	\$ 2,015,623
Incremental O&M Pre Tax	\$ -	\$ -	\$ -	\$ -	\$ -
Operating Income	\$ 8,378,690	\$ 6,783,223	\$ 5,187,755	\$ 3,592,287	\$ 2,015,623
Revenue Factor	1.01643	1.01643	1.0164	1.0164	1.0164
Revenue Requirement Excluding SUT	\$ 8,516,335	\$ 6,894,657	\$ 5,272,979	\$ 3,651,301	\$ 2,048,736
<b><u>RATE CALCULATION</u></b>					
Revenue Requirement For Direct Investments Excluding SUT	\$ 25,979,365	\$ 24,886,712	\$ 23,794,059	\$ 22,701,405	\$ 21,608,752
Revenue Requirement For OBRs Programs Excluding SUT	\$ 8,516,335	\$ 6,894,657	\$ 5,272,979	\$ 3,651,301	\$ 2,048,736
OBR Write-Off Recovery	\$ 109,994	\$ 109,994	\$ 109,994	\$ 109,994	\$ 109,994
Prior Year (Over)/Under Recovered Deferred Balance Includ	\$ 1,841,826	\$ (289,651)	\$ (675,536)	\$ (453,426)	\$ (385,618)
Total Revenue Requirements	\$ 36,447,521	\$ 31,601,713	\$ 28,501,496	\$ 26,009,274	\$ 23,381,864
Therms	559,523,915	559,523,915	559,523,915	559,523,915	559,523,915
Rate Per Therm, Excluding SUT	\$ 0.065140	\$ 0.056480	\$ 0.050939	\$ 0.046485	\$ 0.041789
Rate Per Therm, Including SUT	\$ 0.069456	\$ 0.060222	\$ 0.054314	\$ 0.049565	\$ 0.044558

	Year 9	Year 10	Year 11	Year 12	Year 13
<b><u>DIRECT PROGRAM INVESTMENTS</u></b>					
Annual Investment	\$ -	\$ -	\$ -	\$ -	\$ -
Cumulative Investment	\$ 166,889,578	\$ 166,889,578	\$ 166,889,578	\$ 166,889,578	\$ 166,889,578
Less Accumulated Amortization	\$ (120,271,280)	\$ (136,960,237)	\$ (152,977,410)	\$ (163,535,163)	\$ (166,889,578)
Less Accumulated Deferred Tax	\$ (13,104,404)	\$ (8,413,138)	\$ (3,910,710)	\$ (942,926)	\$ (0)
Net Investment	\$ 33,513,895	\$ 21,516,203	\$ 10,001,458	\$ 2,411,489	\$ 0
Rate of Return (Pre Tax)	8.96%	8.96%	8.96%	8.96%	8.96%
Required Net Operating Income	\$ 3,495,550	\$ 2,420,557	\$ 1,355,180	\$ 490,094	\$ 60,019
Incremental O&M Pre Tax	\$ -	\$ -	\$ -	\$ -	\$ -
Pre Tax Amortization	\$ 16,688,958	\$ 16,688,958	\$ 16,017,173	\$ 10,557,753	\$ 3,354,416
Operating Income	\$ 20,184,508	\$ 19,109,515	\$ 17,372,352	\$ 11,047,846	\$ 3,414,435
Revenue Factor	1.01643	1.01643	1.01643	1.01643	1.01643
Revenue Requirement Excluding SUT	\$ 20,516,099	\$ 19,423,446	\$ 17,657,746	\$ 11,229,340	\$ 3,470,527
<b><u>OBR PROGRAM INVESTMENTS</u></b>					
Annual Investment	\$ -	\$ -	\$ -	\$ -	\$ -
Less OBR Repayments	\$ (10,712,046)	\$ (3,538,022)	\$ (143,943)	\$ (94,791)	\$ (30,220)
OBR Write-Off	\$ (109,994)	\$ (109,994)	\$ (109,994)	\$ (109,994)	\$ (109,994)
Net Investment	\$ (10,822,041)	\$ (3,648,016)	\$ (253,937)	\$ (204,785)	\$ (140,215)
Cumulative Investment	\$ 4,246,953	\$ 598,937	\$ 344,999	\$ 140,215	\$ 0
Rate of Return (Pre Tax)	8.96%	8.96%	8.96%	8.96%	8.96%
Required Net Operating Income	\$ 773,666	\$ 148,668	\$ 41,163	\$ 20,506	\$ 5,269
Incremental O&M Pre Tax	\$ -	\$ -	\$ -	\$ -	\$ -
Operating Income	\$ 773,666	\$ 148,668	\$ 41,163	\$ 20,506	\$ 5,269
Revenue Factor	1.0164	1.0164	1.0164	1.0164	1.0164
Revenue Requirement Excluding SUT	\$ 786,376	\$ 151,111	\$ 41,839	\$ 20,843	\$ 5,356
<b><u>RATE CALCULATION</u></b>					
Revenue Requirement For Direct Investments Excluding SUT	\$ 20,516,099	\$ 19,423,446	\$ 17,657,746	\$ 11,229,340	\$ 3,470,527
Revenue Requirement For OBRs Programs Excluding SUT	\$ 786,376	\$ 151,111	\$ 41,839	\$ 20,843	\$ 5,356
OBR Write-Off Recovery	\$ 109,994	\$ 109,994	\$ 109,994	\$ 109,994	\$ 109,994
Prior Year (Over)/Under Recovered Deferred Balance Includ	\$ (404,230)	\$ (376,041)	\$ (298,935)	\$ (308,563)	\$ (842,945)
Total Revenue Requirements	\$ 21,008,239	\$ 19,308,510	\$ 17,510,644	\$ 11,051,615	\$ 2,742,932
Therms	559,523,915	559,523,915	559,523,915	559,523,915	559,523,915
Rate Per Therm, Excluding SUT	\$ 0.037547	\$ 0.034509	\$ 0.031296	\$ 0.019752	\$ 0.004902
Rate Per Therm, Including SUT	\$ 0.040034	\$ 0.036795	\$ 0.033369	\$ 0.021061	\$ 0.005227

TEMPLATE UTILITY WORKPAPERS

Table of Contents	
Tab name	Description
Performance Metrics	Annual Forecasted versus Achieved energy savings, budget and cost to achieve snapshot
Program Summary	Summary of Forecasted and Achieved program-level data by program year
Measure Summary	Summary of Forecasted and Achieved measure-level data by program year
Appendix A	Program Participants & Energy Savings by Program Year
Appendix B	Program Budgets and Costs by Program Year
Appendix C	Total Budget Summary, Including Annual Budget Summary and Joint Budgets with Partner Utilities
Appendix D	Forecasted Average Cost to Achieve Each Unit of Energy Savings in Each Sector
Appendix E	Benefit-Cost Test Results by Program and Sector
Appendix F	Quantitative Performance Indicators by Program Year
Appendix G	Additional Utility-Led Initiatives
Appendix H	Measure Incentive Ranges
Assumptions	Program and Portfolio Assumptions
Abbreviations & References	Abbreviations and References for all the sources used in the model calculations.



