



FILED
July 31, 2024
INDIANA UTILITY
REGULATORY COMMISSION

CenterPoint Energy Indiana South
P.O. Box 209
Evansville, IN 47702-0209

July 31, 2024

Jane Steinhauer
Director of Energy Division
Indiana Utility Regulatory Commission
PNC Center
101 West Washington, Suite 1500 East
Indianapolis, IN 46204

In RE: CenterPoint Energy Indiana South Electric Demand Side Management Scorecard ("DSM")
Quarterly Performance Update
Cause No. 45387

Dear Ms. Steinhauer:

Southern Indiana Gas and Electric Company d/b/a CenterPoint Energy Indiana South ("CEI South") hereby submits its quarterly DSM scorecard with program results through June 30, 2024, pursuant to Ordering Paragraph No. 2 of the Commission's Order dated December 6, 2023, in Cause No. 45895 which states:

"CEI South shall continue to file scorecards on a quarterly and annual basis as directed in the 45387 Order.",

and in compliance with the reporting requirement beginning on page 28 and continuing on page 29 of the Commission's Order dated February 3, 2021, in Cause No. 45387 which states:

"In the 44927 Order, to better monitor and understand the energy savings being achieved by the EE plan approved in that proceeding, the Commission ordered Vectren South to provide additional information regarding its EE programs by filing quarterly scorecards. The Commission set forth the information for each program to be submitted on a quarterly basis (*i.e.*, by April 30, July 31, October 31, and January 31), with the fourth quarter scorecard to also include the information for the full year. The Commission finds that Vectren South shall file quarterly scorecards for the 2021 – 2023 Plan under this Cause containing the information required by the 44927 Order, with the first scorecard associated with the Plan to be filed by April 30, 2021. In accordance with 170 IAC 4-8-4, Vectren South shall also post to its website, annually, a document containing information, data, and results from its EM&V activities and shall file its annual EM&V report for each Plan year by April 30 under this Cause."

Please contact me if you have any questions.

Sincerely,

Brian Ankenbrand
Manager, Regulatory and Rates

Enclosures

Cc: Indiana Office of Utility Consumer Counselor
Jennifer Washburn, Citizens Action Coalition
Matt Rice
Nick Kessler
Heather Watts
Jeff Earl



CenterPoint Energy Indiana South Electric Quarterly Performance Update Scorecard

DSM Savings Performance - Program Results through June 30, 2024

Residential	Gross MWH Savings					Evaluated MWH Savings ^[4]					Gross MW Savings ^[1]					Evaluated MW Savings				
	Actual Ex Ante Thru 6/30/24	2024 Filed Plan Savings [2]	2024 Updated Plan Savings [3]	% to Filed Plan	% to Updated Goal	Ex-Ante Savings	Audited Savings	Verified Savings	Evaluated Ex-Post Gross Savings	Evaluated Net Savings	Actual Ex Ante Thru 6/30/24	2024 Filed Plan Savings [2]	2024 Updated Plan Savings [3]	% to Filed Plan	% to Updated Goal	Ex-Ante Savings	Audited Savings	Verified Savings	Evaluated Ex-Post Gross Savings	Evaluated Net Savings
Residential Specialty Lighting		4,385	0	0%	0%							0.607	0.000	0%	0%					
Residential Prescriptive	1,230	2,591	5,296	47%	23%						0.527	1.358	0.924	39%	57%					
Other Residential Prescriptive	300	749	560	40%	54%						0.039	0.405	0.090	10%	44%					
Instant Rebates		426	0	0%	0%							0.010	0.000	0%	0%					
Residential Midstream	929	1,272	1,316	73%	71%						0.488	0.938	0.749	52%	65%					
Marketplace	0	144	3,419	0%	0%						0.000	0.004	0.085	0%	0%					
Residential New Construction	18	189	47								0.019	0.066	0.039	29%	48%					
Home Energy Assessment		685										0.063								
Income Qualified Weatherization	152	444	328	34%	46%						0.047	0.103	0.068	45%	69%					
Energy Efficient Schools		662		0%								0.071		0%						
Residential Behavioral Savings	2,446	6,790	6,210	36%	39%						1.850	1.210	1.850	153%	100%					
Appliance Recycling		1,082	0	0%	0%							0.143	0.000	0%	0%					
Conservation Voltage Reduction Residential	0	1,068	0								0.000	0.430	0.000							
Smart Cycle (DLC Change Out)	38	363	246	11%	16%						0.086	1.140	0.550	8%	16%					
BYOT (Bring Your Own Thermostat)											0.736	0.570	1.430	129%	51%					
Home Energy Management Systems		515										0.080								
Community Connections	1,491	1,159	1,491	129%	100%						0.000	0.160	0.000	0%	0%					
Total Residential	5,375	19,933	13,618	27%	39%						3.264	6.000	4.861	54%	67%					
Commercial & Industrial Prescriptive	2,166	12,520	14,900	17%	15%						0.558	2.695	2.555	21%	22%					
Commercial & Industrial Midstream	1,224	32	100	3877%	1224%						0.034	0.005	0.012	615%	288%					
Commercial & Industrial Custom	1,316	6,221	5,000	21%	26%						0.188	0.831	0.706	23%	27%					
Small Business Energy Solutions	1,585	3,953	6,500	40%	24%						0.167	0.558	0.479	30%	35%					
Conservation Voltage Reduction Commercial	0	875	0								0.000	0.214	0.000							
Building Optimization	0	0	1,500								0.000	0.000	0.020							
Total C&I Programs [5]	6,290	23,601	28,000	27%	22%						0.946	4.303	3.772	22%	25%					
Total Residential and C&I	11,665	43,534	41,618	27%	28%						4.210	10.303	8.632	41%	49%					
Emerging Markets	0													0%	0%					
Total Portfolio	11,665	43,534	41,618	27%	28%						4.210	10.303	8.632	41%	49%					

