

North Shore Gas Energy Efficiency Program - Plan Year 5

PY5 First Quarter Report: June 2015 - August 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	88,793	1,407,703	6%	Total	59,564	1,023,341	6%	Total	29,229	384,362	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	\$396,089	\$3,384,508	12%	Total	\$195,722	\$1,746,610	11%	Total	\$140,030	\$1,194,759	12%	Total	\$60,337	\$443,139	14%

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	54,474	179,342	30.4%	290,342	18.8%	Savings on target with modified savings goal.
Multifamily Program	5,090	136,022	3.7%	25,022	20.3%	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	59,564	1,023,341	5.8%	1,023,341	5.8%	

Program Costs						
NSG Residential Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Residential Program	\$143,322	\$829,565	17.3%	\$966,939	14.8%	Budget increased with additional incentives shifted from MF to Residential.
Multifamily Program	\$50,459	\$342,303	14.7%	\$277,878	18.2%	Budget reduced in line with savings shifts.
Residential Outreach Programs	\$1,941	\$574,742	0.3%	\$574,742	0.3%	Includes Home Energy Reports and Elementary Education.
Residential Programs - Total	\$195,722	\$1,746,610	11.2%	\$1,819,559	10.8%	

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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	\$396,089	\$3,384,508	12%	Total	\$195,722	\$1,746,610	11%	Total	\$140,030	\$1,194,759	12%	Total	\$60,337	\$443,139	14%

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	12,646	355,678	3.6%	355,678	3.6%	Savings on forecast; large C&I Projects typically close in Q4
Small Business Program	16,583	28,684	57.8%	28,684	57.8%	Substantial pipeline carried over from PY4 into PY5 driving early savings.
Business Programs - Total	29,229	384,362	7.6%	384,362	7.6%	

Program Costs						
NSG Business Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Business Program	\$96,657	\$1,012,122	9.5%	\$881,878	11.0%	With few paid projects that were very cost effective, spending is trending low but will catch up as the year progresses.
Small Business Program	\$43,373	\$182,637	23.7%	\$182,637	23.7%	
Business Programs - Total	\$140,030	\$1,194,759	11.7%	\$1,064,515	13.2%	

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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	88,793	1,407,703	6%	Total	59,564	1,023,341	6%	Total	29,229	384,362	8%	Total	0	0	NA
Program Costs				Program Costs				Program Costs				Program Costs			
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Total	\$396,089	\$3,384,508	12%	Total	\$195,722	\$1,746,610	11%	Total	\$140,030	\$1,194,759	12%	Total	\$60,337	\$443,139	14%

Other Portfolio Costs						
Program Costs						
Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Administration	\$31,976	\$227,696	14.0%	\$ 227,696	14.0%	
EM&V- EE	\$20,844	\$100,476	20.7%	\$ 100,476	20.7%	
Utility Verification of DCEO Invoices	\$293	\$1,350	21.7%	\$ 1,350	21.7%	
OBF Program Mgt (Coord, Measure Qualification)	\$0	\$2,785	0.0%	\$ 2,785	0.0%	
OBF Program Mgt (Financial Institution)	\$3,726	\$28,018	13.3%	\$ 28,018	13.3%	
EM&V- OBF	\$0	\$4,500	0.0%	\$ 4,500	0.0%	
Research & Development	\$3,498	\$56,129	6.2%	\$ 56,129	6.2%	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	\$60,337	\$443,139	13.6%	\$443,139	13.6%	
DCEO - Implementation	\$0	\$1,128,169	0.0%	\$1,128,169	0.0%	
Other- Total	\$60,337	\$1,571,308	3.8%	\$1,571,308	3.8%	

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	\$31,976	\$227,696	14.0%	\$227,696	14.0%		8.1%
Implementation	\$201,211	\$927,000	21.7%	\$897,168	22.4%		50.8%
Incentives	\$57,929	\$867,675	6.7%	\$857,067	6.8%		14.6%
Incentive Delivery	\$40,110	\$997,894	4.0%	\$981,039	4.1%		10.1%
Marketing	\$36,766	\$148,800	24.7%	\$148,800	24.7%		9.3%
Utility Verification of DCEO Invoices	\$293	\$1,350	21.7%	\$1,350	21.7%		0.1%
EM&V- EE	\$20,844	\$100,476	20.7%	\$100,476	20.7%		5.3%
OBF Program Management Measure Qualification	\$0	\$2,785	0.0%	\$2,785	0.0%		0.0%
OBF Program Management (Financial Institution)	\$3,726	\$28,018	13.3%	\$28,018	13.3%		0.9%
EM&V- OBF	\$0	\$4,500	0.0%	\$4,500	0.0%		0.0%
Research & Development	\$3,498	\$56,129	6.2%	\$56,129	6.2%	R&D funding in PY5 is used for Joint Utilities Building Codes Compliance Initiative and Smart Thermostats	0.9%
Phase 3 Plan Development	\$0	\$22,185	0.0%	\$22,185	0.0%		0.0%
Total Utility EEP Costs	\$396,353	\$3,384,508	11.7%	\$3,327,213	11.9%		
DCEO - Implementation	\$0	\$1,128,169	0.0%	\$1,128,169	0.0%		