Program Summary Worksheet (Table 1)

Rows

Sector	Program Name	Program Year
Residential	Behavioral	T1 Total
	Behavioral	T2 Total
	Behavioral	T3 Total
	Income Qualified	T1 Total
	Income Qualified	T2 Total
	Income Qualified	T3 Total
	Energy Efficient Proc	T1 Total
	Energy Efficient Proc	T2 Total
	Energy Efficient Proc	T3 Total
	Whole Home	T1 Total
	Whole Home	T2 Total
	Whole Home	T3 Total
	Multifamily	T1 Total
	Multifamily	T2 Total
	Multifamily	T3 Total
Commercial and Industrial	Energy Solutions	T1 Total
	Energy Solutions	T2 Total
	Energy Solutions	T3 Total
	Direct Install	T1 Total
	Direct Install	T2 Total
	Direct Install	T3 Total
	Prescriptive and Cus	T1 Total
	Prescriptive and Cus	T2 Total
	Prescriptive and Cus	T3 Total
Utility Led	Building Decarbonizi	T1 Total
	Building Decarbonizi	T2 Total
	Building Decarbonizi	T3 Total
	Demand Response	T1 Total
	Demand Response	T2 Total
	Demand Response	T3 Total
	Next Generation Sav	T1 Total
	Next Generation Sav	T2 Total
	Next Generation Sav	T3 Total
	Other Portfolio	T1 Total
	Other Portfolio	T2 Total
	Other Portfolio	T3 Total
	Total	T1 Total
	Total	T2 Total
	Total	T3 Total

Columns

NUCT Benefit Cost Ratio (\$)
Cost To Achieve (Achieved) \$/Lifetime therms
Cost To Achieve (Achieved) \$/Lifetime kWh
Cost To Achieve (Forecasted) \$/Lifetime therms
Cost To Achieve (Forecasted) \$/Lifetime kWh
Total Costs (\$) Achieved
Total Costs (\$) Forecasted
Net Annual Achieved Gas Savings (MMBtu)
Net Annual Forecasted Gas Savings (MMBtu)

Program Summary Worksheet (Table 2)

Rows

Sector	Program Name	Program Year
Residential	Behavioral	PY1
Residential	Behavioral	PY2
Residential	Behavioral	PY3
Residential	Behavioral	PY4
Residential	Behavioral	PY5
Residential	Behavioral	PY6
Residential	Behavioral	PY7
Residential	Behavioral	PY8
Residential	Behavioral	PY9
Residential	Income Qualified	PY1
Residential	Income Qualified	PY2
Residential	Income Qualified	PY3
Residential	Income Qualified	PY4
Residential	Income Qualified	PY5
Residential	Income Qualified	PY6
Residential	Income Qualified	PY7
Residential	Income Qualified	PY8
Residential	Income Qualified	PY9
Residential	Energy Efficient Prod	PY1
Residential	Energy Efficient Prod	PY2
Residential	Energy Efficient Prod	PY3
Residential	Energy Efficient Prod	PY4
Residential	Energy Efficient Prod	PY5
Residential	Energy Efficient Prod	PY6
Residential	Energy Efficient Prod	PY7
Residential	Energy Efficient Prod	PY8
Residential	Energy Efficient Prod	PY9
Residential	Whole Home	PY1
Residential	Whole Home	PY2
Residential	Whole Home	PY3
Residential	Whole Home	PY4
Residential	Whole Home	PY5
Residential	Whole Home	PY6
Residential	Whole Home	PY7
Residential	Whole Home	PY8
Residential	Whole Home	PY9
Multifamily	Multifamily	PY1
Multifamily	Multifamily	PY2
Multifamily	Multifamily	PY3
Multifamily	Multifamily	PY4
Multifamily	Multifamily	PY5
Multifamily	Multifamily	PY6
Multifamily	Multifamily	PY7
Multifamily	Multifamily	PY8
Multifamily	Multifamily	PY9
Commercial and Industrial	Energy Solutions	PY1
Commercial and Industrial	Energy Solutions	PY2
Commercial and Industrial	Energy Solutions	PY3
Commercial and Industrial	Energy Solutions	PY4
Commercial and Industrial	Energy Solutions	PY5
Commercial and Industrial	Energy Solutions	PY6
Commercial and Industrial	Energy Solutions	PY7
Commercial and Industrial	Energy Solutions	PY8
Commercial and Industrial	Energy Solutions	PY9
Commercial and Industrial	Direct Install	PY1
Commercial and Industrial	Direct Install	PY2
Commercial and Industrial	Direct Install	PY3
Commercial and Industrial	Direct Install	PY4
Commercial and Industrial	Direct Install	PY5
Commercial and Industrial	Direct Install	PY6
Commercial and Industrial	Direct Install	PY7
Commercial and Industrial	Direct Install	PY8
Commercial and Industrial	Direct Install	PY9
Commercial and Industrial	Prescriptive and Cui	PY1
Commercial and Industrial	Prescriptive and Cui	PY2
Commercial and Industrial	Prescriptive and Cui	PY3
Commercial and Industrial	Prescriptive and Cui	PY4
Commercial and Industrial	Prescriptive and Cui	PY5
Commercial and Industrial	Prescriptive and Cui	PY6
Commercial and Industrial	Prescriptive and Cui	PY7
Commercial and Industrial	Prescriptive and Cui	PY8
Commercial and Industrial	Prescriptive and Cui	PY9
Utility Led	Building Decarboniza	PY1
Utility Led	Building Decarboniza	PY2
Utility Led	Building Decarboniza	PY3
Utility Led	Building Decarboniza	PY4
Utility Led	Building Decarboniza	PY5
Utility Led	Building Decarboniza	PY6
Utility Led	Building Decarboniza	PY7
Utility Led	Building Decarboniza	PY8
Utility Led	Building Decarboniza	PY9
Utility Led	Demand Response	PY1
Utility Led	Demand Response	PY2
Utility Led	Demand Response	PY3
Utility Led	Demand Response	PY4
Utility Led	Demand Response	PY5
Utility Led	Demand Response	PY6
Utility Led	Demand Response	PY7
Utility Led	Demand Response	PY8
Utility Led	Demand Response	PY9
Utility Led	Next Generation Sav	PY1
Utility Led	Next Generation Sav	PY2
Utility Led	Next Generation Sav	PY3
Utility Led	Next Generation Sav	PY4
Utility Led	Next Generation Sav	PY5
Utility Led	Next Generation Sav	PY6
Utility Led	Next Generation Sav	PY7
Utility Led	Next Generation Sav	PY8
Utility Led	Next Generation Sav	PY9
Other	Other Portfolio	PY1
Other	Other Portfolio	PY2
Other	Other Portfolio	PY3
Other	Other Portfolio	PY4
Other	Other Portfolio	PY5
Other	Other Portfolio	PY6
Other	Other Portfolio	PY7
Other	Other Portfolio	PY8
Other	Other Portfolio	PY9
TOTAL	TOTAL Portfolio	PY1
TOTAL	TOTAL Portfolio	PY2
TOTAL	TOTAL Portfolio	PY3
TOTAL	TOTAL Portfolio	PY4
TOTAL	TOTAL Portfolio	PY5
TOTAL	TOTAL Portfolio	PY6
TOTAL	TOTAL Portfolio	PY7
TOTAL	TOTAL Portfolio	PY8
TOTAL	TOTAL Portfolio	PY9

