

December 23, 2020

VIA ELECTRONIC MAIL

Luly E. Massaro, Commission Clerk
Rhode Island Public Utilities Commission
89 Jefferson Boulevard
Warwick, RI 02888

RE: Docket 5076 – 2021-2023 Energy Efficiency Program Plan & 2021 Energy Efficiency Plan Compliance Filing Pursuant to December 22, 2020 Open Meeting

Dear Ms. Massaro:

On behalf of The Narragansett Electric Company d/b/a National Grid (“National Grid” or the “Company”), enclosed, please find the Company’s compliance filing which is being submitted in accordance with the Commission’s directives as set forth at an Open Meeting on December 22, 2020.

This compliance filing provides an updated implementation budget for Year 1 (2021) and updated goals, targets, and proposed energy efficiency rates for Year 1 as reflected through the following updated tables: E-1, E-2, E-3, E-4, E-5, E-5A, E-6, E-6A, E-6B, E-7, E-10, G-1, G-2, G-3, G-4, G-5, G-5A, G-6, G-6A, G-7, and G-10. Please note that updated Tables E-8 and G-8 (Performance Incentives) are not included within this filing and tables E-9 and G-9 did not change

The updated tables are consistent with the Commission’s rulings: (i) to utilize an electric sales forecast of 6,856,927,553 kWh; (ii) to deny the Company’s funding request for the energy management framework platform; (iii) to disallow the incremental workforce development budget; (iv) to deny funding for the proposed electric vehicle-based demand response program; (v) to maintain 2020 budget levels for the EnergyWise Program, EnergyWise Multi-Family Program, Single-Family Income Eligible Services Program, and Income Eligible Multi-Family Program for both electric and gas; and (vi) to require the Company to submit a filing at a later date once the Company produces a moderate-income definition and income verification plan.

The result of these updates is a decrease in the requested overall electric budget of \$5,519,688 and a decrease in the requested overall gas budget of \$3,641,417. As a result of the reduced electric budget, the Company has now proposed a 2021 Electric Energy Efficiency Program Charge of \$0.01113/kWh, a 15.9% decrease from the rate proposed in the Company’s October 15th filing. As a result of the reduced gas budget, the Company has now proposed a 2021 Gas Energy Efficiency Residential Program Charge of \$0.871/Dth, a 13.8% decrease from the rate proposed in the Company’s October 15th filing. As a result of the reduced gas budget, the Company has now

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proposed a 2021 Gas Energy Efficiency Commercial & Industrial Program Charge of \$0.596/Dth, a 15.3% decrease from the rate proposed in the Company's October 15th filing.

Thank you for your attention to this filing. If you have any questions or concerns, please do not hesitate to contact me at 401-784-4263.

Sincerely,

A handwritten signature in blue ink, appearing to read "Andrew S. Marcaccio".

Andrew S. Marcaccio

cc: Docket 5076 Service List
John Bell, Division
Jon Hagopian, Esq.

Certificate of Service

I hereby certify that a copy of the cover letter and any materials accompanying this certificate was electronically transmitted to the individuals listed below.

The paper copies of this filing are being hand delivered to the Rhode Island Public Utilities Commission and to the Rhode Island Division of Public Utilities and Carriers.

December 23, 2020

Joanne M. Scanlon

Date

**Docket No. 5076 - National Grid – 2021-2023 Energy Efficiency Program Plan & 2021 Annual Energy Efficiency Program Plan
Service list updated 12/7/2020**

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Table E-1
National Grid
Electric DSM Funding Sources in 2021 by Sector
\$(000)

	Income Eligible Residential	Projections by Sector Non-Income Eligible Residential	Commercial & Industrial	Total
(1) Projected Budget (from E-2):	\$17,540.47	\$39,225.53	\$60,020.34	\$116,786.34
Sources of Other Funding:				
(2) Projected DSM Commitments at Year-End 2020:	\$0.00	\$0.00	\$0.00	\$0.00
(3) Projected Year-End 2020 Fund Balance and Interest:	\$0.00	\$454.01	\$24,891.62	\$25,345.62
(4) Projected FCM Payments from ISO-NE:	\$492.40	\$6,375.50	\$9,150.10	\$16,018.00
(5) Total Other Funding:	\$492.40	\$6,829.51	\$34,041.72	\$41,363.62
(6) Customer Funding Required:	\$17,048.07	\$32,396.03	\$25,978.62	\$75,422.72
(7) Forecasted kWh Sales:	210,767,045	2,729,207,755	3,916,952,753	6,856,927,553
(8) Energy Efficiency Program charge per kWh, excluding uncollectible recovery:				\$0.01099
(9) Proposed SRP Opex Factor per kWh, excluding uncollectible recovery:				<u>\$0.00000</u>
(10) Total Proposed Energy Efficiency Charge per kWh, excluding uncollectible recovery:				\$0.01099
(11) Currently Effective Uncollectible Rate				1.30%
(12) Proposed Energy Efficiency Program Charge per kWh, including Uncollectible Recovery:				\$0.01113
(13) Currently Effective Energy Efficiency Program Charge per kwh				<u>\$0.01323</u>
(14) Proposed Adjustment to Reflect Fully Reconciling Funding Mechanism				(\$0.00210)

Notes:

- (1) Projected Budget from E-2 includes OER and EERMC costs allocated to each sector based on forecasted sales.
- (2) DSM Commitments are projects that are under construction with anticipated completion in 2021.
- (3) Fund balance projections include projected revenue and spend through year end with Income Eligible sector set to \$0 through projected subsidization from other sectors, minus commitments which are illustrated separately on line (2). The Company proposes to refile this table with updated Fund Balance projections on December 1, 2020 as proposed in Section 12.1 of the Plan's Main Text.
- (3a) The Fund balance projection includes a credit and interest in the amount of \$469,641.16 pursuant to the PUC Open Meeting on September 1, 2020 in relation to Docket No. 4755 and the Navy CHP Settlement Agreement.
- (4) The total projection of FCM revenue is allocated by kWh sales to each sector.
- (5) Line (2) + Line (3) + Line (4)
- (6) Line (1) - Line (5)
- (7) Per Docket 5076, Record Request 12, Attachment 5, Line 7 kwh forecast
- (8) Line (6) ÷ Line (7), truncated to 5 decimal places
- (9) Truncated to 5 decimal places
- (11) Proposed SRP Opex Factor is \$0.00000.
- (10) Line (8) + Line (9)
- (11) Uncollectible rate approved in Docket No 4770.
- (12) Line (10) ÷ (1-Line (11)), truncated to 5 decimal places
- (13) Currently Effective EE Charge includes System Reliability Factor and uncollectible recovery.
- (14) Line (12) - Line (13)

Table E-2
National Grid
2021 Electric Energy Efficiency Program Budget (\$000)

	Program Planning & Administration	Marketing	Cost of services and product rebates/incentives provided to customers	Sales, Technical Assistance & Training	Evaluation & Market Research	Total Performance Incentive	Grand Total
Non-Income Eligible Residential							
Residential New Construction	\$64.5	\$24.0	\$831.8	\$525.6	\$165.4		\$1,611.3
ENERGY STAR® HVAC	\$83.8	\$278.3	\$2,584.5	\$480.3	\$60.9		\$3,487.8
EnergyWise	\$381.8	\$373.1	\$13,545.4	\$1,166.5	\$225.4		\$15,692.2
EnergyWise Multifamily	\$88.7	\$44.2	\$2,270.0	\$369.9	\$31.5		\$2,804.3
ENERGY STAR® Lighting	\$237.6	\$560.4	\$4,057.2	\$231.6	\$187.8		\$5,274.8
Residential Consumer Products	\$71.8	\$531.5	\$1,486.1	\$542.5	\$49.3		\$2,681.2
Home Energy Reports	\$44.8	\$10.5	\$0.0	\$2,550.8	\$35.6		\$2,641.7
Residential ConnectedSolutions	\$35.7	\$11.1	\$1,351.8	\$332.0	\$190.0		\$1,920.5
Energy Efficiency Education Programs	\$0.0	\$40.0	\$0.0	\$0.0	\$0.0		\$40.0
Residential Pilots	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0		\$0.0
Community Based Initiatives - Residential	\$29.5	\$112.3	\$84.4	\$0.0	\$0.0		\$226.2
Comprehensive Marketing - Residential	\$2.3	\$330.4	\$0.0	\$0.0	\$0.0		\$332.7
Residential Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1,925.0	\$1,925.0
Subtotal - Non-Income Eligible Residential	\$1,040.6	\$2,315.7	\$26,211.2	\$6,199.2	\$945.9	\$1,925.0	\$38,637.7
Income Eligible Residential							
Single Family - Income Eligible Services	\$317.1	\$141.0	\$10,132.5	\$2,103.4	\$152.1		\$12,846.1
Income Eligible Multifamily	\$116.2	\$9.1	\$3,024.0	\$344.5	\$55.2		\$3,549.0
Income Eligible Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1,100.0	\$1,100.0
Subtotal - Income Eligible Residential	\$433.3	\$150.1	\$13,156.5	\$2,448.0	\$207.2	\$1,100.0	\$17,495.1
Commercial & Industrial							
Large Commercial New Construction	\$218.6	\$352.0	\$5,872.2	\$1,581.6	\$163.9		\$8,188.2
Large Commercial Retrofit	\$885.7	\$266.0	\$24,825.0	\$4,746.19	\$842.4		\$31,565.2
Small Business Direct Install	\$278.3	\$281.2	\$7,934.3	\$338.9	\$50.9		\$8,883.6
Commercial ConnectedSolutions	\$88.1	\$7.6	\$2,680.0	\$214.5	\$0.0		\$2,990.1
Commercial Pilots	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0		\$0.0
Community Based Initiatives - C&I	\$9.8	\$36.6	\$28.1	\$0.0	\$0.0		\$74.5
Finance Costs	\$0.0	\$0.0	\$5,000.0	\$0.0	\$0.0		\$5,000.0
Commercial & Industrial Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$2,475.0	\$2,475.0
Subtotal - Commercial & Industrial	\$1,480.5	\$943.2	\$46,339.6	\$6,881.1	\$1,057.2	\$2,475.0	\$59,176.6
Regulatory							
OER	\$738.5	\$0.0	\$0.0	\$0.0	\$0.0		\$738.5
EERMC	\$738.5	\$0.0	\$0.0	\$0.0	\$0.0		\$738.5
Subtotal - Regulatory	\$1,477.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1,477.0
Grand Total	\$4,431.4	\$3,409.1	\$85,707.2	\$15,528.3	\$2,210.4	\$5,500.0	\$116,786.3

