

STATE OF VERMONT  
PUBLIC UTILITY COMMISSION

CASE NO. 20-2022-INV

DETERMINATION OF 2021 ENERGY EFFICIENCY CHARGE  
RATES

CASE NO. 20-2241-PET

VERMONT DEPARTMENT OF PUBLIC SERVICE REQUEST  
FOR DETERMINATION OF REALLOCATION OF UNSPENT  
2015-2017 ENERGY EFFICIENCY CHARGE FUNDS --

EEU-2016-03

IN RE: 2016-2017 DEMAND RESOURCES PLAN  
PROCEEDING

September 11, 2020  
11 a.m.

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Via GoToMeeting

Joint Status Conference held before the  
Vermont Public Utility Commission, via videoconference, on  
September 11, 2020, beginning at 11 a.m.

P R E S E N T

COMMISSION STAFF: Thomas Knauer, Utilities Analyst  
Joan White, Utilities Analyst  
Mary Jo Krolewski, Utilities  
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A P P E A R A N C E S

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25

1 MR. KNAUER: Okay. Here we go. Good  
2 morning. This is a joint status conference being  
3 held in three Public Utility Commission cases. The  
4 first is case EEU-2016-03 which is the 2016-2017  
5 Demand Resources Plan proceeding.

6 The second case is 20-2022-INV, which  
7 is the commission's investigation to determine 2021  
8 efficiency charge rates.

9 And the third case is 20-2241-PET,  
10 which addresses the reallocation of unspent Energy  
11 Efficiency Charge funds for the 2015 through 2017  
12 performance period.

13 My name is Tom Knauer. I'm the Vermont  
14 Public Utility Commission's policy director. And I  
15 will serve as hearing officer for this status  
16 conference. Also attending the status conference  
17 today are three of the commission's analysts; Joan  
18 White, Andrea Poppiti and Mary Jo Krolewski. And  
19 Joan White is serving as the platform manager today.

20 Please note that the PUC is not and  
21 will not be recording the audio or video from today's  
22 meeting. If a party or a participant intends on  
23 recording the hearing via video or audio, please  
24 indicate this when you provide your name for the  
25 court reporter.

1 To facilitate an orderly status  
2 conference, at times when responses from parties are  
3 required, I will call on the parties' representatives  
4 in the following order. Department of Public  
5 Service. Efficiency Vermont. Vermont Gas.  
6 Burlington Electric. Is there anyone present today  
7 who is not from one of those parties? If so, please  
8 identify yourself now.

9 (No response.)

10 MR. KNAUER: Okay. I'll start by  
11 taking appearances starting with Department of Public  
12 Service.

13 MS. LUDWIG: Megan Ludwig for the  
14 Department of Public Service. And Tom, would it make  
15 sense, do you want me to identify the other members  
16 of the Department who are joining the call, or would  
17 you like everyone to do that individually?

18 MR. KNAUER: To keep things orderly,  
19 I'm going to ask the official representative from  
20 each party to introduce all their -- all the members  
21 from that party.

22 MS. LUDWIG: Okay. Well with us today,  
23 Erin Bennett is on the call. She is also an attorney  
24 representing the Department. T.J. Poor and Brian  
25 Cotterill.

1 MR. KNAUER: And from Efficiency  
2 Vermont?

3 MR. WESTMAN: Good morning, Tom. This  
4 is Dave Westman from Efficiency Vermont. I'm joined  
5 today by Jim Massie and Matthew Walker.

6 MR. KNAUER: And from Vermont Gas?

7 MS. PFENNING: Jill Pfenning from  
8 Vermont Gas. I'm joined by Karen Horne and Richard  
9 Donnelly.

10 MR. KNAUER: And Burlington Electric?

11 MR. LYLE: Good morning. Tom Lyle with  
12 Burlington Electric. And with me is Chris Burns and  
13 Dan Roy.

14 MR. KNAUER: Okay. Good morning,  
15 everyone. Due to the COVID-19 pandemic, the  
16 commission is limiting in-person contact. As a  
17 result, this status conference is being conducted  
18 remotely. We are using the web-based platform  
19 GoToMeeting.

20 During this meeting we will be using  
21 some special procedures uniquely related to using a  
22 web-based platform. I'll read them now for the  
23 benefit of the parties and to ensure we have them on  
24 the record. Participants may raise concerns about  
25 these procedures either now or at any point during

1 the meeting if the platform is not performing as  
2 expected or if you are having difficulties. We  
3 expect that this meeting will proceed more slowly  
4 than usual, and we may need to stop along the way to  
5 resolve technical issues as we are able.

6 We also recognize that because we are  
7 all in remote locations, such as our homes, there may  
8 be unexpected interruptions at those locations.  
9 Anyone who anticipates speaking during the meeting  
10 should keep their cameras on during the entire  
11 meeting. It is very helpful for us to see you,  
12 particularly when you are speaking. If you plan on  
13 listening throughout the meeting, it is helpful if  
14 you turn off your camera. Even with your own camera  
15 off, you will still be able to see everyone who has  
16 their cameras turned on. And commission staff may  
17 choose whether to leave their cameras on or off.  
18 Mine will be on the whole time.

19 My preference is that people who are  
20 not actively participating in the proceeding leave  
21 their cameras off so that the pictures of the active  
22 participants are larger. Commission staff will not  
23 mute anyone's microphone whether a participant or a  
24 member of the public. This means that you should  
25 keep yourself on mute unless you are speaking. That

1 way we can minimize background noises which can be  
2 very disruptive.

3 To indicate that you want to speak,  
4 please unmute your microphone or raise your hand. I  
5 will keep a list of those who wish to speak and call  
6 on people in order. And I don't think we have anyone  
7 on the phone today, so that's helpful.

8 It is very important that we avoid  
9 talking over one another. Each time you begin  
10 talking, please identify yourself by name for the  
11 court reporter. If your internet connection cuts  
12 out, please try to rejoin the GoToMeeting or call  
13 into the workshop using the GoToMeeting telephone  
14 number that was provided in the status conference  
15 notice. If the audio or video from the meeting has  
16 cut out, let me know when you are able to rejoin, and  
17 I will summarize what happened.

18 If you are unable to call in or rejoin,  
19 notify Joan, who is serving as platform manager, or  
20 the clerk's office immediately via email or phone,  
21 and we will pause the meeting to try to resolve the  
22 issue.

23 Similarly, if at any point any of you  
24 becomes aware of another party participant or member  
25 of the public having trouble accessing the video or

1 audio feeds of the remote meeting, please let us know  
2 immediately. We will pause the meeting to try to  
3 resolve the issue.

4 When you are presenting, we will make  
5 you the presenter in GoToMeeting. You should share  
6 your slides if you have any on your screen by  
7 clicking the share screen icon. When you are done  
8 with the slides, please click stop sharing screen.

9 Does anyone have any questions or  
10 concerns about these procedures? From the  
11 Department?

12 MS. LUDWIG: No.

13 MR. KNAUER: Efficiency Vermont?

14 MR. WESTMAN: No.

15 MR. KNAUER: Vermont Gas?

16 MS. PFENNING: No concerns.

17 MR. KNAUER: And Burlington Electric?

18 MR. LYLE: No concerns.

19 MR. KNAUER: Great. With that covered,  
20 now we will get to the substantive portion of the  
21 workshop. Efficiency Vermont requested that the  
22 commission convene this status conference to discuss  
23 and finalize dates in each of the three proceedings.  
24 My intent is to look at the proposed schedules in  
25 each case and ask a few procedural questions.

1 Commission staff may also ask or foreshadow some of  
2 our substantive questions.

3 Before we jump in to discuss schedule,  
4 is there anything else that the parties wish to have  
5 on today's agenda? The Department?

6 MS. LUDWIG: No.

7 MR. KNAUER: And Efficiency Vermont?

8 MR. WESTMAN: Not at this time.

9 MR. KNAUER: Vermont Gas?

10 MS. PFENNING: No.

11 MR. KNAUER: Burlington Electric?

12 MR. LYLE: Not at this time.

13 MR. KNAUER: Excellent. I have  
14 prepared a matrix that I am now going to try to --  
15 I'm going to ask Joan to try and share this on her  
16 screen. Okay. Thank you, Joan.