Columns

Customers and Participation			Expected Annual Savings																Annual Savings (Achieved)																Budget (Forecasted)																Costs (Achieved)																Cost to Achieve (Forecasted)																New Jersey Cost Test Results (forecasted)																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																				
Eligible Customers	Revised Participation	Achieved Participation	Gross Annual On-Peak Energy Savings (kWh)	Net Annual Forecasted On-Peak Energy Savings (kWh)	Gross Annual Forecasted On-Peak Energy Savings (kWh)	Net Annual Forecasted Off-Peak Energy Savings (MMBtu)	Gross Annual Forecasted Off-Peak Energy Savings (MMBtu)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings 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Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Off-Peak Energy Savings (kWh)	Gross Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Capacity Savings (kW)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (peak-day)	Gross Annual Forecasted Energy Savings (peak-day)	Net Annual Forecasted Energy Savings (therm)	Gross Annual Forecasted Energy Savings (therm)	Net Annual Forecasted Energy Savings (kWh)	Gross Annual

## Columns

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## Appendix A Worksheet

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## Appendix B Worksheet

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Appendix C: Total Budget Summary, Including Annual Budget Summary and Joint Budgets with Partner Utilities												
T2 Program												
Program Year	Total Budget Summary	Lead Program Budget										
Program Year 4												
Program Year 5												
Program Year 6												
Portfolio Total												
NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW
Program Years 4 - 6	Savings Outflow (\$ million)		Savings Outflow (kWh)		Savings Outflow (therms)		Savings Inflow (\$ million)		Savings Inflow (kWh)		Savings Inflow (therms)	
Utility	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs
ACE												
ETG												
JCP&L												
NING												
PSE&G												
RECO												
SIG												
NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW
Program Year 4	Savings Outflow (\$ million)		Savings Outflow (kWh)		Savings Outflow (therms)		Savings Inflow (\$ million)		Savings Inflow (kWh)		Savings Inflow (therms)	
Utility	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs
ACE												
ETG												
JCP&L												
NING												
PSE&G												
RECO												
SIG												
NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW
Program Year 5	Savings Outflow (\$ million)		Savings Outflow (kWh)		Savings Outflow (therms)		Savings Inflow (\$ million)		Savings Inflow (kWh)		Savings Inflow (therms)	
Utility	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs
ACE												
ETG												
JCP&L												
NING												
PSE&G												
RECO												
SIG												
NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW
Program Year 6	Savings Outflow (\$ million)		Savings Outflow (kWh)		Savings Outflow (therms)		Savings Inflow (\$ million)		Savings Inflow (kWh)		Savings Inflow (therms)	
Utility	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs	To Partner EDCs	To Partner GDCs
ACE												
ETG												
JCP&L												
NING												
PSE&G												
RECO												
SIG												

Therms to kwh- conversion details to be provided by the utilities in their net budget transfer reporting, if applicable.

### Appendix C Worksheet (T3 Program Table)

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Appendix E Worksheet (Cost Test Tables)

