

North Shore Gas Energy Efficiency Program - Plan Year 5

PY5 Second Quarter Report: June 2015 - November 2015

Preliminary

Overall Utility EEP Portfolio				Utility EEP Residential Programs				Utility EEP Business Programs				Other Utility Portfolio Costs			
Energy Savings (Net Therms)				Energy Savings (Net Therms)				Energy Savings (Net Therms)				Energy Savings (Net Therms)			
Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal	PY Pct. Achieved
Total	175,334	1,407,703	12%	Total	132,979	1,023,341	13%	Total	42,355	384,362	11%	Total	0	0	NA
Program Costs				Program Costs				Program Costs				Program Costs			
Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced
Total	\$1,221,409	\$3,384,508	36%	Total	\$753,773	\$1,746,610	43%	Total	\$317,794	\$1,194,759	27%	Total	\$149,843	\$443,139	34%

EEP Residential Programs						
Energy Savings (Therm)						
NSG Residential Programs	Cumulative Net Therms YTD	Planned PY5 Goal	PY5 Pct. Achieved	Revised PY5 Goal	PY5 Pct. Achieved	Comments
Residential Program	112,647	179,342	62.8%	290,342	38.8%	Savings on target with modified savings goal.
Multifamily Program	20,332	136,022	14.9%	25,022	81.3%	Due to limited opportunities in the MF marketing in North Shore Gas, 111,000 therms shifted from MF to Residential.
Residential Outreach Programs	-	707,977	0.0%	707,977	0.0%	Includes Home Energy Reports and Elementary Education. Savings will not be realized until after the close of the Program Year, as planned.
Residential Programs - Total	132,979	1,023,341	13.0%	1,023,341	13.0%	

Program Costs						
NSG Residential Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Residential Program	\$339,803	\$829,565	41.0%	\$966,939	35.1%	Budget increased with additional incentives shifted from MF to Residential.
Multifamily Program	\$100,226	\$342,303	29.3%	\$277,878	36.1%	Budget reduced in line with savings shifts.
Residential Outreach Programs	\$313,743	\$574,742	54.6%	\$574,742	54.6%	Includes Home Energy Reports and Elementary Education.
Residential Programs - Total	\$753,773	\$1,746,610	43.2%	\$1,819,559	41.4%	

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Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal	PY Pct. Achieved
Total	175,334	1,407,703	12%	Total	132,979	1,023,341	13%	Total	42,355	384,362	11%	Total	0	0	NA
Program Costs				Program Costs				Program Costs				Program Costs			
Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced
Total	\$1,221,409	\$3,384,508	36%	Total	\$753,773	\$1,746,610	43%	Total	\$317,794	\$1,194,759	27%	Total	\$149,843	\$443,139	34%

EEP Business Programs						
Energy Savings (Therm)						
NSG Business Programs	Cumulative Net Therms YTD	Planned PY5 Goal	PY5 Pct. Achieved	Revised PY5 Goal	PY5 Pct. Achieved	Comments
Business Program	24,480	355,678	6.9%	355,678	6.9%	Savings on forecast; large C&I Projects typically close in Q4
Small Business Program	17,875	28,684	62.3%	28,684	62.3%	Substantial pipeline carried over from PY4 into PY5 driving early savings.
Business Programs - Total	42,355	384,362	11.0%	384,362	11.0%	

Program Costs						
NSG Business Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Business Program	\$232,380	\$1,012,122	23.0%	\$881,878	26.4%	With few paid projects that were very cost effective, spending is trending low but will catch up as the year progresses.
Small Business Program	\$85,414	\$182,637	46.8%	\$182,637	46.8%	
Business Programs - Total	\$317,794	\$1,194,759	26.6%	\$1,064,515	29.9%	

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Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal	PY Pct. Achieved
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Program Costs				Program Costs				Program Costs				Program Costs			
Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced
Total	\$1,221,409	\$3,384,508	36%	Total	\$753,773	\$1,746,610	43%	Total	\$317,794	\$1,194,759	27%	Total	\$149,843	\$443,139	34%