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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	661,455	7,476,068	9%	Total	474,897	3,842,039	12%	Total	186,558	3,634,029	5%	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	\$2,471,293	\$19,254,383	13%	Total	\$1,133,922	\$8,858,523	13%	Total	\$1,100,994	\$8,580,835	13%	Total	\$236,377	\$1,815,025	13%

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	211,156	1,018,531	20.7%	1,099,045	19.2%	Includes Home Energy Rebates and Home Energy Jumpstart.
Multifamily Program	263,741	1,487,057	17.7%	1,160,000	22.7%	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	474,897	3,842,039	12.4%	3,595,496	13.2%	

Program Costs						
PGL Residential Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Residential Program	\$358,700	\$4,125,554	8.7%	\$4,108,798	8.7%	Includes Home Energy Rebates and Home Energy Jumpstart.
Multifamily Program	\$771,523	\$3,594,600	21.5%	\$3,664,940	21.1%	
Residential Outreach Programs	\$3,699	\$1,138,369	0.3%	\$1,138,369	0.3%	Includes Home Energy Reports and Elementary Education.
Residential Programs - Total	\$1,133,922	\$8,858,523	12.8%	\$8,912,107	12.7%	

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Total	\$2,471,293	\$19,254,383	13%	Total	\$1,133,922	\$8,858,523	13%	Total	\$1,100,994	\$8,580,835	13%	Total	\$236,377	\$1,815,025	13%

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	110,470	3,185,430	3.5%	3,200,000	3.5%	Savings on forecast; large C&I Projects typically close in Q4
Small Business Program	76,088	448,599	17.0%	448,599	17.0%	
Business Programs - Total	186,558	3,634,029	5.1%	3,648,599	5.1%	

Program Costs						
PGL Business Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Business Program	\$936,109	\$7,213,650	13.0%	\$6,475,596	14.5%	
Small Business Program	\$164,885	\$1,367,185	12.1%	\$1,367,199	12.1%	
Business Programs - Total	\$1,100,994	\$8,580,835	12.8%	\$7,842,795	14.0%	

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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	\$2,471,293	\$19,254,383	13%	Total	\$1,133,922	\$8,858,523	13%	Total	\$1,100,994	\$8,580,835	13%	Total	\$236,377	\$1,815,025	13%

Other Portfolio Costs						
Program Costs						
Programs	Cumulative Costs YTD	Planned PY5 Budget	PY5 Pct. Invoiced	Revised PY5 Budget	PY5 Pct. Achieved	Comments
Administration	\$99,075	\$705,630	14.0%	\$705,630	14.0%	
EM&V- EE	\$119,078	\$573,147	20.8%	\$573,147	20.8%	
Utility Verification of DCEO Invoices	\$910	\$7,500	12.1%	\$7,500	12.1%	
OBF Program Mgt (Coord, Measure Qualification)	\$0	\$17,172	0.0%	\$17,172	0.0%	
OBF Program Mgt (Financial Institution)	\$6,475	\$76,125	8.5%	\$76,125	8.5%	
EM&V- OBF	\$0	\$30,000	0.0%	\$30,000	0.0%	
Research & Development	\$10,839	\$279,736	3.9%	\$279,736	3.9%	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	\$236,377	\$1,815,025	13.0%	\$1,815,025	13.0%	
DCEO - Implementation		\$6,418,398	0.0%	\$6,418,398	0.0%	
Other- Total	\$236,377	\$8,233,423	2.9%	\$8,233,423	2.9%	

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	\$99,075	\$705,630	14.0%	\$705,630	14.0%		4.0%
Implementation	\$1,219,121	\$5,614,000	21.7%	\$5,614,000	21.7%		49.3%
Incentives	\$270,358	\$6,394,104	4.2%	\$6,689,523	4.0%		10.9%
Incentive Delivery	\$632,030	\$4,856,254	13.0%	\$4,045,436	15.6%		25.6%
Marketing	\$113,407	\$575,000	19.7%	\$575,000	19.7%		4.6%
Utility Verification of DCEO Invoices	\$910	\$7,500	12.1%	\$7,500	12.1%		0.0%
EM&V- EE	\$119,078	\$573,147	20.8%	\$573,147	20.8%		4.8%
OBF Program Management Measure Qualification	\$0	\$17,172	0.0%	\$17,172	0.0%		0.0%
OBF Program Management (Financial Institution)	\$6,475	\$76,125	8.5%	\$76,125	8.5%		0.3%
EM&V- OBF	\$0	\$30,000	0.0%	\$30,000	0.0%		0.0%
Research & Development	\$10,839	\$279,736	3.9%	\$279,736	3.9%	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	\$2,471,293	\$19,254,383	12.8%	\$18,738,984	13.2%		
DCEO - Implementation	\$0	\$6,418,398	0.0%	\$6,418,398	0.0%		