Notes:

- (1) 2021 Large Commercial Retrofit Commitments (\$000):
- (2) For more information on Finance Costs, please refer to Attachment 2, Section 9.
- (3) OER and EERMC total 2.0% of customers' EE Program Charge collected on Table E-1, minus 2%.
- (4) Finance Costs are detailed in Table E-9.
- (5) Demonstrations and Assessments budgets are included in specific program level budgets listed above. More information on Demonstration and Assessments descriptions, budgets, and which program level budget they are included in can be found in Attachment 8.

Table E-3
National Grid
Derivation of the 2021 Spending and Implementation Budgets (\$000)

	Proposed 2021 Budget From E-2	Commitments	Regulatory Costs	Performance Incentive	Eligible Sector Spending Budget for Performance Incentive on E-9	Implementation Expenses for Cost- Effectiveness on E-5
Non-Income Eligible Residential						
Residential New Construction	\$1,611.3					\$1,611.3
ENERGY STAR® HVAC	\$3,487.8					\$3,487.8
EnergyWise	\$15,692.2					\$15,692.2
EnergyWise Multifamily	\$2,804.3					\$2,804.3
ENERGY STAR® Lighting	\$5,274.8					\$5,274.8
Residential Consumer Products	\$2,681.2					\$2,681.2
Home Energy Reports	\$2,641.7					\$2,641.7
Residential ConnectedSolutions	\$1,920.5					\$1,920.5
Energy Efficiency Education Programs	\$40.0					\$40.0
Residential Pilots	\$0.0					\$0.0
Community Based Initiatives - Residential	\$226.2					\$226.2
Comprehensive Marketing - Residential	\$332.7					\$332.7
Residential Performance Incentive	\$1,925.0			\$1,925.0		\$0.0
Subtotal - Non-Income Eligible Residential	\$38,637.7	\$0.0	\$0.0	\$1,925.0	\$34,785.6	\$36,712.7
Income Eligible Residential						
Single Family - Income Eligible Services	\$12,846.1					\$12,846.1
Income Eligible Multifamily	\$3,549.0					\$3,549.0
Income Eligible Performance Incentive	\$1,100.0			\$1,100.0		\$0.0
Subtotal - Income Eligible Residential	\$17,495.1	\$0.0	\$0.0	\$1,100.0	\$16,395.1	\$16,395.1
Commercial & Industrial						
Large Commercial New Construction	\$8,188.2	\$0.0				\$8,188.2
Large Commercial Retrofit	\$31,565.2	\$0.0				\$31,565.2
Small Business Direct Install	\$8,883.6	\$0.0				\$8,883.6
Commercial ConnectedSolutions	\$2,990.1					\$2,990.1
Commercial Pilots	\$0.0					\$0.0
Community Based Initiatives - C&I	\$74.5					\$74.5
Finance Costs	\$5,000.0					\$5,000.0
Commercial & Industrial Performance Incentive	\$2,475.0			\$2,475.0		\$0.0
Subtotal - Commercial & Industrial	\$59,176.6	\$0.0	\$0.0	\$2,475.0	\$53,627.3	\$56,701.6
Regulatory						
OER	\$738.5		\$738.5			\$738.5
EERMC	\$738.5		\$738.5			\$738.5
Subtotal - Regulatory	\$1,477.0	\$0.0	\$1,477.0	\$0.0	\$0.0	\$1,477.0
Grand Total	\$116,786.3	\$0.0	\$1,477.0	\$5,500.0	\$104,808.0	\$111,286.3

Notes:

- (1) Eligible Sector Spending Budget = Total Budget from E-2 minus commitments, regulatory costs, pilots, assessments, Residential ConnectedSolutions, Commercial ConnectedSolutions, Performance Incentive
- (2) Eligible Sector Spending Budget does not include assessments, see Attachment 8 for assessments budgets.
- (3) Implementation Expenses = Total Budget from E-2 minus commitments and Performance Incentive.

**Table E-4
National Grid
Proposed 2021 Budget Compared to Approved 2020 Budget (\$000)**

	Proposed Implementation Budget 2021	Approved Implementation Budget 2020	Difference
Non-Income Eligible Residential			
Residential New Construction	\$1,611.3	\$973.5	\$637.9
ENERGY STAR® HVAC	\$3,487.8	\$2,525.1	\$962.7
EnergyWise	\$15,692.2	\$15,692.2	\$0.0
EnergyWise Multifamily	\$2,804.3	\$2,804.3	\$0.0
ENERGY STAR® Lighting	\$5,274.8	\$15,375.8	-\$10,101.1
Residential Consumer Products	\$2,681.2	\$2,199.2	\$482.1
Home Energy Reports	\$2,641.7	\$2,728.1	-\$86.4
Residential ConnectedSolutions	\$1,920.5	\$461.6	\$1,458.9
Energy Efficiency Education Programs	\$40.0	\$40.0	\$0.0
Residential Pilots	\$0.0	\$287.8	-\$287.8
Community Based Initiatives - Residential	\$226.2	\$203.9	\$22.3
Comprehensive Marketing - Residential	\$332.7	\$382.3	-\$49.6
Subtotal - Non-Income Eligible Residential	\$36,712.7	\$43,673.8	-\$6,961.2
Income Eligible Residential			
Single Family - Income Eligible Services	\$12,846.1	\$12,846.1	\$0.0
Income Eligible Multifamily	\$3,549.0	\$3,549.0	\$0.0
Subtotal - Income Eligible Residential	\$16,395.1	\$16,395.1	\$0.0
Commercial & Industrial			
Large Commercial New Construction	\$8,188.2	\$5,335.7	\$2,852.4
Large Commercial Retrofit	\$31,565.2	\$23,801.3	\$7,763.9
Small Business Direct Install	\$8,883.6	\$7,568.6	\$1,315.0
Commercial ConnectedSolutions	\$2,990.1	\$2,078.5	\$911.6
Community Based Initiatives - C&I	\$74.5	\$66.1	\$8.4
Commercial Pilots	\$0.0	\$106.3	-\$106.3
Finance Costs	\$5,000.0	\$5,216.7	-\$216.7
Subtotal Commercial & Industrial	\$56,701.6	\$44,173.2	\$12,528.5
Regulatory			
EERMC	\$738.5	\$893.7	-\$155.2
OER	\$738.5	\$893.7	-\$155.2
Subtotal Regulatory	\$1,477.0	\$1,787.4	-\$310.4
TOTAL IMPLEMENTATION BUDGET	\$111,286.3	\$106,029.5	\$5,256.9
OTHER EXPENSE ITEMS			
Commitments	\$0.0	\$0.0	\$0.0
Company Incentive	\$5,500.0	\$5,054.4	\$445.6
Subtotal - Other Expense Items	\$5,500.0	\$5,054.4	\$445.6
TOTAL BUDGET	\$116,786.3	\$111,083.9	\$5,702.4

Notes:

- (1) Program Implementation Budget excludes Commitments, Company Incentive; derived on Table E-3
- (2) Total Budget includes Implementation, Commitments; illustrated on Table E-3
- (3) The Energy Star® Lighting program year-over-year declines are driven by decreased opportunities for this program due to market transformation
- (4) The Large Commercial New Construction program had an increase in measure quantities specifically HVAC prescriptive measures, lighting controls. Increase in quantities in the custom measure category, specifically HVAC and refrigeration resulting in increased incentive costs. Increase in budgets to accommodate new Zero Net Energy pathways, that increase incentives for TA studies and commissioning support for customers.
- (5) The Large Commercial Retrofit program had an increase in savings from lighting and HVAC control measures that were identified in the potential study, for which incentive costs per kWh are higher. Additionally, increase in budgets to develop the Energy Information Framework Platform to facilitate advanced insights to drive savings with customers.
- (6) The Small Business Direct program is incorporating higher incentives for customers to increase participation in non-lighting measures. Increasing quantities for lighting controls with installed luminaires and retrofit kits with integrated controls.

