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2011 Q2 Qualitative Results

Presentation to the EEAC

July 12, 2011

Highlights of the Second Quarter

- Continued Focus on:
  - Training
  - Pipeline
- Promotion of energy efficiency financing program
- Implementation and rollout of marketing campaign
- EM&V completes approximately 30 studies
- Tornado recovery efforts

Residential Market

Residential Market

- New Construction
  - Tornado Recovery Efforts by Columbia Gas of Massachusetts, WMECO and National Grid

Residential Market

- New Construction, cont.
  - PAs continue to support the EPA ENERGY STAR® Homes label during the transition of ENERGY STAR versions
- Rebate Programs
  - Strong Q2
  - Gas PAs see an increase in rebates due to volatile energy prices
- Home Energy Assessments
  - Demand continues to increase due to seasonal factors and energy prices
- Program Design Changes
  - Working on the establishment of Best Practices Working Group

Residential Market

- Lighting
  - Good results continue for all PAs
  - Introduction of the first ENERGY STAR® qualified LED lamps; enter the major store market showing much promise
- Appliance program
  - Two PAs have surpassed their refrigerator goals in Q2, others are on target to reach their goals by the end of the year
- Multi-family
  - Continues to be a challenge for some PAs
  - Electric PAs have a healthy pipeline of multi-family projects and expect to be close or exceed goal

Residential Market

- Low Income Single Family:
  - Slow production in Q2 but PAs are working closely with CAP Agencies/Lead vendors to increase production for the remainder of the year
- Low Income Multifamily:
  - Most PAs are behind, but have been working on contracting/infrastructure
  - Many projects in the pipeline, which may bring PAs close to or above goal
  - Expect a busy second half

Commercial and Industrial Market

Commercial and Industrial Market

- Focus
  - Working aggressively towards goal
  - Promotion of upstream lighting in September
  - Large C&I customers who utilize multi-year plans continue to grow successfully
  - Productive work in C&I Management Committee

- Combined Heat & Power
  - A draft market assessment report has been developed
  - A literature review has been conducted which was the basis of a white paper adopted by the PAs

Training, Marketing & Outreach

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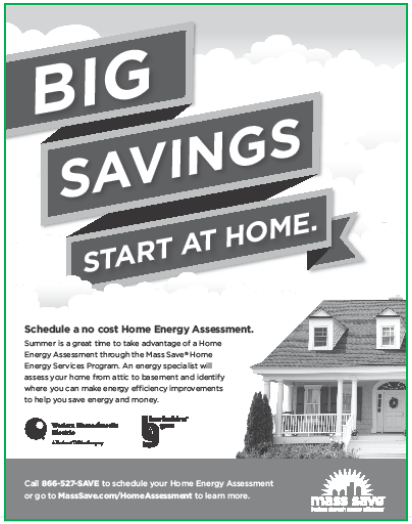
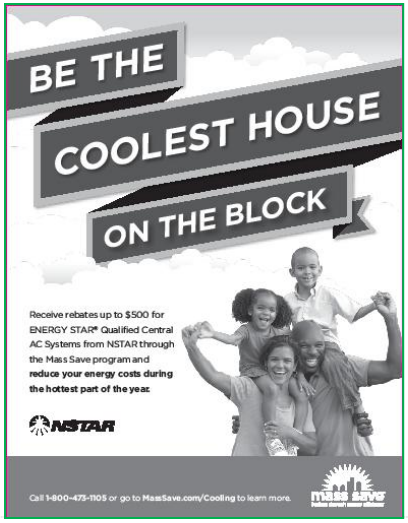
Training

- Over 100 companies participated in COOL Smart program, **70** of whom were new to the program
- GasNetworks® conducted 2 educational training sessions for local inspectors, plumbing/heating and HVAC contractors.
- Sponsored trainings with MAEEP
  - Chiller Training
  - Industrial Refrigeration
  - CHP Training
  - Labs 21 Training
- Massachusetts Office of Technical Assistance sponsored two Energy Efficiency Workshops in Tewksbury and Holyoke; PAs presented information and provided support

Marketing & Outreach

- Strategic implementation of both the Residential and C&I plans occurred in 2nd Quarter
- Residential Marketing
  - :30 and :60 second radio spots on 25 stations across the PAs' territories
  - Print ads in over 30 publications with 5 million impressions
  - Participated in the annual Earth Fest Festival along the Esplanade





Marketing & Outreach

- C&I Marketing
  - Developed and delivered print ads, online presence and specific market sector collateral
  - Launch of the C&I finance program through paid radio advertising partnership with WBZ radio, both at the WBZ Business Expo and collateral/signage at the Energy Efficiency Expo at Gillette Stadium sponsored by National Grid and NSTAR.

R&D and Pilots

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R&D and Pilots

- Deep Energy Retrofit:
  - Process evaluation completed
  - Interest, but a long process
- New Construction – Multi-Family: recruitment continues
- Major Renovation: 41 projects with 7 projects completed and 27 leads in the design/planning stage
- Behavioral Feedback
  - Pilots continue with Cape Light Compact beginning 2nd phase pilot recruitment in March and installation of the Tendril Energize™ platform in June
- Community Based
  - Hard-to-Reach/Hard-to-Serve Charette was held in Quarter 2

Financing

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Financing

- Over 40 lending institutions
- Developed and implemented a marketing awareness campaign (*C&I Financing Brochure below*)

The Mass Save® Financing Program

The Mass Save Financing Program* provides customers the opportunity to apply for an interest free loan from participating lenders to assist with the installation of qualified energy-efficient improvements** in their facilities.

Real money that flows directly to your bottom line:

- Interest free loans available up to $100,000
- Terms up to seven years
- Additional incentives for qualified pre-approved energy efficiency measures

Energy efficiency improvements can provide:

- Better lighting conditions
- Increased comfort
- Improved work environment
- A pathway to corporate sustainability initiatives
- Monetary savings

Here are some energy efficiency improvements that may be eligible for the Mass Save Financing Program:

- High Efficiency Lighting/Controls
- Motors/Variable Frequency Drives
- Compressed Air
- Custom Measures

*Financing is subject to third party approval. Additional terms and conditions apply.

**Improvements require pre-approval from your utility or energy efficiency provider and must comply with program terms & conditions.

ABOUT MASS SAVE

Mass Save is an initiative sponsored by Massachusetts' gas and electric utilities and energy efficiency service providers, including Berkshire Gas, Cape Light Compact, Columbia Gas of Massachusetts, National Grid, New England Gas Company, NSTAR, Unitil and Western Massachusetts Electric Company.

The Sponsors of Mass Save work closely with the Massachusetts Department of Energy Resources to provide a wide range of services, incentives, trainings, and information promoting energy efficiency that help residents and businesses manage energy use and related costs.

Financing

- Mass Save® PAs have arranged financing of $11 Million to Residential customers since the beginning of the year

Sector	Product	Min Loan Amt	Max Loan Amt	Max Term (mo)
Owner Occupied Residential	Micro	$500	$2,000	24
	Standard	$2,001	$15,000	84
	Extended	$15,001	$25,000	84
Non-Owner Occupied Residential	Standard	$5,000	$25,000	84
C&I, Multi-family, Non-Profits	Standard	$5,000	$25,000	84
	Large	$25,001	$100,000	84