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**2013-2014 PROPOSED BUDGET  
RESPONSE TO REQUEST FOR INFORMATION**

Late Backup

**DEPARTMENT: AE**

**REQUESTED BY:** Carol Biedrzycki, Texas Ratepayers' Organization to Save Energy

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**DATE REQUESTED: 8/6/13, Original Response submitted 08/15/13, Revised 09/22/13**

**REQUEST:** Subject: Austin Energy Energy Efficiency Program Budget and Expenditures  
I am requesting the following: Copies of Record(s) State the requested document(s) or record(s) below:

1. For FY 2012 and 2013 please provide all reports, workpapers, and other documents describing the total amount of revenue collected through the Community Benefit Charge (CBC) for street lighting, energy efficiency programs, and the customer assistance program and, the amount of expenditures from each fund.
2. For FY 2012, FY 2013, and FY 2014 please provide all reports, workpapers and other documents describing Austin Energy's energy efficiency program budget for all energy efficiency programs and for each individual program.
3. For FY 2012 and FY 2013 please provide all reports, workpapers and other documents describing Austin Energy's energy efficiency program expenditures for all energy efficiency programs and for each individual program.

Comments/Additional Information (if needed): Readable electronic files are acceptable.

**RESPONSE:**

1. The Community Benefit Charge (CBC) was not in existence during FY 2012. Please see the Rate Adjustment Summary below: (Revised 09/22/13)

|                                  | FY 2013 CYE<br>Expenses | FY 2013 CYE<br>Revenues | (Over)/Under<br>Recovery | FY 2014 Budget | Non Recoverable<br>(until contract<br>expiration) | Total<br>Recoverable |
|----------------------------------|-------------------------|-------------------------|--------------------------|----------------|---|----------------------|
| <b>Community Benefit Charge:</b> |                         |                         |                          |                |   |                      |
| Energy Efficiency                | \$ 28,702,363           | \$ 23,904,923           | \$ 4,797,441             | \$ 37,267,932  | \$ (6,291,066)                                    | \$ 35,774,307        |
| Customer Assistance              | \$ 5,419,395            | \$ 10,444,316           | \$ (5,024,921)           | \$ 9,950,013   | N/A   | N/A                  |
| Street/Traffic Lighting          | \$ 7,927,132            | \$ 7,405,459            | \$ 521,673               | \$ 9,371,871   | \$ (1,515,970)                                    | \$ 8,377,574         |
| <b>Regulatory Charge</b>         | \$ 72,021,287           | \$ 69,642,401           | \$ 2,378,886             | \$ 83,565,222  | \$ (11,251,084)                                   | \$ 74,693,024        |

2. & 3.

The chart below shows the FY12 Amended Budget and Audited Actual, FY13 Amended Budget and Year-to Date Actual and the FY14 Proposed Budget for Distributed Energy Services.  
(Revised 09/22/13)