[1] Reported demand is calculated based on participants x 2024 Operating Plan demand savings per participant.

[2] The 2024 Filed Plan are the savings from the 2024 one year extension filing (Cause No. 45895).

[3] The 2024 Updated Plan is the OSB approved 2024 Operating Plan savings. The Operating Plan contains the program modifications outlined and approved in Cause No. 45985 for the 2024 1-year extension filing, which held intact the Settlement Agreement in Cause No. 45387. The Settlement Agreement (Cause No. 45387) contains General Service Lamp ("GSL") EUL baseline modifications which renders the Home Energy Assessment and Energy Efficient Schools to not be cost effective.

[4] Audited, verified, ex-post gross, and net evaluation results for 2024 will be available in the 2nd quarter of 2025.



CenterPoint Energy Indiana South Electric Quarterly Performance Update Scorecard

DSM Budget Performance - Program Results through June 30, 2024

	DIRECT COSTS					INCENTIVES					TOTAL PROGRAM				
	Actual Expense thru 6/30/24	Original Budget (Filed Plan) [1]	Updated Authorized Budget [2]	% of Original Budget	% of Updated Authorized Budget	Actual Expense thru 6/30/24	Original Budget (Filed Plan) [1]	Updated Authorized Budget [2]	% of Original Budget	% of Updated Authorized Budget	Actual Expense thru 6/30/24	Original Budget (Filed Plan) [1]	Updated Authorized Budget [2]	% of Original Budget	% of Updated Authorized Budget
Residential															
Residential Specialty Lighting		\$ 256,634		0%			\$ 265,000		0%	0%		\$ 521,634		0%	0%
Residential Prescriptive	\$ 265,967	\$ 682,178	\$ 500,220	39%	53%	\$ 399,956	\$ 769,805	\$ 1,077,851	52%	37%	\$ 665,923	\$ 1,451,983	\$ 1,578,071	46%	42%
Other Residential Prescriptive	\$ 37,207	\$ 406,690	\$ 81,591	9%	46%	\$ 26,828	\$ 271,405	\$ 112,975	10%		\$ 64,035	\$ 678,095	\$ 194,566	9%	
Instant Rebates		\$ 89,686		0%			\$ 78,375		0%			\$ 168,061		0%	
Residential Midstream	\$ 209,522	\$ 98,923	\$ 369,965	212%	57%	\$ 380,125	\$ 399,150	\$ 536,900	95%		\$ 589,647	\$ 498,073	\$ 906,865	118%	
Marketplace	\$ 19,237	\$ 86,878	\$ 48,664	22%	40%	\$ (6,997)	\$ 20,875	\$ 427,976	-34%		\$ 12,240	\$ 107,753	\$ 476,640	11%	
Residential New Construction	\$ 12,598	\$ 55,815	\$ 34,157	23%	37%	\$ 5,320	\$ 29,250	\$ 21,280	18%	25%	\$ 17,918	\$ 85,065	\$ 55,437	21%	32%
Home Energy Assessment		\$ 286,488		0%			\$ 10,380		0%			\$ 296,868		0%	
Income Qualified Weatherization	\$ 347,462	\$ 714,673	\$ 389,977	49%	89%	\$ -		\$ 316,923		0%	\$ 347,462	\$ 714,673	\$ 706,900	49%	49%
Energy Efficient Schools		\$ 102,451		0%								\$ 102,451		0%	
Residential Behavioral Savings	\$ 200,083	\$ 268,896	\$ 366,345	74%	55%						\$ 200,083	\$ 268,896	\$ 366,345	74%	55%
Appliance Recycling		\$ 192,902		0%			\$ 56,250		0%			\$ 249,152		0%	0%
Smart Cycle (DLC Change Out)	\$ 96,518	\$ 988,768	\$ 441,962	10%	22%	\$ 8,175	\$ 153,560	\$ 111,480	5%	7%	\$ 104,693	\$ 1,142,328	\$ 553,442	9%	19%
BYOT (Bring Your Own Thermostat)	\$ 91,899	\$ 105,226	\$ 301,436	87%	30%	\$ 76,545	\$ 84,020	\$ 247,020	91%	31%	\$ 168,444	\$ 189,246	\$ 548,456	89%	31%
