



PA Summary of 2013-2015 Term Report

August 17, 2016



BLACKSTONE
GAS COMPANY



Columbia Gas
of Massachusetts
A NiSource Company

EVERSOURCE



nationalgrid
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Statewide PA Achievements & Highlights



Deeper Savings

- Developed the Efficient Neighborhoods+ initiative to serve hard-to-reach customers
- Transitioned to providing LEDs for majority of whole house lighting installations
- Created early boiler and furnace replacement offerings
- Expanded the Heat Loan
- Better integrated electric and gas programs in the C&I sector

Reaching More Customers

- Created On-line Assessment tool on MassSave.com
- Expanded social media outreach, and now have more Facebook fans than ENERGY STAR
- Recruited non-participating builders in the communities that adopted the “Stretch Energy Code”
- Continued to advance the Main Streets Delivery Model to effectively serve C&I customers in select towns

Leveraging Data

- Developed Mass Save Data (“MSD”) – an online, publicly accessible database with detailed program data, including measure-level and geographic.
- Undertook Customer Profile studies and built data repository that will be used for future studies and facilitate cross-year comparisons

Recognitions



- #1 on ACEEE State Scorecard 5 years running
 - Perfect score on utility portion in 2014 and 2015
- AESP Social Media Award
 - “Outstanding achievement in marketing and communication”
- ENERGY STAR® Partner of the Year Award
 - “Excellence in energy efficiency program delivery”

PA's Exceeded Goals



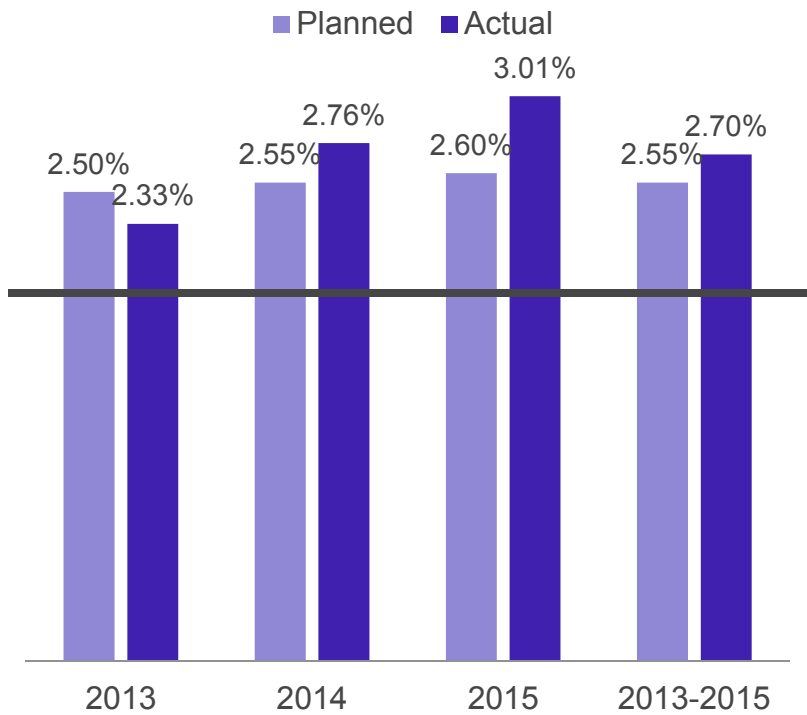
Electric	Amount	Percent to Goal
Annual Savings (MWh)	3,924,746	106%
Lifetime Savings (MWh)	43,316,435	108%
Summer (kW)	558,688	105%
Benefits (\$)	\$7,727,185,069	110%
Expenditures (\$)	\$1,484,409,846	99%

Gas	Amount	Percent to Goal
Annual Savings (Therms)	78,733,649	109%
Lifetime Savings (Therms)	1,042,896,635	111%
Benefits (\$)	\$1,612,229,767	114%
Expenditures (\$)	\$508,244,693	97%