Table E-5
National Grid
Calculation of 2021 Program Year Cost-Effectiveness
All Dollar Values in (\$000)

	RI Test Benefit/ Cost¹	Total Benefit	Program Implementation Expenses²	Customer Contribution	Performance Incentive	¢/Lifetime kWh
Non-Income Eligible Residential						
Residential New Construction	2.65	\$6,539.1	\$1,611.3	\$855.7		13.6
ENERGY STAR® HVAC	2.77	\$13,306.5	\$3,487.8	\$1,311.6		9.4
EnergyWise	1.91	\$31,315.6	\$15,692.2	\$698.1		113.9
EnergyWise Multifamily	2.35	\$7,847.9	\$2,804.3	\$532.0		20.5
Home Energy Reports	3.23	\$8,530.8	\$2,641.7	\$0.0		9.8
ENERGY STAR® Lighting	3.29	\$14,018.2	\$5,274.8	-\$1,012.9		15.9
Residential Consumer Products	2.84	\$11,372.7	\$2,681.2	\$1,321.2		10.5
Residential ConnectedSolutions	5.88	\$11,301.0	\$1,920.5	\$0.0		N/A
Energy Efficiency Education Programs			\$40.0			
Residential Pilots			\$0.0			
Community Based Initiatives - Residential			\$226.2			
Comprehensive Marketing - Residential			\$332.7			
Non-Income Eligible Residential SUBTOTAL	2.46	\$104,231.8	\$36,712.7	\$3,705.7	\$1,925.0	21.1
Income Eligible Residential						
Single Family - Income Eligible Services	2.66	\$34,193.5	\$12,846.1	\$0.0		34.8
Income Eligible Multifamily	1.93	\$6,861.6	\$3,549.0	\$0.0		15.7
Income Eligible Residential SUBTOTAL	2.35	\$41,055.1	\$16,395.1	\$0.0	\$1,100.0	27.6
Commercial & Industrial						
Large Commercial New Construction	6.35	\$57,678.8	\$8,188.2	\$893.1		4.8
Large Commercial Retrofit	7.54	\$327,029.8	\$31,565.2	\$11,821.8		5.8
Small Business Direct Install	3.35	\$36,190.8	\$8,883.6	\$1,922.8		10.3
Commercial ConnectedSolutions	9.85	\$29,465.0	\$2,990.1	\$0.0		N/A
Commercial Pilots			\$0.0			
Community Based Initiatives - C&I			\$74.5			
Finance Costs			\$5,000.0			
C&I SUBTOTAL	6.10	\$450,364.4	\$56,701.6	\$14,637.7	\$2,475.0	6.9
Regulatory						
OER			\$738.5			
EERMC			\$738.5			
Regulatory SUBTOTAL			\$1,477.0			
TOTAL	4.41	\$595,651.3	\$111,286.3	\$18,343.4	\$5,500.0	10.0

Notes:

(1) RI Test B/C Test = (Energy + Capacity + Resource Benefits + Economic Benefits + Carbon Benefits) / (Program Implementation + Customer Contribution + Performance Incentive)

Also includes effects of free-ridership and spillover.

(2) For Implementation Expenses derivation, see Table E-3.

(3) ENERGY STAR® Lighting customer cost is negative due to a high free-ridership rate. Any financial incentives paid to free-riders are counted as a cost because the Company incurred those costs as part of the overall cost of the Plan regardless of whether the participant is free-rider or not. Therefore the Company reduces benefits and the customer cost by the net-to-gross ratio but not the incentives.

Table E-5A
National Grid
Calculation of 2021 Program Year Cost-Effectiveness with TRC Test
All Dollar Values in (\$000)

	TRC Benefit/ Cost¹	Total Benefit	Program Implementation Expenses²	Customer Contribution	Performance Incentive	¢/Lifetime kWh
Non-Income Eligible Residential						
Residential New Construction	1.51	\$3,713.4	\$1,611.3	\$855.7		13.6
ENERGY STAR® HVAC	1.37	\$6,557.3	\$3,487.8	\$1,311.6		9.4
EnergyWise	0.84	\$13,815.9	\$15,692.2	\$698.1		113.9
EnergyWise Multifamily	1.13	\$3,759.9	\$2,804.3	\$532.0		20.5
Home Energy Reports	1.90	\$5,008.4	\$2,641.7	\$0.0		9.8
ENERGY STAR® Lighting	1.17	\$4,988.9	\$5,274.8	-\$1,012.9		15.9
Residential Consumer Products	1.52	\$6,092.4	\$2,681.2	\$1,321.2		10.5
Residential ConnectedSolutions	5.05	\$9,704.9	\$1,920.5			
Energy Efficiency Education Programs			\$40.0			
Residential Pilots			\$0.0			
Community Based Initiatives - Residential			\$226.2			
Comprehensive Marketing - Residential			\$332.7			
Non-Income Eligible Residential SUBTOTAL	1.27	\$53,641.1	\$36,712.7	\$3,705.7	\$1,925.0	21.1
Income Eligible Residential						
				\$0.0		
Single Family - Income Eligible Services	1.61	\$20,738.9	\$12,846.1	\$0.0		34.8
Income Eligible Multifamily	0.67	\$2,378.6	\$3,549.0	\$0.0		15.7
Income Eligible Residential SUBTOTAL	1.32	\$23,117.6	\$16,395.1	\$0.0	\$1,100.0	27.6
Commercial & Industrial						
Large Commercial New Construction	2.97	\$26,984.4	\$8,188.2	\$893.1		4.8
Large Commercial Retrofit	2.95	\$127,987.1	\$31,565.2	\$11,821.8		5.8
Small Business Direct Install	1.47	\$15,926.4	\$8,883.6	\$1,922.8		10.3
Commercial ConnectedSolutions	7.66	\$22,916.6	\$2,990.1			
Commercial Pilots			\$0.0			
Community Based Initiatives - C&I			\$74.5			
Finance Costs			\$5,000.0			
C&I SUBTOTAL	2.63	\$193,814.4	\$56,701.6	\$14,637.7	\$2,475.0	6.9
Regulatory						
OER			\$738.5			
EERMC			\$738.5			
Regulatory SUBTOTAL			\$1,477.0			
TOTAL	2.00	\$270,573.0	\$111,286.3	\$18,343.4	\$5,500.0	10.0

Notes:

(1) TRC B/C Test = (Energy + Capacity + Resource Benefits) / (Program Implementation + Customer Contribution + Performance Incentive)

Also includes effects of free-ridership and spillover.

(2) For Implementation Expenses derivation, see Table E-3.

(3) ENERGY STAR® Lighting customer cost is negative due to a high free-ridership rate. Any financial incentives paid to free-riders are counted as a cost because the Company incurred those costs as part of the overall cost of the Plan regardless of whether the participant is free-rider or not. Therefore the Company reduces benefits and the customer cost by the net-to-gross ratio but not the incentives.

Table E-6
National Grid
Summary of 2021 Benefits by Program (Energy Efficiency Measures)