Conservation Voltage Reduction Residential	\$ 130,950	\$ 418,537	\$ 286,072	31%	46%						\$ 128,485	\$ 418,537	\$ 286,072	31%	45%
Community Connections	\$ 343,110	\$ 177,923	\$ 428,908	193%	80%						\$ 343,110	\$ 177,923	\$ 428,908	193%	80%
Home Energy Management Systems		\$ 220,513		0%								\$ 220,513		0%	0%
Subtotal Residential	\$ 1,488,585	\$ 4,471,003	\$ 2,749,076	33%	54%	\$ 489,996	\$ 1,368,265	\$ 1,774,554	36%	28%	\$ 1,976,116	\$ 5,839,268	\$ 4,523,631	34%	44%
Commercial & Industrial															
C&I Programs [3]	\$ 677,501	\$ 1,532,948	\$ 2,085,942	44%	32%	\$ 505,000	\$ 2,528,957	\$ 3,155,709	20%	16%	\$ 1,182,501	\$ 4,061,905	\$ 5,241,651	29%	23%
Conservation Voltage Reduction Commercial	\$ 135,849	\$ 172,184	\$ 335,589	79%	40%						\$ 135,849	\$ 172,184	\$ 335,589	79%	40%
Building Optimization	\$ 60,911	\$ -	\$ 123,916	0%	49%	\$ -		\$ 176,250		0%	\$ 60,911	\$ -	\$ 300,166	0%	20%
Subtotal Commercial & Industrial	\$ 874,262	\$ 1,705,131	\$ 2,545,447	51%	34%	\$ 505,000	\$ 2,528,957	\$ 3,331,959	20%	15%	\$ 1,379,262	\$ 4,234,089	\$ 5,877,405	33%	23%
Total Residential & Commercial & Industrial	\$ 2,362,847	\$ 6,176,135	\$ 5,294,523	38%	45%	\$ 994,996	\$ 3,897,222	\$ 5,106,513	26%	19%	\$ 3,355,378	\$ 10,073,357	\$ 10,401,036	33%	32%
Indirect Costs															
Contact Center											\$ 33,565	\$ 67,130	\$ 67,130	50%	50%
Online Audit											\$ 19,716	\$ 45,724	\$ 45,724	43%	43%
Outreach & Education											\$ 126,858	\$ 436,877	\$ 421,390	29%	30%
Subtotal Indirect Costs											\$ 180,139	\$ 549,730	\$ 534,244	33%	34%
Evaluation											\$ 188,502	\$ 512,192	\$ 400,000	37%	47%
DSM Portfolio Total	\$ 2,362,847	\$ 6,176,135	\$ 5,294,523	38%	45%	\$ 994,996	\$ 3,897,222	\$ 5,106,513	26%	19%	\$ 3,724,019	\$ 11,135,280	\$ 11,335,280	33%	33%
Other Costs															
Emerging Markets											\$ -	\$ 200,000	\$ -	0%	0%
Market Potential Study											\$ -	\$ -	\$ -		0%
Total Other Costs											\$ -	\$ 200,000	\$ -	0%	0%
Unallocated Budget															
Reallocation of Marketplace funds to support OSB approved overdrive [4]											\$ -		\$ (150,000)		
Income Qualified Weatherization Flex Funding [5]											\$ -		\$ 49,846		
Residential New Construction Flex Funding [5]											\$ -		\$ 3,541		
Residential Midstream Flex Funding [5]											\$ -		\$ 89,290		
Gap Initiative - Commercial DI [5]											\$ -		\$ 269,267		
Total Unallocated											\$ -		\$ 261,943		0%
DSM Portfolio Total including Other Costs	\$ 2,362,847	\$ 6,176,135	\$ 5,294,523	38%	45%	\$ 994,996	\$ 3,897,222	\$ 5,106,513	26%	19%	\$ 3,724,019	\$ 11,335,280	\$ 11,597,223	33%	32%

[1] Original Budget by program is the CenterPoint Energy Indiana South ("CEI South") 2024 1-year extension filing (CN 45895) with a total 2024 Budget, before flex funding of \$11,335,280. In addition CEI South has \$1,133,528 in flex funding, which is the authority to exceed Commission approved budgets for DSM programs by up to 10% without having to seek additional approval from the Commission.