Columns

Rows

Total Resource Cost Test (TRC)		
BENEFITS		
1	Lifetime Avoided Wholesale Electric Energy and Ancillary Costs	
2	Lifetime Avoided Wholesale Electric Capacity Costs	
3	Lifetime Avoided Wholesale Natural Gas Costs	
4	Lifetime DRIPE Benefits (E&G)	
5	Lifetime Avoided RPS REC Purchase Costs	
6	Lifetime Avoided Wholesale Volatility Costs (E&G)	
7	Lifetime Avoided T&D Costs (E&G)	
	Total Benefits	1+2+3+4+5+6+7
COSTS		
8	Lifetime Incremental Costs	
9	Lifetime Administration Costs	
	Total Costs	8+9
	Benefit Cost Ratio	(1+2+3+4+5+6+7)/(8+9)
Participant Cost Test (PCT)		
BENEFITS		
10	Lifetime Avoided Retail Electric Costs	
11	Lifetime Avoided Retail Natural Gas Costs	
12	Lifetime Program Incentive Costs	
13	Lifetime Time-Value of Loan Repayments	
	Total Benefits	10+11+12+13
COSTS		
14	Lifetime Participant Costs	
	Total Costs	14
	Benefit Cost Ratio	(10+11+12+13)/14
Program Administrator Cost Test (PAC)		
BENEFITS		
15	Lifetime Avoided Wholesale Electric Energy and Ancillary Costs	
16	Lifetime Avoided Wholesale Electric Capacity Costs	
17	Lifetime Avoided Wholesale Natural Gas Costs	
18	Lifetime DRIPE Benefits (E&G)	
19	Lifetime Avoided RPS REC Purchase Costs	
20	Lifetime Avoided Wholesale Volatility Costs	
21	Lifetime Avoided T&D Costs	
	Total Benefits	15+16+17+18+19+20+21
COSTS		
22	Lifetime Administration Costs	
23	Lifetime Program Investment Costs	
24	Lifetime Time-Value of Loan Repayments	
	Total Costs	22+23+24
	Benefit Cost Ratio	(15+16+17+18+19+20+21)/(22+23+24)
Ratepayer Impact Measure Test (RIM)		
BENEFITS		
25	Lifetime Avoided Wholesale Electric Energy and Ancillary Costs	
26	Lifetime Avoided Wholesale Electric Capacity Costs	
27	Lifetime Avoided Wholesale Natural Gas Costs	
28	Lifetime DRIPE Benefits (E&G)	
29	Lifetime Avoided RPS REC Purchase Costs	
30	Lifetime Avoided Wholesale Volatility Costs	
31	Lifetime Avoided T&D Costs	
	Total Benefits	25+26+27+28+29+30+31
COSTS		
32	Lifetime Administration Costs	
33	Lifetime Program Investment Costs	
34	Lifetime Re-allocated Distribution Costs	
35	Lifetime Time-Value of Loan Repayments	
	Total Costs	32+33+34+35
	Benefit Cost Ratio	(25+26+27+28+29+30+31)/(32+33+34+35)
Societal Cost Test (SC)		
BENEFITS		
36	Lifetime Avoided Wholesale Electric Energy and Ancillary Costs	
37	Lifetime Avoided Wholesale Electric Capacity Costs	
38	Lifetime Avoided Wholesale Natural Gas Costs	
39	Lifetime DRIPE Benefits (E&G)	
40	Lifetime Avoided RPS REC Purchase Costs	
41	Lifetime Avoided Wholesale Volatility Costs	
42	Lifetime Avoided T&D Costs	
43	Lifetime Avoided Emissions Damages	
44	Job and Savings Multiplier Benefits	
45	Non-Energy Benefit Adder	
46	Low-Income Adder	
	Total Benefits	36+37+38+39+40+41+42+43+44+45+46
COSTS		
45	Lifetime Incremental Costs	
46	Lifetime Administration Costs	
	Total Costs	45+46
	Benefit Cost Ratio	(36+37+38+39+40+41+42+43+44+45+46)/(45+46)
New Jersey Cost Test (NJCT)		
BENEFITS		
47	Lifetime Avoided Wholesale Electric Energy and Ancillary Costs	
48	Lifetime Avoided Wholesale Electric Capacity Costs	
49	Lifetime Avoided Wholesale Natural Gas Costs	
50	Lifetime DRIPE Benefits (E&G)	
51	Lifetime Avoided Electric Transmission Costs	
52	Lifetime Avoided Distribution Costs	
53	Lifetime Avoided Emissions Damages	
54	Non-Energy Benefit Adder	
55	Low-Income Adder	
	Total Benefits	47+48+49+50+51+52+53+54+55
COSTS		
56	Lifetime Incremental Costs	
57	Lifetime Administration Costs	
	Total Costs	56+57
	Benefit Cost Ratio	(47+48+49+50+51+52+53+54+55)/(56+57)
	Net income	Total benefits - total costs
	shareholders' equity	Total assets - total liabilities
	ROE	Net income / shareholders' equity

Res	CEI	MF	LMI	Total Portfolio	Res - Behavioral	EE Products	Income Qualified	Whole House	Demand Response Programs	Building Decarbonization Programs	Next Generation Savings	Multi-Family	Prescription/Custom	Energy Solutions for Business	Direct Install	Workforce Development	CEO Outreach
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### Appendix E Worksheet (Summary Cost Test Table)

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## Appendix F Worksheet

Appendix F: Quantitative Performance Indicators by Program Year								
	Net Annual Energy Savings (Source MMBtu)	Net Annual Demand Savings (Peak MW)	Net Annual Demand Savings (Peak-day therm)	Net Lifetime Energy Savings (Source MMBtu)	LMI and OBC Net Lifetime Energy Savings (Source MMBtu)	Small Business Net Lifetime Energy Savings (Source MMBtu)	Cost to Achieve (\$/ Lifetime Source MMBtu)	
Program Year 4								
Program Year 5								
Program Year 6								
T2 Portfolio Total								
NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW
	Net Annual Energy Savings (Source MWh)	Net Annual Energy Savings (Source therms)	Net Lifetime Energy Savings (Source MWh)	Net Lifetime Energy Savings (Source therms)	LMI and OBC Net Lifetime Energy Savings (Source MWh)	LMI and OBC Net Lifetime Energy Savings (Source therms)	Small Business Net Lifetime Energy Savings (Source MMBtu)	Small Business Net Lifetime Energy Savings (Source MMBtu)
Program Year 4								
Program Year 5								
Program Year 6								
T2 Portfolio Total								

	Net Annual Energy Savings (Source MMBtu)	Net Annual Demand Savings (Peak MW)	Net Annual Demand Savings (Peak-day therm)	Net Lifetime Energy Savings (Source MMBtu)	LMI and OBC Net Lifetime Energy Savings (Source MMBtu)	Small Business Net Lifetime Energy Savings (Source MMBtu)	Cost to Achieve (\$/ Lifetime Source MMBtu)	
Program Year 7								
Program Year 8								
Program Year 9								
T3 Portfolio Total								
NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW	NEW
	Net Annual Energy Savings (Source MWh)	Net Annual Energy Savings (Source therms)	Net Lifetime Energy Savings (Source MWh)	Net Lifetime Energy Savings (Source therms)	LMI and OBC Net Lifetime Energy Savings (Source MWh)	LMI and OBC Net Lifetime Energy Savings (Source therms)	Small Business Net Lifetime Energy Savings (Source MMBtu)	Small Business Net Lifetime Energy Savings (Source MMBtu)
Program Year 7								
Program Year 8								
Program Year 9								
T3 Portfolio Total								