**Austin Energy**

**Prior Year History by Mega Business Unit - Distributed Energy Services**

Phase 6, Final Approved at September 18, 2013

|   |  | 2012              | 2012              | 2013              | 2013 YTD          | 2014                     |
|---|--|-------------------|-------------------|-------------------|-------------------|--------------------------|
|   |  | BUDGET            | ACTUALS           | BUDGET            | ACTUALS           | APPROVE with Dias change |
| BUSINESS_UNIT   | ORGN_NAME                              |                   |                   |                   |                   |                          |
| Conservation Rebates & Incentives   | Free Weatherization                    | 849,850           | 598,003           | 849,850           | 19,256            | 850,000                  |
|   | Multi-Family Rebates                   | 1,592,600         | 2,734,740         | 1,592,600         | 1,444,973         | 1,896,130                |
|   | Loan Options                           | 78,380            | 24,137            | 13,380            | 5,000             | 536,970                  |
|   | Rebate Options                         | -                 | 41,595            | -                 | 1,248,515         | -                        |
|   | Clothes Washer Rebates                 | 40,000            | 20,750            | 40,000            | 15,550            | 40,000                   |
|   | Duct Diagnostic/Sealing Rebates        | -                 | 3,770             | -                 | -                 | -                        |
|   | Nexus-Home Audit Cd                    | 65,000            | 56,550            | 65,000            | 51,838            | 66,950                   |
|   | Compact Fluorescent Distrib.           | 25,000            | -                 | 25,000            | -                 | 25,750                   |
|   | Loan Star Debt Service                 | -                 | 58,957            | -                 | -                 | -                        |
|   | Commercial-Exit Construction           | 2,968,600         | 3,001,704         | 2,968,600         | 1,386,189         | 4,028,610                |
|   | Small Businesses                       | 800,000           | 379,963           | 800,000           | 449,839           | 998,300                  |
|   | Green Building                         | -                 | -                 | 300,000           | -                 | 300,000                  |
|   | Commercial Power Partner               | 300,000           | 97,381            | 300,000           | 233,969           | 545,900                  |
|   | Commercial Miser Program               | -                 | -                 | -                 | -                 | -                        |
|   | Solar Program                          | 4,630,000         | 5,849,240         | 7,500,000         | 6,029,539         | 7,500,000                |
|   | Solar Performance Based Incentive Prog | -                 | -                 | -                 | 76,148            | -                        |
|   | Refrigerator Recycle Program           | 458,528           | 346,040           | 543,528           | 261,545           | 559,830                  |
|   | Multi-Family Duct Sealing              | -                 | -                 | -                 | -                 | -                        |
|   | Residential Power Partner-Aggr         | 834,000           | 400,035           | 834,000           | 703,553           | 762,180                  |
|   | Load Coop                              | 812,500           | 135,250           | 812,500           | 105,481           | 1,560,000                |
|   | Thermal Energy Storage                 | 226,000           | -                 | 226,000           | -                 | 103,000                  |
|   | Home Performance w Energy Star         | 2,360,000         | 2,140,221         | 2,563,250         | 2,456,825         | 2,163,000                |
|   | Appliance Efficiency Program           | 180,000           | 1,647,015         | -                 | -                 | 259,780                  |
|   | Air Conditioning Rebates               | 851,000           | 20,500            | 1,300,000         | -                 | 930,420                  |
|   | Electric Vehicles Incentives           | -                 | -                 | 315,000           | 68,082            | 315,000                  |
| <b>Total - Conservation Rebates &amp; Incentives</b>                                |  | <b>17,071,468</b> | <b>17,566,849</b> | <b>21,048,708</b> | <b>14,556,301</b> | <b>23,441,860</b>        |
| Distributed Energy Services Corporate   | Distributed Enrgy Serv. Adm            | 959,456           | 840,985           | 1,013,438         | 459,901           | 808,540                  |
|   | Des Corporate Corporate                | 556,347           | 398,491           | 729,445           | 105,932           | 348,800                  |
| Energy Efficiency Services  | Advertising-Conservation               | 444,375           | 475,173           | 504,200           | 265,412           | 504,200                  |
|   | DSM Administration                     | 3,414,979         | 3,272,761         | 3,902,016         | 3,033,765         | 3,748,790                |
|   | DSM Program Mgmt                       | 1,144,730         | 1,175,069         | 1,270,513         | 1,229,372         | 725,610                  |
|   | DSM Program Support                    | 1,783,780         | 1,391,973         | 1,952,762         | 1,229,827         | 1,815,270                |
|   | DSM Solar Program                      | 890,934           | 714,312           | 891,182           | 424,738           | 1,198,420                |
|   | EES Technical Support                  | 1,269,162         | 937,271           | 1,304,599         | 1,054,163         | 1,608,260                |
|   | CAP Weatherization Program             | -                 | -                 | -                 | 5,426             | 1,000,000                |
| Green Building and Technologies Group   | Residential Incentives                 | 2,207,741         | 336,679           | 991,491           | 153,463           | 2,207,741                |
|   | Municipal Conservation Program         | 100,000           | 4,217             | 100,000           | 73,063            | 100,000                  |
|   | Green Building Prgm                    | 2,196,039         | 1,991,145         | 2,583,884         | 1,604,802         | 2,431,480                |
|   | Electric Vehicles                      | 1,393,598         | 612,359           | 1,148,194         | 480,340           | 913,640                  |
| Key Accounts Mgt  | Emerging Technologies                  | 531,990           | 494,391           | 525,994           | 509,556           | 529,850                  |
|   | Key Accounts Management                | \$1,459,151       | \$1,280,172       | \$1,411,349       | \$1,037,303       | \$1,540,180              |
| Market Research, Planning & Development   |  | \$1,422,206       | \$1,271,528       | \$1,970,835       | \$1,691,899       | \$2,353,370              |
| <b>Total Distributed Energy Services less Conservation Rebates &amp; Incentives</b> |  | <b>19,774,488</b> | <b>16,196,626</b> | <b>20,299,902</b> | <b>13,358,962</b> | <b>21,834,190</b>        |
| <b>Total - Distributed Energy Services</b>  |  | <b>36,845,946</b> | <b>32,762,376</b> | <b>41,348,610</b> | <b>27,916,263</b> | <b>45,276,050</b>        |

Note: \$1m in budget is being reallocated to fund FY13 CAP Weatherization Program.

The attached PDF is the FY12 Distributed Energy Services Annual Report which provides more detail on the Energy Efficiency programs.