17 That's showing up kind of small on my  
18 screen. Are others having that experience? I see  
19 T.J. nodding.

20 MS. WHITE: One option is -- can't see  
21 all three of these at once. I could Zoom in on one  
22 case at a time, Tom. Or actually you could just have  
23 most people switch their cameras off, and it will  
24 make it bigger.

25 MS. KROLEWSKI: You can also adjust

1 your own screen too, Tom. There is a button, you  
2 know, on the right, adjusting the size.

3 MR. KNAUER: Yup. Thank you. Yes.

4 MS. LUDWIG: Tom, before we get to the  
5 schedule, it may preempt some discussion of this  
6 particular schedule which I think is based on what  
7 Efficiency Vermont provided in its filing. And if I  
8 can -- right now if you want to go forward and talk  
9 about the schedule, that's fine, but we have had an  
10 opportunity to discuss an alternative schedule with  
11 Efficiency Vermont. The Department has had some  
12 concerns and had some ideas on how to move forward.  
13 And I think we are pretty close to aligned on that  
14 alternative schedule if you would like me to discuss  
15 it.

16 MR. KNAUER: Yeah. It makes sense. If  
17 the parties have a different schedule in mind, let's  
18 discuss that rather than discussing yesterday's news.

19 MS. LUDWIG: Okay. So we have three  
20 proceedings here. One is the EEC rate determination,  
21 and that schedule we anticipated proceeding along the  
22 lines just as prescribed through rule 5.3 -- 5.300.  
23 So our -- the Department's comments on the proposed  
24 alternative methodologies would be due on September  
25 15. No, I'm sorry. The questions on those proposed

1 alternative methodologies would be sent to the  
2 parties on September 15th and also filed in ePUC.  
3 And then our comments would be due on September 30th.

4 So that proceeding we anticipated  
5 following that schedule as specified under the rule.

6 The two other proceedings -- so  
7 Efficiency Vermont filed a request to modify the  
8 budgets and performance indicators for the 2018  
9 through 2020 budgets and QPIs. And our comments on  
10 the budget adjustment, we anticipated filing at the  
11 same time as our comments on the EEC rate,  
12 alternative methodologies, on September 30th.

13 And we wanted to propose an alternative  
14 schedule for dealing with the QPIs because we had a  
15 number of questions and feel that needs to be fleshed  
16 out a little more, you know, greater length with some  
17 -- an opportunity to reply and all. So I'll get into  
18 that particular schedule.

19 And as to the third proceeding for the  
20 unspent EEC funds, for 2015 through 2017, both  
21 Vermont Gas and Efficiency Vermont filed comments  
22 supportive of our recommendations. I believe those  
23 were filed either late last week or early this week,  
24 so we didn't anticipate any additional process, at  
25 least filings from the parties, being needed in that

1 case.

2 So as to -- as I mentioned, we had --  
3 we would like to handle Efficiency Vermont's request  
4 for the 2018 through 2020 budget and QPIs, the  
5 budgets separately from the QPIs. And so the process  
6 we had in mind would be we would file discovery, like  
7 questions, they can be formal discovery, if people  
8 believe that's appropriate, by September 16th. And  
9 we would file them in ePUC. Anticipate response from  
10 Efficiency Vermont by September 23rd. And reply  
11 filing by the Department either in the form of  
12 testimony or comments on October 5th.

13 And then by October 9th, I think at  
14 that point we would know like what sort of  
15 outstanding issues we have. We should determine if  
16 there is any more process needed, so we would make a  
17 request or indication whether we thought an  
18 evidentiary hearing should take place. And if we  
19 believe an evidentiary hearing is necessary,  
20 hopefully sometime October 13 through 15, and then  
21 briefs or comments within two weeks of the hearing  
22 date. And reply within two weeks of the brief or  
23 comments.

24 And so we did have an exchange with  
25 Efficiency Vermont this morning. I think there was a

1 little miscommunication initially, but we wanted to  
2 reiterate that that schedule is just for the QPIs.

3 MR. KNAUER: Understood. Megan, I  
4 can't write as quickly as you can speak.

5 MS. LUDWIG: Sorry. I keep doing that.

6 MR. KNAUER: That's fine.

7 MS. LUDWIG: Okay. So --

8 MR. KNAUER: Could I just ask you a  
9 couple things? Beginning with October 13. Can you  
10 just restate those for me, please?

11 MS. LUDWIG: October 13, 14 or 15 for  
12 an evidentiary hearing, if needed, if requested by  
13 October 9th.

14 MR. KNAUER: So I'm going to interrupt  
15 right here. We are required by law to give at least  
16 12 days' notice of a hearing. So that would -- if we  
17 -- so would mean we would need to know by October 1  
18 if we were having a hearing.

19 MS. LUDWIG: Okay.

20 MS. WHITE: Could we notice one and  
21 then cancel it if we end up not needing it? Is that  
22 allowed?

23 MR. KNAUER: It is allowed. Yeah.

24 MS. LUDWIG: I would think -- yeah. I  
25 would suggest do that if we can.

1 MS. WHITE: Maybe we can pick a hearing  
2 date, notice it, and then cancel it if we don't need  
3 it on the 9th. That still gives people like five or  
4 six days' notice.

5 MR. KNAUER: Okay. And Megan, I wanted  
6 to double check. The October 9th, are you suggesting  
7 that the parties would file something indicating  
8 whether they wanted additional process?

9 MS. LUDWIG: Correct.

10 MR. KNAUER: Okay. Thank you.

11 MS. LUDWIG: And it would be -- I'm  
12 sorry. We can provide a status update indicating  
13 whether there's agreement on issues so you know  
14 specifically where there is agreement or  
15 disagreement.

16 MR. KNAUER: Okay. That would be  
17 helpful. And then hearing dates, and then you had a  
18 briefing schedule. Can you repeat that, please?

19 MS. LUDWIG: Sure. The brief or  
20 comments due two weeks after the hearing date. And  
21 then reply comments due two weeks after the initial  
22 briefing or comment deadline.

23 MR. KNAUER: Thank you for going  
24 through this again.

25 MS. LUDWIG: No problem.

1 MR. KNAUER: Efficiency Vermont, how  
2 does that schedule sound to you?

3 MR. WESTMAN: Thanks, Megan. Thanks  
4 for that clarification because there was some  
5 confusion. I think when we were discussing that  
6 longer process, I think we were thinking that that  
7 was the Energy Efficiency Charge and budget time  
8 line.

9 So let's just talk about the EEC charge  
10 and budget time line first. So if I understand it,  
11 then the -- and I apologize. I'm looking at another  
12 screen, so if I'm looking over here, that's why.

13 So if I understand it then, the  
14 questions of Efficiency Vermont would be filed on  
15 September 16th. I'm sorry. Questions on the 15th.  
16 And comments on the 30th? Is there a due date for  
17 questions filed in ePUC for Efficiency Vermont? I'm  
18 -- I would expect that the Department files comments  
19 on the 30th. But if we have the luxury of two weeks  
20 to reply to those questions, I would certainly take  
21 it.

22 MS. LUDWIG: Looking at the rule, there  
23 is not a date for reply by the EEU's on the  
24 alternative methodologies. Questions on September  
25 30th -- September 15th, we have -- we would have

1 essentially two weeks after that to file our  
2 comments. So it would be helpful if we could have  
3 responses within a week to 10 days.

4 MR. WESTMAN: So you would request  
5 comments to be due say like the 23rd?

6 MS. LUDWIG: I think that would be -- I  
7 think that would work for us.

8 MR. WESTMAN: Okay. That would be  
9 helpful, I think, to have at least a week. But you  
10 know, if we can file it earlier, then expedite our  
11 comments, we can do that.

12 MS. LUDWIG: That would be great.  
13 Thank you.

14 MR. WESTMAN: Okay. I have an F35  
15 going over my house. I'm just going to go on jet  
16 mute for a second.

17 MR. KNAUER: All right. So Dave, I'm  
18 going to ask you, so Megan just went through a  
19 proposed schedule. Let's just talk about the EEU-  
20 2016-03. How does that schedule sound to you?

