

North Shore Gas Energy Efficiency Program - Plan Year 5

PY5 Third Quarter Report: December 2015 - February 2016

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	543,827	1,407,703	39%	Total	422,653	1,023,341	41%	Total	121,174	384,362	32%	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	\$2,139,084	\$3,384,508	63%	Total	\$1,173,886	\$1,746,610	67%	Total	\$505,692	\$1,194,759	42%	Total	\$459,507	\$443,139	104%

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	394,943	179,342	220.2%	290,342	136.0%	Savings on target with modified program savings goal, representing 111,000 therms shifted from MF to Residential.
Multifamily Program	27,710	136,022	20.4%	25,022	110.7%	Due to limited opportunities in the MF market 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	422,653	1,023,341	41.3%	1,023,341	41.3%	

Program Costs						
NSG Residential Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Residential Program	\$643,348	\$829,565	77.6%	\$966,939	66.5%	Budget increased with additional incentives shifted from MF to Residential. Cost-effective furnace rebates and cost-sharing with ComEd on Weatherization.
Multifamily Program	\$147,021	\$342,303	43.0%	\$277,878	52.9%	Incentive budget reduced in line with savings shifts; implementation efforts continue in the territory.
Residential Outreach Programs	\$383,517	\$574,742	66.7%	\$574,742	66.7%	Includes Home Energy Reports and Elementary Education.
Residential Programs - Total	\$1,173,886	\$1,746,610	67.2%	\$1,819,559	64.5%	

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Total	\$2,139,084	\$3,384,508	63%	Total	\$1,173,886	\$1,746,610	67%	Total	\$505,692	\$1,194,759	42%	Total	\$459,507	\$443,139	104%

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	81,761	355,678	23.0%	355,678	23.0%	Savings on forecast; large C&I Projects typically close in Q4
Small Business Program	39,413	28,684	137.4%	28,684	137.4%	Substantial pipeline carried over from PY4 into PY5 driving early savings. No additional projects expected in PY5.
Business Programs - Total	121,174	384,362	31.5%	384,362	31.5%	

Program Costs						
NSG Business Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Business Program	\$363,017	\$1,012,122	35.9%	\$881,878	41.2%	With few paid projects that were very cost effective, spending is trending low but will catch up as the year progresses.
Small Business Program	\$142,674	\$182,637	78.1%	\$182,637	78.1%	Cost-effective projects completed with implementation efforts still underway.
Business Programs - Total	\$505,692	\$1,194,759	42.3%	\$1,064,515	47.5%	

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Other Portfolio Costs						
Program Costs						
Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Administration	\$145,973	\$227,696	64.1%	\$ 227,696	64.1%	
EM&V - EE	\$93,809	\$100,476	93.4%	\$ 100,476	93.4%	
Utility Verification of DCEO Invoices	\$723	\$1,350	53.6%	\$ 1,350	53.6%	
OBF Program Mgt (Coord, Measure Qualification)	\$0	\$2,785	0.0%	\$ 2,785	0.0%	
OBF Program Mgt (Financial Institution)	\$12,887	\$28,018	46.0%	\$ 28,018	46.0%	
EM&V - OBF	\$0	\$4,500	0.0%	\$ 4,500	0.0%	
Potential Study	\$198,535	\$0	0.0%	\$0	0.0%	
Research & Development	\$7,579	\$56,129	13.5%	\$ 56,129	13.5%	R&D funding in PY5 is used for Smart Thermostats and Joint Utilities Building Codes Compliance Initiative.
Phase 3 Plan Development	\$0	\$22,185	0.0%	\$ 22,185.00	0.0%	
Other EE Programs - Total	\$459,507	\$443,139	103.7%	\$443,139	103.7%	
DCEO - Implementation	\$42,745	\$1,128,169	3.8%	\$1,128,169	3.8%	
Other- Total	\$502,252	\$1,571,308	32.0%	\$1,571,308	32.0%	

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	\$145,973	\$227,696	64.1%	\$227,696	64.1%		6.8%
Implementation	\$671,477	\$927,000	72.4%	\$897,168	74.8%		31.4%
Incentives	\$424,309	\$867,675	48.9%	\$857,067	49.5%		19.8%
Incentive Delivery	\$483,419	\$997,894	48.4%	\$981,039	49.3%		22.6%
Marketing	\$100,373	\$148,800	67.5%	\$148,800	67.5%		4.7%
Utility Verification of DCEO Invoices	\$723	\$1,350	53.6%	\$1,350	53.6%		0.0%
EM&V - EE	\$93,809	\$100,476	93.4%	\$100,476	93.4%		4.4%
OBF Program Management Measure Qualification	\$0	\$2,785	0.0%	\$2,785	0.0%		0.0%
OBF Program Management (Financial Institution)	\$12,887	\$28,018	46.0%	\$28,018	46.0%		0.6%
EM&V - OBF	\$0	\$4,500	0.0%	\$4,500	0.0%		0.0%
Potential Study	\$198,535	\$0	0.0%	\$0	0.0%		9.3%
Research & Development	\$7,579	\$56,129	13.5%	\$56,129	13.5%	R&D funding in PY5 is used for Smart Thermostats and Joint Utilities Building Codes Compliance Initiative.	0.4%
Phase 3 Plan Development	\$0	\$22,185	0.0%	\$22,185	0.0%		0.0%
Total Utility EEP Costs	\$2,139,084	\$3,384,508	63.2%	\$3,327,213	64.3%		
DCEO - Implementation	\$42,745	\$1,128,169	3.8%	\$1,128,169	3.8%		
EEP Portfolio - Total	\$2,181,830	\$4,512,677	48.3%	\$4,455,382	49.0%		