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Project name	Project description (what is being done)	Project location	Project start date	Project end date	Project status	Project type	Project size (MW)	Project cost (USD)	Project owner	Project sponsor	Project manager	Project team	Project risks	Project benefits	Project challenges	Project lessons learned	Project impact	Project evaluation	Project feedback	Project communication	Project documentation	Project reporting	Project transparency	Project accountability	Project integrity	Project trustworthiness	Project credibility	Project reputation	Project brand	Project identity	Project culture	Project values	Project mission	Project vision	Project strategy	Project goals	Project objectives	Project outcomes	Project results	Project performance	Project quality	Project safety	Project security	Project privacy	Project ethics	Project law	Project compliance	Project standards	Project best practices	Project innovation	Project leadership	Project management	Project organization	Project structure	Project processes	Project systems	Project tools	Project equipment	Project materials	Project resources	Project budget	Project financing	Project funding	Project revenue	Project profit	Project ROI	Project NPV	Project IRR	Project payback period	Project break-even point	Project risk rating	Project risk level	Project risk score	Project risk index	Project risk matrix	Project risk register	Project risk assessment	Project risk analysis	Project risk mitigation	Project risk transfer	Project risk retention	Project risk avoidance	Project risk reduction	Project risk elimination	Project risk prevention	Project risk detection	Project risk response	Project risk recovery	Project risk resilience	Project risk robustness	Project risk flexibility	Project risk adaptability	Project risk agility	Project risk speed	Project risk accuracy	Project risk precision	Project risk consistency	Project risk reliability	Project risk validity	Project risk soundness	Project risk logic	Project risk coherence	Project risk clarity	Project risk simplicity	Project risk ease of use	Project risk user-friendliness	Project risk accessibility	Project risk inclusivity	Project risk diversity	Project risk equity	Project risk justice	Project risk fairness	Project risk transparency	Project risk openness	Project risk honesty	Project risk integrity	Project risk trustworthiness	Project risk credibility	Project risk reputation	Project risk brand	Project risk identity	Project risk culture	Project risk values	Project risk mission	Project risk vision	Project risk strategy	Project risk goals	Project risk objectives	Project risk outcomes	Project risk results	Project risk performance	Project risk quality	Project risk safety	Project risk security	Project risk privacy	Project risk ethics	Project risk law	Project risk compliance	Project risk standards	Project risk best practices	Project risk innovation	Project risk leadership	Project risk management	Project risk organization	Project risk structure	Project risk processes	Project risk systems	Project risk tools	Project risk equipment	Project risk materials	Project risk resources	Project risk budget	Project risk financing	Project risk funding	Project risk revenue	Project risk profit	Project risk ROI	Project risk NPV	Project risk IRR	Project risk payback period	Project risk break-even point	Project risk risk rating	Project risk risk level	Project risk risk score	Project risk risk index	Project risk risk matrix	Project risk risk register	Project risk risk assessment	Project risk risk analysis	Project risk risk mitigation	Project risk risk transfer	Project risk risk retention	Project risk risk avoidance	Project risk risk reduction	Project risk risk elimination	Project risk risk prevention	Project risk risk detection	Project risk risk response	Project risk risk recovery	Project risk risk resilience	Project risk risk robustness	Project risk risk flexibility	Project risk risk adaptability	Project risk risk agility	Project risk risk speed	Project risk risk accuracy	Project risk risk precision	Project risk risk consistency	Project risk risk reliability	Project risk risk validity	Project risk risk soundness	Project risk risk logic	Project risk risk coherence	Project risk risk clarity	Project risk risk simplicity	Project risk risk ease of use	Project risk risk user-friendliness	Project risk risk accessibility	Project risk risk inclusivity	Project risk risk diversity	Project risk risk equity	Project risk risk justice	Project risk risk fairness	Project risk risk transparency	Project risk risk openness	Project risk risk honesty	Project risk risk integrity	Project risk risk trustworthiness	Project risk risk credibility	Project risk risk reputation	Project risk risk brand	Project risk risk identity	Project risk risk culture	Project risk risk values	Project risk risk mission	Project risk risk vision	Project risk risk strategy	Project risk risk goals	Project risk risk objectives	Project risk risk outcomes	Project risk risk results	Project risk risk performance	Project risk risk quality	Project risk risk safety	Project risk risk security	Project risk risk privacy	Project risk risk ethics	Project risk risk law	Project risk risk compliance	Project risk risk standards	Project risk risk best practices	Project risk risk innovation	Project risk risk leadership	Project risk risk management	Project risk risk organization	Project risk risk structure	Project risk risk processes	Project risk risk systems	Project risk risk tools	Project risk risk equipment	Project risk risk materials	Project risk risk resources	Project risk risk budget	Project risk risk financing	Project risk risk funding	Project risk risk revenue	Project risk risk profit	Project risk risk ROI	Project risk risk NPV	Project risk risk IRR	Project risk risk payback period	Project risk risk break-even point	Project risk risk risk rating	Project risk risk risk level	Project risk risk risk score	Project risk risk risk index	Project risk risk risk matrix	Project risk risk risk register	Project risk risk risk assessment	Project risk risk risk analysis	Project risk risk risk mitigation	Project risk risk risk transfer	Project risk risk risk retention	Project risk risk risk avoidance	Project risk risk risk reduction	Project risk risk risk elimination	Project risk risk risk prevention	Project risk risk risk detection	Project risk risk risk response	Project risk risk risk recovery	Project risk risk risk resilience	Project risk risk risk robustness	Project risk risk risk flexibility	Project risk risk risk adaptability	Project risk risk risk agility	Project risk risk risk speed	Project risk risk risk accuracy	Project risk risk risk precision	Project risk risk risk consistency	Project risk risk risk reliability	Project risk risk risk validity	Project risk risk risk soundness	Project risk risk risk logic	Project risk risk risk coherence	Project risk risk risk clarity	Project risk risk risk simplicity	Project risk risk risk ease of use	Project risk risk risk user-friendliness	Project risk risk risk accessibility	Project risk risk risk inclusivity	Project risk risk risk diversity	Project risk risk risk equity	Project risk risk risk justice	Project risk risk risk fairness	Project risk risk risk transparency	Project risk risk risk openness	Project risk risk risk honesty	Project risk risk risk integrity	Project risk risk risk trustworthiness	Project risk risk risk credibility	Project risk risk risk reputation	Project risk risk risk brand	Project risk risk risk identity	Project risk risk risk culture	Project risk risk risk values	Project risk risk risk mission	Project risk risk risk vision	Project risk risk risk strategy	Project risk risk risk goals	Project risk risk risk objectives	Project risk risk risk outcomes	Project risk risk risk results	Project risk risk risk performance	Project risk risk risk quality	Project risk risk risk safety	Project risk risk risk security	Project risk risk risk privacy	Project risk risk risk ethics	Project risk risk risk law	Project risk risk risk compliance	Project risk risk risk standards	Project risk risk risk best practices	Project risk risk risk innovation	Project risk risk risk leadership	Project risk risk risk management	Project risk risk risk organization	Project risk risk risk structure	Project risk risk risk processes	Project risk risk risk systems	Project risk risk risk tools	Project risk risk risk equipment	Project risk risk risk materials	Project risk risk risk resources	Project risk risk risk budget	Project risk risk risk financing	Project risk risk risk funding	Project risk risk risk revenue	Project risk risk risk profit	Project risk risk risk ROI	Project risk risk risk NPV	Project risk risk risk IRR	Project risk risk risk payback period	Project risk risk risk break-even point	Project risk risk risk risk rating	Project risk risk risk risk level	Project risk risk risk risk score	Project risk risk risk risk index	Project risk risk risk risk matrix	Project risk risk risk risk 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coherence	Project risk risk risk risk clarity	Project risk risk risk risk simplicity	Project risk risk risk risk ease of use	Project risk risk risk risk user-friendliness	Project risk risk risk risk accessibility	Project risk risk risk risk inclusivity	Project risk