	Benefits (000's)																		
	Total	Capacity						Energy					Non Electric				Societal		
		Summer Generation	Capacity DRIPE	Trans	Dist	Reliability	Winter		Summer		Energy DRIPE	Natural Gas	Oil	Other Resource	Non Resource	Carbon	NOx	Economic	
							Peak	Off Peak	Peak	Off Peak									
Non-Income Eligible Residential																			
Residential New Construction	\$6,539	\$75	\$5	\$95	\$83	\$0	\$421	\$501	\$182	\$124	\$363	\$0	\$280	\$1,543	\$42	\$536	\$34	\$2,256	
ENERGY STAR® HVAC	\$13,307	\$270	\$0	\$343	\$298	\$1	\$1,471	\$1,639	\$184	\$141	\$1,296	\$609	\$93	-\$11	\$225	\$1,685	\$112	\$4,953	
EnergyWise	\$31,316	\$273	\$104	\$359	\$311	\$2	\$278	\$259	\$206	\$161	\$508	\$0	\$9,838	\$200	\$1,316	\$2,581	\$325	\$14,594	
EnergyWise Multifamily	\$7,848	\$179	\$18	\$223	\$194	\$1	\$84	\$73	\$120	\$92	\$156	\$0	\$646	\$28	\$1,947	\$303	\$27	\$3,758	
Home Energy Reports	\$8,531	\$251	\$1,287	\$406	\$352	\$10	\$692	\$560	\$317	\$213	\$920	\$0	\$0	\$0	\$0	\$843	\$38	\$2,642	
ENERGY STAR® Lighting	\$14,018	\$291	\$789	\$466	\$404	\$7	\$671	\$537	\$302	\$200	\$1,206	-\$260	-\$325	-\$120	\$822	\$632	\$11	\$8,387	
Residential Consumer Products	\$11,373	\$487	\$14	\$729	\$633	\$5	\$750	\$732	\$459	\$402	\$1,806	\$16	\$40	\$18	\$0	\$1,150	\$54	\$4,075	
Non-Income Eligible Residential SUBTOTAL	\$92,931	\$1,826	\$2,218	\$2,620	\$2,275	\$26	\$4,367	\$4,302	\$1,769	\$1,332	\$6,254	\$364	\$10,571	\$1,658	\$4,352	\$7,731	\$600	\$40,664	
Income Eligible Residential																			
Single Family - Income Eligible Services	\$34,193	\$457	\$50	\$584	\$508	\$2	\$790	\$796	\$399	\$371	\$924	\$99	\$5,131	\$363	\$10,265	\$2,191	\$216	\$11,048	
Income Eligible Multifamily	\$6,862	\$47	\$17	\$61	\$53	\$0	\$72	\$67	\$39	\$31	\$100	\$0	\$655	\$44	\$1,192	\$235	\$25	\$4,223	
Income Eligible Residential SUBTOTAL	\$41,055	\$504	\$67	\$645	\$560	\$2	\$863	\$863	\$438	\$402	\$1,024	\$99	\$5,786	\$407	\$11,457	\$2,426	\$241	\$15,271	
Commercial & Industrial																			
Large Commercial New Construction	\$57,679	\$2,676	\$0	\$3,343	\$2,903	\$9	\$4,146	\$2,454	\$3,316	\$2,061	\$4,673	-\$377	\$0	\$4	\$1,774	\$5,006	\$223	\$25,465	
Large Commercial Retrofit	\$327,030	\$11,123	\$44	\$14,776	\$12,831	\$57	\$15,960	\$12,734	\$10,861	\$6,924	\$22,839	-\$6,820	\$0	\$199	\$26,459	\$17,987	\$550	\$180,506	
Small Business Direct Install	\$36,191	\$976	\$0	\$1,324	\$1,150	\$6	\$2,326	\$1,255	\$1,994	\$917	\$3,844	-\$796	\$0	\$0	\$2,930	\$2,678	\$86	\$17,501	
C&I SUBTOTAL	\$420,899	\$14,776	\$44	\$19,443	\$16,885	\$71	\$22,433	\$16,443	\$16,171	\$9,902	\$31,356	-\$7,993	\$0	\$203	\$31,163	\$25,671	\$859	\$223,472	
TOTAL	\$554,885	\$17,106	\$2,328	\$22,709	\$19,721	\$100	\$27,663	\$21,608	\$18,379	\$11,636	\$38,635	-\$7,530	\$16,357	\$2,268	\$46,972	\$35,828	\$1,700	\$279,407	

Table E-6A
National Grid
Summary of 2021 Impacts by Program (Energy Efficiency Measures)

	Load Reduction in kW		Electric Energy Savings				Gas Saved		Oil Saved		Propane Saved		Total Net Savings (Electric, Gas, Oil, Propane)	
			MWh		MMBtu		MMBtu		MMBtu		MMBtu		MMBtu	
	Summer	Winter	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime
Non-Income Eligible Residential														
Residential New Construction	66	234	979	18,088	3,342	61,715	-	-	439	10,970	1,755	43,869	5,535	116,554
ENERGY STAR® HVAC	204	741	3,181	51,309	10,854	175,067	4,068	61,092	224	3,730	(26)	(340)	15,119	239,549
EnergyWise	445	517	2,841	14,385	9,694	49,082	-	-	20,445	391,306	310	5,131	30,448	445,519
EnergyWise Multifamily	158	98	1,240	16,307	4,232	55,640	-	-	1,046	25,326	-	-	5,278	80,966
Home Energy Reports	3,692	5,706	26,852	26,852	91,619	91,619	-	-	-	-	-	-	91,619	91,619
ENERGY STAR® Lighting	1,872	2,264	11,533	26,801	39,350	91,444	(12,634)	(25,268)	(7,679)	(15,359)	(1,982)	(3,964)	17,055	46,854
Residential Consumer Products	1,019	718	5,926	38,130	20,221	130,101	80	1,596	81	1,607	25	172	20,407	133,476
Non-Income Eligible Residential SUBTOTAL	7,455	10,278	52,553	191,872	179,311	654,667	(8,486)	37,420	14,555	417,581	81	44,869	185,461	1,154,537
Income Eligible Residential														
Single Family - Income Eligible Services	457	469	3,120	36,909	10,645	125,932	901	11,294	10,615	204,170	90	1,637	22,251	343,034
Income Eligible Multifamily	70	91	1,554	22,545	5,303	76,925	-	-	1,239	25,915	-	-	6,542	102,840
Income Eligible Residential SUBTOTAL	527	560	4,674	59,454	15,947	202,857	901	11,294	11,854	230,085	90	1,637	28,793	445,873
Commercial & Industrial														
Large Commercial New Construction	1,856	1,121	11,837	189,441	40,387	646,371	(2,944)	(41,220)	-	-	-	-	37,443	605,151
Large Commercial Retrofit	11,648	14,665	59,496	744,562	203,000	2,540,445	(57,130)	(744,835)	-	-	-	-	145,870	1,795,610
Small Business Direct Install	1,134	962	9,696	105,134	33,083	358,716	(8,030)	(86,616)	-	-	-	-	25,053	272,100
C&I SUBTOTAL	14,638	16,747	81,029	1,039,136	276,471	3,545,532	(68,104)	(872,670)	-	-	-	-	208,366	2,672,861
TOTAL	22,621	27,586	138,256	1,290,462	471,729	4,403,056	(75,689)	(823,956)	26,409	647,666	171	46,506	422,620	4,273,272

Table E-6B
National Grid
Summary of 2021 Demand Response Benefits and Savings

	Benefits (000's)												Load Reduction (MW)	MWh Saved	
	Total	Capacity					Energy			Non Electric	Societal		Summer	Annual	Lifetime
		Summer Generation	Capacity DRIPE	Trans	Dist	Reliability	Summer		Energy DRIPE	Non Resource	Carbon	Economic			
							Peak	Off Peak							
Non-Income Eligible Residential															
Residential ConnectedSol	\$11,301	\$382	\$8,131	\$597	\$518	\$72	\$2	\$1	\$2	\$0	\$2	\$1,594	5.4	0.1	0.1
Commercial & Industrial															
Commercial ConnectedSc	\$29,465	\$700	\$14,874	\$3,691	\$3,205	\$447	\$0	\$0	\$0	\$0	\$0	\$6,548	33.6	0.0	0.0
TOTAL	\$40,766	\$1,082	\$23,005	\$4,287	\$3,723	\$520	\$2	\$1	\$2	\$0	\$2	\$8,142	39	0	0

Table E-7
National Grid
Comparison of 2021 and 2020 Goals and Tracking

	Proposed 2021 Goal				Proposed 2021 Tracking		Approved 2020			Difference		
	Annual Electric Energy Savings (MWh)	Lifetime Electric Energy Savings (MWh)	Annual Summer Demand Savings (kW)	Active Demand Response (kW)	Total Net Lifetime Energy Savings (MMBtu)	Planned Unique Participants	Annual Electric Energy Savings (MWh)	Annual Summer Demand Savings (kW)	Active Demand Response (kW)	Annual Summer Demand Savings (kW)	Annual Energy Savings (MWh)	Demand Response (kW)
Non-Income Eligible Residential												
Residential New Construction	979	18,088	66		116,554	417	870	74		-9	110	
ENERGY STAR® HVAC	3,181	51,309	204		239,549	5,037	2,233	94		110	948	
EnergyWise	2,841	14,385	445		445,519	11,223	6,082	967		-522	-3,241	
EnergyWise Multifamily	1,240	16,307	158		80,966	3,600	2,793	364		-206	-1,552	
Home Energy Reports	26,852	26,852	3,692		91,619	323,248	23,239	3,195		497	3,613	
ENERGY STAR® Lighting	11,533	26,801	1,872		46,854	68,164	38,093	6,201		-4,329	-26,560	
Residential Consumer Products	5,926	38,130	1,019		133,476	33,111	4,768	714		305	1,158	
Residential ConnectedSolutions				5,431		4,178			1,672			3,759
Non-Income Eligible Residential SUBTOTAL	52,553	191,872	7,455	5,431	1,154,537	448,979	78,077	11,609	1,672	-4,154	-25,524	3,759
Income Eligible Residential		0										
Single Family - Income Eligible Services	3,120	36,909	457		343,034	3,412	3,755	566		-108	-635	
Income Eligible Multifamily	1,554	22,545	70		102,840	3,600	2,392	155		-85	-838	
Income Eligible Residential SUBTOTAL	4,674	59,454	527		445,873	7,012	6,147	721		-193	-1,473	
Commercial & Industrial		0										
Large Commercial New Construction	11,837	189,441	1,856		605,151	145	9,828	1,183		673	2,009	
Large Commercial Retrofit	59,496	744,562	11,648		1,795,610	2,882	72,871	14,933		-3,285	-13,375	
Small Business Direct Install	9,696	105,134	1,134		272,100	571	11,500	1,347		-213	-1,803	
Commercial ConnectedSolutions				33,600		180			49,000			-15,400
C&I SUBTOTAL	81,029	1,039,136	14,638	33,600	2,672,861	3,778	94,198	17,463	49,000	-2,825	-13,169	-15,400
TOTAL	138,256	1,290,462	22,621	39,031	4,273,272	459,769	178,423	29,793	50,672	-7,172	-40,167	-11,641

