

North Shore Gas Energy Efficiency Program - Plan Year 5

PY5 Fourth Quarter Report: March 2016 - May 2016

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	1,974,529	1,407,703	140%	Total	1,758,307	1,023,341	172%	Total	216,222	384,362	56%	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	\$3,067,583	\$3,384,508	91%	Total	\$1,810,372	\$1,746,610	104%	Total	\$858,507	\$1,194,759	72%	Total	\$398,704	\$443,139	90%

EEP Residential Programs							Comments
Energy Savings (Therm)							
NSG Residential Programs	Cumulative Net Therms YTD	Planned PY5 Goal	Planned PY5 Pct. Achieved	Revised PY5 Goal	Revised PY5 Pct. Achieved		
Residential Program	653,496	179,342	364.4%	290,342	225.1%		Strong performance in Weatherization and Rebate programs delivered high savings. Final savings values still pending.
Multifamily Program	28,732	136,022	21.1%	25,022	114.8%		Due to limited opportunities in the MF market in North Shore Gas, 111,000 therms shifted from MF to Residential.
Residential Outreach Programs	1,076,079	707,977	152.0%	707,977	152.0%		Includes Home Energy Reports and Elementary Education. Final savings values still pending.
Residential Programs - Total	1,758,307	1,023,341	171.8%	1,023,341	171.8%		

Program Costs							Comments
NSG Residential Programs	Cumulative Costs YTD	Planned PY5 Budget	Planned PY5 Pct. Achieved	Revised PY5 Budget	Revised PY5 Pct. Achieved		
Residential Program	\$1,075,677	\$829,565	129.7%	\$966,939	111.2%		Budget increased with additional incentives shifted from MF to Residential. Cost-effective furnace rebates and cost-sharing with ComEd on Weatherization allowed the program to significantly overachieve with only a slight budget overage.
Multifamily Program	\$226,382	\$342,303	66.1%	\$277,878	81.5%		Incentive budget reduced in line with savings shift to Residential program; implementation efforts continue in the territory.
Residential Outreach Programs	\$508,312	\$574,742	88.4%	\$574,742	88.4%		Includes Home Energy Reports and Elementary Education.
Residential Programs - Total	\$1,810,372	\$1,746,610	103.7%	\$1,819,559	99.5%		

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Total	\$3,067,583	\$3,384,508	91%	Total	\$1,810,372	\$1,746,610	104%	Total	\$858,507	\$1,194,759	72%	Total	\$398,704	\$443,139	90%

EEP Business Programs						
Energy Savings (Therm)						
NSG Business Programs	Cumulative Net Therms YTD	Planned PY5 Goal	Planned PY5 Pct. Achieved	Revised PY5 Goal	Revised PY5 Pct. Achieved	Comments
Business Program	175,410	355,678	49.3%	355,678	49.3%	Several large projects were pushed into PY6. Savings are in-line with expectations and overall portfolio savings exceeded the goal.
Small Business Program	40,812	28,684	142.3%	28,684	142.3%	Substantial pipeline carried over from PY4 into PY5 driving early savings.
Business Programs - Total	216,222	384,362	56.3%	384,362	56.3%	

Program Costs						
NSG Business Programs	Cumulative Costs YTD	Planned PY5 Budget	Planned PY5 Pct. Achieved	Revised PY5 Budget	Revised PY5 Pct. Achieved	Comments
Business Program	\$653,097	\$1,012,122	64.5%	\$881,878	74.1%	Implementation spending continued while savings were shifted out.
Small Business Program	\$205,410	\$182,637	112.5%	\$182,637	112.5%	Cost-effective projects completed with implementation efforts still underway.
Business Programs - Total	\$858,507	\$1,194,759	71.9%	\$1,064,515	80.6%	

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Other Portfolio Costs						
Program Costs						
Programs	Cumulative Costs YTD	Planned PY5 Budget	Planned PY5 Pct. Achieved	Revised PY5 Budget	Revised PY5 Pct. Achieved	Comments
Administration	\$251,677	\$227,696	110.5%	\$ 227,696	110.5%	
EM&V - EE	\$114,849	\$100,476	114.3%	\$ 100,476	114.3%	
Utility Verification of DCEO Invoices	\$898	\$1,350	66.5%	\$ 1,350	66.5%	
OBF Program Mgt (Coord, Measure Qualification)	\$0	\$2,785	0.0%	\$ 2,785	0.0%	
OBF Program Mgt (Financial Institution)	\$15,236	\$28,018	54.4%	\$ 28,018	54.4%	
EM&V - OBF	\$0	\$4,500	0.0%	\$ 4,500	0.0%	
Research & Development	\$16,044	\$56,129	28.6%	\$ 56,129	28.6%	R&D funding in PY5 was used for Smart Thermostats and exploration of a formal R&D program for PY6.
Phase 3 Plan Development	\$0	\$22,185	0.0%	\$ 22,185	0.0%	
Other EE Programs - Total	\$398,704	\$443,139	90.0%	\$443,139	90.0%	
DCEO - Implementation	\$63,309	\$1,128,169	5.6%	\$1,128,169	5.6%	
Other - Total	\$462,013	\$1,571,308	29.4%	\$1,571,308	29.4%	

Program Costs by Budget Category							
Budget Category	Cumulative Costs YTD	Planned PY5 Budget	Planned PY5 Pct. Achieved	Revised PY5 Budget	Revised PY5 Pct. Achieved	Comments	As a % of Total PY5 PGL
Administration	\$251,677	\$227,696	110.5%	\$227,696	110.5%		8.2%
Implementation	\$1,063,575	\$927,000	114.7%	\$897,168	118.5%		34.7%
Incentives	\$770,773	\$867,675	88.8%	\$857,067	89.9%		25.1%
Incentive Delivery	\$672,321	\$997,894	67.4%	\$981,039	68.5%		21.9%
Marketing	\$162,210	\$148,800	109.0%	\$148,800	109.0%		5.3%
Utility Verification of DCEO Invoices	\$898	\$1,350	66.5%	\$1,350	66.5%		0.0%
EM&V - EE	\$114,849	\$100,476	114.3%	\$100,476	114.3%		3.7%
OBF Program Management Measure Qualification	\$0	\$2,785	0.0%	\$2,785	0.0%		0.0%
OBF Program Management (Financial Institution)	\$15,236	\$28,018	54.4%	\$28,018	54.4%		0.5%
EM&V - OBF	\$0	\$4,500	0.0%	\$4,500	0.0%		0.0%
Research & Development	\$16,044	\$56,129	28.6%	\$56,129	28.6%	R&D funding in PY5 was used for Smart Thermostats and exploration of a formal R&D program for PY6.	0.5%
Phase 3 Plan Development	\$0	\$22,185	0.0%	\$22,185	0.0%		0.0%
Total Utility EEP Costs	\$3,067,583	\$3,384,508	90.6%	\$3,327,213	92.2%		
DCEO - Implementation	\$63,309	\$1,128,169	5.6%	\$1,128,169	5.6%		
EEP Portfolio - Total	\$3,130,892	\$4,512,677	69.4%	\$4,455,382	70.3%		