Other Portfolio Costs						
Program Costs						
Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Administration	\$76,197	\$227,696	33.5%	\$ 227,696	33.5%	
EM&V- EE	\$62,874	\$100,476	62.6%	\$ 100,476	62.6%	
Utility Verification of DCEO Invoices	\$574	\$1,350	42.5%	\$ 1,350	42.5%	
OBF Program Mgt (Coord, Measure Qualification)	\$0	\$2,785	0.0%	\$ 2,785	0.0%	
OBF Program Mgt (Financial Institution)	\$3,194	\$28,018	11.4%	\$ 28,018	11.4%	
EM&V- OBF	\$0	\$4,500	0.0%	\$ 4,500	0.0%	
Research & Development	\$7,004	\$56,129	12.5%	\$ 56,129	12.5%	R&D funding in PY5 is used for Joint Utilities Building Codes Compliance Initiative and Smart Thermostats
Phase 3 Plan Development	\$0	\$22,185	0.0%	\$ 22,185.00	0.0%	
Other EE Programs - Total	\$149,843	\$443,139	33.8%	\$443,139	33.8%	
DCEO - Implementation	\$41,830	\$1,128,169	3.7%	\$1,128,169	3.7%	
Other- Total	\$191,673	\$1,571,308	12.2%	\$1,571,308	12.2%	

Program Costs by Budget Category							
Budget Category	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments	As a % of Total PY5 PGL
Administration	\$76,197	\$227,696	33.5%	\$227,696	33.5%		6.2%
Implementation	\$439,397	\$927,000	47.4%	\$897,168	49.0%		36.0%
Incentives	\$183,487	\$867,675	21.1%	\$857,067	21.4%		15.0%
Incentive Delivery	\$379,939	\$997,894	38.1%	\$981,039	38.7%		31.1%
Marketing	\$68,744	\$148,800	46.2%	\$148,800	46.2%		5.6%
Utility Verification of DCEO Invoices	\$574	\$1,350	42.5%	\$1,350	42.5%		0.0%
EM&V- EE	\$62,874	\$100,476	62.6%	\$100,476	62.6%		5.1%
OBF Program Management Measure Qualification	\$0	\$2,785	0.0%	\$2,785	0.0%		0.0%
OBF Program Management (Financial Institution)	\$3,194	\$28,018	11.4%	\$28,018	11.4%		0.3%
EM&V- OBF	\$0	\$4,500	0.0%	\$4,500	0.0%		0.0%
Research & Development	\$7,004	\$56,129	12.5%	\$56,129	12.5%	R&D funding in PY5 is used for Joint Utilities Building Codes Compliance Initiative and Smart Thermostats	0.6%
Phase 3 Plan Development	\$0	\$22,185	0.0%	\$22,185	0.0%		0.0%
Total Utility EEP Costs	\$1,221,409	\$3,384,508	36.1%	\$3,327,213	36.7%		
DCEO - Implementation	\$43,555	\$1,128,169	3.9%	\$1,128,169	3.9%		

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Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal	PY Pct. Achieved
Total	1,304,193	7,476,068	17%	Total	998,451	3,842,039	26%	Total	305,742	3,634,029	8%	Total	0	0	NA
Program Costs				Program Costs				Program Costs				Program Costs			
Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced
Total	\$5,967,072	\$19,254,383	31%	Total	\$3,340,041	\$8,858,523	38%	Total	\$2,001,873	\$8,580,835	23%	Total	\$625,159	\$1,815,025	34%

EEP Residential Programs						
Energy Savings (Therm)						
PGL Residential Programs	Cumulative Net Therms YTD	Planned PY5 Goal	PY5 Pct. Achieved	Revised PY5 Goal	PY5 Pct. Achieved	Comments
Residential Program	391,744	1,018,531	38.5%	1,099,045	35.6%	Includes Home Energy Rebates and Home Energy Jumpstart.
Multifamily Program	606,707	1,487,057	40.8%	1,160,000	52.3%	Due to strong program performance in PY4, savings reduced to balance the program over the three year period.
Residential Outreach Programs	-	1,336,451	0.0%	1,336,451	0.0%	Includes Home Energy Reports and Elementary Education. Savings will not be realized until after the close of the Program Year, as planned.
Residential Programs - Total	998,451	3,842,039	26.0%	3,595,496	27.8%	

Program Costs						
PGL Residential Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Residential Program	\$1,249,725	\$4,125,554	30.3%	\$4,108,798	30.4%	Includes Home Energy Rebates and Home Energy Jumpstart.
Multifamily Program	\$1,475,170	\$3,594,600	41.0%	\$3,664,940	40.3%	
Residential Outreach Programs	\$615,146	\$1,138,369	54.0%	\$1,138,369	54.0%	Includes Home Energy Reports and Elementary Education.
Residential Programs - Total	\$3,340,041	\$8,858,523	37.7%	\$8,912,107	37.5%	