Notes:
(1) Planned 2021 participation takes into account net-to-gross and estimates unique participation by taking into account 2018 unique customer accounts to savings ratios. Therefore the number of planned measures may be more than the estimated participants shown. For measure counts please view the widget tables in Attachments 1 and 2. Table E-7 no longer includes a comparison to the previous year's participation. Due to the way unique participation is calculated it is not possible to compare year-over-year results.
(2) There are additional Low Income participants in Residential New Construction.
(3) A customer can participate in more than one program, for example, ENERGY STAR® Lighting and Home Energy Reports, therefore the population reached can be more than 100%.

Table E-10
National Grid
Rhode Island Electric Energy Efficiency 2003 - 2021
\$(000)

Electric	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013 ⁽⁴⁾	2014	2015	2016	2017	2018	2019	2020 ⁽⁵⁾	2021 ⁽⁶⁾
Energy Efficiency Budget (\$Million) ⁽¹⁾	\$23.1	\$22.6	\$23.1	\$22.4	\$22.5	\$21.0	\$32.4	\$37.6	\$59.2	\$61.4	\$77.5	\$87.0	\$86.6	\$87.5	\$94.6	\$94.6	\$107.5	\$111.1	\$116.8
Spending Budget (\$Million) ⁽²⁾	\$16.3	\$15.8	\$17.6	\$16.5	\$16.4	\$14.7	\$23.5	\$28.8	\$45.3	\$55.3	\$64.8	\$80.6	\$77.3	\$77.6	\$88.5	\$88.7	\$98.1	\$101.1	\$104.8
Actual Expenditures (\$Million) ⁽³⁾	\$22.8	\$19.5	\$23.4	\$23.7	\$21.9	\$19.2	\$31.7	\$29.7	\$40.0	\$50.7	\$72.9	\$85.3	\$87.4	\$78.4	\$94.8	\$93.0	\$100.7		
Incentive Percentage ⁽¹⁰⁾	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	N/A
Target Incentive ⁽¹¹⁾	\$712,557	\$781,959	\$774,689	\$726,627	\$723,000	\$647,689	\$1,035,943	\$1,267,043	\$1,992,513	\$2,434,131	\$3,240,747	\$4,032,000	\$3,867,400	\$3,878,087	\$4,425,528	\$4,436,022	\$4,905,009	\$5,054,448	\$5,500,000
Earned Incentive	\$712,557	\$604,876	\$795,648	\$760,623	\$716,075	\$675,282	\$1,085,888	\$1,333,996	\$1,929,273	\$2,469,411	\$2,997,681	\$4,223,321	\$4,533,360	\$4,128,034	\$4,829,847	\$4,940,402	\$3,290,237		
Annual Summer Demand kW Savings Goal Achieved (%)				106%	106%	113%	142%	78%	71%	83%	114%	78%	112%	101%	103%	116%	98%		
Annual MWh Energy Savings Goal Achieved (%)				111%	102%	111%	115%	107%	94%	93%	99%	105%	115%	107%	115%	110%	98%		
Energy Efficiency Program Charge (\$/kWh) ⁽⁷⁾	\$0.00200	\$0.00200	\$0.00200	\$0.00200	\$0.00200	\$0.00200	\$0.00320	\$0.00320	\$0.00526	\$0.00592	\$0.00876	\$0.00911	\$0.00953	\$0.01077	\$0.01124	\$0.00972	\$0.01121	\$0.01323	\$0.01113
Annual Cost to 500 kWh/month Residential Customer w/o tax ⁽⁸⁾	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$19.20	\$19.20	\$31.56	\$35.52	\$52.56	\$54.66	\$57.18	\$64.62	\$67.44	\$58.32	\$67.26	\$79.38	\$66.78
Annual Cost to 500 kWh/month Residential Customer w/ tax ⁽⁹⁾	\$12.50	\$12.50	\$12.50	\$12.50	\$12.50	\$12.50	\$20.00	\$20.00	\$32.88	\$37.00	\$54.75	\$56.94	\$59.56	\$67.31	\$70.25	\$60.75	\$70.06	\$82.69	\$69.56

Notes:

- (1) Energy Efficiency Budget includes total expenditures and commitments. Includes all demand side management program-related expenses, including rebates, administration and general expenses, evaluation, commitments for future years and Company incentive.
- (2) Prior to 2017, Spending Budget Eligible for Shareholder Incentive includes: Implementation, Administration, General, and Evaluation Expenses; excludes EERMC and OER Costs, Commitments, Copays, and Outside Finance Costs. Beginning in 2017, Outside Finance Costs were also included. Beginning in 2018 Pilot expenses were also excluded. Beginning in 2019 ConnectedSolutions expenses and assessments were also excluded.
- (3) Actual Expenditures is actual spend during calendar year. Includes expenditures and commitments. Includes all demand side management program-related expenses, including rebates, administration and general expenses, evaluation, commitments for future years and Company incentive.
- (4) In the Company's gas and electric rate cases in docket 4323, the PUC approved the uncollectibles gross-up in the electric EE Program Charge effective February 1, 2013, and a new rate applicable to the gross-up of the gas EE Program Charge, effective February 1, 2013.
- (5) 2020 values are planned.
- (6) 2021 values are proposed.
- (7) Beginning in 2012, the EE Program Charge includes the System Reliability Factor. It does not include the \$0.0003 renewables per RI General Laws §39-2-1.2 and Order #19608, which appears on customer bills.
- (8) Reflects the annual cost excluding Gross Earnings Tax.
- (9) Reflects the annual cost including Gross Earnings Tax.
- (10) Incentive percentage not applicable for 2021 due to new performance incentive mechanism developed for the 2021 Annual Plan. See Section 12 of the Main Text of the 2021 Annual Plan for additional details.
- (11) Target incentive is calculated in the same way as in 2020 in order to provide a more accurate estimate of the energy efficiency surcharge.

**Table G-1
National Grid
Gas DSM Funding Sources in 2021 by Sector
\$(000)**

	<u>Projections by Sector</u>			Total
	Income Eligible Residential	Non-Income Eligible Residential	Commercial & Industrial	
(1) Projected Budget (from G-2):	\$9,409.58	\$15,409.35	\$10,156.27	\$34,975.20
Sources of Other Funding:				
(2) Projected Year-End 2020 Fund Balance and Interest:	\$0.00	\$2,117.68	\$4,776.34	\$6,894.01
(3) Low Income Weatherization in Base Rates:	\$0.00			\$0.00
(4) Total Other Funding:	\$0.00	\$2,117.68	\$4,776.34	\$6,894.01
(5) Customer Funding Required:	\$9,409.58	\$13,291.67	\$5,379.93	\$28,081.20
(6) Forecasted Firm Dth Volume	1,600,863	18,655,474	19,605,949	39,862,286
(7) Forecasted Non Firm Dth Volume			230,757	230,757
(8) Less: Exempt DG Customers			(1,485,040)	(1,485,040)
(9) Forecasted Dth Volume:	1,600,863	18,655,474	18,351,666	38,608,003
Average Energy Efficiency Program Charge per Dth				
(10) excluding Uncollectible Recovery:				\$0.727
(11) Proposed Energy Efficiency Program Charge per Dth excluding Uncollectible Recovery	\$0.855	\$0.855	\$0.585	
(12) Currently Effective Uncollectible Rate	<u>1.91%</u>	<u>1.91%</u>	<u>1.91%</u>	
(13) Proposed Energy Efficiency Program Charge per Dth, including Uncollectible Recovery:	\$0.871	\$0.871	\$0.596	
(14) Currently Effective Energy Efficiency Program Charge per Dth	\$1.011	\$1.011	\$0.704	
(15) Adjustment to Reflect Fully Reconciling Funding Mechanism	(\$0.140)	(\$0.140)	(\$0.108)	

Notes

(1) Projected Budget from G-2 includes OER and EERMC costs allocated to each sector based on forecasted volume.

(2) Fund Balance projections include projected revenue and spend through year-end with Residential and C&I sector subsidies applied to Income Eligible as detailed in the 2021 EE Plan Table G-1. The Company proposes to refile this table with updated Fund Balance projections on December 1, 2020 as proposed in Section 12.1 of the Plan's Main Text.