21 MR. WESTMAN: So yeah. As I understand  
22 it then, the focus of the process that Megan laid out  
23 beginning on September 16 and running through  
24 probably, you know, if there is a hearing, it would  
25 probably go through November, that would be

1 specifically to address the goal adjustment portion  
2 of the request in EEU-2016-03.

3 My understanding is that the budget  
4 adjustment in 2016-03 would be lumped in with the EEC  
5 discovery or with the EEC process. Is that  
6 everyone's understanding?

7 MS. LUDWIG: That's correct. We would  
8 anticipate making a filing on the 30th that would be  
9 filed simultaneously in both the EEC rate docket and  
10 the 2016-03 adjusted, both issues. Addressing both  
11 issues.

12 MS. WHITE: Can I just ask a clarifying  
13 question about that? Is the reason for separating  
14 the budget out from the QPI issue and tracking the  
15 budget with the 2021 EEC is because the decision on  
16 the 2020 budget is going to impact the 2021 EEC  
17 calculations; is that right? Those two have to be  
18 decided at once, but the QPIs would be separated out  
19 because that's a substance issue and is not going to  
20 be in play until the conclusion of 2020; is that  
21 right?

22 MS. LUDWIG: Correct.

23 MS. WHITE: Okay. Got it.

24 MS. KROLEWSKI: So you would be looking  
25 for two decisions by the commission in 2016-03?

1 MS. LUDWIG: That's right.

2 MS. KROLEWSKI: Right. Okay.

3 MR. WESTMAN: Yeah. So I understand  
4 the Department's perspective to want to dig into  
5 process and methodology behind the QPI adjustments,  
6 and so we support that being on a different track. I  
7 should note for matters of the record it's not ideal  
8 to be closing out the end of a performance period  
9 with the goals still sort of in question. But due to  
10 the circumstances and the lateness of -- you know,  
11 essentially the COVID pandemic hitting Efficiency  
12 Vermont portfolio at the time that it did, it seems  
13 inevitable. You know, suffice it to say that our  
14 program managers are going flat out, and we are going  
15 to try and hit as many energy efficiency and resource  
16 acquisition goals as we can for the time being.

17 It's not ideal that we won't know what  
18 our goals are until probably the end of the year.  
19 But, you know, we understand that there is -- there  
20 is a need here for developing this process and under  
21 -- and having everyone comfortable with the goal  
22 adjustment that has been proposed and needs -- it  
23 needs to be discussed.

24 So for that reason, Efficiency Vermont  
25 supports this secondary process to adjust the goals.

1 MR. KNAUER: Okay. I'm willing to -- I  
2 want to interject here -- the Department -- with  
3 respect to the budget portion of this, the Department  
4 has proposed its comments would be on -- due on  
5 September 30th. In Efficiency Vermont's original  
6 schedule, you had proposed one week later filing  
7 reply comments. So if we take that one week, you  
8 know, seven-day period and attach that to the end of  
9 the Department's due proposal, would that be an  
10 adequate amount of time for you to reply to the  
11 Department's comments looking at October 7th?  
12 Looking at you, Dave.

13 MR. WESTMAN: Oh, I'm sorry. I thought  
14 that was a question directed at the Department.

15 MR. KNAUER: No, no. So in Efficiency  
16 Vermont's original proposed schedule, you had  
17 comments due on September 18, and then Efficiency  
18 Vermont reply comments due one week later. Now the  
19 Department has proposed pushing that back -- back  
20 that September 18th deadline to September 30th.

21 So what I'm asking you is whether one  
22 week to file reply comments continues to work.

23 MR. WESTMAN: It's going to be -- it's  
24 going to be tough, but we can do it. Yes.

25 MR. KNAUER: Okay. Very good. So to

1 my understanding, we have got a schedule established  
2 for 2016-03, and I'm going to go through the parties  
3 to confirm. Megan?

4 MS. WHITE: Hang on one second before  
5 -- do you mind if I interject, Tom? Is that okay?

6 MR. KNAUER: Yes, it is.

7 MS. WHITE: Okay. I just wanted to  
8 make sure I understood the time limitations on EVT,  
9 because I think the schedule we just talked about  
10 would also apply to the calculation of the 2021 EEC.  
11 And there is a timeliness where you need an order by  
12 a certain date on both the budget, the 2020 budget  
13 and the 2021 EEC, in order to kind of get it in the  
14 utility billing systems for 2021.

15 Can you give us a sense of when you  
16 need an order for that? Because we have pushed back  
17 some dates, and I want to make sure the commission  
18 has adequate time to do its work.

19 MR. WESTMAN: Thanks, Joan. I think  
20 for that reason we should probably refresh what the  
21 Department's dates are for the EEC rate. It's my  
22 understanding that they are actually trying to follow  
23 the schedule as it's proposed in rule 5.300. So I  
24 don't think that there is going to be a delay in the  
25 EEC rate. Generally, we try to get that order

1 completed by November 1. I've seen it in the past  
2 where it can slip a little, and that does create some  
3 difficulties. So, you know, to us this sort of --  
4 the ideal date is the -- is November 1 just as the  
5 rule says.

6 But the sort of back up to that would  
7 be the first or second week of November. You know,  
8 we understand sometimes it takes some time for the  
9 commission to get through them. But you're  
10 absolutely right that we need time to implement the  
11 rule -- the new rates and coordinate with all of the  
12 DUs on bill inserts, and you know, the language in  
13 those bill inserts needs to also get approved by the  
14 clerk.

15 So there is a couple steps that sort of  
16 follow after the rule is -- after the rate is  
17 approved.

18 MS. WHITE: Okay. And you would need  
19 basically the commission decision on both the 2021  
20 EEC rate and the 2020 budget from EEU-03-2016 more or  
21 less by September 1. By November 1, excuse me.

22 MR. WESTMAN: November 1.

23 MS. WHITE: Super helpful. Thank you  
24 so much.

25 MR. KNAUER: All right. So I'm just

1 going to confirm the parties' agreement to the  
2 2016-03 schedule starting with the Department.

3 MS. LUDWIG: Yes.

4 MR. KNAUER: Efficiency Vermont?

5 MR. WESTMAN: Yes.

6 MR. KNAUER: And I don't think this  
7 really affects Vermont Gas or Burlington Electric.  
8 But I'm going to ask them to chime in anyway.  
9 Vermont Gas?

10 MS. PFENNING: Yes, that's fine.

11 MR. KNAUER: And Burlington Electric?

12 MR. LYLE: We are all set.

13 MR. KNAUER: Great. Okay. I'm going  
14 to now talk about the EEC rate schedule. This is  
15 case 20-2022. So we have got Efficiency Vermont's  
16 filing on September 4. So we discussed the rule,  
17 calls for questions on this alternative methodology  
18 by September 15. And we have discussed Efficiency  
19 Vermont filing responses September 23rd.

20 Due dates pursuant to the rule are --  
21 the due date for comments is September 30th.

22 Dave, in your initial filing, you had  
23 asked for a commission decision on October 9th. In  
24 person or remotely here today, we have clarified that  
25 you don't need a decision until November 1 as the

1 rule calls for. So is there anything remaining to  
2 that October 9th date?

3 MR. WESTMAN: Let me -- that's a good  
4 question, Tom. Let me just pull up the -- I see.  
5 Yeah. No. That's -- that's fine. I think we were  
6 being, call it optimistic, with a schedule proposal  
7 there just given the overlapping functions of all  
8 these different decisions. But that works fine for  
9 us, as long as the November first deadline is met.

10 MR. KNAUER: Okay. And I know that  
11 commission staff is going to have some questions on  
12 Efficiency Vermont's proposal.

13 Joan, did you want to ask any of your  
14 questions right now?

15 MS. WHITE: I mean it certainly would  
16 be easier for us if we could just get our questions  
17 out there, and if you can answer them today, great.  
18 If it's easier -- we can also issue a formal request  
19 for information.

20 So I guess I would -- can just ask --  
21 they are mostly questions to EVT. So do you want us  
22 to sort of go ahead and ask those now, or should we  
23 wait and do it by info. request?

24 MR. WESTMAN: We do have Jim Massie on  
25 the phone and conference today. Jim is the filer of

1 that process. So if you have technical questions, we  
2 are able to answer them right now.

