




Higher Targets, Lower Prices

The State of Gas Efficiency Programs

Kara Rodgers
Senior Program Manager
September 27, 2011
Denver, CO

A Snapshot of CEE



- ▶ CEE brings together over 135 members serving all or part of 45 states and 8 provinces
- ▶ CEE members manage the majority of the \$7.5B* total efficiency budget
- ▶ CEE members were recognized by the EPA with the 2009 Climate Protection Award 
- ▶ CEE is a member-driven nonprofit, governed by a Board of Directors from member organizations

* Source: CEE's [State of the Efficiency Program Industry](#) (2010)

By working together binationally, CEE members capture greater savings locally

- ▶ Develop approaches to market barriers and reduce the cost of capturing greater energy efficiency savings
- ▶ Achieve greater consistency on program offerings
- ▶ Create consistent binational programs required to move markets, members

CEE Supports Natural Gas Efficiency Programs

By

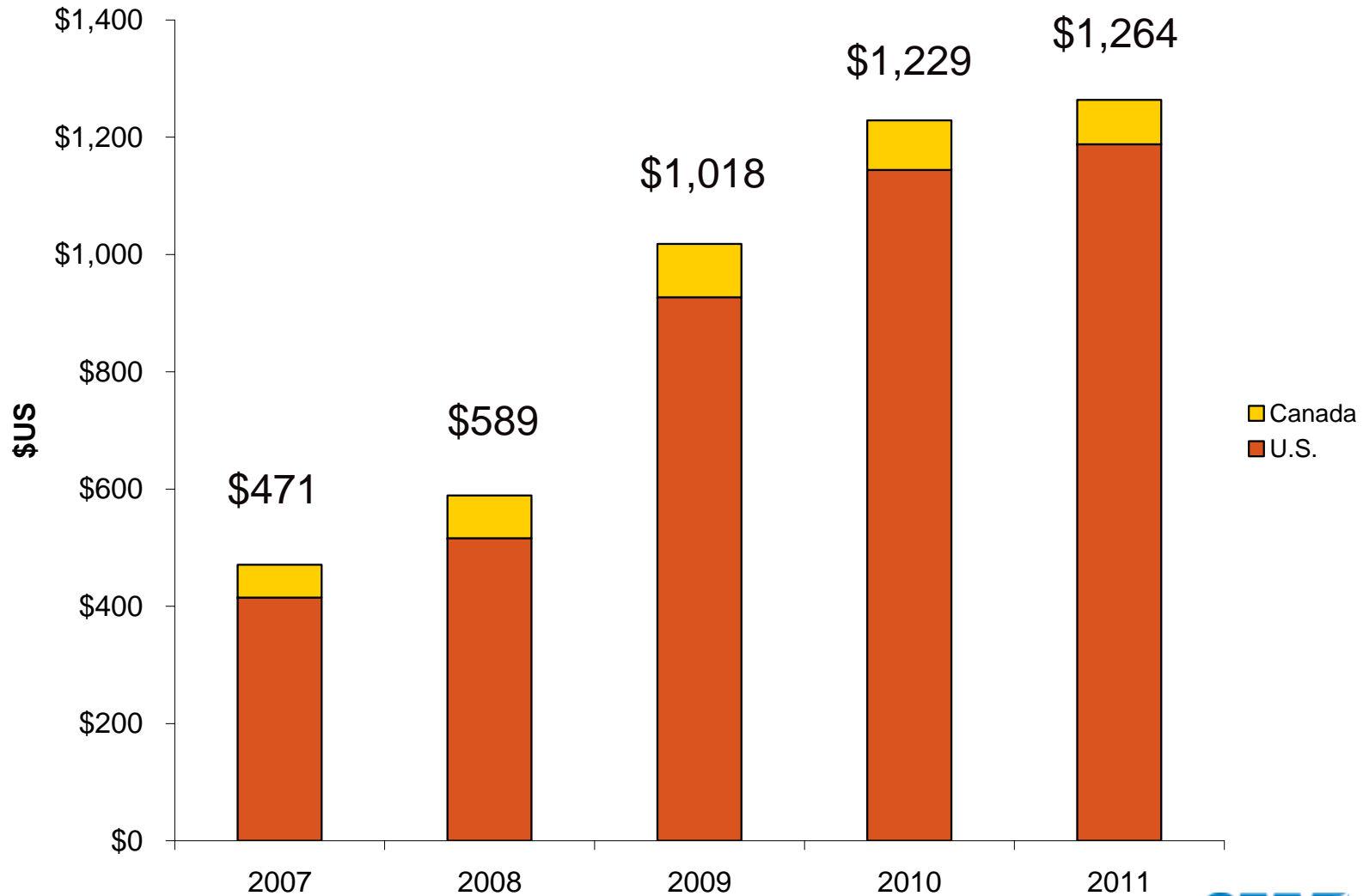
- ▶ Supporting gas-only initiatives
- ▶ Helping to integrate gas efficiency programs into dual fuel approaches
- ▶ Exploring comprehensive approaches