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Total	\$5,967,072	\$19,254,383	31%	Total	\$3,340,041	\$8,858,523	38%	Total	\$2,001,873	\$8,580,835	23%	Total	\$625,159	\$1,815,025	34%

EEP Business Programs						
Energy Savings (Therm)						
PGL Business Programs	Cumulative Net Therms YTD	Planned PY5 Goal	PY5 Pct. Achieved	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Business Program	200,040	3,185,430	6.3%	3,200,000	6.3%	Savings on forecast; large C&I Projects typically close in Q4
Small Business Program	105,702	448,599	23.6%	448,599	23.6%	
Business Programs - Total	305,742	3,634,029	8.4%	3,648,599	8.4%	

Program Costs						
PGL Business Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Business Program	\$1,525,172	\$7,213,650	21.1%	\$6,475,596	23.6%	
Small Business Program	\$476,701	\$1,367,185	34.9%	\$1,367,199	34.9%	
Business Programs - Total	\$2,001,873	\$8,580,835	23.3%	\$7,842,795	25.5%	

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Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal*	PY Pct. Achieved	Indicator	Cumulative Net Therms YTD	Planned PY5 Goal	PY Pct. Achieved
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Program Costs				Program Costs				Program Costs				Program Costs			
Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced	Indicator	Cumulative Costs YTD	Planned Budget	Pct. Invoiced
Total	\$5,967,072	\$19,254,383	31%	Total	\$3,340,041	\$8,858,523	38%	Total	\$2,001,873	\$8,580,835	23%	Total	\$625,159	\$1,815,025	34%

Other Portfolio Costs						
Program Costs						
Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Administration	\$236,085	\$705,630	33.5%	\$705,630	33.5%	
EM&V- EE	\$359,184	\$573,147	62.7%	\$573,147	62.7%	
Utility Verification of DCEO Invoices	\$1,778	\$7,500	23.7%	\$7,500	23.7%	
OBF Program Mgt (Coord, Measure Qualification)	\$0	\$17,172	0.0%	\$17,172	0.0%	
OBF Program Mgt (Financial Institution)	\$6,410	\$76,125	8.4%	\$76,125	8.4%	
EM&V- OBF	\$0	\$30,000	0.0%	\$30,000	0.0%	
Research & Development	\$21,702	\$279,736	7.8%	\$279,736	7.8%	R&D funding in PY5 is used for Joint Utilities Building Codes Compliance Initiative and Smart Thermostats
Phase 3 Plan Development	\$0	\$125,715	0.0%	\$125,715	0.0%	
Other EE Programs - Total	\$625,159	\$1,815,025	34.4%	\$1,815,025	34.4%	
DCEO - Implementation	\$153,027	\$6,418,398	2.4%	\$6,418,398	2.4%	
Other- Total	\$778,185	\$8,233,423	9.5%	\$8,233,423	9.5%	

Total EEP Recoverable Costs							
Program Costs by Budget Category							
Budget Category	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments	As a % of Total PY5 PGL
Administration	\$236,085	\$705,630	33.5%	\$705,630	33.5%		4.0%
Implementation	\$2,622,531	\$5,614,000	46.7%	\$5,614,000	46.7%		44.0%
Incentives	\$836,438	\$6,394,104	13.1%	\$6,689,523	12.5%		14.0%
Incentive Delivery	\$1,678,410	\$4,856,254	34.6%	\$4,045,436	41.5%		28.1%
Marketing	\$204,535	\$575,000	35.6%	\$575,000	35.6%		3.4%
Utility Verification of DCEO Invoices	\$1,778	\$7,500	23.7%	\$7,500	23.7%		0.0%
EM&V- EE	\$359,184	\$573,147	62.7%	\$573,147	62.7%		6.0%
OBF Program Management Measure Qualification	\$0	\$17,172	0.0%	\$17,172	0.0%		0.0%
OBF Program Management (Financial Institution)	\$6,410	\$76,125	8.4%	\$76,125	8.4%		0.1%
EM&V- OBF	\$0	\$30,000	0.0%	\$30,000	0.0%		0.0%
Research & Development	\$21,702	\$279,736	7.8%	\$279,736	7.8%	R&D funding in PY5 is used for Joint Utilities Building Codes Compliance Initiative and Smart Thermostats	0.4%
Phase 3 Plan Development	\$0	\$125,715	0.0%	\$125,715	0.0%		0.0%
Total Utility EEP Costs	\$5,967,072	\$19,254,383	31.0%	\$18,738,984	31.8%		
DCEO - Implementation	\$153,027	\$6,418,398	2.4%	\$6,418,398	2.4%		