3 MS. WHITE: Okay. Great. Yeah. I  
4 think that's probably easiest for us. We can get the  
5 ball rolling in terms of, you know, writing things  
6 out.

7 So my first question is just around the  
8 assumptions that were made in the modeling regarding  
9 load for next year. I think we all have a bunch of  
10 question marks about what that might mean. But I  
11 wondered, Mr. Massie, whether you ran any sensitivity  
12 testing on different load potentials for next year.

13 So like, for example, I think you had  
14 load decreased over by 7 something percent. Did you  
15 try to assess whether -- how the numbers would look  
16 different under different scenarios?

17 MR. MASSIE: So basically what we  
18 looked at was the report that was provided by the  
19 Department from Cavet. I don't remember exactly what  
20 the full name of that report was. To look at the  
21 trends over the last few months related to COVID, and  
22 you know, some of the comments about the future  
23 expectations.

24 We also looked at actual collections  
25 over the last four or five months to see how those

1 were trending. And, you know, a couple things we  
2 noticed in the data from the utilities provided for  
3 the EEC rate calculation was, you know, how things  
4 have changed over the last couple years.

5 So the rule is pretty strict around  
6 using data from two years prior in forecasting the  
7 load for the next year. And that hasn't been a good  
8 indicator for some time. And so we have been trying  
9 to look at ways to bring that more in line with what  
10 we are actually seeing currently rather than two --  
11 data from two years ago.

12 And so I've shared this whole model  
13 with the Department on a number of occasions over the  
14 month of August on how I was forecasting, you know,  
15 sales for this year and what we might expect for next  
16 year. Essentially we were looking at trend lines by  
17 the different rate classes for each customer group  
18 and looking at how sales were tracking against or the  
19 collections were tracking against the forecasted  
20 collections for 2020, and then modeling that out for  
21 the rest of the year.

22 And look at how things have changed in  
23 the last couple of years. What we noticed was -- so  
24 I mean I'm not sure I'm directly answering your  
25 question. We didn't do a sensitivity, other than we

1 did some forecasting based on -- I looked at specific  
2 customers and customer groups. I looked at actual  
3 data from the utilities at the account level and  
4 found that there were a number of examples where we  
5 were seeing businesses going out. And I think I  
6 provided some of those examples in the filing. You  
7 know, there have been a couple of colleges that have  
8 gone out just in Rutland County in the last two  
9 years. There have been others across the state that  
10 have also struggled. So we have seen different  
11 sectors where we are starting to see, especially in  
12 the commercial sector, where the load has been going  
13 down, and it seems like it would continue that way in  
14 the current environment.

15 So that's how we ended up forecasting  
16 those areas. You know, obviously we don't have all  
17 the data that we need to be able to be a hundred  
18 percent accurate. But we definitely believe that  
19 compared to following the strict guidelines of 5.3,  
20 we think we have a closer forecast that will allow us  
21 to be able to recover collections on a more accurate  
22 basis going forward.

23 MS. WHITE: Okay. That's extremely  
24 helpful. That's exactly what I was curious about.

25 The next question I have is my

1 understanding of the alternative calculation  
2 methodology for the 2021 EEC is that if the rule  
3 5.300 were applied strictly, that residential  
4 customers would see a rather significant return on  
5 their bills next year or they would see less of --  
6 yeah, they would see a significant return.

7 And in the filing you specified that is  
8 around 11 percent. But I wanted to understand the  
9 dollar magnitude of that return. So it looked to me  
10 like digging around a little bit in the model that  
11 EVT had provided, there is a tab labeled "EEC Rates  
12 Report." And a little section that says "Revenue  
13 under each methodology." And I think I'm  
14 interpreting these numbers correctly, but I just want  
15 to verify with you because sometimes our sheets can  
16 be a little -- I don't know -- I likened it to poking  
17 around in someone else's attic, never quite sure what  
18 you're going find.

19 But it looks to me if we went with the  
20 5.300 method for calculating the EEC, residential  
21 customers would see a return of about 3.1 million  
22 dollars, whereas commercial would be -- we need to  
23 collect an additional 3.7 million dollars from  
24 commercial customers. And in the case of industrial,  
25 it would see a return of around 623,000. So I just

1 wanted to verify those numbers, and that I was  
2 understanding them in the right way.

3 MR. MASSIE: So I'm just getting the  
4 file open now. And you're looking at EEC Rates  
5 Report, is that what you said?

6 MS. WHITE: Yes. EEC Rates Report.

7 MR. MASSIE: In column 6 through 20 and  
8 row -- I mean row 6 through 20 and columns L and M?

9 MS. WHITE: You know what? I have a  
10 clip of it. I don't actually have like the whole  
11 model open.

12 MR. KNAUER: That's it, Jim.

13 MR. MASSIE: I'll explain the table for  
14 others that probably haven't had a chance to look at  
15 it. Basically what I did was a comparison.

16 MR. WESTMAN: Hey Jim, before you  
17 begin; Joan, were you planning to do a screen share  
18 to show this section?

19 MS. WHITE: Oh, sure. Yeah, yeah. Let  
20 me just --

21 MR. WESTMAN: That would be helpful.  
22 Thank you.

23 MS. WHITE: Great. Let me figure out  
24 if I can -- sorry. I had the wrong screen there.

25 MR. KNAUER: Joan, I've got it open if

1 you want me to share the whole spreadsheet.

2 MS. WHITE: Oh sure. Yeah. If you  
3 want to. I think I have the clip from email.

4 MR. KNAUER: Right. Why don't we throw  
5 -- why don't we --

6 MS. WHITE: Okay. So I'm going to.

7 MR. KNAUER: Mine.

8 MS. WHITE: I'm going to make you the  
9 presenter, Tom. Okay. If you have the spreadsheet,  
10 it's a little easier.

11 MR. KNAUER: I do, and we are looking  
12 up in column M. Rows 6 through 20, as you said. Can  
13 everyone see those?

14 MR. MASSIE: Yeah.

15 MR. WESTMAN: Yeah. Thanks, Tom.

16 MR. MASSIE: So what you're seeing in  
17 this whole table basically is the different customer  
18 classes that we are establishing the rates for. I'm  
19 showing you in column J the collection rates that  
20 were established for 2020 and then 5.3. So this was  
21 -- so the column K is following 5.3 strictly, and  
22 then columns L and M are when we apply all the  
23 credits that we designated on the 2021 rate factors  
24 worksheet.

25 So we basically established, you know,

1 the carryover from the Department, the under-  
2 collections we forecasted for 2020. We used that as  
3 a rate credit. We apply all those credits, and so  
4 under that mechanism, you see that residential sector  
5 would get about a 3 million dollar return. And that  
6 -- I'm sorry.

7 That's not the way you're reading this.  
8 You described it as a 3 million dollar return. But  
9 basically what this means is that the residential  
10 class would actually end up paying \$3 million more is  
11 what this is saying. Okay? Because the rate credits  
12 are applied, you know, the rates -- we basically set  
13 the rates what they were in 2020 and added 1.62  
14 percent to each class. And when you do that,  
15 essentially, you know, the burden would have been on  
16 the commercial sector.

17 But in this model what it's doing is  
18 giving the commercial sector a break. Because their  
19 rates would not have gone up as much as they would --  
20 as they should have under 5.3 without the rate  
21 credits. That's essentially what this is doing.

22 MS. WHITE: Okay. Okay. So we are  
23 basically -- we are going to collect around 3.1  
24 million more from residential customers than we would  
25 have otherwise, and we are going to use that money to

1 offset what we would collect from commercial. So I  
2 don't know if we necessarily want to use the word  
3 cross subsidy, but you could maybe describe it that  
4 way. That's the magnitude of the dollars that are  
5 flowing from residential to commercial.

6 MR. MASSIE: Right. What we were  
7 thinking about it was that we didn't want to describe  
8 it as cross subsidy because essentially we thought of  
9 it as the 2020 rates being equitable. And so we  
10 basically traded an equitable increase across all  
11 rate classes.