risk risk risk diversity	Project risk risk risk risk equity	Project risk risk risk risk justice	Project risk risk risk risk fairness	Project risk risk risk risk transparency	Project risk risk risk risk openness	Project risk risk risk risk honesty	Project risk risk risk risk integrity	Project risk risk risk risk trustworthiness	Project risk risk risk risk credibility	Project risk risk risk risk reputation	Project risk risk risk risk brand	Project risk risk risk risk identity	Project risk risk risk risk culture	Project risk risk risk risk values	Project risk risk risk risk mission	Project risk risk risk risk vision	Project risk risk risk risk strategy	Project risk risk risk risk goals	Project risk risk risk risk objectives	Project risk risk risk risk outcomes	Project risk risk risk risk results	Project risk risk risk risk performance	Project risk risk risk risk quality	Project risk risk risk risk safety	Project risk risk risk risk security	Project risk risk risk risk privacy	Project risk risk risk risk ethics	Project risk risk risk risk law	Project risk risk risk risk compliance	Project risk risk risk risk standards	Project risk risk risk risk best practices	Project risk risk risk risk innovation	Project risk risk risk risk leadership	Project risk risk risk risk management	Project risk risk risk risk organization	Project risk risk risk risk structure	Project risk risk risk risk processes	Project risk risk risk risk systems	Project risk risk risk risk tools	Project risk risk risk risk equipment	Project risk risk risk risk materials	Project risk risk risk risk resources	Project risk risk risk risk budget	Project risk risk risk risk financing	Project risk risk risk risk funding	Project risk risk 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risk risk risk risk risk resilience	Project risk risk risk risk risk robustness	Project risk risk risk risk risk flexibility	Project risk risk risk risk risk adaptability	Project risk risk risk risk risk agility	Project risk risk risk risk risk speed	Project risk risk risk risk risk accuracy	Project risk risk risk risk risk precision	Project risk risk risk risk risk consistency	Project risk risk risk risk risk reliability	Project risk risk risk risk risk validity	Project risk risk risk risk risk soundness	Project risk risk risk risk risk logic	Project risk risk risk risk risk coherence	Project risk risk risk risk risk clarity	Project risk risk risk risk risk simplicity	Project risk risk risk risk risk ease of use	Project risk risk risk risk risk user-friendliness	Project risk risk risk risk risk accessibility	Project risk risk risk risk risk inclusivity	Project risk risk risk risk risk diversity	Project risk risk risk risk risk equity	Project risk risk risk risk risk justice	Project 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privacy	Project risk risk risk risk risk ethics	Project risk risk risk risk risk law	Project risk risk risk risk risk compliance	Project risk risk risk risk risk standards	Project risk risk risk risk risk best practices	Project risk risk risk risk risk innovation	Project risk risk risk risk risk leadership	Project risk risk risk risk risk management	Project risk risk risk risk risk organization	Project risk risk risk risk risk structure	Project risk risk risk risk risk processes	Project risk risk risk risk risk systems	Project risk risk risk risk risk tools	Project risk risk risk risk risk equipment	Project risk risk risk risk risk materials	Project risk risk risk risk risk resources	Project risk risk risk risk risk budget	Project risk risk risk risk risk financing	Project risk risk risk risk risk funding	Project risk risk risk risk risk revenue	Project risk risk risk risk risk profit	Project risk risk risk risk risk ROI	Project risk risk risk risk risk NPV	Project risk risk risk risk risk IRR	Project risk risk risk risk risk payback period	Project risk risk risk risk risk break-even point	Project risk risk risk risk risk risk rating	Project risk risk risk risk risk risk level	Project risk risk risk risk risk risk score	Project risk risk risk risk risk risk index	Project risk risk risk risk risk risk matrix	Project risk risk risk risk risk risk register	Project risk risk risk risk risk risk assessment	Project risk risk risk risk risk risk analysis	Project risk risk risk risk risk risk mitigation	Project risk risk risk risk risk risk transfer	Project risk risk risk risk risk risk retention	Project risk risk risk risk risk risk avoidance	Project risk risk risk risk risk risk reduction	Project risk risk risk risk risk risk elimination	Project risk risk risk risk risk risk prevention	Project risk risk risk risk risk risk detection	Project risk risk risk risk risk risk response	Project risk risk risk risk risk risk recovery	Project risk risk risk risk risk risk resilience	Project risk risk risk risk risk risk robustness	Project risk risk risk risk risk risk flexibility	Project risk risk risk risk risk risk adaptability	Project risk risk risk risk risk risk agility	Project risk risk risk risk risk risk speed	Project risk risk risk risk risk risk accuracy	Project risk risk risk risk risk risk precision	Project risk risk risk risk risk risk consistency	Project risk risk risk risk risk risk reliability	Project risk risk risk risk risk risk validity	Project risk risk risk risk risk risk soundness	Project risk risk risk risk risk risk logic	Project risk risk risk risk risk risk coherence	Project risk risk risk risk risk risk clarity	Project risk risk risk risk risk risk simplicity	Project risk risk risk risk risk risk ease of use	Project risk risk risk risk risk risk user-friendliness	Project risk risk risk risk risk risk accessibility	Project risk risk risk risk risk risk inclusivity	Project risk risk risk risk risk risk diversity	Project risk 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risk risk risk performance	Project risk risk risk risk risk risk quality	Project risk risk risk risk risk risk safety	Project risk risk risk risk risk risk security	Project risk risk risk risk risk risk privacy	Project risk risk risk risk risk risk ethics	Project risk risk risk risk risk risk law	Project risk risk risk risk risk risk compliance	Project risk risk risk risk risk risk standards	Project risk risk risk risk risk risk best practices	Project risk risk risk risk risk risk innovation	Project risk risk risk risk risk risk leadership	Project risk risk risk risk risk risk management	Project risk risk risk risk risk risk organization	Project risk risk risk risk risk risk structure	Project risk risk risk risk risk risk processes	Project risk risk risk risk risk risk systems	Project risk risk risk risk risk risk tools	Project risk risk risk risk risk risk equipment	Project risk risk risk risk risk risk materials	Project risk risk risk risk risk risk resources	Project risk risk risk risk risk risk budget	Project risk risk risk risk risk risk financing	Project risk risk risk risk risk risk funding	Project risk risk risk risk risk risk revenue	Project risk risk risk risk risk risk profit	Project risk risk risk risk risk risk ROI	Project risk risk risk risk risk risk NPV	Project risk risk risk risk risk risk IRR	Project risk risk risk risk risk risk payback period	Project risk risk risk risk risk risk break-even point	Project risk risk risk risk risk risk risk rating	Project risk risk risk risk risk risk risk level	Project risk risk risk risk risk risk risk score	Project risk risk risk risk risk risk risk index	Project risk risk risk risk risk risk risk matrix	Project risk risk risk risk risk risk risk register	Project risk risk risk risk risk risk risk assessment	Project risk risk risk risk risk risk risk analysis	Project risk risk risk risk risk risk risk mitigation	Project risk risk risk risk risk risk risk transfer	Project risk risk risk risk risk risk risk retention	Project risk risk risk risk risk risk risk avoidance	Project risk risk risk risk risk risk risk reduction	Project risk risk risk risk risk risk risk elimination	Project risk risk risk risk risk risk risk prevention	Project risk risk risk risk risk risk risk detection	Project risk risk risk risk risk risk risk response	Project risk risk risk risk risk risk risk recovery	Project risk risk risk risk risk risk risk resilience	Project risk risk risk risk risk risk risk robustness	Project risk risk risk risk risk risk risk flexibility	Project risk risk risk risk risk risk risk adaptability	Project risk risk risk risk risk risk risk agility	Project risk risk risk risk risk risk risk speed	Project risk risk risk risk risk risk risk accuracy	Project risk risk risk risk risk risk risk precision	Project risk risk risk risk risk risk risk consistency	Project risk risk risk risk risk risk risk reliability	Project risk risk risk risk risk risk risk validity	Project risk risk risk risk risk 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risk risk risk risk risk risk reputation	Project risk risk risk risk risk risk risk brand	Project risk risk risk risk risk risk risk identity	Project risk risk risk risk risk risk risk culture	Project risk risk risk risk risk risk risk values	Project risk risk risk risk risk risk risk mission	Project risk risk risk risk risk risk risk vision	Project risk risk risk risk risk risk risk strategy	Project risk risk