(11) As agreed to by the settling parties, the proposed EE program charges allow for the use of collections from one sector to fund energy efficiency services in other sectors that would otherwise not be supported with the proposed collection rates. The C&I charge includes collection of \$5.06 million of which \$4.57 million will be allocated to the low income sector and \$0.49 million to the residential sector.

(12) Uncollectible rate approved in Docket No. 4770.

**Table G-2
National Grid
2021 Gas Energy Efficiency Program Budget (\$000)**

	Program Planning and Administration	Marketing	Cost of services and product rebates/incentives provided to customers	Sales, Technical Assistance and Training	Evaluation & Market Research	Performance Incentive	Grand Total
Non-Income Eligible Residential:							
ENERGY STAR® HVAC	\$142.3	\$213.8	\$3,013.0	\$167.3	\$136.6	\$0.0	\$3,673.0
EnergyWise	\$260.5	\$71.3	\$6,569.2	\$998.9	\$217.8	\$0.0	\$8,117.6
EnergyWise Multifamily	\$56.6	\$35.6	\$1,216.0	\$154.4	\$29.0	\$0.0	\$1,491.6
Home Energy Reports	\$11.0	\$0.1	\$0.0	\$428.5	\$11.3	\$0.0	\$450.9
Residential Pilots	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Residential New Construction	\$37.9	\$2.4	\$491.2	\$125.2	\$18.1	\$0.0	\$674.8
Comprehensive Marketing - Residential	\$0.2	\$64.6	\$0.0	\$0.0	\$0.0	\$0.0	\$64.8
Community Based Initiatives - Residential	\$9.8	\$37.9	\$28.1	\$0.0	\$0.0	\$0.0	\$75.8
Residential Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$595.0	\$595.0
Subtotal - Non-Income Eligible Residential	\$518.4	\$425.6	\$11,317.4	\$1,874.3	\$412.9	\$595.0	\$15,143.5
Income Eligible Residential:							
Single Family - Income Eligible Services	\$160.5	\$26.4	\$4,565.0	\$1,101.6	\$98.8	\$0.0	\$5,952.3
Income Eligible Multifamily	\$89.5	\$6.2	\$2,474.5	\$362.4	\$76.8	\$0.0	\$3,009.4
Income Eligible Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$425.0	\$425.0
Subtotal - Income Eligible Residential	\$250.0	\$32.6	\$7,039.5	\$1,464.1	\$175.6	\$425.0	\$9,386.8
Commercial & Industrial							
Large Commercial New Construction	\$129.4	\$190.1	\$1,264.1	\$951.8	\$98.7	\$0.0	\$2,634.2
Large Commercial Retrofit	\$245.1	\$315.8	\$2,988.8	\$1,322.0	\$182.5	\$0.0	\$5,054.1
Small Business Direct Install	\$6.9	\$40.4	\$251.8	\$32.9	\$0.8	\$0.0	\$332.7
Commercial & Industrial Multifamily	\$28.1	\$22.4	\$756.0	\$144.2	\$2.5	\$0.0	\$953.2
Commercial Pilots	\$0.0	\$7.5	\$178.3	\$25.0	\$5.0	\$0.0	\$215.8
Finance Costs	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Community Based Initiatives - C&I	\$3.3	\$12.2	\$9.4	\$0.0	\$0.0	\$0.0	\$24.8
Commercial & Industrial Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$680.0	\$680.0
Subtotal - Commercial & Industrial	\$412.8	\$588.3	\$5,448.4	\$2,475.9	\$289.4	\$680.0	\$9,894.8
Regulatory							
EERMC	\$275.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$275.1
OER	\$275.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$275.1
Subtotal - Regulatory	\$550.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$550.1
Grand Total	\$1,731.3	\$1,046.5	\$23,805.3	\$5,814.2	\$877.9	\$1,700.0	\$34,975.2

Notes:

- (1) OER and EERMC is equal to 2% of total collections from customers' Energy Efficiency Program Charge, reduced by 2%.
- (2) Demonstrations and Assessments are included in specific program level budgets listed above. More information on Demonstration and Assessments descriptions, budgets, and which program level budget they are included in can be found in Attachment 8.

Table G-3
National Grid
Derivation of the 2021 Spending & Implementation Budgets (\$000)

	Proposed 2020 Budget From G-2 (\$000)	Outside Finance and Stakeholder Oversight Costs (\$000)	Performance Incentive (\$000)	Eligible Sector Spending Budget for Performance Incentive on G-9 (\$000)¹	Implementation Expenses for Cost-Effectiveness on G-5 (\$000)²
Non-Income Eligible Residential					
ENERGY STAR® HVAC	\$3,673.0				\$3,673.0
EnergyWise	\$8,117.6				\$8,117.6
EnergyWise Multifamily	\$1,491.6				\$1,491.6
Home Energy Reports	\$450.9				\$450.9
Residential Pilots	\$0.0				\$0.0
Residential New Construction	\$674.8				\$674.8
Comprehensive Marketing - Residential	\$64.8				\$64.8
Community Based Initiatives - Residential	\$75.8				\$75.8
Residential Performance Incentive	\$595.0		\$595.0		\$0.0
Subtotal - Non-Income Eligible Residential	\$15,143.5	\$0.0	\$595.0	\$14,529.1	\$14,548.5
Income Eligible Residential					
Single Family - Income Eligible Services	\$5,952.3				\$5,952.3
Income Eligible Multifamily	\$3,009.4				\$3,009.4
Income Eligible Performance Incentive	\$425.0		\$425.0		\$0.0
Subtotal - Income Eligible Residential	\$9,386.8	\$0.0	\$425.0	\$8,961.8	\$8,961.8
Commercial & Industrial					
Large Commercial New Construction	\$2,634.2				\$2,634.2
Large Commercial Retrofit	\$5,054.1				\$5,054.1
Small Business Direct Install	\$332.7				\$332.7
Commercial & Industrial Multifamily	\$953.2				\$953.2
Commercial Pilots	\$215.8				\$215.8
Finance Costs	\$0.0	\$0.0			\$0.0
Community Based Initiatives - C&I	\$24.8				\$24.8
Commercial & Industrial Performance Incentive	\$680.0		\$680.0		\$0.0
Subtotal - Commercial & Industrial	\$9,894.8	\$0.0	\$680.0	\$8,953.6	\$9,214.8
Regulatory					
EERMC	\$275.1	\$275.1			\$275.1
OER	\$275.1	\$275.1			\$275.1
Subtotal - Regulatory	\$550.1	\$550.1			\$550.1
Grand Total	\$34,975.2	\$550.1	\$1,700.0	\$32,444.5	\$33,275.2

Notes:

- (1) Eligible Sector Spending Budget for Performance Incentive = Budget from G-2 minus Regulatory Costs, Pilots, Assessments, and Performance Incentive.
- (2) Implementation Expenses = Budget from G-2 minus Performance Incentive.
- (3) Eligible Sector Spending Budget does not include assessments, see Attachment 8 for assessments budgets.

**Table G-4
National Grid
Proposed 2021 Budget Compared to Approved 2020 Budget (\$000)**

	Proposed Budget 2021 from G-2	2020 Approved Gas Budget	Difference
Non-Income Eligible Residential			
ENERGY STAR® HVAC	\$3,673.0	\$2,693.1	\$980.0
EnergyWise	\$8,117.6	\$8,117.6	\$0.0
EnergyWise Multifamily	\$1,491.6	\$1,512.1	-\$20.5
Home Energy Reports	\$450.9	\$471.5	-\$20.6
Residential Pilots	\$0.0	\$0.0	\$0.0
Residential New Construction	\$674.8	\$620.5	\$54.3
Comprehensive Marketing - Residential	\$64.8	\$79.9	-\$15.1
Community Based Initiatives - Residential	\$75.8	\$68.9	\$6.9
Residential Performance Incentive	\$595.0	\$677.7	-\$82.7
Subtotal - Non-Income Eligible Residential	\$15,143.5	\$14,241.2	\$902.3
Income Eligible Residential			
Single Family - Income Eligible Services	\$5,952.3	\$5,952.3	\$0.0
Income Eligible Multifamily	\$3,009.4	\$3,009.5	\$0.0
Income Eligible Performance Incentive	\$425.0	\$448.1	-\$23.1
Subtotal - Income Eligible Residential	\$9,386.8	\$9,409.9	-\$23.1
Commercial & Industrial			
Large Commercial New Construction	\$2,634.2	\$2,652.6	-\$18.4
Large Commercial Retrofit	\$5,054.1	\$4,889.1	\$165.0
Small Business Direct Install	\$332.7	\$125.0	\$207.6
Commercial & Industrial Multifamily	\$953.2	\$967.9	-\$14.7
Commercial Pilots	\$215.8	\$366.0	-\$150.2
Finance Costs	\$0.0	\$500.0	-\$500.0
Community Based Initiatives - C&I	\$24.8	\$22.0	\$2.8
Commercial & Industrial Performance Incentive	\$680.0	\$452.8	\$227.2
Subtotal Commercial & Industrial	\$9,894.8	\$9,975.5	-\$80.7
Regulatory			
EERMC	\$275.1	\$361.2	-\$86.1
OER	\$275.1	\$361.2	-\$86.1
Subtotal Regulatory	\$550.1	\$722.4	-\$172.3
TOTAL BUDGET	\$34,975.2	\$34,349.0	\$626.2