12 I think the big challenge we faced in  
13 5.3 is when you have these major sector changes in  
14 consumption or demand, you see, you know, these big  
15 fluctuations. And so, you know, we looked at a few  
16 different ways of allocating, you know, trying to  
17 forecast sales or trying to come up with different  
18 alternative methodologies to propose that would mute  
19 these issues.

20 But really it was almost impossible  
21 because of the, you know, the declining sales in that  
22 commercial sector, and you know, I think the other  
23 factor that we cited in the filing was timing is --  
24 can be an issue as well, especially in the ski  
25 industry, where you have these major companies that

1 are either making snow or not making snow. And if  
2 they miss the cut off in a particular season by five  
3 days, it could end up in a different billing month.  
4 And if it happens at the end of the year, then the  
5 sales end up in December or January.

6 And so when you're doing the rate  
7 calculation it has impact on where that lands. So  
8 those are annual fluctuations that -- you will see  
9 those things happen from year to year.

10 In the commercial sector it's a  
11 different problem. I mean some of it could be  
12 seasonality related to snow making or ski industry or  
13 whatever. But the big issue we are seeing is  
14 businesses going away. And that's the big problem  
15 there.

16 MS. WHITE: Great. So I feel like I  
17 have a much better understanding of that issue. And  
18 then, Tom, you had one more substantive issue. I'm  
19 happy to kind of summarize it and ask it; you can,  
20 whatever. Either way.

21 MR. KNAUER: Sure. I'll ask it. Jim,  
22 you had mentioned, you know, the expected under-  
23 collections from 2020. I think that's approximately  
24 1.5 million dollars.

25 MR. MASSIE: Yeah.

1 MR. KNAUER: So that's included in your  
2 calculation. And then does your calculation also  
3 reflect the -- Efficiency Vermont's proposed budget  
4 reductions for 2020 in the proposed 2021 collections,  
5 so those two would have the effect of offsetting each  
6 other?

7 MR. MASSIE: Yeah. So if you go to the  
8 next worksheet, that file you have open, the 2021  
9 rate factors --

10 MR. KNAUER: Yup.

11 MR. MASSIE: You'll see on row 21 is  
12 the Department's carryover value, so we applied that  
13 as a credit.

14 MR. KNAUER: Okay.

15 MR. MASSIE: And then you've got in row  
16 23, 24 and 25, that's the undercollections amount.

17 MR. KNAUER: Great. Okay.

18 MS. WHITE: Tom, can you scroll down?  
19 Because I can only see up to 2020. Can you scroll  
20 down just a smidge, so I can see line 20 through 25.  
21 That's helpful.

22 MR. KNAUER: Does anyone else have  
23 questions on the worksheet while we have it open?  
24 From the Department?

25 MR. WESTMAN: One thing that I just

1 want to jump in with, Tom, and Joan, as far as timing  
2 goes, is that it's clear in our filing that we are  
3 basing the 2021 budget on the matters being addressed  
4 in the EEU DRP case. I just -- I think it's worth  
5 noting here again, that, you know, that DRP  
6 proceeding is also taking place as we speak. And I  
7 think reply briefs will be filed today by our  
8 attorney and by the Department and others -- other  
9 EEUs.

10 And so, you know, resolution of that  
11 case could very well also be dependent on these  
12 budget matters and the numbers being presented in  
13 this spreadsheet. But the intent with the filing  
14 made last week was to have those DRP numbers that are  
15 largely, you know, agreed to, presented in this table  
16 as they are proposed, and we don't make any  
17 deviations from the Efficiency Vermont budget  
18 proposal in the spreadsheet.

19 MR. KNAUER: Understood. Does the  
20 Department have any questions about the worksheet  
21 that they want to ask?

22 MS. LUDWIG: I understand we have one  
23 question, and I'll let T.J. ask that question.

24 MR. POOR: Thank you. Actually I have  
25 two questions. One is actually a process question

1 for the commission, but I'll start with the  
2 Efficiency Vermont question.

3 When I was looking at the spreadsheet  
4 it looked like you based the commercial load  
5 forecast, at least in part, on the 7 percent, roughly  
6 maybe 7 and-a-half percent reduction in load that we  
7 are seeing from COVID in 2020, and kind of carrying  
8 that forward to 2021, plus an additional trend line  
9 in sales that you talked about earlier.

10 On the residential side it looks like  
11 you used the trend line, but did not kind of  
12 incorporate, you know, 2020 has additional  
13 residential load due to COVID. And I'm not sure if I  
14 missed it or I'm looking at it wrong, but it looks  
15 like you used the, you know, residential sales from  
16 2019 without having kind of the COVID increase in  
17 residential sales for 2020.

18 And it would be great if you could  
19 either correct me or explain kind of the difference  
20 in treatment of the sectors.

21 MS. WHITE: Could you tell us, T.J.,  
22 where you're at in the spreadsheet so we can follow  
23 along?

24 MR. POOR: Yeah. So I kind of did that  
25 from memory when I was looking at it. But if you

1 look at the EEC Rates Report, and so K31 that has EEC  
2 -- that's the 2021 estimated sales, and you can trace  
3 that back to EEC calculations. C -- I lost it. C68.

4 MR. MASSIE: So I think you want to be  
5 looking at the EEC calculation worksheet, and you  
6 want to go down to row 63. And that's the whole  
7 table that forecast sales for 2021. And you can see  
8 those adjustments that I described in the filing are  
9 over in column F. And the numbers that T.J. was just  
10 referencing are in F67, F74, where I put a note in  
11 there describing how I did the forecasting.

12 And T.J.'s right. The -- in row 74 I  
13 basically tried to account for what I was seeing for  
14 trends, what I'm seeing for COVID, and trying to come  
15 up with a factor that discounted sales for next year.

16 The starting point, of course, is the  
17 number that you've got in for the commercial sectors  
18 in row 71. And you can see the reference for that is  
19 the data that's in the revenue and load data which is  
20 2019 data.

21 So again, when I refer back to, you  
22 know, the challenges with 5.3, the way it's written  
23 it's looking at sales from last year and trying to  
24 say what are the sales going to be next year. Right?  
25 So what I'm trying to get to is if you look at last

1 year, what are you seeing year over year? And what  
2 could we anticipate that to be next year?

3 And so, you know, I think -- I mean so  
4 anyway that explains the commercial piece. I think  
5 the question about the residential is true. The  
6 number that's in row 65 in column C, cell C65, is the  
7 2019 sales data. We have seen that number dropping  
8 year over year generally. I think there is actually  
9 a worksheet at the beginning of this file that  
10 illustrates some of the changes you've seen in these  
11 sectors.

12 But the other thing that happened and  
13 that's going to happen in 2021 that I think I  
14 highlighted in the summary or the filing that we  
15 haven't talked about here is the adjustment for gross  
16 consumption. And so you'll see that adjustment  
17 happening in row 66 and in row 73. So we have added  
18 in half of the year of gross consumption related to  
19 net-metered customers, and it was a pretty extensive  
20 effort that I went through, and I've reviewed with  
21 the Department. I talked to every utility about how  
22 they might provide that number for me. And there was  
23 some confusion, but we were able to finally arrive at  
24 a number that we could estimate as a value that we  
25 use for next year.

1                   But to get back to the zero percent  
2 growth, you know, the concept that I was using was we  
3 saw decreases year over year about 2 percent, 2 plus  
4 percent. And so if you carry that out for two years  
5 it might be as much as 5 percent. This year we are  
6 seeing trends where the residential sector are off as  
7 much as 10, 12 percent some months, you know, in the  
8 early months of the COVID stages. And but that's --  
9 it's tended to tail off a little bit. I think we are  
10 starting to see that tail off a little bit, although  
11 I wouldn't expect it to go back down to where we  
12 originally forecasted collections for 2020 to be. So  
13 we are seeing an increase.

14                   So the question is what does that look  
15 like next year? And I wish I had a crystal ball.  
16 You know, it's possible it could be higher. Again,  
17 we are using 2019. If you deescalate by 2 and-a-half  
18 percent a year, we are down 5 percent. This year we  
19 are up an average of about 8 percent. I don't know  
20 what it looks like next year. It might be -- if  
21 people go back to work, and kids are back in schools,  
22 you know, maybe we don't -- we won't see this number  
23 as high as it's trending right now this year. Hard  
24 to predict. Could that number be higher? Possibly.