risk risk risk risk risk goals	Project risk risk risk risk risk risk risk objectives	Project risk risk risk risk risk risk risk outcomes	Project risk risk risk risk risk risk risk results	Project risk risk risk risk risk risk risk performance	Project risk risk risk risk risk risk risk quality	Project risk risk risk risk risk risk risk safety	Project risk risk risk risk risk risk risk security	Project risk risk risk risk risk risk risk privacy	Project risk risk risk risk risk risk risk ethics	Project risk risk risk risk risk risk risk law	Project risk risk risk risk risk risk risk compliance	Project risk risk risk risk risk risk risk standards	Project risk risk risk risk risk risk risk best practices	Project risk risk risk risk risk risk risk innovation	Project risk risk risk risk risk risk risk leadership	Project risk risk risk risk risk risk risk management	Project risk risk risk risk risk risk risk organization	Project risk risk risk risk risk risk risk structure	Project risk risk risk risk risk risk risk processes	Project risk risk risk risk risk risk risk systems	Project risk risk risk risk risk risk risk tools	Project risk risk risk risk risk risk risk equipment	Project risk risk risk risk risk risk risk materials	Project risk risk risk risk risk risk risk resources	Project risk risk risk risk risk risk risk budget	Project risk risk risk risk risk risk risk financing	Project risk risk risk risk risk risk risk funding	Project risk risk risk risk risk risk risk revenue	Project risk risk risk risk risk risk risk profit	Project risk risk risk risk risk risk 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risk elimination	Project risk risk risk risk risk risk risk risk prevention	Project risk risk risk risk risk risk risk risk detection	Project risk risk risk risk risk risk risk risk response	Project risk risk risk risk risk risk risk risk recovery	Project risk risk risk risk risk risk risk risk resilience	Project risk risk risk risk risk risk risk risk robustness	Project risk risk risk risk risk risk risk risk flexibility	Project risk risk risk risk risk risk risk risk adaptability	Project risk risk risk risk risk risk risk risk agility	Project risk risk risk risk risk risk risk risk speed	Project risk risk risk risk risk risk risk risk accuracy	Project risk risk risk risk risk risk risk risk precision	Project risk risk risk risk risk risk risk risk consistency	Project risk risk risk risk risk risk risk risk reliability	Project risk risk risk risk risk risk risk risk validity	Project risk risk risk risk risk risk risk risk soundness	Project risk risk risk risk risk risk risk risk logic	Project risk risk risk risk risk risk risk risk coherence	Project risk risk risk risk risk risk risk risk clarity	Project risk risk risk risk risk risk risk risk simplicity	Project risk risk risk risk risk risk risk risk ease of use	Project risk risk risk risk risk risk risk risk user-friendliness	Project risk risk risk risk risk risk risk risk accessibility	Project risk risk risk risk risk risk risk risk inclusivity	Project risk risk risk risk risk risk risk risk diversity	Project risk risk risk risk risk risk risk risk equity	Project risk risk risk risk risk risk risk risk justice	Project risk risk risk risk risk risk risk risk fairness	Project risk risk risk risk risk risk risk risk transparency	Project risk risk risk risk risk risk risk risk openness	Project risk risk risk risk risk risk risk risk honesty	Project risk risk risk risk risk risk risk risk integrity	Project risk risk risk risk risk risk risk risk trustworthiness	Project risk risk risk risk risk risk risk risk credibility	Project risk risk risk risk risk risk risk risk reputation	Project risk risk risk risk risk risk risk risk brand	Project risk risk risk risk risk risk risk risk identity	Project risk risk risk risk risk risk risk risk culture	Project risk risk risk risk risk risk risk risk values	Project risk risk risk risk risk risk risk risk mission	Project risk risk risk risk risk risk risk risk vision	Project risk risk risk risk risk risk risk risk strategy	Project risk risk risk risk risk risk risk risk goals	Project risk risk risk risk risk risk risk risk objectives	Project risk risk risk risk risk risk risk risk outcomes	Project risk risk risk risk risk risk risk risk results	Project risk risk risk risk risk risk risk risk performance	Project risk risk risk risk risk risk risk risk quality	Project risk risk risk risk risk risk risk risk safety	Project risk risk risk risk risk risk risk risk security	Project risk risk risk risk risk risk risk risk privacy	Project risk risk risk risk risk risk risk risk ethics	Project risk risk risk risk risk risk risk risk law	Project risk risk risk risk risk risk risk risk compliance	Project risk risk risk risk risk risk risk risk standards	Project risk risk risk risk risk risk risk risk best practices	Project risk risk risk risk risk risk risk risk innovation	Project risk risk risk risk risk risk risk risk leadership	Project risk risk risk risk risk risk risk risk management	Project risk risk risk risk risk risk risk risk organization	Project risk risk risk risk risk risk risk risk structure	Project risk risk risk risk risk risk risk risk processes	Project risk risk risk risk risk risk risk risk systems	Project risk risk risk risk risk risk risk risk tools	Project risk risk risk risk risk risk risk risk equipment	Project risk risk risk risk risk risk risk risk materials	Project risk risk risk risk risk risk risk risk resources	Project risk risk risk risk risk risk risk risk budget	Project risk risk risk risk risk risk risk risk financing	Project risk risk risk risk risk risk risk risk funding	Project risk risk risk risk risk risk risk risk revenue	Project risk risk risk risk risk risk risk risk profit	Project risk risk risk risk risk risk risk risk ROI	Project risk risk risk risk risk risk risk risk NPV	Project risk risk risk risk risk risk risk risk IRR	Project risk risk risk risk risk risk risk risk payback period	Project risk risk risk risk risk risk risk risk break-even point	Project risk risk risk risk risk risk risk risk risk rating	Project risk risk risk risk risk risk risk risk risk level	Project risk risk risk risk risk risk risk risk risk score	Project risk risk risk risk risk risk risk risk risk index	Project risk risk risk risk risk risk risk risk risk matrix	Project risk risk risk risk risk risk risk risk risk register	Project risk risk risk risk risk risk risk risk risk assessment	Project risk risk risk risk risk risk risk risk risk analysis	Project risk risk risk risk risk risk risk risk risk mitigation	Project risk risk risk risk risk risk risk risk risk transfer	Project risk risk risk risk risk risk risk risk risk retention	Project risk risk risk risk risk risk risk risk risk avoidance	Project risk risk risk risk risk risk risk risk risk reduction	Project risk risk risk risk risk risk risk risk risk elimination	Project risk risk risk risk risk risk risk risk risk prevention	Project risk risk risk risk risk risk risk risk risk detection	Project risk risk risk risk risk risk risk risk risk response	Project risk risk risk risk risk risk risk risk risk recovery	Project risk risk risk risk risk risk risk risk risk resilience	Project risk risk risk risk risk risk risk risk risk robustness	Project risk risk risk risk risk risk risk risk risk flexibility	Project risk risk risk risk risk risk risk risk risk adaptability	Project risk risk risk risk risk risk risk risk risk agility	Project risk risk risk risk risk risk risk risk risk speed	Project risk risk risk risk risk risk risk risk risk accuracy	Project risk risk risk risk risk risk risk risk risk precision	Project risk risk risk risk risk risk risk risk risk consistency	Project risk risk risk risk risk risk risk risk risk reliability	Project risk risk risk risk risk risk risk risk risk validity	Project risk risk risk risk risk risk risk risk risk soundness	Project risk risk risk risk risk risk risk risk risk logic	Project risk risk risk risk risk risk risk risk risk coherence	Project risk risk risk risk risk risk risk risk risk clarity	Project risk risk risk risk risk risk risk risk risk simplicity	Project risk risk risk risk risk risk risk risk risk ease of use	Project risk risk risk risk risk risk risk risk risk user-friendliness	Project risk risk risk risk risk risk risk risk risk accessibility	Project risk risk risk risk risk risk risk risk risk inclusivity	Project risk risk risk risk risk risk risk risk risk diversity	Project risk risk risk risk risk risk risk risk risk equity	Project risk risk risk risk risk risk risk risk risk justice	Project risk risk risk risk risk risk risk risk risk fairness	Project risk risk risk risk risk risk risk risk risk transparency	Project risk risk risk risk risk risk risk risk risk openness	Project risk risk risk risk risk risk risk risk risk honesty	Project risk risk risk risk risk risk risk risk risk integrity	Project risk risk risk risk risk risk risk risk risk trustworthiness	Project risk risk risk risk risk risk risk risk risk credibility	Project risk risk risk risk risk risk risk risk risk reputation	Project risk
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## Appendix G Worksheet - Additional Utility-Led Initiatives (Demand Response Table)

