

North Shore Gas Energy Efficiency Program - Plan Year 4

PY4 Fourth Quarter Report: June 2014 - May 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 PY4 Goal* | PY Pct. Achieved | Indicator | Cumulative Net Therms YTD | Planned PY4 Goal* | PY Pct. Achieved | Indicator | Cumulative Net Therms YTD | Planned PY4 Goal* | PY Pct. Achieved | Indicator | Cumulative Net Therms YTD | Planned PY4 Goal | PY Pct. Achieved |
| Total | 1,790,924 | 1,401,316 | 128% | Total | 1,221,792 | 996,737 | 123% | Total | 569,132 | 404,579 | 141% | 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 | \$3,122,860 | \$3,384,507 | 92% | Total | \$1,705,278 | \$1,748,579 | 98% | Total | \$1,107,171 | \$1,224,781 | 90% | Total | \$310,411 | \$411,147 | 75% |

| EEP Residential Programs | | | | | | |
|-------------------------------------|---------------------------|------------------|-------------------|------------------|-------------------|---|
| Energy Savings (Therm) | | | | | | |
| NSG Residential Programs | Cumulative Net Therms YTD | Planned PY4 Goal | PY4 Pct. Achieved | Revised PY4 Goal | PY4 Pct. Achieved | Comments |
| Residential Program | 305,888 | 174,660 | 175.1% | 174,660 | 175.1% | Includes HE Jumpstart and HE Rebates. Strong savings through furnace rebates. |
| Multifamily Program | 32,004 | 142,859 | 22.4% | 51,006 | 62.7% | Shifted 91,853 net therms from Multifamily to Business Programs in Q2. |
| Residential Outreach Programs | 883,900 | 679,218 | 130.1% | 679,218 | 130.1% | Includes HE Reports, Elementary Education. |
| Residential Programs - Total | 1,221,792 | 996,737 | 122.6% | 904,884 | 135.0% | |

| Program Costs | | | | | | |
|-------------------------------------|----------------------|--------------------|-------------------|--------------------|-------------------|---|
| NSG Residential Programs | Cumulative Costs YTD | Planned Budget | PY4 Pct. Invoiced | Revised PY4 Budget | PY4 Pct. Achieved | Comments |
| Residential Program | \$919,774 | \$816,608 | 112.6% | \$846,442 | 108.7% | |
| Multifamily Program | \$203,517 | \$357,229 | 57.0% | \$312,518 | 65.1% | Shifted \$35,289 (1.04% of Total Utility EEP Budget) in MF Incentives to Business Programs. |
| Residential Outreach Programs | \$581,986 | \$574,742 | 101.3% | \$574,742 | 101.3% | Includes HE Reports, Elementary Education. Results will not be posted until close of PY4. |
| Residential Programs - Total | \$1,705,278 | \$1,748,579 | 97.5% | \$1,733,702 | 98.4% | |

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| 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 PY4 Goal* | PY Pct. Achieved | Indicator | Cumulative Net Therms YTD | Planned PY4 Goal* | PY Pct. Achieved | Indicator | Cumulative Net Therms YTD | Planned PY4 Goal* | PY Pct. Achieved | Indicator | Cumulative Net Therms YTD | Planned PY4 Goal | PY Pct. Achieved |
| Total | 1,790,924 | 1,401,316 | 128% | Total | 1,221,792 | 996,737 | 123% | Total | 569,132 | 404,579 | 141% | 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 | \$3,122,860 | \$3,384,507 | 92% | Total | \$1,705,278 | \$1,748,579 | 98% | Total | \$1,107,171 | \$1,224,781 | 90% | Total | \$310,411 | \$411,147 | 75% |

| EEP Business Programs | | | | | | |
|----------------------------------|---------------------------|------------------|-------------------|------------------|-------------------|---|
| Energy Savings (Therm) | | | | | | |
| NSG Business Programs | Cumulative Net Therms YTD | Planned PY4 Goal | PY4 Pct. Achieved | Revised PY4 Goal | PY4 Pct. Achieved | Comments |
| Business Program | 531,414 | 375,895 | 141.4% | 467,747 | 113.6% | Includes Direct Install, Engineering Assistance, Standard Incentives, Custom Incentives, and Gas Optimization. See Comments under EEP Residential |
| Small Business Program | 37,718 | 28,684 | 131.5% | 28,684 | 131.5% | |
| Business Programs - Total | 569,132 | 404,579 | 140.7% | 496,431 | 114.6% | |

| Program Costs | | | | | | |
|----------------------------------|----------------------|--------------------|-------------------|--------------------|-------------------|--|
| NSG Business Programs | Cumulative Costs YTD | Planned Budget | PY4 Pct. Invoiced | Revised PY4 Budget | PY4 Pct. Achieved | Comments |
| Business Program | \$955,993 | \$1,042,144 | 91.7% | \$1,057,022 | 90.4% | Implemented projects were more cost-effective than forecast. See Comments under EEP Residential Budget Section regarding Business budget shifts. |
| Small Business Program | \$151,178 | \$182,637 | 82.8% | \$182,637 | 82.8% | |
| Business Programs - Total | \$1,107,171 | \$1,224,781 | 90.4% | \$1,239,659 | 89.3% | |