25                   MR. POOR: Thanks, Jim. I guess I have

1 one follow up, and I realize, you know, any forecast  
2 that's done, the only thing we know about it really  
3 is that it's going to be wrong, right? So just --  
4 and I do appreciate that Montpelier kids are back in  
5 school right now, so my kids aren't here, which is  
6 great.

7 But the -- one other follow up is when  
8 you talk about trends, you're really talking about  
9 2018 to '19 it looks like. And at least it looked  
10 like that from the spreadsheet. And I'm curious if  
11 you looked back further, and also if, you know,  
12 January and February of 2020 were, I think, more  
13 moderate temperature than normal, and if you looked  
14 at weather impacts at all.

15 MR. MASSIE: It's not normalized. The  
16 data is not normalized. But if you go back to the  
17 very first worksheet that's visible in this file,  
18 it's called the "2018-2020 C&I Comp." You'll see --  
19 I don't have -- well I do have the residential  
20 numbers in here too. I guess I added those at the  
21 end of the day.

22 But you'll see in the top section the  
23 industrial trends. So on the left-hand side you'll  
24 see what the data that was reported by the utilities  
25 going back to 2016, you can see the percentage of

1 kilowatthour changes in column F. You know,  
2 interestingly enough over that period of time you'll  
3 see how the rates are changing. We had columns N, O,  
4 P, Q that's across the state. That's just basically  
5 an average, so it's not actually pulling the utility  
6 rates by customer class, but it's basically  
7 calculating what those rates look like.

8 And then starting in row 17 is the  
9 commercial trends. And, you know, again, they are up  
10 and down when you look at KWH. But, you know, you  
11 can see that in '19 and '20 for the commercial areas,  
12 you know, what we are projecting. And, you know, the  
13 numbers are down. So it gives you an idea of sort of  
14 what we have been seeing.

15 But even in residential sectors in row  
16 26, 27, 28, it's not changed a whole lot. It went  
17 down from '18 to '19. It looks like it's up this  
18 year. And, you know, we used row 27 to forecast  
19 2021. And then we made adjustments to that. And  
20 obviously we didn't make any escalation or  
21 deescalation adjustment. We did add in the net  
22 metering number.

23 So this gives you a little, you know,  
24 vision into some of the data we were using. Is that  
25 helpful?

1 MR. POOR: It is. Thanks. And I guess  
2 I hadn't looked at this tab maybe closely enough yet  
3 to see that you went back to 2016 for the C&I  
4 sectors. But thank you. That's helpful.

5 I did have one question for the  
6 commission in terms of, one, if we have questions for  
7 Efficiency Vermont or the other EEUs, are those  
8 intended to be filed with the commission as well? We  
9 were kind of assuming so, but I figured I would ask.  
10 And then, if so, do you want us to repeat the  
11 questions that I just asked in the filing?

12 MR. KNAUER: So I'll take a stab here.  
13 I think the rule is silent. It establishes that a  
14 deadline for questions, but doesn't establish the  
15 format or whether they get filed with the commission  
16 or not.

17 From my perspective and probably my  
18 colleagues', we like to know what the questions are  
19 about the filings, so -- and we also like to know  
20 what the responses are. More information is usually  
21 better.

22 MR. POOR: We can file them with you  
23 for sure then.

24 MR. KNAUER: Great. Thank you. And  
25 then I guess you also asked whether the questions

1 you've asked during the status conference should be  
2 reasked; is that correct?

3 MR. POOR: Yes.

4 MR. KNAUER: I personally don't see  
5 that as necessary. But I will let you decide whether  
6 you want to put them in writing.

7 MR. POOR: Okay.

8 MS. WHITE: Also keep in mind we have a  
9 transcript of today's scheduling conference, so there  
10 is a record to refer to which is valid, I think, in  
11 briefs and things like that.

12 MR. POOR: Great. Thank you.

13 MR. KNAUER: Does the Department have  
14 any other questions about the spreadsheet while we  
15 have got it open? If not, I am going to close it.

16 MS. WHITE: Yeah. I had one.

17 MR. KNAUER: Go ahead.

18 MS. WHITE: I had one follow up. It  
19 was based on T.J.'s line of questioning, but it's not  
20 a question that can be answered today. It might be  
21 more for when EVT plans to file responses to  
22 questions in a few weeks or something. I just, you  
23 know, with all of these models is it hard to get a  
24 sense of which assumptions are very relevant in terms  
25 of the ultimate rate impact and the magnitude of

1 dollars that's flowing between customer classes and  
2 things like that.

3 I think we are all looking at a 2021  
4 wondering like what is -- what are the right numbers  
5 by class for load. So it would be helpful at some  
6 point, Jim, if you're just playing around and you  
7 say, okay, what if customer load was 4 percent higher  
8 next year or 5 percent higher, it would be really  
9 helpful for us to get a sense of how much those  
10 inputs matter.

11 So I don't know -- I'm not saying go do  
12 a whole full-blown sensitivity analysis certain with  
13 scenarios, et cetera, et cetera. But I think what we  
14 are trying to avoid is major undercollection and  
15 major overcollection, so we are not looking at 2022  
16 with a great big true-up. So it could be that these  
17 numbers don't matter all that much, or it could be  
18 very relevant. I would find that helpful. I'm not  
19 saying it's a mandatory thing, but it would really  
20 help us get to the right answer on this.

21 MR. MASSIE: Okay. I'll see what I can  
22 do.

23 MS. WHITE: Thank you so, so much.

24 MR. KNAUER: All right. I am guessing  
25 that Vermont Gas and Burlington Electric do not have

1 questions about the spreadsheet, but I'll just ask  
2 you to confirm. Jill, are you still there?

3 MS. PFENNING: Yes. No questions.  
4 Thanks.

5 MR. KNAUER: Okay. And Burlington  
6 Electric?

7 MR. LYLE: No questions. Thank you.

8 MR. KNAUER: Great. So I should have  
9 -- I think we are done sharing screen. Anything else  
10 to discuss in terms of schedule for the EEC case? I  
11 think we have covered everything, but I'm going to  
12 ask the parties one more time just to confirm that.  
13 The Department?

14 MS. LUDWIG: I don't have anything  
15 else.

16 MR. KNAUER: Great. Efficiency  
17 Vermont?

18 MR. WESTMAN: Tom, it might be helpful  
19 just to go through the dates that you've written down  
20 and that we plan on putting into the record for a  
21 schedule before I confirm, if that's not too much to  
22 ask.

23 MR. KNAUER: Yeah. I'll run through it  
24 again. We have got questions due to Efficiency  
25 Vermont on September 15. We have got responses from

1 Efficiency Vermont on September 23rd. A due date for  
2 comments is September 30th. And the rule has --  
3 November 1 we are assumed or as soon as possible  
4 thereafter for the commission to issue its decision.

5 MR. WESTMAN: Thank you very much for  
6 that. Yes. That's agreeable for both the Energy  
7 Efficiency Charge and the 2020 goal -- 2020 budget.  
8 Sorry. 2020 budget.

9 MS. WHITE: A quick clarifying. For  
10 the 2020 budget we had talked about an EVT reply  
11 comments date of October 7 earlier. Do you also want  
12 to do reply comments in the 2021 EEC calculation?  
13 Because the rule doesn't contemplate EVT reply in  
14 that case. But I guess it's between the Department  
15 and EVT whether they want to do that.

16 MR. WESTMAN: I don't feel strongly  
17 that we would need a formalized reply comment, but if  
18 comments are filed on the 30th that we feel should be  
19 responded to, then we can notify the commission that  
20 we would intend to file those reply comments. But I  
21 don't feel the need to put those in a formal process  
22 at this time.

23 MR. KNAUER: And I'm just going to  
24 double check with Vermont Gas and Burlington Electric  
25 that they are fine with the schedule or have no

1 input. Vermont Gas?

2 MS. PFENNING: We are fine with the  
3 schedule. Thank you.

4 MR. KNAUER: Yeah. And Burlington  
5 Electric?

6 MR. LYLE: Yes. We are all set.

7 MR. KNAUER: Great. So now turning to  
8 the last case. This is with respect to the carryover  
9 funds. The petition was filed on August 12, and I  
10 issued a scheduling order that included a comment  
11 deadline of September 8. And we have received  
12 comments from Vermont Gas and Efficiency Vermont.