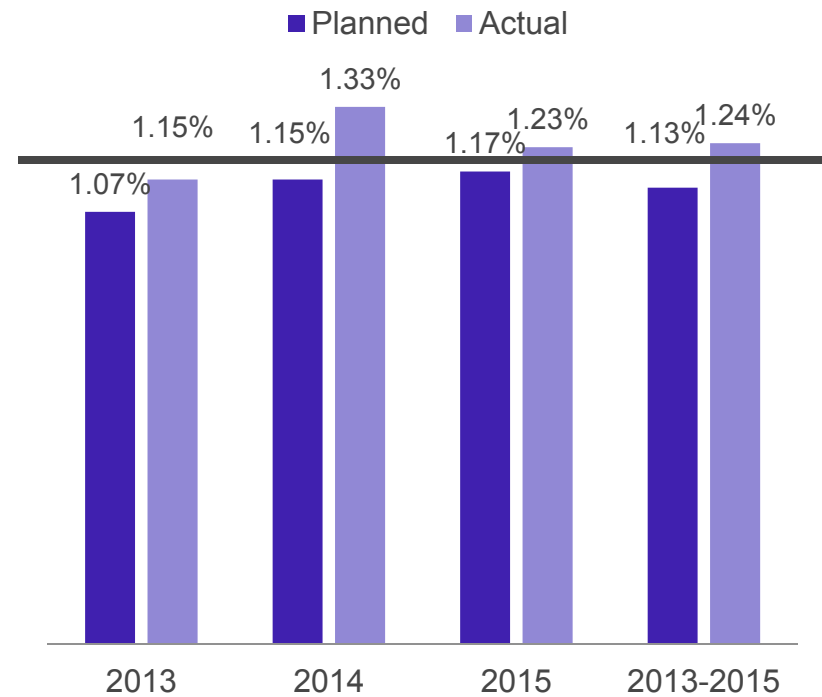
Solid Performance Over Term



Statewide Elec % Of Sales Achieved



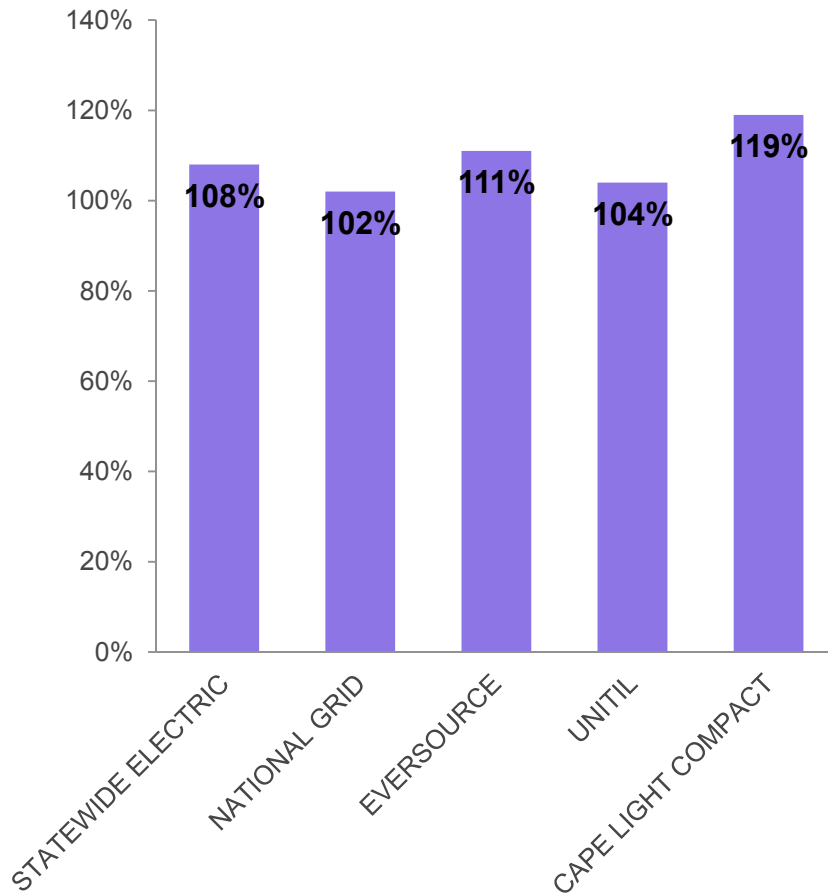
Statewide Gas % Of Sales Achieved



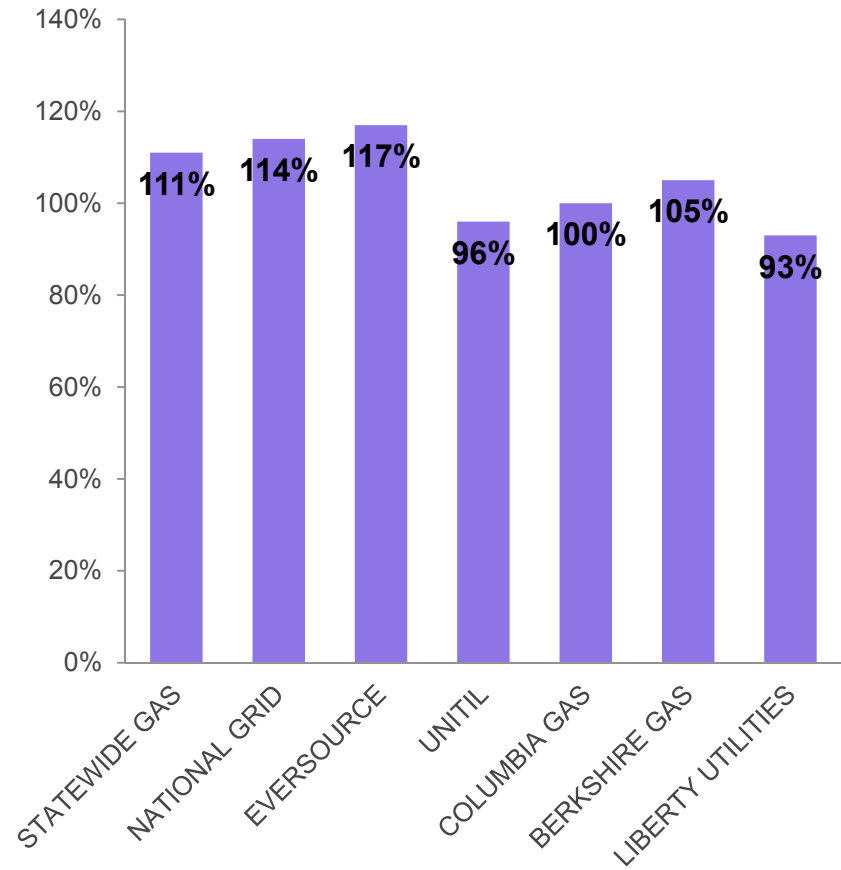
Achievements by PA



Percent of 2013-15 Electric Lifetime Savings Goal Achieved by PA



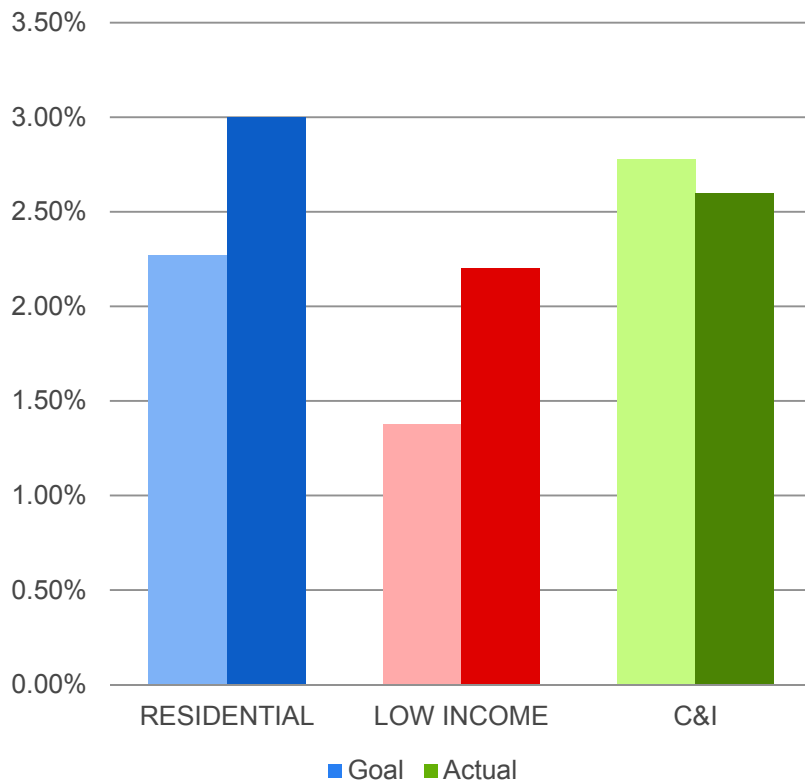
Percent of 2013-15 Gas Lifetime Savings Goal Achieved by PA



