

# MEMORANDUM

**TO:** Tad A. Johnsen, Director of Water and Light

**FROM:** Jim Windsor, Manager of Rates & Fiscal Planning

**DATE:** May 20, 2013

**SUBJECT:** Demand Side Management (DSM) Comparative Data – FY13

The following table shows FY13 activity for major DSM programs compared to the activity during the prior two fiscal years. The total number of loans through April is similar to FY12, although loan amount is down. Total value of rebates is below the FY12 level. Both loan and rebate amounts are down significantly from FY11.

## Loans, Evaluations, Incentives and Rebates October-April YTD Comparison

Status of programs for October-April	FY13 YTD	FY12 YTD	FY11 YTD
All New Loans	96	95	146
Dollar Value of All Loans	\$840,482	\$914,395	\$1,334,395
Average Value of All Loans	\$8,755	\$9,625	\$9,140
Number HPwES Loans	94	90	143
Dollar Value HPwES Loans	\$821,937	\$813,748	\$1,308,831
Average Value of HPwES Loans	\$8,744	\$9,042	\$9,153
Number Commercial Loans	2	5	3
Dollar Value Commercial Loans	\$18,545	\$100,647	\$25,564
Average Value of Commercial Loans	\$9,273	\$20,129	\$8,521
Dollar Value Paid Back into the Loan Fund	\$1,092,234	\$827,510	\$696,193
Loans in Process	(\$74,608)	(\$77,390)	(\$119,177)
Current Available Funds To Loan	\$780,726	\$269,416	\$457,759
Current Outstanding Loan Amount	\$4,975,615	\$5,141,031	\$4,880,906
Number of Outstanding Loans	794	723	651
Loans at Least Two Months Delinquent	45	42	37
Delinquent Loans Being Paid	15	16	11
Value of Delinquent Loans	\$346,400	\$282,722	\$191,386
Loans in Bankruptcy	6	5	4
Bankruptcy Loans Being Paid	1	0	2
Value of Loans in Bankruptcy	\$41,612	\$33,123	\$20,573
Loans in Write-Off	10	11	5
Write-Off Loans Being Paid	0	0	0
Value of Write-Off Loans	\$38,848	\$40,562	\$14,304
Total Loans At Risk	61	58	46
At Risk Loans Being Paid	16	16	13
Total Value of At Risk Loans	\$426,859	\$356,407	\$226,263
Percentage of Outstanding Loans At Risk	8.6%	6.9%	4.6%
Number HPwES Pre Eval	410	501	625
Number HPwES Post Eval	400	448	595
Number Initial Audit Incentives	444	500	653
Dollar Value Initial Audit Incentives	\$44,400	\$50,000	\$65,300
Number Final Audit Incentives	408	458	645
Dollar Value Final Audit Incentives	\$124,790	\$151,400	\$232,100

Status of programs for October-April	FY13 YTD	FY12 YTD	FY11 YTD
Number HPwES Heat Pump Rebates	46	81	102
Dollar Value HPwES Heat Pump Rebates	\$9,050	\$16,200	\$20,400
Average Value of HPwES Heat Pump Rebates	\$197	\$200	\$200
Number HPwES Rebates	394	455	658
Dollar Value HPwES Rebates	\$242,560	\$266,163	\$380,911
Average Value of HPwES Rebates	\$616	\$585	\$579
Number Non HPwES Rebates	162	183	254
Dollar Value Non HPwES Rebates	\$53,850	\$66,175	\$87,025
Average Value of Non HPwES Rebates	\$332	\$362	\$343
Number Commercial SEER Rebates	5	5	1
Dollar Value Commercial SEER Rebates	\$6,809	\$8,225	\$12,890
Average Value of Commercial SEER Rebates	\$1,362	\$1,645	\$12,890
Number Commercial Lighting Rebates	36	30	27
Dollar Value Commercial Lighting Rebates	\$72,360	\$94,628	\$76,780
Average Value of Commercial Lighting Rebates	\$2,010	\$3,154	\$2,844
Number New Home Energy Star Rebates	1	1	6
Dollar Value New Home Energy Star Rebates	\$1,000	\$1,000	\$6,000
Number Solar Electric System Rebates	4	2	0
Dollar Value Solar Electric System Rebates	\$4,530	\$3,580	\$0
Number Solar Water Heater Rebates	3	4	0
Dollar Value Solar Water Heater Rebates	\$2,400	\$2,800	\$0
Total Dollar Value All Rebates and Incentives	\$552,699	\$643,971	\$861,006
Customer Investment with Loan Program	\$923,754	\$1,014,765	\$1,703,023
Customer Investment without Loan Program	\$2,239,072	\$1,913,812	\$2,394,170