13 Efficiency Vermont proposes a second  
14 comment deadline of September 18. Is this second  
15 comment deadline still needed, Dave?

16 MR. WESTMAN: No. I don't believe it  
17 is. We were just trying to line up all of those  
18 comments where if -- if our initial schedule were to  
19 follow, that any comments on that carryover would be  
20 filed.

21 I understand that VGS and Efficiency  
22 Vermont have already filed comments supporting that  
23 carryover proceeding. So given that there are no --  
24 -- well I guess we should ask BED. But -- our intent  
25 was to align the comments on all matters in one

1 filing, and so it seems like that deadline's already  
2 passed. So we can live with the -- with that  
3 schedule.

4 MR. KNAUER: Okay. And you have  
5 proposed a reply comment deadline. What I understand  
6 is those who have commented on this matter are in  
7 agreement. So from my perspective, I don't see reply  
8 comments as necessary. But I wanted, you know, this  
9 is your proposal, so I wanted to double check whether  
10 you think reply comments are still needed.

11 MR. WESTMAN: Thanks, Tom. I mean the  
12 schedule was proposed out of an abundance of caution  
13 of again joining all three of these cases, so I don't  
14 think reply comments are necessary. But I would also  
15 defer to BED who has not filed anything in the case  
16 at this point.

17 MR. KNAUER: Okay.

18 MR. LYLE: This is Tom Lyle. I don't  
19 know if there is a specific question for us. Yes.  
20 We didn't miss the filing deadline. We didn't intend  
21 to have, you know, to file comments. We have been  
22 kind of supportive. I mean this has been ongoing for  
23 quite sometime, and so we have been supportive all  
24 along. So we didn't think it was really necessary to  
25 file anything on the 8th. But if you need

1 confirmation from us, we can either do that now, or  
2 we can file a letter that, you know, we are  
3 supportive of the Department's proposal as outlined  
4 in their latest filing which was, I believe, in the  
5 end of August.

6 MR. KNAUER: Tom, if you're saying  
7 right now with the court reporter present that you  
8 support the proposal, then I'm good with that. Is  
9 that what you're saying?

10 MR. LYLE: Yes. On the virtual table,  
11 we are supportive.

12 MR. KNAUER: Thank you. And so the  
13 Department had originally filed a proposal -- a  
14 proposed commission decision by September 25th, and  
15 now Efficiency Vermont has proposed a commission  
16 decision by October 9th.

17 Is there a need for a commission  
18 decision 14 days from today? Turning to you, Megan.

19 MS. LUDWIG: Not that I'm aware of.

20 MR. KNAUER: Okay. Great. Efficiency  
21 Vermont? You can live with the October proposal?

22 MR. WESTMAN: The October proposal. I  
23 was actually thinking --

24 MR. KNAUER: I'm sorry. You had  
25 suggested an October 9th commission decision. That's

1 what I was referring to.

2 MR. WESTMAN: All right. So similar to  
3 the time frame that we lined up with the EEC, we  
4 would expect the decision in this case to be made no  
5 later than, you know, the decision in the EEC case.  
6 Because again, Jim's spreadsheet identified that  
7 carryover is important for the -- as a rate credit  
8 for 2021 rates. And so obviously we just need to  
9 have -- we need to have those dates aligned.

10 So as long as the commission orders it  
11 before the EEC order, or at the same time, that is  
12 fine.

13 MR. KNAUER: Okay. Is there anything  
14 else to discuss with respect to this case? Turning  
15 to the Department.

16 MS. LUDWIG: No.

17 MR. KNAUER: Efficiency Vermont?

18 MR. WESTMAN: No.

19 MR. KNAUER: Vermont Gas?

20 MS. PFENNING: No.

21 MR. KNAUER: Burlington Electric?

22 MR. LYLE: Just so I'm clear, so we  
23 will get an order from the commission hopefully by  
24 the 9th of October on the carryover funds. I'm just  
25 trying to figure out the process in terms of all of

1 the calculations that go into making the 2021 charge.

2 So we need this order on the carryover  
3 funds, but we also need the DRP budget approvals to  
4 also make the calculations? I'm just trying to  
5 figure out the time line for all these dates when  
6 they line up and when we actually have to set the  
7 charge.

8 MR. KNAUER: Yeah. I understand that  
9 question, Tom. I'm not sure that the schedules do  
10 line up perfectly this year. So yeah, it would be  
11 useful to you and to Vermont Gas and to Efficiency  
12 Vermont to have a commission -- or I guess mostly to  
13 you and Vermont Gas, to have a commission order  
14 before October 1 because that's when your 2021 EEC  
15 proposal is due.

16 So, you know, staff at the commission  
17 can work to get you there without making a promise  
18 about the commissioners' timing. And with respect to  
19 the DRP, I'm not sure when that order is going to  
20 come out.

21 MR. LYLE: Okay.

22 MR. KNAUER: We are still waiting for  
23 some reply briefs.

24 MR. LYLE: Okay. I can imagine this is  
25 going to be somewhat of a multi-step process. So I'm

1 just trying to forecast what the October 1 date  
2 filing is going to look like. I mean maybe a  
3 preliminary charge or we can ask for an extension to  
4 file -- to make that filing on the 1st of October to  
5 reflect actual numbers or actual approval.

6 MR. KNAUER: Right. So I can't tell  
7 you how to make the October 1 filing. I can make a  
8 couple of observations, though. That everyone who  
9 has commented on this carryover case is in agreement.  
10 And my understanding of the DRP case is that the  
11 parties are in agreement. So I can't tell you what  
12 the commission's going to say, but you know, you  
13 could -- I can make an educated guess on that one.  
14 Is that everything from you, Tom --

15 MR. LYLE: Yes.

16 MR. KNAUER: -- on this case? Okay.  
17 Dave, I see you raising your hand.

18 MR. WESTMAN: Yeah. I think you just  
19 answered this question, Tom, but I guess if the  
20 commission were to reject the carryover proposal that  
21 the Department has put forward, and that the EEU's all  
22 have indicated their support for, we would need to  
23 know that sooner rather than later. Probably but --  
24 you know, in advance of this September 30th comment  
25 period in the EEC case. I think the likelihood of

1 that is very low, but just sort of let it -- I should  
2 say that out loud -- is that if the commission  
3 rejects it, that would require a significant change  
4 in the Energy Efficiency Charge calculation.

5 And I would also point out that per the  
6 Department's request, in our Energy Efficiency Charge  
7 filing, we did submit different numbers based on  
8 whether or not that carryover proposal was accepted  
9 or rejected.

10 MR. KNAUER: Okay. So I'm going to --  
11 I'm making a leap here, and I'm going to ask you to  
12 confirm what I have inferred. That if the commission  
13 rejected the carryover proposal, that Efficiency  
14 Vermont's proposed alternative rates would look  
15 different than what they have filed here. Is that --

16 MR. WESTMAN: Correct.

17 MR. KNAUER: Great. That's good to  
18 know. Yeah. I think we have gone through everything  
19 in terms of scheduling for the three cases now.

20 Mary Jo, I'm sorry. Did you have a  
21 question about the DRP case, or was that answered?

22 MS. KROLEWSKI: Well no. I don't think  
23 -- why don't I ask my question. I mean went over a  
24 schedule about the QPI sort of determination. I  
25 noticed in the original schedule that there was going

1 to be a compliance filing in that case. And I'm  
2 guessing -- I'm not sure if that's totally how we  
3 should work things out. But maybe I should wait and  
4 see how you guys proceed through the case.

5 But I'm wondering if when people are  
6 making their proposals with regard to the QPIs, they  
7 just present them, you know, revised tables with  
8 their proposals so it's just easier for us to follow  
9 than to have a compliance filing later where then we  
10 find out what the tables really look like.

11 So I don't know if that's possible, but  
12 I think it would be helpful at least for me. It's  
13 helpful to look at actual tables with the numbers all  
14 laid out. Does that make sense?