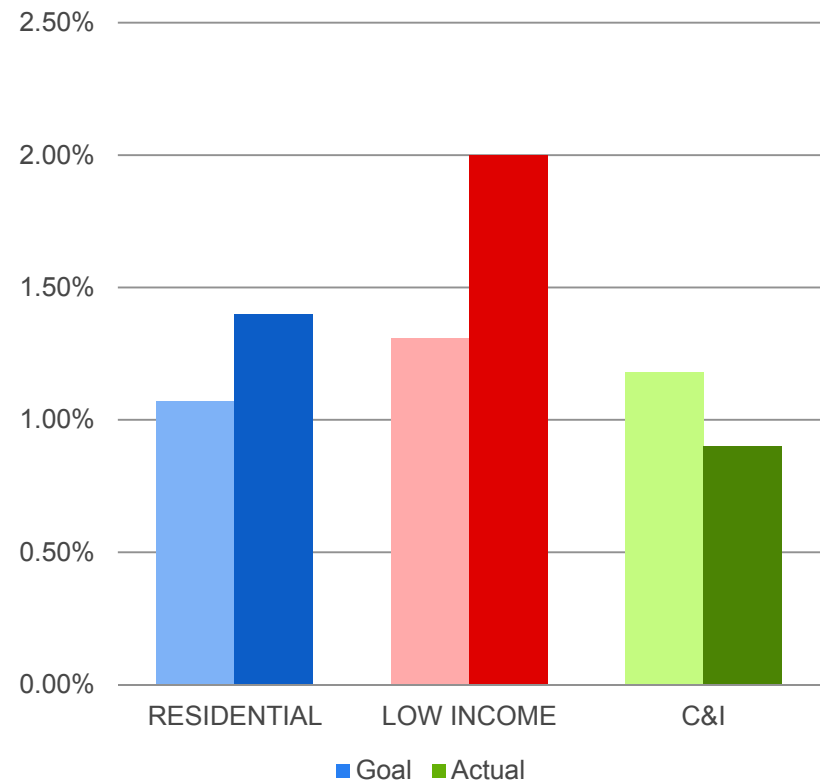
Statewide Achievement by Sector



% of Sales Achieved by Sector, Electric



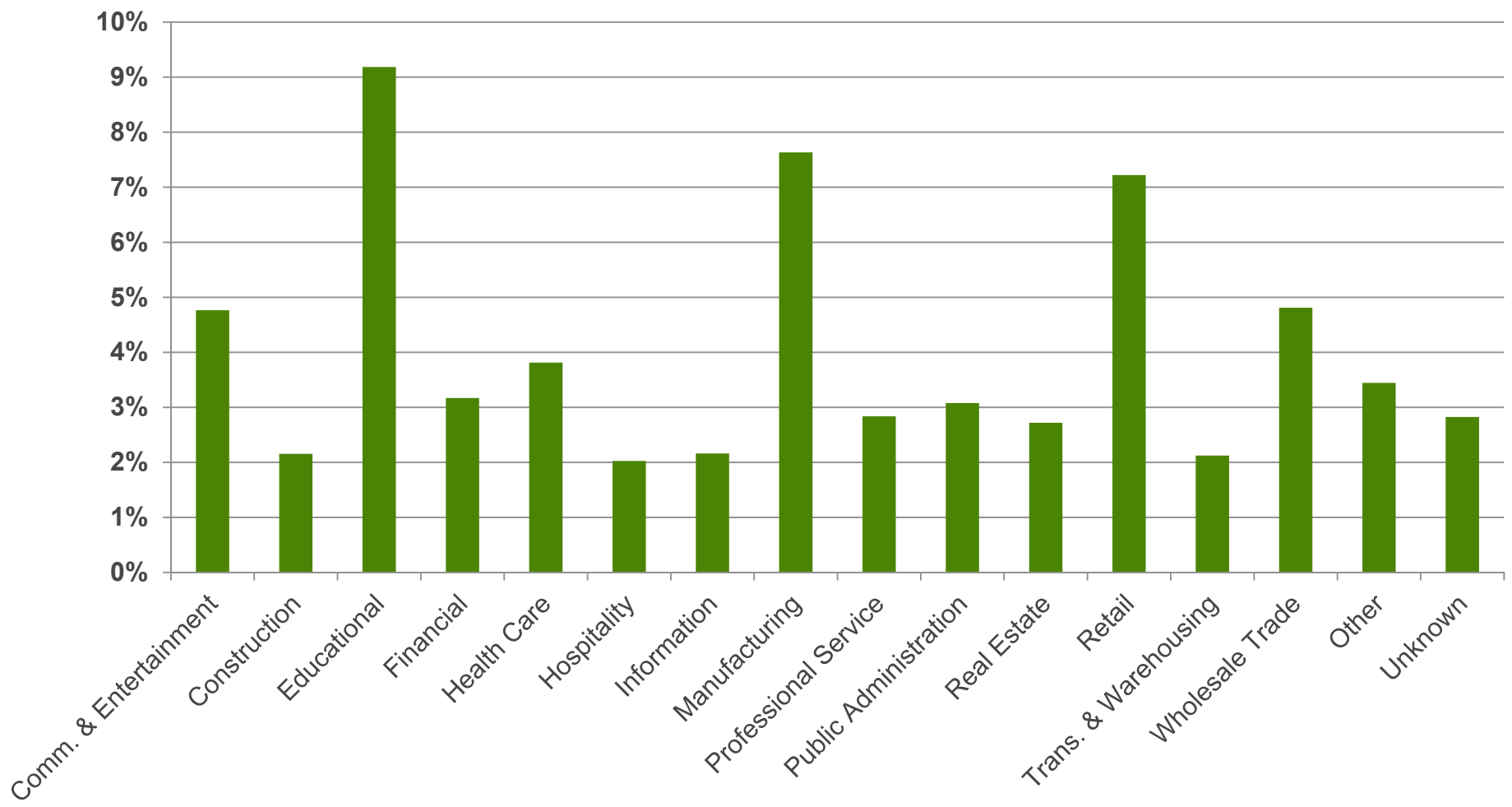
% of Sales Achieved by Sector, Gas



C&I Customer Demographics Electric



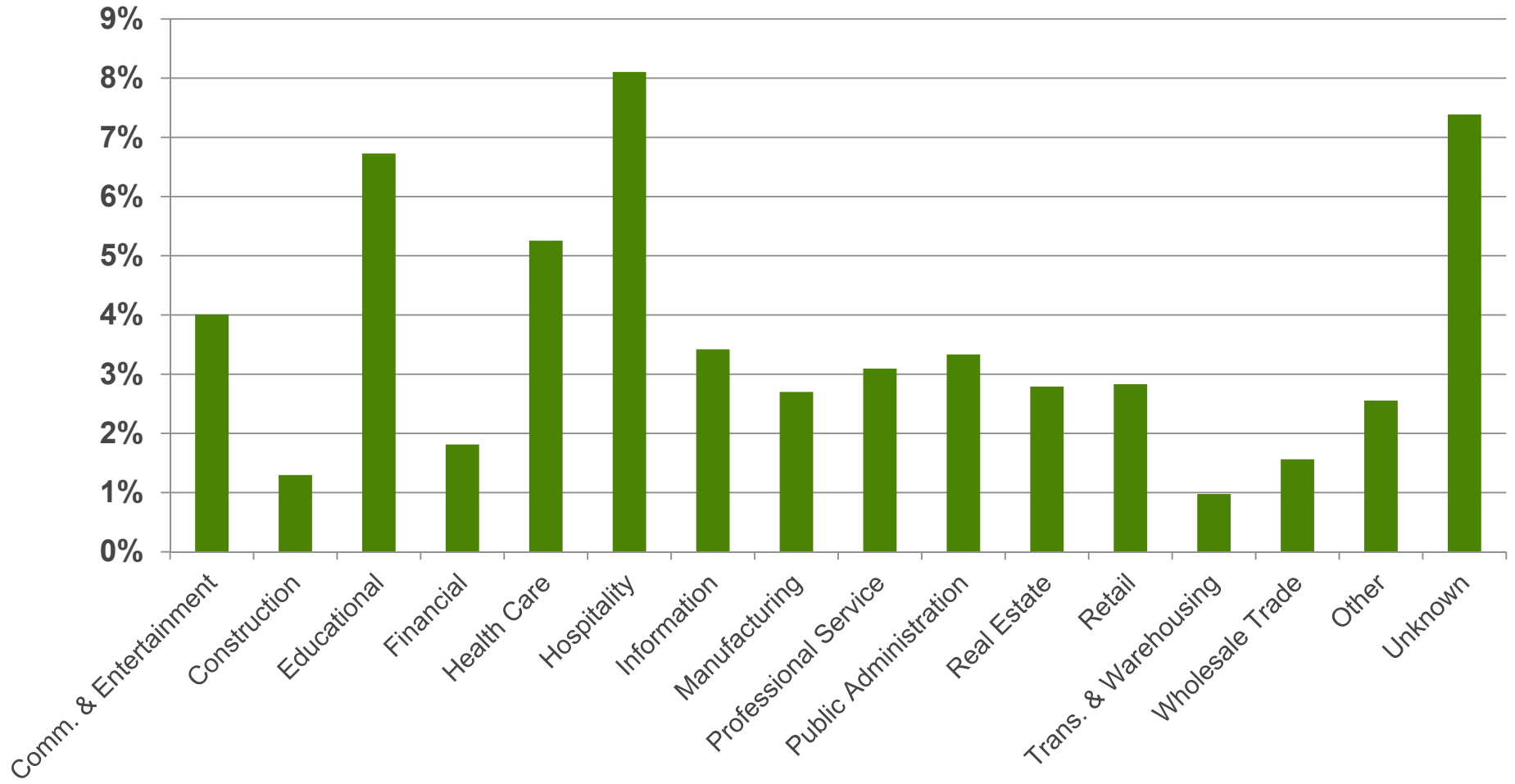
Participating Customers as a Percent of Customers in Segment



C&I Customer Demographics Gas



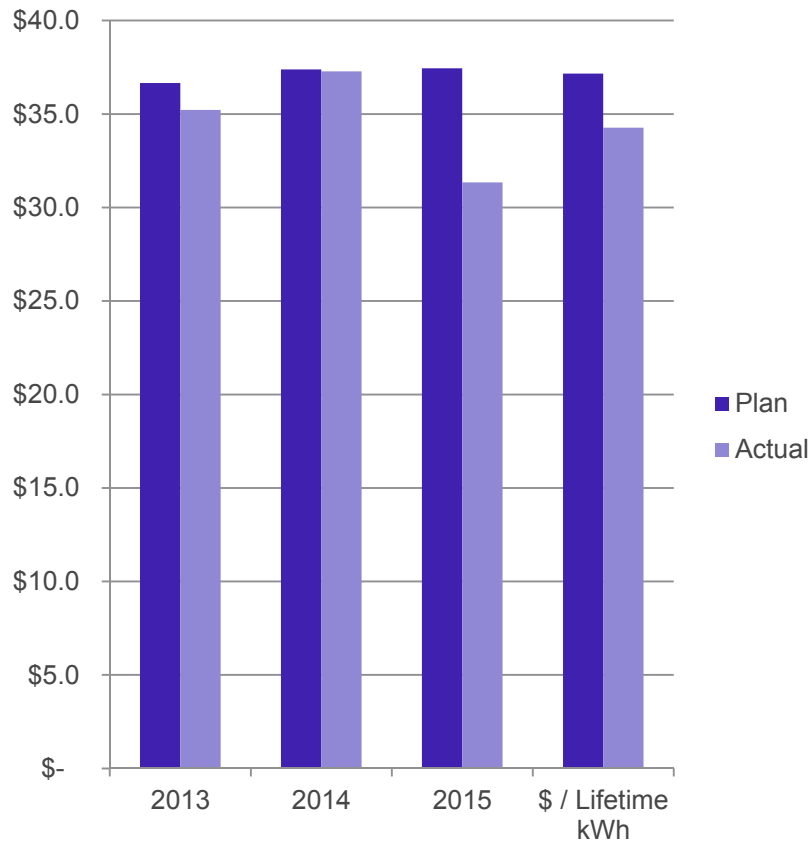
Participating Customers as a Percent of Customers in Segment