[2] Updated Authorized Budget is the 2024 Electric DSM Operating Plan. Portfolio costs include evaluation, outreach, modified school education program, online audit tool and contact center. The Operating Plan contains General Service Lamp ("GSL") EUL baseline modifications. This causes the Home Energy Assessment and Energy Efficient Schools to fail cost effectiveness tests. The budget for those programs are allocated to other Residential Programs. The Low Income Weatherization budget of \$102,451 is transferred to Outreach to accommodate a Modified School Program.

[3] Based on approval from the Oversight Board, the Commercial Prescriptive, Custom, and Small Business Assessments are rolled into one Commercial & Industrial category.

[4] On June 6th, 2024 CEI South received OSB approval to reallocate \$150,000 from the Markeplace program to support CEI South mid-year true up request

[5] On June 6th, 2024 CEI South received OSB approval to utilize Flex Funding of \$261,944 to support CEI South mid-year true up request

2024 Lost Revenue and Shared Savings (as of 6/30/2024)			
Actual Ex-Ante [5]		2023 Evaluated [6]	
	YTD Lost Revenue	YTD Lost Revenue	Shared Savings
Portfolio Total	\$ 7,738,305	\$ 15,044,089	\$ 1,000,540

[5] The audited, verified and ex-post are not applicable. The Actual Ex-Ante shown above utilizes 2022 evaluation.

[6] The 2023 Shared Savings and LRAM are based on the 2023 evaluation results.

There is not a projection filed for Performance Incentive therefore Ex-Ante does not apply, only the actual performance Incentive is reported, as shown.

Item	Description
Gross and Net MWH/MW Savings (as the information becomes available)	
Ex-Ante Savings	From program tracking system, as reported by third-party administrator or the utility
Audited Savings	Ex-ante savings after deemed calculations and project/measure counts have been confirmed by the evaluation administrator
Verified Savings	Savings estimated following confirmation of the installation and use of a sample of a project/measure installations
Ex-Post Savings	Evaluated savings resulting from the installation and use of incented or provided technologies directly attributable to the program
Net Energy Savings	Evaluated savings resulting from the installation and use of incented or provided technologies directly attributable to the program
Original Savings Goal	Commission approved MWH/MW savings
Savings % to Original Goal	Actual savings as a % of the original goal
Revised Goal	Changes to Original Goal, approved by OSB
Savings % to Revised Goal (if applicable)	Actual savings as a % of the revised goal
Expenses	
Original Goal	Commission approved budget in Cause No. 45895
Updated Goal, If applicable	Any changes from the 2024 Electric DSM Extension Plan Order (Cause No. 45895)
Direct Program Expense by Program	Will include vendor implementation costs and program-specific administrative costs incurred by the utility
Indirect Program Expense	Costs not tied directly to a single program, but rather to multiple programs or an entire portfolio
Incentives by Program	Actual incentive expense, by program
EM&V	Actual EM&V expense, by program
Total Expenses by Program	Total actual expense, by program
% to Total Budget, by Type	Expenses for each type as a % of total annual budget
% to Budget & Revised Budget, if applicable	Actual expenditures shall be compared to Commission approved budget as well as an updated budget, if applicable
Other information	
Lost Revenue	Corresponding to ex ante savings, audited savings, verified savings, ex post gross, and net energy savings as the numbers become available. Minimally this will require CEI South to provide information from the year in which the quarterly reporting occurs as well as the previous year so that net energy savings information can be captured
Shared Savings	

Authorized Updates to Original Budget Description	\$ Amount
The Updated Authorized Budget is the Operating Plan Budget. The Operating Plan contains General Service Lamp ("GSL") EUL baseline modifications, which eliminates the Home Energy Assessment and Energy Efficient Schools Programs. The Budgets are transferred to other Residential programs.	Total Change is Budget Neutral
Funds from Low Income Weatherization are being transferred to Outreach to fund a Modified School Education Program \$122,451.	Budget Neutral