15 MR. WESTMAN: It does. The tables  
16 require some substantial work, and so sometimes the  
17 time lines of finalizing the numbers, you know, like  
18 the reason why the -- all of those QPI and NPR tables  
19 were not presented, was just due to the time crunch  
20 and wanting to make sure that we got these in on  
21 time --

22 MS. KROLEWSKI: Yeah.

23 MR. WESTMAN: -- with the schedule. I  
24 do believe that we can submit that.

25 MS. KROLEWSKI: Yeah. I mean, don't

1 need to submit it now. I'm just thinking when you're  
2 getting through -- I forget what the schedule was.  
3 But when you sort of get the point of your final  
4 recommendations, to -- if you -- if those could be  
5 submitted or at least an indication where they would  
6 vary, you know, what parts of the tables would be  
7 varying depending upon -- on which -- say you both  
8 have different proposals -- which proposal we adopt.  
9 I think that would be helpful.

10 MR. WESTMAN: Okay.

11 MR. MASSIE: Can I ask a clarifying  
12 question? So I think I just heard you say you want  
13 Efficiency Vermont to file its proposed QPI tables.  
14 And that if the Department was proposing different  
15 values, they would also have to provide a set of  
16 tables?

17 MS. KROLEWSKI: Ideally if that's  
18 simple to do, or at least tables that indicate, hey,  
19 under our proposal this portion of the tables would  
20 change. Something like that. Just to give an idea  
21 of how things are proceeding.

22 Maybe I'm the only one -- I mean I  
23 think your filing sort of indicated sort of how the  
24 major numbers change, but it would be nice to see how  
25 that carries over in the tables. So even if you

1 don't have the actual values, just like a table  
2 highlighting, hey, you know, when we change this, all  
3 this carries through, something like that.

4 I don't know if that's easy to do. And  
5 again, it doesn't need to be done -- I'm trying to  
6 look at the schedule that I hand wrote on my paper  
7 here. But maybe at least by the, you know, after  
8 your discovery period is done or something if that  
9 can be filed.

10 MR. MASSIE: So our next round of  
11 responses it sounds like would be on September 23rd.  
12 Those would be responses to the Department's  
13 questions. So I think we could file a set of tables  
14 there. I mean I'm not sure that the Department's  
15 going to be prepared to be able to file an  
16 alternative set of tables at that point. But that's  
17 their call, I guess.

18 MS. KROLEWSKI: Yeah. Maybe if you  
19 guys could file that, and then, you know, if the  
20 tables are just highlighted where things carry  
21 through and change, and so -- just so we know what  
22 parts are changing. And recognizing if the  
23 Department proposes something different, that their  
24 tables would change in those areas as well. Just  
25 like a guide template what's going to change when you

1 change the goals.

2 MR. MASSIE: Let me ask one more  
3 clarifying question.

4 MS. KROLEWSKI: Sure.

5 MR. MASSIE: I believe we have done it  
6 in the past. We actually produced a table that  
7 showed what the existing QPIs were and how they  
8 changed every single QPI and every change in the  
9 whole. As you know, the tables are -- there is eight  
10 or nine worksheets maybe. I think there is even more  
11 than that. There might be 14 worksheets. None of  
12 the TEPF numbers are changing, but all the electric  
13 QPI tables and then all the spending tables at the  
14 end will change.

15 And so we would file a whole new set of  
16 those.

17 MS. KROLEWSKI: Yeah. Jim, I think  
18 that would be helpful. So like you've done in the  
19 past, hey, this is how it's changing. And maybe  
20 that's enough just so I -- when I'm reviewing it,  
21 it's easier if I'm just seeing how the tables are  
22 changing, even if I don't have the final actual  
23 numbers in them.

24 MR. MASSIE: Right.

25 MS. KROLEWSKI: Just to know where they

1 are changing.

2 MR. MASSIE: I can do that.

3 MS. KROLEWSKI: All right. All right.  
4 That was my only question. Maybe it was a request.

5 MR. WESTMAN: Given that we just talked  
6 about some -- it seems like that is a question that  
7 we should be responsive to by the 23rd. Can we just  
8 go over that time line again? I know you did it in  
9 the context of the 2016-03 case, Tom, which I think  
10 we agreed to. But I realize that we didn't actually  
11 run through the dates when we agreed to it.

12 I know it's in front of me from an  
13 email I have from the Department. But I want to make  
14 sure that -- I want to make sure we are all on the  
15 same page.

16 MR. KNAUER: Yeah. So I'll go through  
17 what I understand. And so we have got Efficiency  
18 Vermont's filing came in on September 4th. Today we  
19 have agreed to comments due on that proposal, the  
20 budget portion of the proposal, by September 30, and  
21 Efficiency Vermont providing reply comments on  
22 October 7th. And a commission decision sometime --  
23 sometime thereafter, the sooner the better, hopefully  
24 aligning with the efficiency charge decision.

25 And then a separate track for the QPI

1 portion. Discovery on Efficiency Vermont's proposal  
2 on September 16, with Efficiency Vermont responding  
3 by September 23rd. The Department and anyone else  
4 who wanted to file comments or testimony would be  
5 October 5th. By October 9 there would be an  
6 indication from the parties as to whether any  
7 additional process is required, including the  
8 possibility of a hearing.

9 The parties have proposed hearing dates  
10 sometime between October 13 and 15. And that, of  
11 course, is subject to check with the Clerk's office  
12 and court reporters and whatnot. And then two weeks  
13 following a hearing would be the due date for briefs  
14 with two more weeks for reply briefs.

15 MR. WESTMAN: Thank you. That seems  
16 consistent with my understanding, and I appreciate  
17 that you broke out the budget change in 2016-03  
18 separate from the QPI. So thank you. Okay.

19 MS. KROLEWSKI: And just to add, we  
20 will notice the hearing once we pick the date anyway,  
21 the 12 days in advance. And we will cancel it if  
22 need be, if no one requests it on October 9th; right?  
23 I think we all agreed to that? That we needed a 12-  
24 day notice?

25 MR. KNAUER: We do need that.

1 MS. KROLEWSKI: I mean we can notice it  
2 at any time before that period. It just has to be at  
3 least 12 days.

4 MR. KNAUER: All right. So from my  
5 perspective, we have addressed all the business that  
6 we had on the agenda for today. But I want to check  
7 in with the parties one more time. Let me know if  
8 you would like to discuss anything else or whether  
9 you prefer going to lunch. Starting with the  
10 Department.

11 MS. LUDWIG: I have nothing else.

12 MR. KNAUER: Okay. Efficiency Vermont?

13 MR. WESTMAN: Nothing else.

14 MR. KNAUER: Vermont Gas?

15 MS. PFENNING: We have nothing else.

16 MR. KNAUER: And Burlington Electric?

17 MR. LYLE: No. We are all set.

18 MR. KNAUER: All right. I'm going to  
19 check with my colleagues. Joan?

20 MS. WHITE: All set. Thank you.

21 MR. KNAUER: Andrea?

22 MS. POPPITI: All good.

23 MR. KNAUER: And Mary Jo?

24 MS. KROLEWSKI: All good.

25 MR. KNAUER: Okay. Thanks to everyone

1 for participating today, especially on short notice.  
2 We will issue scheduling orders as we have discussed  
3 today, and with that, happy lunch. We are adjourned.  
4 Bye bye.

5 (Whereupon, the proceeding was  
6 adjourned at 12:26 p.m.)  
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C E R T I F I C A T E

1  
2  
3 I, Kim U. Sears, do hereby certify that I  
4 recorded by stenographic means the Joint Status Conference  
5 re: Case Nos. 20-2022-INV, 20-2241-PET, EEU-2016-03,  
6 held via videoconference on September 11, 2020, beginning  
7 at 11 a.m.

8 I further certify that the foregoing  
9 testimony was taken by me stenographically and thereafter  
10 reduced to typewriting and the foregoing 60 pages are a  
11 transcript of the stenograph notes taken by me of the  
12 evidence and the proceedings to the best of my ability.

13 I further certify that I am not related to  
14 any of the parties thereto or their counsel, and I am in  
15 no way interested in the outcome of said cause.

16 Dated at Williston, Vermont, this 16th day  
17 of September, 2020.

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