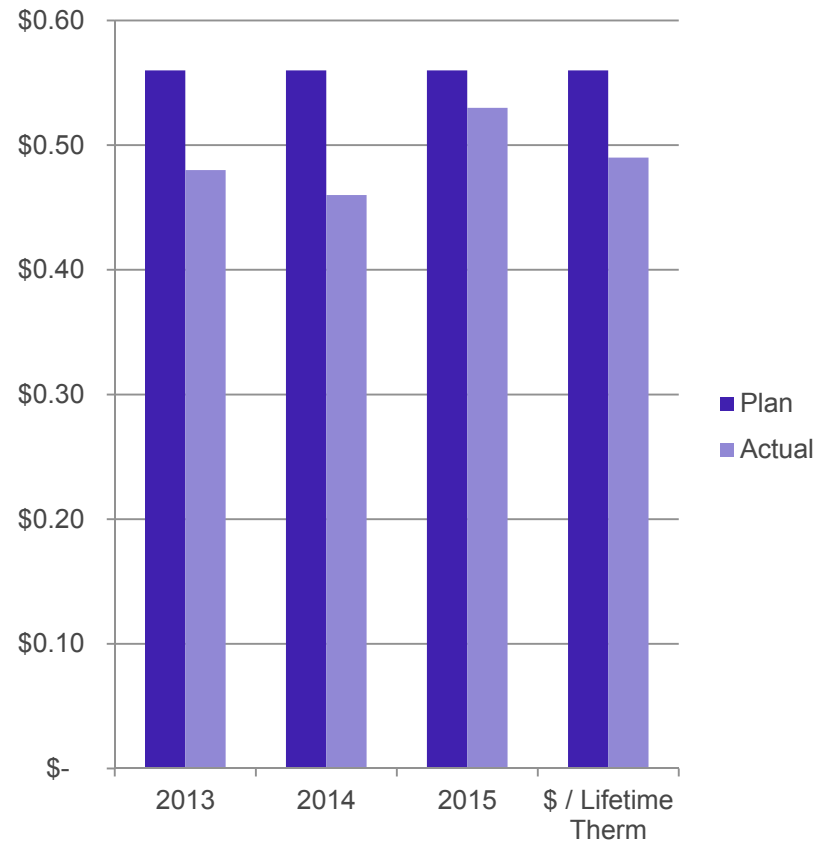
Cost to Achieve



\$ / Lifetime MWh



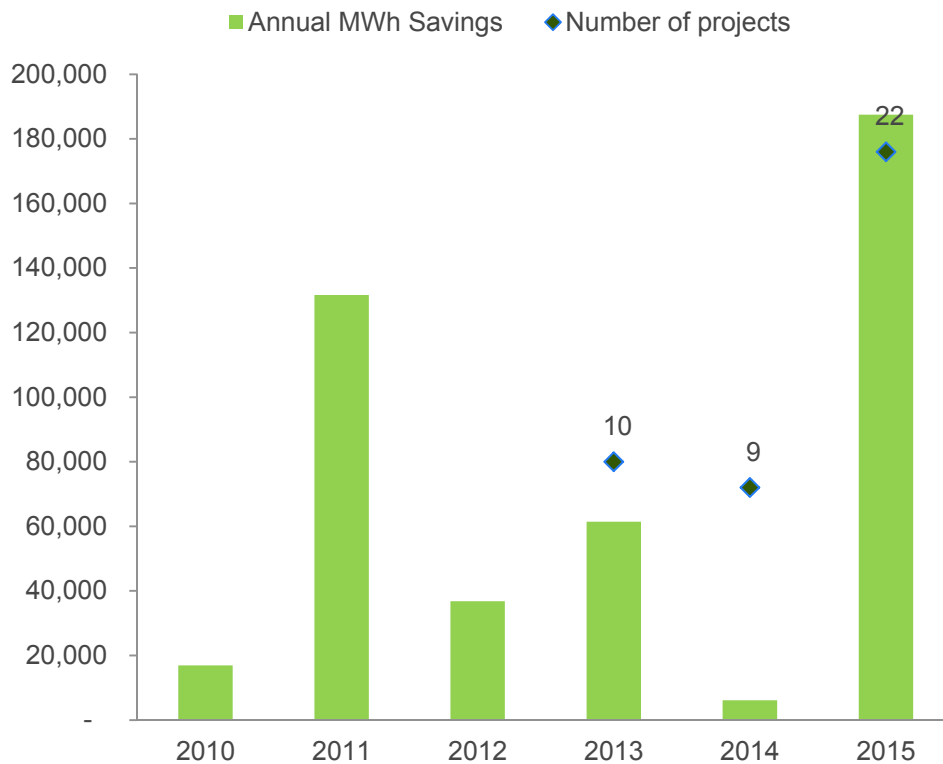
\$ / Lifetime Therm



CHP TRENDS



Statewide CHP Trends



CHP big contributor to achieving statewide goals in 2013-2015

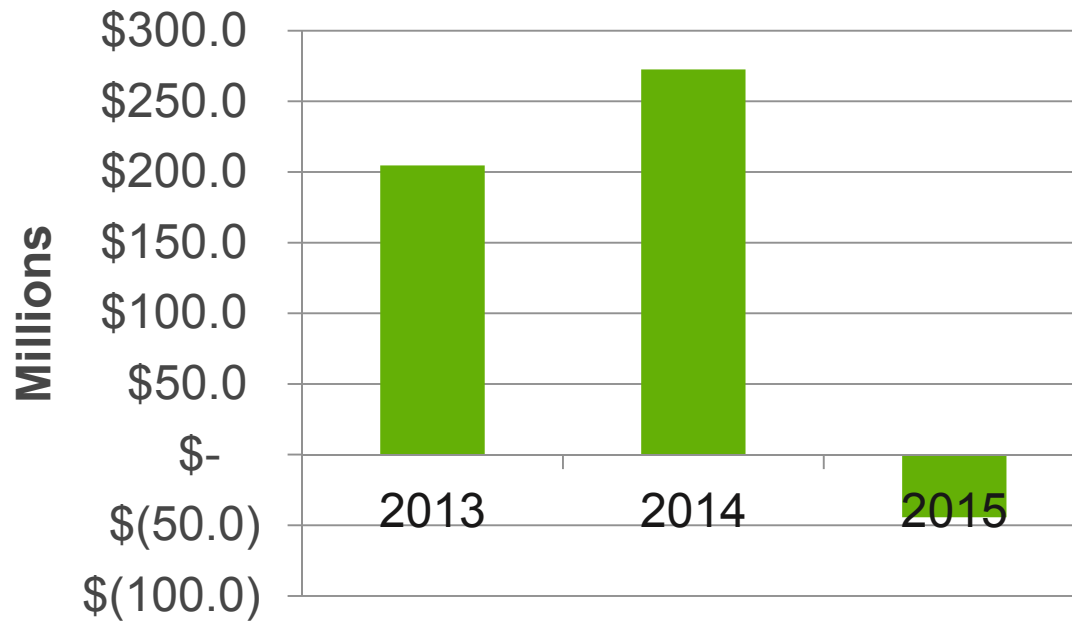
Remains “lumpy”; doesn’t follow trend

Long lead time benefits from multi-year strategy

Impact of CHP on Benefits



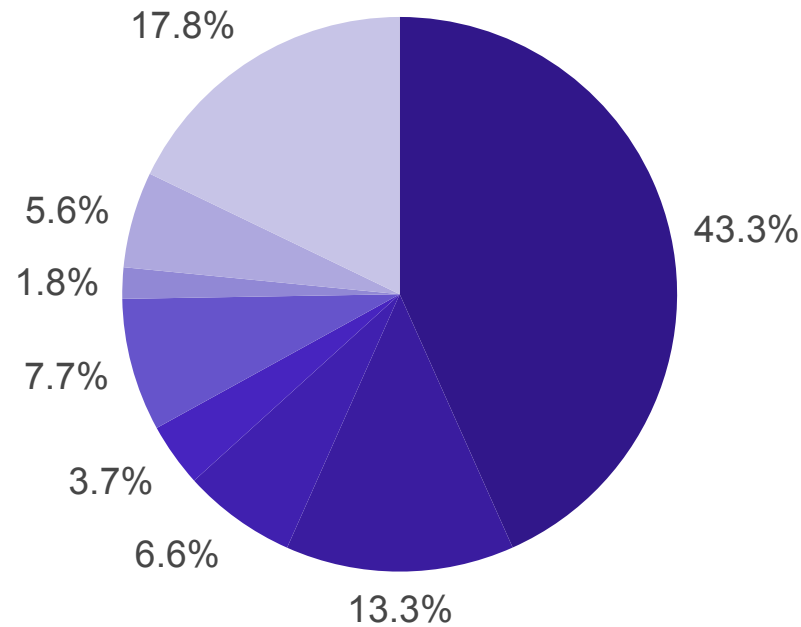
C&I Non-Electric Resource Benefits



Range of Benefits

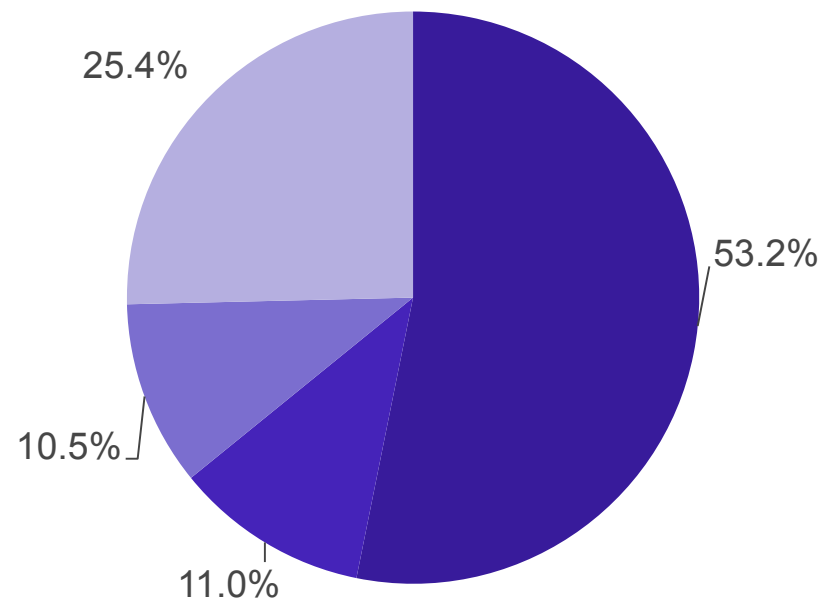


Electric Benefits