Notes:

- (1) Program Implementation Budget excludes Commitments, Company Incentive; derived on Table G-3
- (2) Total Budget includes Implementation, Commitments; illustrated on Table G-3

Table G-5
National Grid
Calculation of 2021 Program Year Cost-Effectiveness
All Dollar Values in (\$000)

	Rhode Island Benefit/ Cost	Total Benefit	Program Implementation Expenses	Customer Contribution	Performance Incentive	\$/Lifetime MMBtu
Non-Income Eligible Residential						
Energy Star® HVAC	1.66	\$13,615.7	\$3,673.0	\$4,539.3		\$12.30
EnergyWise	2.08	\$18,350.6	\$8,117.6	\$697.9		\$18.50
EnergyWise MultiFamily	4.70	\$8,630.2	\$1,491.6	\$344.0		\$12.35
Home Energy Reports	4.05	\$1,825.1	\$450.9	\$0.0		\$4.82
Residential New Construction	1.02	\$1,378.3	\$674.8	\$670.9		\$15.78
Comprehensive Marketing - Residential			\$64.8			
Community Based Initiatives - Residential			\$75.8			
Residential Pilots			\$0.0			
Non-Income Eligible Residential Subtotal	2.05	\$43,799.9	\$14,548.5	\$6,252.2	\$ 595.0	\$14.14
Income Eligible Residential						
Single Family - Income Eligible Services	2.96	\$17,598.3	\$5,952.3	\$0.0		\$29.60
Income Eligible Multifamily	4.24	\$12,749.9	\$3,009.4	\$0.0		\$9.54
Income Eligible Residential Subtotal	3.23	\$30,348.1	\$8,961.8	\$0.0	\$ 425.0	\$17.35
Large Commercial & Industrial						
Large Commercial New Construction	5.03	\$12,422.2	\$2,634.2	-\$166.4		\$5.64
Large Commercial Retrofit	5.30	\$44,777.8	\$5,054.1	\$3,387.0		\$5.80
Small Business Direct Install	3.83	\$1,539.9	\$332.7	\$69.4		\$8.23
Commercial & Industrial Multifamily	4.75	\$4,922.8	\$953.2	\$84.0		\$7.31
Commercial Pilots			\$215.8			
Community Based Initiatives - C&I			\$24.8			
Finance Costs			\$0.0			
Commercial & Industrial Subtotal	4.80	\$63,662.7	\$9,214.8	\$3,374.0	\$ 680.0	\$6.04
Regulatory						
EERMC			\$275.1			
OER			\$275.1			
Regulatory Subtotal			\$550.1			
Grand Total	3.09	\$137,810.7	\$33,275.2	\$9,626.2	\$ 1,700.0	\$10.54

Notes:

(1) RI Test B/C Test = (Energy + Capacity + Resource Benefits+Economic Benefits + Carbon Benefits) / (Program Implementation + Customer Contribution + Performance Incentive)

Also includes effects of free-ridership and spillover.

(2) For Implementation Expenses derivation, see Table G-3.

(3) Large Commercial New Construction customer cost is negative due to a high free-ridership rate. Any financial incentives paid to free-riders are counted as a cost because the Company incurred those costs as part of the overall cost of the Plan regardless of whether the participant is free-rider or not. Therefore the Company reduces benefits and the customer cost by the net-to-gross ratio but not the incentives.

Table G-5A
National Grid
Calculation of 2021 Program Year Cost-Effectiveness with TRC Test
All Dollar Values in (\$000)

	TRC Benefit/ Cost	Total Benefit	Program Implementation Expenses	Customer Contribution	Performance Incentive	\$/Lifetime MMBtu
Non-Income Eligible Residential						
Energy Star® HVAC	0.91	\$7,481.1	\$3,673.0	\$4,539.3		\$12.30
EnergyWise	0.90	\$7,916.5	\$8,117.6	\$697.9		\$18.50
EnergyWise MultiFamily	3.00	\$5,509.4	\$1,491.6	\$344.0		\$12.35
Home Energy Reports	2.00	\$901.9	\$450.9	\$0.0		\$4.82
Residential New Construction	0.62	\$840.0	\$674.8	\$670.9		\$15.78
Comprehensive Marketing - Residential			\$64.8			
Community Based Initiatives - Residential			\$75.8			
Residential Pilots			\$0.0			
Residential Workforce Development			\$0.0			
Non-Income Eligible Residential Subtotal	1.06	\$22,648.9	\$14,548.5	\$6,252.2	\$ 595.0	\$14.14
Income Eligible Residential						
Single Family - Income Eligible Services	1.81	\$10,747.4	\$5,952.3	\$0.0		\$29.60
Income Eligible Multifamily	2.21	\$6,643.9	\$3,009.4	\$0.0		\$9.54
Income Eligible Workforce Development			\$0.0			
Income Eligible Residential Subtotal	1.85	\$17,391.3	\$8,961.8	\$0.0	\$ 425.0	\$17.35
Large Commercial & Industrial						
Large Commercial New Construction	2.69	\$6,643.7	\$2,634.2	-\$166.4		\$5.64
Large Commercial Retrofit	2.97	\$25,105.0	\$5,054.1	\$3,387.0		\$5.80
Small Business Direct Install	1.81	\$727.3	\$332.7	\$69.4		\$8.23
Commercial & Industrial Multifamily	2.37	\$2,454.4	\$953.2	\$84.0		\$7.31
Commercial Demonstration and R&D			\$215.8			
Community Based Initiatives - C&I			\$24.8			
Finance Costs			\$0.0			
Commercial Workforce Development			\$0.0			
Commercial & Industrial Subtotal	2.63	\$34,930.5	\$9,214.8	\$3,374.0	\$ 680.0	\$6.04
Regulatory						
EERMC			\$275.1			
OER			\$275.1			
Regulatory Subtotal			\$550.1			
Grand Total	1.68	\$74,970.8	\$33,275.2	\$9,626.2	\$ 1,700.0	\$10.54

Notes:

(1) TRC B/C Test = (Energy + Capacity + Resource Benefits) / (Program Implementation + Customer Contribution + Performance Incentive)

Also includes effects of free-ridership and spillover.

(2) For Implementation Expenses derivation, see Table G-3.

(3) Large Commercial New Construction customer cost is negative due to a high free-ridership rate. Any financial incentives paid to free-riders are counted as a cost because the Company incurred those costs as part of the overall cost of the Plan regardless of whether the participant is free-rider or not. Therefore the Company reduces benefits and the customer cost by the net-to-gross ratio but not the incentives.

**Table G-6
National Grid
Summary of 2021 Benefits by Program**

	Benefits (\$000)			
	Total	Natural Gas	Non-Gas Benefits	
			Economic Benefit	Other Non-Gas Benefit
Non-Income Eligible Residential				
EnergyWise	\$18,350.6	\$4,596.3	\$8,198.8	\$5,555.5
Energy Star® HVAC	\$13,615.7	\$6,410.4	\$3,048.6	\$4,156.7
EnergyWise Multifamily	\$8,630.2	\$1,424.0	\$2,431.3	\$4,774.9
Home Energy Reports	\$1,825.1	\$859.7	\$477.9	\$487.5
Residential New Construction	\$1,378.3	\$822.0	\$148.5	\$407.8
Non-Income Eligible Residential SUBTOTAL	\$43,799.9	\$14,112.5	\$14,305.1	\$15,382.3
Income Eligible Residential				
Single Family - Income Eligible Services	\$17,598.3	\$1,951.8	\$5,892.8	\$9,753.7
Income Eligible Multifamily	\$12,749.9	\$3,037.2	\$4,664.6	\$5,048.0
Income Eligible Residential SUBTOTAL	\$30,348.1	\$4,989.0	\$10,557.4	\$14,801.7
Commercial & Industrial				
Large Commercial New Construction	\$12,422.2	\$3,542.4	\$3,740.5	\$5,139.3
Large Commercial Retrofit	\$44,777.8	\$12,449.2	\$12,786.9	\$19,541.7
Small Business Direct Install	\$1,539.9	\$403.9	\$582.1	\$553.9
Commercial & Industrial Multifamily	\$4,922.8	\$1,254.5	\$1,801.6	\$1,866.7
Commercial & Industrial SUBTOTAL	\$63,662.7	\$17,649.9	\$18,911.1	\$27,101.6
Grand Total	\$137,810.7	\$36,751.4	\$43,773.7	\$57,285.6

Notes:

- 1) Equal to the sum of Natural Gas benefits and Participant Resource benefits.
- 2) Non-Gas Benefits are equal to the dollar value of expected electricity savings and non-resource savings that have not been included in National Grid's electric energy efficiency plans for 2021.

