2013 Plan Year Report Performance

Presentation to the EEAC by the PAs

July 8, 2014
Statewide Overview

NEW FORMAT
- One master data tab with savings, benefits, budgets and BCR standard outputs
- Plan Year and Three-Year look
- Improved user interface for access to data

MORE INFORMATION
- More consistent approach to BCR Screening Tools. Common naming conventions used wherever possible
- National Grid added cost information by measure or end-use to be more consistent with other PAs providing this level of detail

STREAMLINED REPORTING
- Data reported month and half earlier than previous years
- PAs working to put data on MassSave Data website
# Changes Between Q4 & Plan Year Report

## EVALUATION RESULTS

<table>
<thead>
<tr>
<th>Study</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Hours of Use Study</td>
<td>Increased annual savings, lifetime savings, benefits for residential lighting</td>
</tr>
<tr>
<td>C&amp;I Upstream Lighting Impact Study</td>
<td>Baseline assumptions shifted resulting in net increase to benefits</td>
</tr>
<tr>
<td>HEHE Time of Replacement Study</td>
<td>Increased annual and lifetime savings</td>
</tr>
</tbody>
</table>

## GENERAL QC

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Savings</td>
<td>Corrections made to ensure consistency among PAs and with TRM, thorough review of vendor-calculated savings</td>
</tr>
<tr>
<td>Costs</td>
<td>No big corrections made to total spend, most changes were shifts in reporting categories (i.e. PP&amp;A to STAT)</td>
</tr>
</tbody>
</table>
Q4 Report vs 2013 Plan Year Report – Statewide Electric

- Total Spend: 89% (Q4), 88% (Plan Year Report)
- Annual Savings: 89% (Q4), 93% (Plan Year Report)
- Lifetime Savings: 89% (Q4), 91% (Plan Year Report)
- Benefits: 96% (Q4), 100% (Plan Year Report)
Q4 Report vs 2013 Plan Year Report – Statewide Gas

<table>
<thead>
<tr>
<th>Category</th>
<th>Q4</th>
<th>Plan Year Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Spend</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>Annual Savings</td>
<td>106%</td>
<td>109%</td>
</tr>
<tr>
<td>Lifetime Savings</td>
<td>101%</td>
<td>107%</td>
</tr>
<tr>
<td>Benefits</td>
<td>100%</td>
<td>107%</td>
</tr>
</tbody>
</table>
Electric Annual & Lifetime Savings
Gas Annual & Lifetime Savings

Annual Therm Savings

- 2010: 15,000,000
- 2011: 20,000,000
- 2012: 25,000,000
- 2013: 30,000,000

Lifetime Therm Savings

- 2010: 10,000,000
- 2011: 15,000,000
- 2012: 20,000,000
- 2013: 25,000,000
Statewide Summary

2013 Plan Year

- Best year yet for total annual savings & benefits
- Achieved over 100% of benefits statewide
- Evaluated results for savings & benefits higher than preliminary data reported in Q4

2013-2015 Three Year Goals

- Gas - On track to exceed 2013-2015 goals
- Electric – PAs confident in ability to close gap and achieve 2013-2015 goals
- Plan Year Report evaluated results closer to 2013 goal than results reported in Implementation Update; closer to three-year goal
Electric Lifetime Savings – Historical & Planned

- Lifetime Actual
- Lifetime Planned

<table>
<thead>
<tr>
<th>Year</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>MWh</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Gas Lifetime Savings – Historical & Planned

Therms

Lifetime Actual
Lifetime Planned


50,000,000 to 350,000,000
Electric and Gas Combined Benefits

Lifetime Actual Benefits
- 2013: $2,811,464,683
- 2014: $2,774,907,049
- 2015: $2,799,484,503

Lifetime Planned Benefits
- 2015: $2,856,824,094
## Performance Incentives Summary