- Electric Energy
- Summer Generation
- Distribution
- Non-Electric Resource Ben.
- Electric Energy DRIPE
- Electric Capacity DRIPE
- Transmission
- Non-Energy Benefits

Gas Benefits

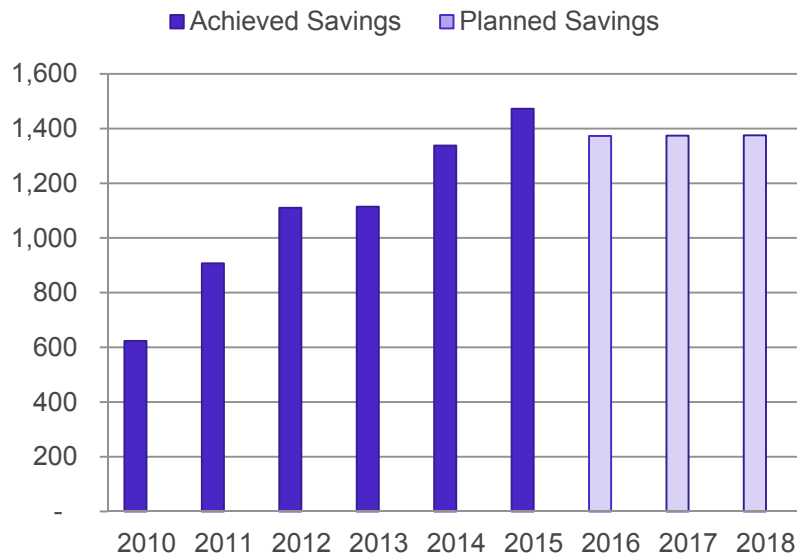


- Natural Gas Energy
- Natural Gas DRIPE
- Non-Gas Resource Benefits
- Non-Energy Benefits

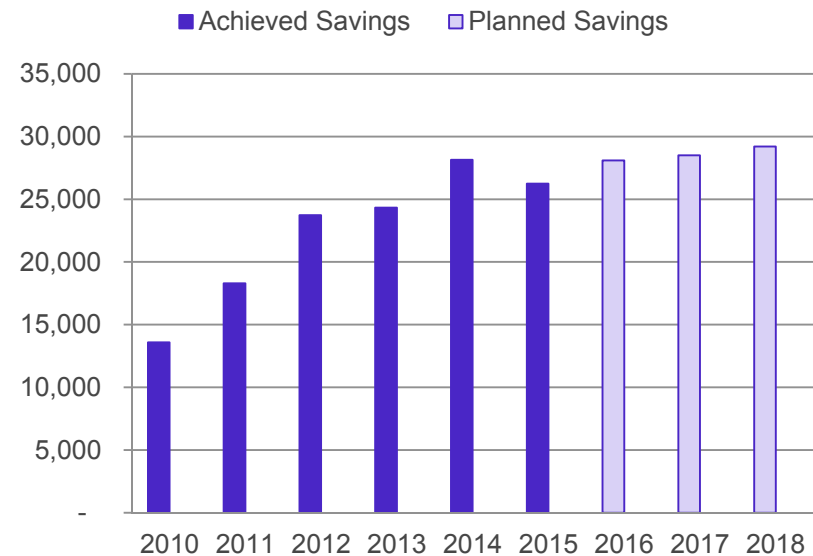
Looking Forward



Statewide Electric Savings Annual GWh



Statewide Gas Savings Annual Therms



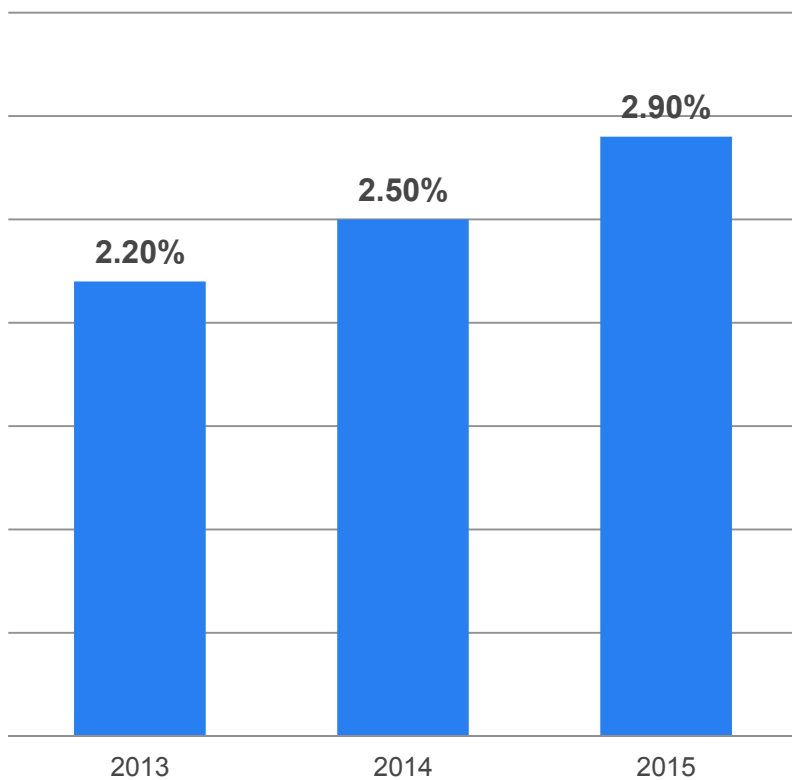
- Available electric savings have plateaued
 - New metrics?

