

NAVIGANT

ENERGY

Peoples and North Shore Gas Three-Year Evaluation Plan

For the Illinois EE Stakeholder Advisory Group

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Agenda

- 1 Evaluation Approach of Peoples Gas & North Shore Gas Programs
- 2 Program Specific Evaluation Plans
- 3 Evaluation Coordination
- 4 Key Contacts

Peoples Gas (PG) and North Shore Gas (NSG) Energy Efficiency Programs – Overview of Evaluation Activities

Time Frame	Overview of Activity
August 2010 to June 2011	Navigant selected as evaluator for PG and NSG three-year portfolio. PG & NSG energy efficiency plan filing (October 1, 2010), ICC order (May 24, 2011); PG & NSG compliance filing (June 2011) sets portfolio plan, goals, and budgets
June 1, 2011	Six of eight programs launched by Franklin Energy Services
June to Sept. 2011	Navigant drafts a three-year EM&V plan for each program
November 2011	Final evaluation plans – updated annually
December 2011 to March 2012	Data requests, discussions, tracking system review, verification procedures review, default values check (coordinated with statewide), reporting in April 2012
April to May 2012	Coordinated development on survey guides and data collection procedures
May to Sept. 2012	Core of evaluation data collection, analysis, and reporting
October 15, 2012	First Program Year evaluation reports delivered

Peoples Gas (PG) and North Shore Gas (NSG) – Balancing Evaluation Requirements, Rigor, Early Needs, and Resources

Programs	Overview of Planned Activity
All Programs Offered	Evaluation budgets are constrained, but sufficient for annual impact evaluations plus at least one process evaluation and net-to-gross estimate for all programs over the three years. Early emphasis on process, NTG, tracking system, defaults, and verification procedures
Residential Prescriptive Rebates Single Family Direct Install C&I Prescriptive Rebates C&I Custom Rebates	Impact evaluation each year. Process evaluation and NTG estimates conducted in PY1 and repeated in PY3. Targeted process evaluations in PY2 and no PY2 NTG estimates.
Multifamily Direct Install C&I Retrocommissioning	Impact evaluation each year. Process and NTG each year if participation allows (issue for RCx)
Small Business Energy Savings	Impact each year, Process and NTG in PY1, Targeted process in PY2 and PY3
Whole House Retrofit Home Energy Reports	Not offered in PY1. Impact, Process, and NTG in PY2 and PY3 if offered.

Peoples Gas (PG) and North Shore Gas (NSG) – Process and Net-to Gross

Programs	Process and NTG Methodology
All Programs Offered	Net-to-Gross <ul style="list-style-type: none">• At least one NTG per three-year plan• Based on customer participant self reports, unless billing analysis is conducted• Methodology and survey guides coordinated with ComEd, Nicor, and Ameren evaluation teams• Some programs with ComEd are jointly implemented and evaluated. Telephone surveys will be jointly conducted with overlapping samples.
All Programs Offered	Process <ul style="list-style-type: none">• Process evaluation of first year of each program• Customer participant telephone surveys• In-depth interviews with trade allies & program staff• After initial large sample process evaluation, next year will be limited sample evaluation, targeting key issues identified in first process evaluation

Peoples Gas (PG) and North Shore Gas (NSG) – Gross Impact Evaluation of Business Programs

Programs	Methodology (occurs annually except as noted)
C&I Prescriptive Rebates	Telephone survey participation verification Engineering assessment of per-unit savings Engineering file review on a sample of projects On-site M&V for a small sample of PY2 and PY3 projects
C&I Custom Rebates	Engineering file review on a sample of projects On-site M&V for a small sample of projects
C&I Retrocommissioning	Engineering file review on a sample of projects On-site M&V for a small sample of projects
Small Business Energy Savings	Telephone survey participation verification Engineering assessment of per-unit savings Engineering file review on a sample of projects On-site M&V for a small sample of projects

Peoples Gas (PG) and North Shore Gas (NSG) – Gross Impact Evaluation of Residential Programs

Programs	Methodology (occurs annually except as noted)
Residential Prescriptive Rebates	Telephone survey participation verification (PY1, PY3) Engineering assessment of per-unit savings Database check and conduct file review on sample
Single Family Direct Install	Telephone survey participation verification. Engineering assessment of per-unit savings
Multifamily Direct Install	Telephone survey participation verification. Engineering assessment of per-unit savings
Whole House Retrofit	Participation verification telephone survey with engineering analysis of savings until timing allows a Statistically Adjusted Engineering analysis
Home Energy Reports	Billing analysis, if launched

PG and NSG Evaluation Coordination with ComEd

- » Three PG and NSG programs have *joint implementation with ComEd*:
 - Multifamily Direct Install
 - Small Business Energy Savings
 - C&I Retrocommissioning
 - Participants will not receive electric and gas measures to the same degree
 - Parts of the impact and process evaluations will be jointly conducted but with separate sampling because the population of gas and electric projects will differ by size of impact and number of projects. Achieve 90/10 separately for ComEd and PG/NSG, although some data collection efforts may cover both at once.
 - Evaluation will have gas-appropriate survey questions and M&V methodologies.
 - Parts of the PG/NSG process evaluations will address only gas issues, trade allies, and participants.
 - Reporting is separate.
- » Some programs have less-formal *coordinated implementation with ComEd*:
 - C&I Custom implementers share leads; some projects or customers may have electric and gas measures. Customers may have C&I Prescriptive projects with all utilities.
 - Evaluations will coordinate on contacting customers and evaluation methodology (e.g. NTG methodology), but otherwise these will be separate evaluations.

PG and NSG Evaluation Coordination and Consistency

- » Statewide coordination and consistency has been facilitated by:
 - Sharing of evaluation plans among teams as they are drafted
 - Review of plans by evaluation portfolio managers
 - Overlapping program evaluation staff
 - Discussion between program evaluation leads
 - Support by ICC and SAG
- » Coordination will be ongoing as programs evolve
 - Sampling and data collection coordination (customers *and* trade allies)
 - Survey instruments
 - Analytical methodologies
 - Supporting deemed values in the statewide TRM
 - Reporting
- » Challenges to evaluation consistency
 - Electric programs (in PY4) have different needs than gas programs (in PY1)
 - Budget and program scale differences for like-programs
 - Different evaluation timelines – some like-programs are on different evaluation schedules by a few weeks due to scope of planned activities that start earlier or later

Key CONTACTS



Randy Gunn, Director-in-Charge
Managing Director
Chicago, IL
(312) 583-5714
Randy.gunn@navigant.com

Kevin Grabner, Project Manager, Peoples Gas & North Shore Gas
Evaluations
Associated Director
Verona, WI
(608) 497-2323
Kevin.grabner@navigant.com

Laura Agapay, Deputy Project Manager
Managing Consultant
Chicago, IL
(312) 583-4178
Laura.agapay@navigant.com