<table>
<thead>
<tr>
<th>Residential Metric #1</th>
<th>Residential Metric #2</th>
<th>Low-Income Metric #1</th>
<th>Low-Income Metric #2</th>
<th>C&amp;I Metric #1</th>
<th>C&amp;I Metric #2</th>
<th>C&amp;I Metric #3</th>
<th>Benefits</th>
<th>Net Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole House/HES: Deeper Savings</td>
<td>Whole House/HES: Early Boiler Replacement</td>
<td>Strategic Targeting</td>
<td>Multi-Family Building Inventory</td>
<td>C&amp;I Large Retrofit Depth of Savings</td>
<td>C&amp;I New Construction Depth of Savings</td>
<td>Small Business Direct Install Depth of Savings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Grid Electric</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>DESIGN</td>
<td>92%</td>
<td>93%</td>
</tr>
<tr>
<td>NU (NSTAR Electric)</td>
<td>THRESHOLD</td>
<td>DID NOT ACHIEVE</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>THRESHOLD</td>
<td>THRESHOLD</td>
<td>111%</td>
<td>120%</td>
</tr>
<tr>
<td>NU (WMECO)</td>
<td>DID NOT ACHIEVE</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>THRESHOLD</td>
<td>DID NOT ACHIEVE</td>
<td>DID NOT ACHIEVE</td>
<td>95%</td>
<td>98%</td>
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<tr>
<td>Unitil Electric</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>DID NOT ACHIEVE</td>
<td>DID NOT ACHIEVE</td>
<td>125+%</td>
<td>125+%</td>
</tr>
<tr>
<td>National Grid Gas</td>
<td>DID NOT ACHIEVE</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>DID NOT ACHIEVE</td>
<td>109%</td>
<td>123%</td>
</tr>
<tr>
<td>NU (NSTAR Gas)</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>DESIGN</td>
<td>120%</td>
<td>125+%</td>
</tr>
<tr>
<td>Columbia Gas</td>
<td>DID NOT ACHIEVE</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>DID NOT ACHIEVE</td>
<td>DID NOT ACHIEVE</td>
<td>DID NOT ACHIEVE</td>
<td>88%</td>
<td>91%</td>
</tr>
<tr>
<td>Unitil Gas</td>
<td>DID NOT ACHIEVE</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>DID NOT ACHIEVE</td>
<td>DID NOT ACHIEVE</td>
<td>EXEMPLARY</td>
<td>81%</td>
<td>55%</td>
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<tr>
<td>Berkshire Gas</td>
<td>DID NOT ACHIEVE</td>
<td>EXEMPLARY</td>
<td>EXEMPLARY</td>
<td>DID NOT ACHIEVE</td>
<td>DID NOT ACHIEVE</td>
<td>DID NOT ACHIEVE</td>
<td>125+%</td>
<td>125+%</td>
</tr>
<tr>
<td>Liberty Utilities</td>
<td>DID NOT ACHIEVE</td>
<td>EXEMPLARY</td>
<td>DESIGN</td>
<td>EXEMPLARY</td>
<td>DID NOT ACHIEVE</td>
<td>DID NOT ACHIEVE</td>
<td>79%</td>
<td>64%</td>
</tr>
<tr>
<td>Statewide Total</td>
<td>88%</td>
<td>79%</td>
<td>125%</td>
<td>125%</td>
<td>99%</td>
<td>109%</td>
<td>75%</td>
<td></td>
</tr>
</tbody>
</table>

**Statewide Total**

- **Savings Component**: $18,939,732
- **Value Component**: $12,196,398

**Total Benefits**: $3,901,242
Appendix
Electric Summary by Sector As % of Goal

- **Sum of Participants**
  - Residential: 123%
  - Low-Income: 128%
  - Commercial & Industrial: 123%
  - Evaluated: 186%

- **Total Spend**
  - Residential: 114%
  - Low-Income: 93%
  - Commercial & Industrial: 88%
  - Evaluated: 72%

- **Total Summer Capacity (kW)**
  - Residential: 133%
  - Low-Income: 117%
  - Commercial & Industrial: 79%
  - Evaluated: 93%

- **Total Annual MWh**
  - Residential: 126%
  - Low-Income: 120%
  - Commercial & Industrial: 80%
  - Evaluated: 93%

- **Total Lifetime MWh**
  - Residential: 148%
  - Low-Income: 119%
  - Commercial & Industrial: 81%
  - Evaluated: 91%
Gas Summary by Sector As % of Goal