Appendix

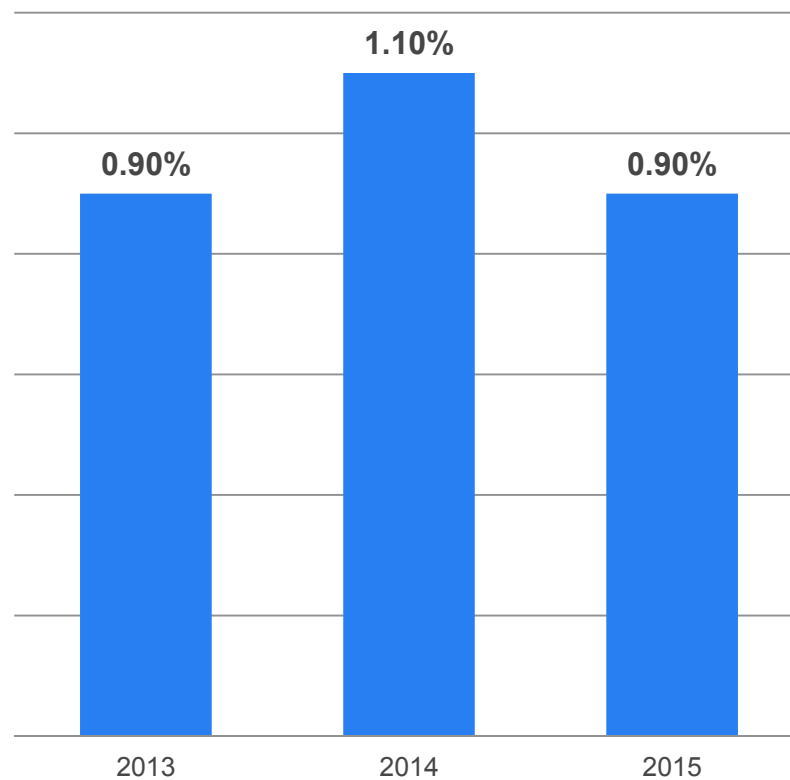
C&I Performance Over Term



C&I % of Forecasted Sales, Electric



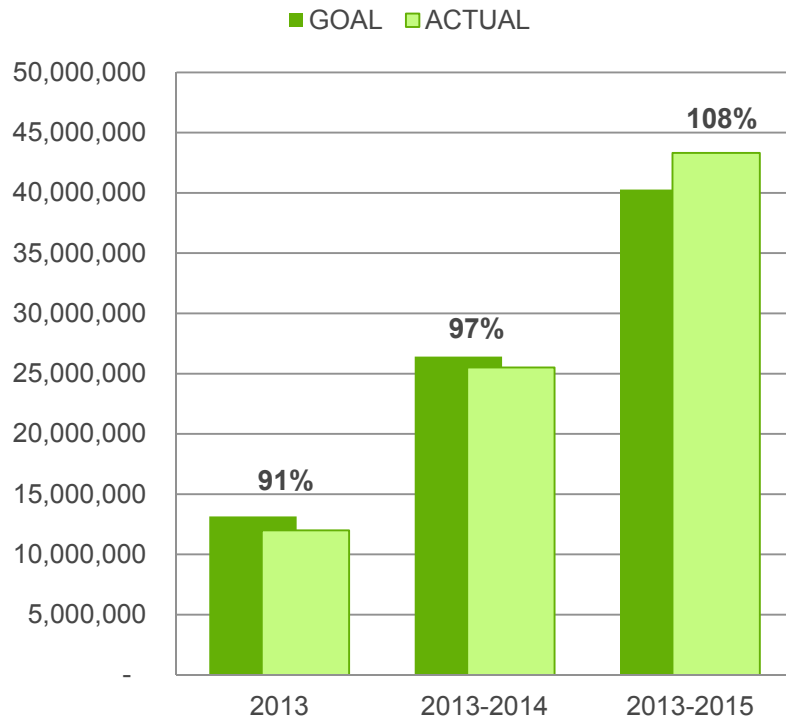
C&I % of Forecasted Sales, Gas



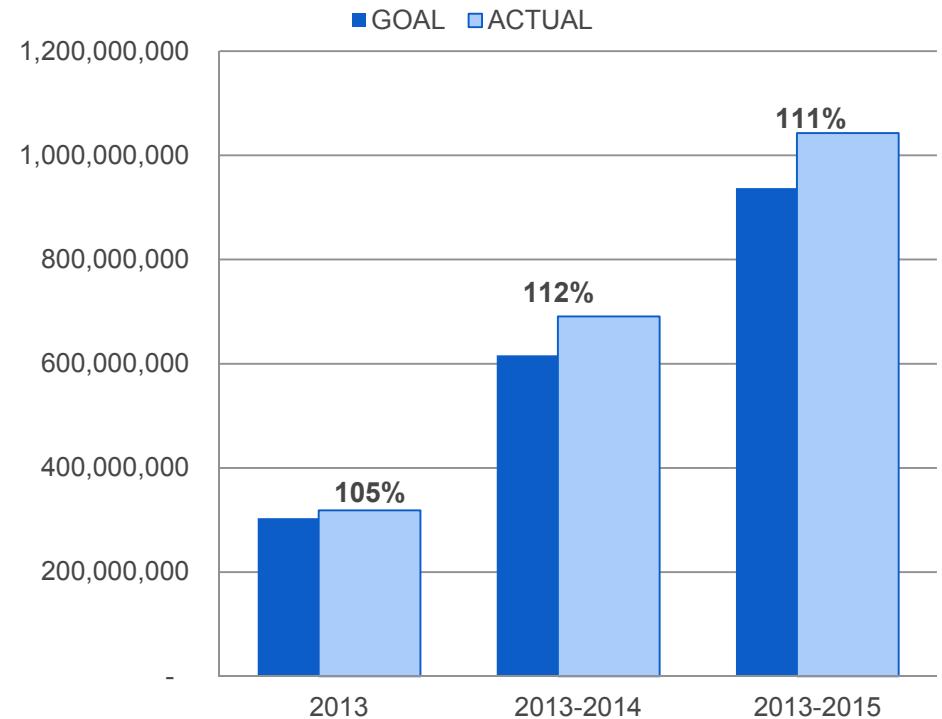
Overview of Electric & Gas Statewide Achievement



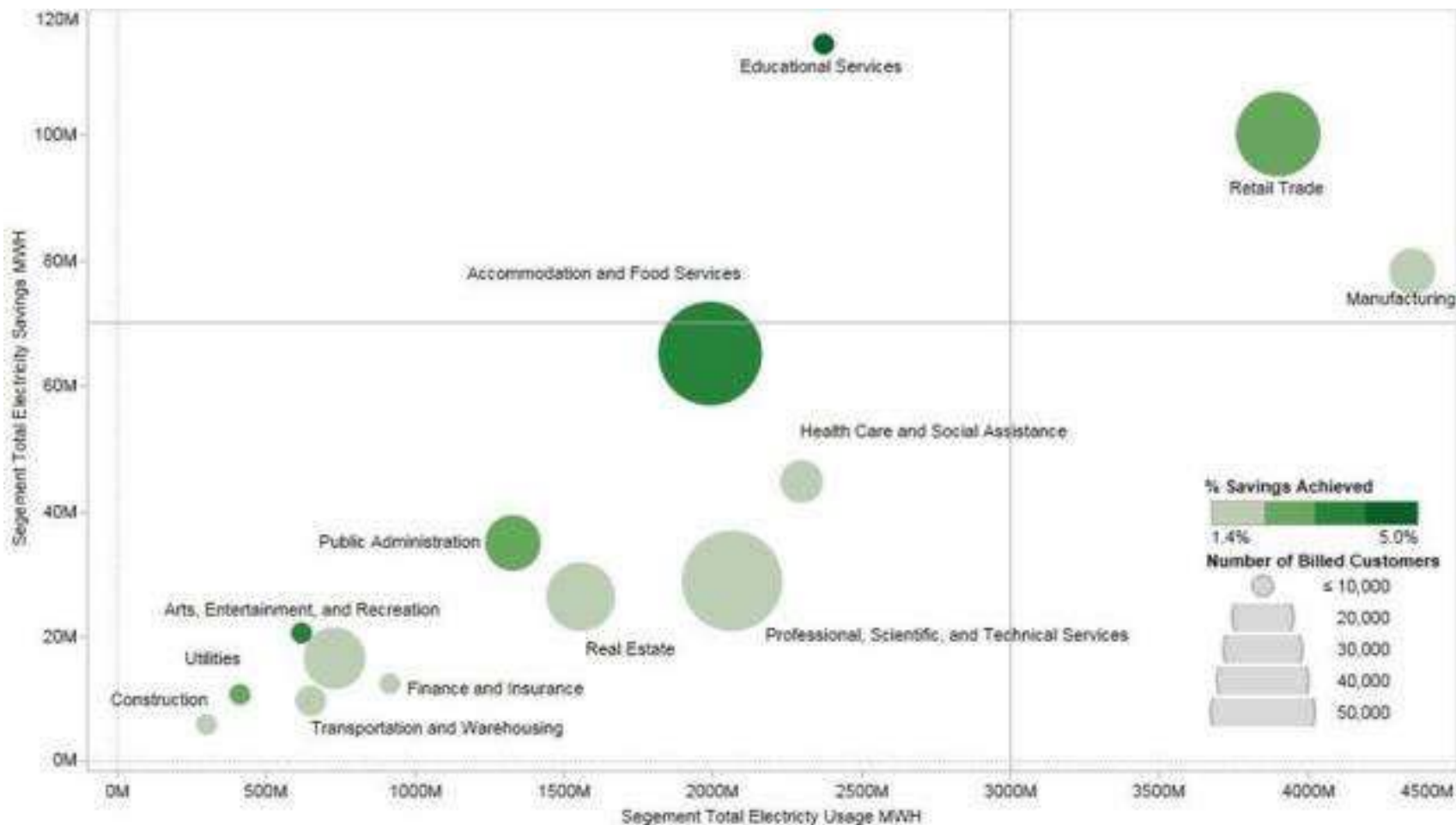
Statewide Electric Lifetime MWh Achieved