Demand Response Metrics								
	Dollars spent per customer enrolled per \$ spent (\$/participant) by segment for each proposed program		Dollars spent per capacity enrolled (\$/therm) by each segment for each proposed program		Intensity impact (tons CO2 during peak event) for each proposed program. The utility shall, based on the program design, define the specific calculation to measure intensity impact;		Ratio of number of customer responses to control requests over number of control requests.	
	Residential	Commercial & Industrial	Residential	Commercial & Industrial	Residential	Commercial & Industrial	Residential *	Commercial & Industrial
Program Year 4								
Program Year 5								
Program Year 6								
Program Year 7								
Program Year 8								
Program Year 9								
Total								

## Appendix H Worksheet – Measure Incentive Ranges

[illegible]

## Assumptions Worksheet (Program Tariff Allocations & Marginal Loss Factors)

Reference Table 1. Program Tariff Allocations  
NEW Source: XX

[illegible]

**Reference Table 2. Marginal Loss Factors**  
**NEW Source: XX**

[illegible]

## Assumptions Worksheet (Portfolio Assumptions Table)

Reference Table 3. Portfolio Assumptions

				NEW
	category	unit	input	Source(s)
Timing Assumptions				
	Model Start Date	date		
	Program Start Date	date		
	First Program Year	date		
Measure Characterization				
	Number of Measures	count		
	Number of Programs	count		
	Therm to MCF Conversion	ratio		
	kWh to MMBtu Conversion	ratio		
NPV Assumptions				
	Discount Rate for TRC/PCT/PAC/RIM	%		
	Discount Rate for SCT/NJCT	%		
	NPV Start Date	date		
Program Repayment Assumptions				
	Loan Repayment Percentage	%		
Utility and Supply Assumptions				
	Electric Secondary Loss Factor - Energy	%		
	Electric Primary Loss Factor - Energy	%		
	Electric Subtransmission Loss Factor - Energy	%		
	Electric Transmission Loss Factor - Energy	%		
	Electric Secondary Loss Factor - Demand	%		
	Electric Primary Loss Factor - Demand	%		
	Electric Subtransmission Loss Factor - Demand	%		
	Electric Transmission Loss Factor - Demand	%		
	Average-to-Marginal Loss Adjustment Factor	%		
	Natural Gas Losses Factor	%		
	Capacity Market Realization Delay	years		
	PJM Forecast Pool Requirement	%		
Volatility Hedge Assumptions				
	Wholesale Electric Volatility Hedge Adder	%		
	Wholesale Natural Gas Volatility Hedge Adder	%		
Economic Assumptions				
	Sales and Use Tax Rate	%		
Non-Energy Benefits				
	NEB Adder	%		
	Low-Income Adder	%		
DRIPE Adder				
	Electric Energy	%		
	Electric Capacity	%		
	Natural Gas	%		

## Abbreviations & References Worksheet

Abbreviations	References and estimates used
Please specify all the abbreviations used in the document here.	Mention the Sources of information to verify the rates and costs used for calculations. Specify any estimates/Thresholds used for calculations here if not mentioned anywhere else.