Today's Presentation

- ▶ Cover growth in gas efficiency program budgets
- ▶ Cover common program approaches and what's worked
- ▶ Discuss the outlook for natural gas efficiency programs

This requires some general assumptions about very diverse programs—your mileage will vary!

Growth in Gas has Moderated



Residential Gas Programs

		Gas Only	Dual Fuel
Heating	Boilers	9	15
	Furnaces	13	17
	Programmable Thermostats	5	9
	Hearth Products	3	1
Water Heating	Storage	13	17
	Tankless	14	14
	Solar	2	4
	Integrated Systems	5	5
Appliance	Clotheswashers	3	9
	Dishwashers	1	7
	Natural Gas Dryers	1	
Whole House	New Homes	7	16
	Existing Home Retrofit	2	10

Commercial & Industrial Gas Programs

		Gas Only	Dual Fuel
Measure	Boilers Systems	19	25
	Storage Water Heater	12	20
	Tankless Water Heater	12	17
	Solar Water Heater	3	5
Segment	Food Service	12	25
	Grocery	4	16
	Schools, K-12	2	7
	Schools, Higher Ed	2	5
	Lodging	2	7
	Healthcare	2	6
	Government	1	4
	Agriculture	1	10
	Data Centers		11
	Office or Real Estate		5

		Gas Only	Dual Fuel	
Whole Building	Comprehensive Existing Buildings	11	23	
	Comprehensive New Construction	9	26	
	Training	6	27	
	Operations and Maintenance - Single Intervention	2	21	
	Benchmarking	2	14	
	Ongoing Energy Management without Demand Response	1	8	
	Energy Management Information System		5	
	Commissioning of Existing Building		2	
	Continuous Energy Improvement		1	
	Industrial	Custom	10	19
		Continuous Energy Improvement	1	11
Municipal Water-Wastewater		2	17	

Behavioral Programs

		Gas Only	Dual Fuel
Behavior	Total	8	15
	Residential	8	15
	Commercial	1	4
	Industrial	1	4
	Public	1	3
	Other		1

What's Working—Engaging Contractors

GasNetworks, MA

- ▶ Established relationships with stakeholders critical to delivering gas efficiency
- ▶ Offered continuous education credits to gain participation
- ▶ Rebates & information for multiple end uses



What's Working—Partnering Across Utilities

- ▶ Partnering with electric, water utilities to deliver
 - Whole home
 - Food service
- ▶ Serving customers more comprehensively
- ▶ Requires ability to share savings, administrative costs



Challenges for Programs

- ▶ Lower price of fuel
- ▶ Engagement with customer
- ▶ Fewer gas end uses



Outlook for Gas

- ▶ Gas efficiency program administrators are feeling the pressure of lower prices and higher targets
 - Some core programs may no longer reach cost-effectiveness targets
- ▶ Looking for new end uses, more ways to deliver value



Questions for All of Us

- ▶ Is there any way to increase the freedom of programs to deliver gas efficiency within the current environment?
- ▶ How can we promote investment in the infrastructure that will enable gas efficiency?
- ▶ What would it take to radically rethink the program model?

Contact

Kara Rodgers
Senior Program Manager
617-337-9262
KRodgers@cee1.org