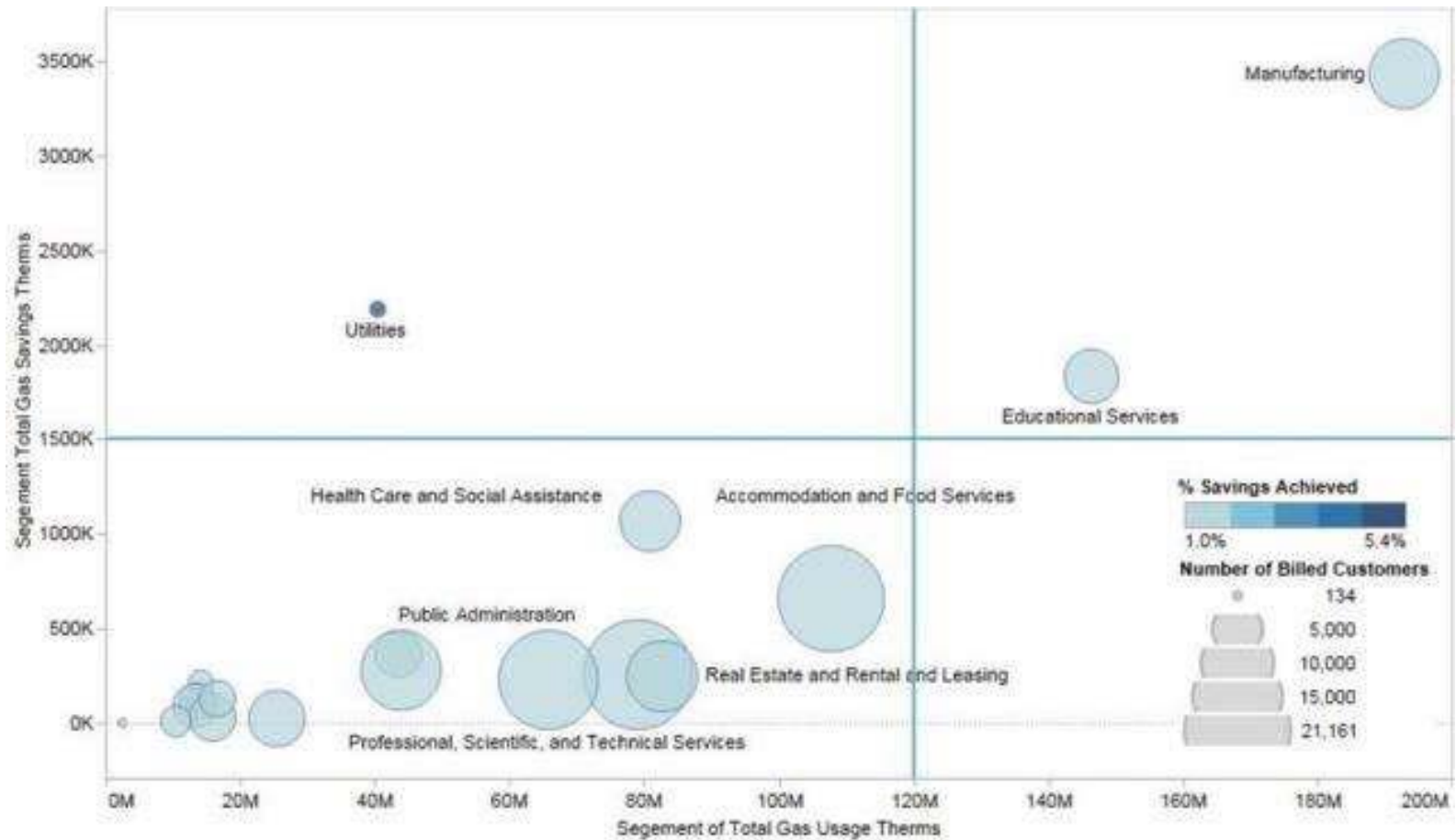
Statewide Gas Lifetime Therms Achieved



Electric 2014 Savings Compared to Usage and Number of Accounts



Gas 2014 Savings Compared to Usage and Number of Accounts



Electric PA Highlights



National Grid



- Completed 10 CHP projects in December that accounted for 14% of the 2015 portfolio savings
- In 2013 – 2015, achieved 103% of lifetime savings goal at the portfolio level, 207% for Residential, 185% for Low-Income, and 81% for C&I
- Met or exceeded our savings goals in all sectors in CY '15

Eversource



- Achieved lifetime goals in all sectors
- Engagement in multiple levels of customer organizations and supply chains on C&I
- MOU delivered 25% of savings
- Improved customer experience and customer engagement

Unitil



- Unitil had success with multi-measure projects in this Plan, including one large project that saved 687,285 annual kWh. Unitil worked with this municipal customer to install new LED streetlights owned by the municipality.

CLC



- Region-wide LED Streetlight Project
- Community Engagement all sectors: over 100 public presentations/events
- C&I Participation – from Business Leaders to micro businesses
- MF Growth after marketing effort

Gas PA Highlights



National Grid

- In 2013 – 2015, achieved 119% of our lifetime therm savings goal, 171% for Residential, 171% for low-income, and 71% for C&I.
- Met or exceeded our savings goals in all sectors in CY '15



Berkshire Gas

- Over 50% of annual & lifetime savings from C&I custom projects achieved in Berkshire's Eastern Division (currently under a moratorium)
- One large project completed in 2014 contributed nearly 30% of the savings
- Overall customer satisfaction reported was 97% according to residential QA/QC vendor



Eversource

- Achieved lifetime goals for all sectors
- Therm goals were our toughest C&I challenge
- Improved customer experience and customer engagement



Unitil

- Success with multi-measure projects in this Plan, including one large project that saved 248,000 annual therms, amounting to 25% of annual usage; Unitil worked with this customer to install new condensing boilers, controls and economizer on central steam plant boiler, attic insulation, new windows, low-flow showerheads, and steam trap repair and replacement.



Liberty Utilities

- Within 6% of 3 Year lifetime therm goal
- Overachievement in Residential Home Energy Services and Residential New Construction
- C&I sector continues to be biggest challenge.