Table G-6A
National Grid
Summary of 2021 Impacts by Program

	Gas Saved (MMBtu)	
	Annual	Lifetime
Non-Income Eligible Residential		
EnergyWise	20,869	476,550
Energy Star® HVAC	38,345	667,485
EnergyWise Multifamily	8,633	148,675
Home Energy Reports	93,548	93,548
Residential New Construction	4,445	85,272
Non-Income Eligible Residential SUBTOTAL	165,840	1,471,530
Income Eligible Residential		
Single Family - Income Eligible Services	10,055	201,104
Income Eligible Multifamily	14,399	315,545
Income Eligible Residential SUBTOTAL	24,454	516,649
Commercial & Industrial		
Large Commercial New Construction	27,631	437,398
Large Commercial Retrofit	187,283	1,455,776
Small Business Direct Install	4,886	48,861
Commercial & Industrial Multifamily	9,444	141,869
Commercial & Industrial SUBTOTAL	229,243	2,083,905
Grand Total	419,537	4,072,084

Notes:

1) Lifetime savings are equal to annual savings multiplied by the expected life of measures expected to be installed in each program.

**Table G-7
National Grid
Comparison of 2021 and 2020 Goals**

	Proposed 2021 Goal	Proposed 2021 Tracking		Approved 2020	Difference
	Annual Energy Savings (MMBtu Natural Gas)	Lifetime Energy Savings (MMBtu Natural Gas)	Planned Unique Participants	Annual Energy Savings (MMBtu Natural Gas)	Annual Energy Savings (MMBtu Natural Gas)
Non-Income Eligible Residential					
EnergyWise	20,869	476,550	1,694	25,621	-4,752
Energy Star® HVAC	38,345	667,485	4,348	29,994	8,351
EnergyWise Multifamily	8,633	148,675	4,000	14,561	-5,928
Home Energy Reports	93,548	93,548	152,324	115,426	-21,878
Residential New Construction	4,445	85,272	323	4,346	99
Non-Income Eligible Residential SUBTOTAL	165,840	1,471,530	162,689	189,948	-24,108
Income Eligible Residential					
Single Family - Income Eligible Services	10,055	201,104	1,005	10,096	-41
Income Eligible Multifamily	14,399	315,545	3,150	24,413	-10,014
Income Eligible Residential SUBTOTAL	24,454	516,649	4,155	34,508	-10,054
Commercial & Industrial					
Large Commercial New Construction	27,631	437,398	61	45,474	-17,844
Large Commercial Retrofit	187,283	1,455,776	98	163,011	24,271
Small Business Direct Install	4,886	48,861	183	2,523	2,363
Commercial & Industrial Multifamily	9,444	141,869	729	11,155	-1,712
Commercial & Industrial SUBTOTAL	229,243	2,083,905	1,071	222,164	7,079
TOTAL	419,537	4,072,084	167,915	446,621	-27,083

Notes:

- (1) Participants can participate in more than one program, for example Home Energy Reports and EnergyWise.
- (2) Planned 2021 participation takes into account net-to-gross and estimates unique participation by taking into account 2019 unique customer accounts to savings ratios. Therefore the number of planned measures may be more than the planned participants. For measure counts please view the widgets tables at the end of the Residential and C&I text sections. Table G-7 no longer includes a comparison to the previous year's participation. Due to the way unique participation is calculated it is not possible to compare year-over-year results.

Table G-10
National Grid
Rhode Island Gas Energy Efficiency 2003 - 2021
\$(000)

Gas	2007 ⁽⁴⁾	2008	2009	2010	2011 ⁽⁵⁾	2012	2013 ⁽⁶⁾	2014	2015	2016	2017	2018	2019	2020 ⁽⁷⁾	2021 ⁽⁸⁾
Energy Efficiency Budget (\$Million) ⁽¹⁾	-	\$7.3	\$7.6	\$4.8	\$7.3	\$13.7	\$19.5	\$23.5	\$24.5	\$27.7	\$29.7	\$28.1	\$31.6	\$34.3	\$ 35.0
Spending Budget (\$Million) ⁽²⁾	-	\$6.6	\$6.1	\$4.5	\$6.2	\$12.9	\$17.9	\$21.8	\$22.4	\$25.0	\$27.8	\$26.2	\$29.2	\$31.6	\$ 32.4
Actual Expenditures (\$Million) ⁽³⁾	-	\$7.4	\$6.3	\$5.5	\$4.9	\$13.3	\$19.6	\$21.5	\$21.5	\$24.6	\$29.1	\$28.8	\$29.5		
Incentive Percentage ⁽¹²⁾	-	4.4%	4.4%	4.4%	4.4%	4.4%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	NA
Target Incentive	-	\$288,734	\$266,980	\$199,743	\$274,460	\$570,382	\$898,285	\$1,089,700	\$1,119,800	\$1,251,654	\$1,387,550	\$1,309,076	\$1,460,570	\$1,578,601	\$1,700,000
Earned Incentive	-	\$288,734	\$262,121	\$231,310	\$239,863	\$586,036	\$968,229	\$1,362,108	\$1,387,079	\$1,496,869	\$1,633,531	\$1,541,255	\$1,580,119		
Annual MMBtu Energy Savings Goal Achieved (%)		109%	139%	127%	117%	99%	109%	124%	111%	106%	113%	120%	104%		
System Benefits Charge (\$/therm) - all non-exempt customers ⁽¹¹⁾	\$0.0071	\$0.0107	\$0.0150	\$0.0150	\$0.0411	\$0.0384	\$0.0417	-	-	-	-	-	-	-	-
Residential System Benefits Chare (\$/therm)	-	-	-	-	-	-	-	\$0.0600	\$0.0781	\$0.0748	\$0.0888	\$0.0869	\$0.0715	\$0.1011	\$0.0871
C&I System Benefits Charge (\$/therm)	-	-	-	-	-	-	-	\$0.0492	\$0.0637	\$0.0487	\$0.0726	\$0.0671	\$0.0420	\$0.0704	\$0.0596
Annual Cost to 846 Therm/year Residential Customer w/o tax ⁽⁹⁾	\$6.04	\$9.05	\$12.69	\$12.69	\$18.28	\$32.49	\$35.28	\$50.76	\$66.07	\$63.28	\$75.12	\$73.52	\$60.49	\$85.53	\$73.69
Annual Cost to 846 Therm/year Residential Customer w/tax ⁽¹⁰⁾	\$6.23	\$9.33	\$13.08	\$13.08	\$18.85	\$33.49	\$36.37	\$52.33	\$68.11	\$65.24	\$77.44	\$75.79	\$62.36	\$88.18	\$75.97

Notes:

- (1) Energy Efficiency Budget includes total expenditures and commitments. Includes all demand side management program-related expenses, including rebates, administration and general expenses, evaluation, commitments for future years and Company incentive.
- (2) Prior to 2017, Spending Budget Eligible for Shareholder Incentive includes: Implementation, Administration, General, and Evaluation Expenses; excludes EERMC and OER Costs, Commitments, Copays, and Outside Finance Costs. Beginning in 2017, Outside Finance Costs were also included. Beginning in 2018 Pilot expenses were also excluded. Beginning in 2019 ConnectedSolutions expenses and assessment were also excluded.
- (3) Actual Expenditures is actual spend during calendar year. Includes expenditures and commitments. Includes all demand side management program-related expenses, including rebates, administration and general expenses, evaluation, commitments for future years and Company incentive.
- (4) Gas programs began during July 2007 and were not reported on separately that year since programs were still in development. The 2007 gas programs are included in 2008 reporting. Systems Benefit Charge shown for 2007 is the weighted average of \$0.063 per decatherm from January 1, 2007 - June 30, 2007 and \$0.107 per decatherm from July 1, 2007 through December 31, 2008.
- (5) On July 25, 2011 the Commission ordered that National Grid could increase the gas System Benefits Charge from \$0.15 to \$0.411 per decatherm for the period of August 1, 2011 through December 31, 2011. Annual cost represents 7 months usage (632 therms) at \$0.015 per therm and 5 months usage (214 therms) at \$0.0411 per therm.
- (6) In the Company's gas and electric rate cases in docket 4323, the PUC approved the uncollectibles gross-up in the electric EE Program Charge effective February 1, 2013, and a new rate applicable to the gross-up of the gas EE Program Charge, effective February 1, 2013.
- (7) 2020 values are planned.
- (8) 2021 values are proposed.
- (9) Reflects the annual cost excluding Gross Earnings Tax.
- (10) Reflects the annual cost including Gross Earnings Tax.
- (11) The Gas EE Program Charge was uniform for all customers until 2014, at which time the Company proposed and the PUC approved individual factors for the residential and C&I sectors.
- (12) Incentive percentage not applicable for 2021 due to new performance incentive mechanism developed for the 2021 Annual Plan. See Section 12 of the Main Text of the 2021 Annual Plan for additional details.