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|-------------------------------|---------------------------|-------------------|------------------|----------------------------------|---------------------------|-------------------|------------------|-------------------------------|---------------------------|-------------------|------------------|-------------------------------|---------------------------|------------------|------------------|
| Energy Savings (Net Therms) | | | | Energy Savings (Net Therms) | | | | Energy Savings (Net Therms) | | | | Energy Savings (Net Therms) | | | |
| Indicator | Cumulative Net Therms YTD | Planned PY4 Goal* | PY Pct. Achieved | Indicator | Cumulative Net Therms YTD | Planned PY4 Goal* | PY Pct. Achieved | Indicator | Cumulative Net Therms YTD | Planned PY4 Goal* | PY Pct. Achieved | Indicator | Cumulative Net Therms YTD | Planned PY4 Goal | PY Pct. Achieved |
| Total | 1,790,924 | 1,401,316 | 128% | Total | 1,221,792 | 996,737 | 123% | Total | 569,132 | 404,579 | 141% | 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 | \$3,122,860 | \$3,384,507 | 92% | Total | \$1,705,278 | \$1,748,579 | 98% | Total | \$1,107,171 | \$1,224,781 | 90% | Total | \$310,411 | \$411,147 | 75% |

| Other Portfolio Costs | | | | | | |
|--|----------------------|--------------------|-------------------|--------------------|-------------------|----------|
| Program Costs | | | | | | |
| Programs | Cumulative Costs YTD | Planned Budget | PY4 Pct. Invoiced | Revised PY4 Budget | PY4 Pct. Achieved | Comments |
| Administration | \$204,769 | \$227,379 | 90.1% | \$227,379 | 90.1% | |
| EM&V- EE | \$44,723 | \$100,514 | 44.5% | \$100,514 | 44.5% | |
| Utility Verification of DCEO Invoices | \$1,486 | \$1,350 | 110.0% | \$1,350 | 110.0% | |
| OBF Program Mgt (Coord, Measure Qualification) | \$78 | \$2,785 | 2.8% | \$2,785 | 2.8% | |
| OBF Program Mgt (Financial Institution) | \$14,319 | \$19,258 | 74.4% | \$19,258 | 74.4% | |
| EM&V- OBF | \$1,388 | \$12,000 | 11.6% | \$12,000 | 11.6% | |
| Research & Development | \$5,816 | \$39,861 | 14.6% | \$39,861 | 14.6% | |
| Wasted Energy Study | \$37,833 | \$8,000 | 472.9% | \$8,000 | 472.9% | |
| Other EE Programs - Total | \$310,411 | \$411,147 | 75.5% | \$411,147 | 75.5% | |
| DCEO - Implementation | \$785,942 | \$1,128,169 | 69.7% | \$1,128,169 | 69.7% | |
| Other- Total | \$1,096,353 | \$1,539,316 | 71.2% | \$1,539,316 | 71.2% | |

| Program Costs by Budget Category | | | | | | | |
|--|----------------------|--------------------|-------------------|--------------------|-------------------|---|-------------------------|
| Budget Category | Cumulative Costs YTD | Planned Budget | PY4 Pct. Invoiced | Revised PY4 Budget | PY4 Pct. Achieved | Comments | As a % of Total PY4 PGL |
| Administration | \$204,769 | \$227,379 | 90.1% | \$227,379 | 90.1% | | 6.5% |
| Implementation | \$859,977 | \$927,000 | 92.8% | \$927,000 | 92.8% | | 27.2% |
| Incentives | \$1,091,104 | \$908,936 | 120.0% | \$908,936 | 120.0% | Overspend a result of high customer demand; future spending will be managed to the three-year budget. | 34.5% |
| Incentive Delivery | \$754,890 | \$988,624 | 76.4% | \$988,624 | 76.4% | | 23.8% |
| Marketing | \$149,915 | \$148,800 | 100.7% | \$148,800 | 100.7% | | 4.7% |
| Utility Verification of DCEO Invoices | \$1,486 | \$1,350 | 110.0% | \$1,350 | 110.0% | | 0.0% |
| EM&V- EE | \$44,723 | \$100,514 | 44.5% | \$100,514 | 44.5% | | 1.4% |
| OBF Program Management Measure Qualification | \$78 | \$2,785 | 2.8% | \$2,785 | 2.8% | | 0.0% |
| OBF Program Management (Financial Institution) | \$14,319 | \$19,258 | 74.4% | \$19,258 | 74.4% | | 0.5% |
| OBF Evaluation | \$1,388 | \$12,000 | 11.6% | \$12,000 | 11.6% | | 0.0% |
| Research & Development | \$5,816 | \$39,861 | 14.6% | \$39,861 | 14.6% | Joint Utilities - Building Codes Compliance Program is delayed. Funds to be used for other R&D projects to be determined. | 0.2% |
| Wasted Energy Study | \$37,833 | \$8,000 | 472.9% | \$8,000 | 472.9% | | 1.2% |
| Total Utility EEP Costs | \$3,166,298 | \$3,384,507 | 93.6% | \$3,384,507 | 93.6% | | |
| DCEO - Implementation | \$785,942 | \$1,128,169 | 69.7% | \$1,128,169 | 69.7% | | |