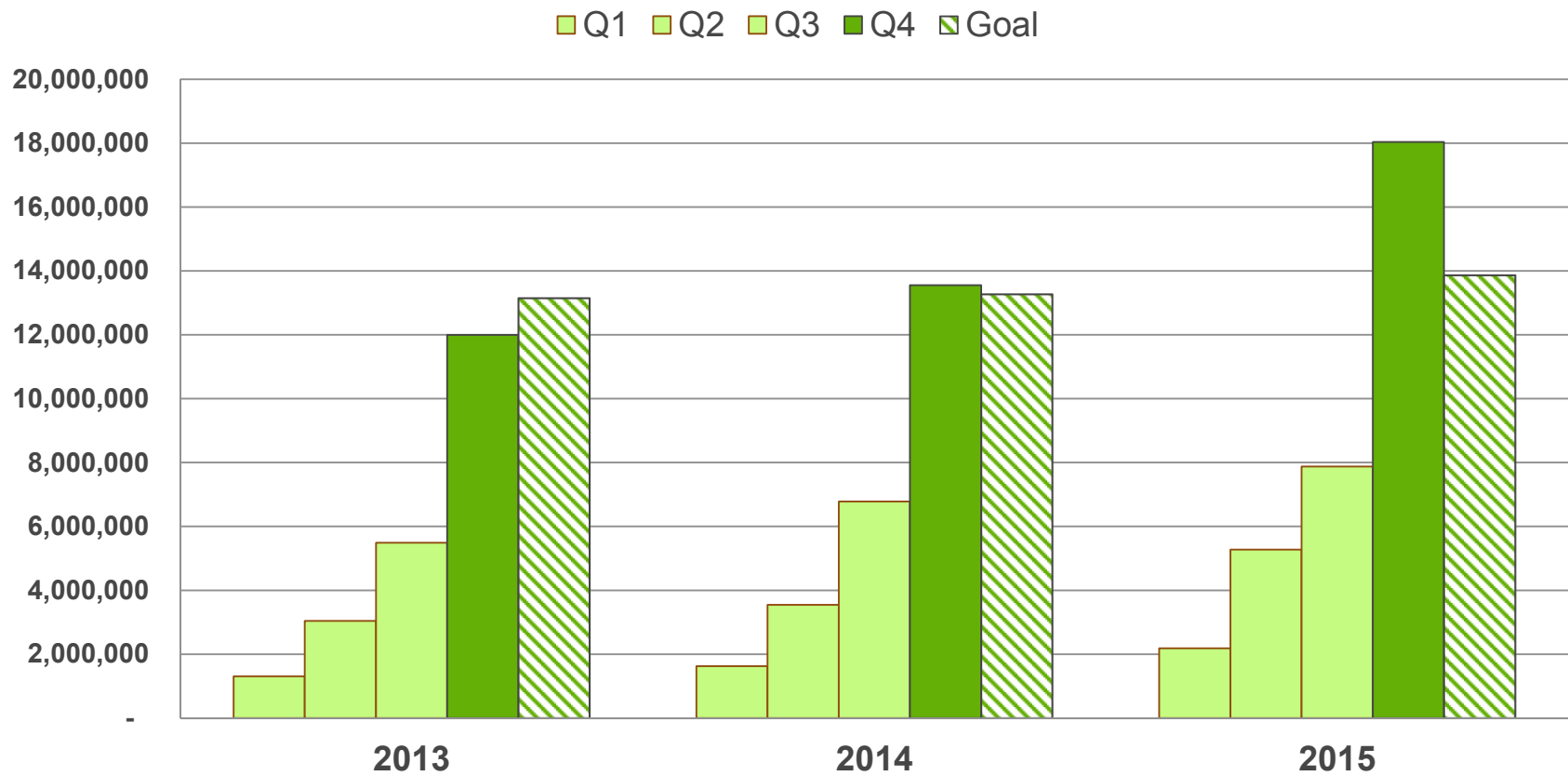
CMA

- Closed triple the number of C&I projects in 2015 as completed in 2013.
- Established a hospitality industry outreach program and track with a dedicated vendor
- Upgraded to a new work process management system providing internal reporting in nearly real time

Electric Lifetime MWh Savings by Quarter 2013-2015



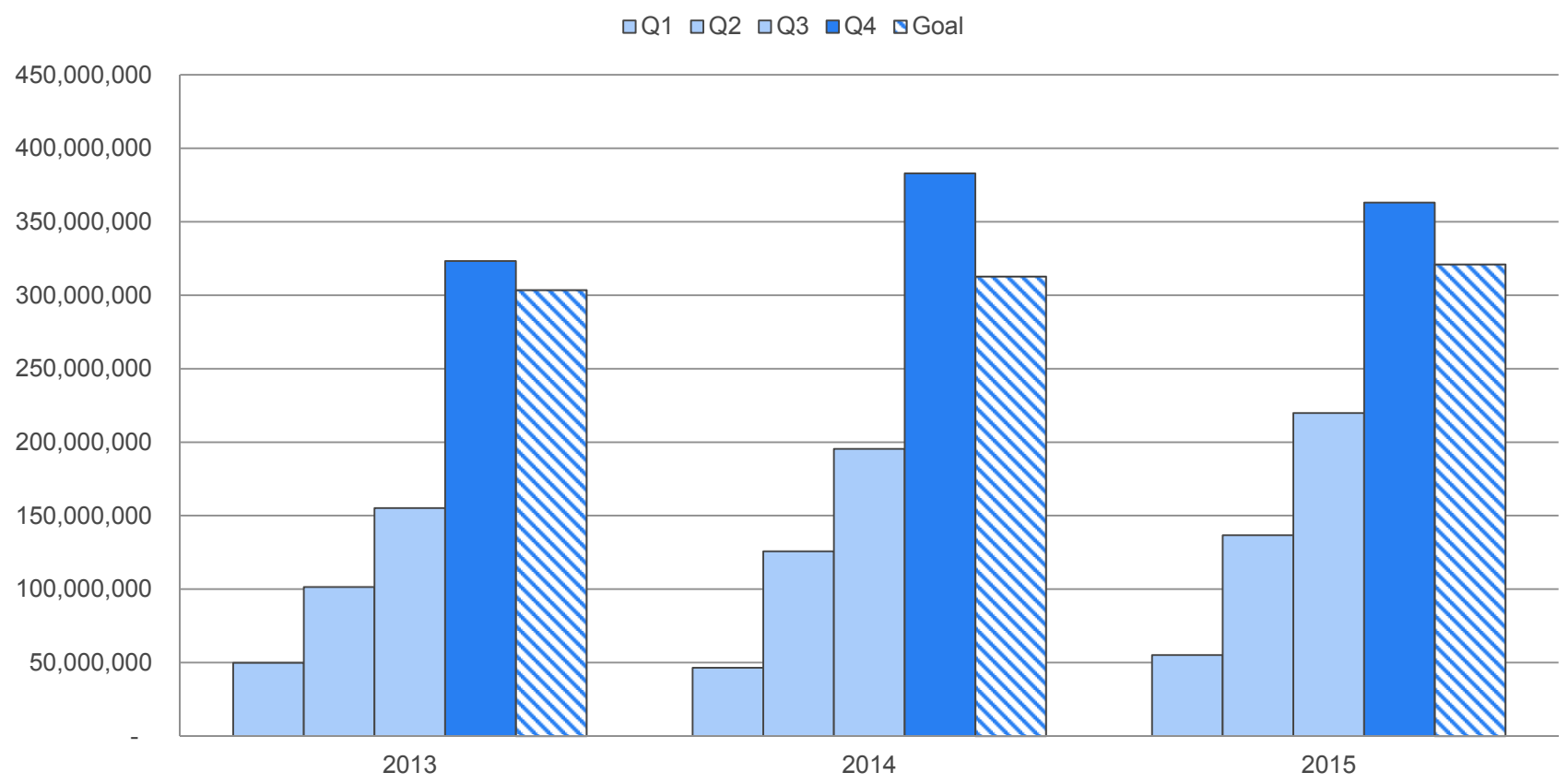
Lifetime Electric Savings by Quarter



Gas Lifetime Therm Savings by Quarter 2013-2015



Lifetime Gas Savings by Quarter



Statewide PA Achievements & Highlights



Overall

- Achieved over 100 percent of benefits of highest goals set in the country while spending less than planned at the statewide portfolio level
- Able to identify and implement multi-year strategy to achieve three year goals
- Programs recognized nationally - #1 in ACEEE, Mass Save awarded AESP Outstanding Achievement in Social Media

Residential & low Income

- Residential and Low-Income sectors exceeded 100% of planned benefits
- PAs completed over 270,000 Home Energy Assessments in 2013-2015
- Transition to providing LEDs for majority of whole house lighting installations
- Completed & evaluated two rounds of Efficient Neighborhoods+ that informed the design of new, statewide moderate income and renter offers

C&I

- C&I sector accounted for 71% of total electric lifetime savings and 38% of gas lifetime savings
- Explosive growth of LED market with 63% of commercial customers having installed at least one type of LED
- Over 9.2 million therms and 780 thousand MWh saved per year