

NH Saves Stakeholder Meeting

C&I: Small Business, Large Business and
Municipal

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10/21/2025

Agenda

1

Intros and Process Reminder (15)

2

Programs – Presentations and Discussion

Small business (30 min: 15 min presentation + 15 min discussion)

Large business (30 min: 15 min presentation + 15 min discussion)

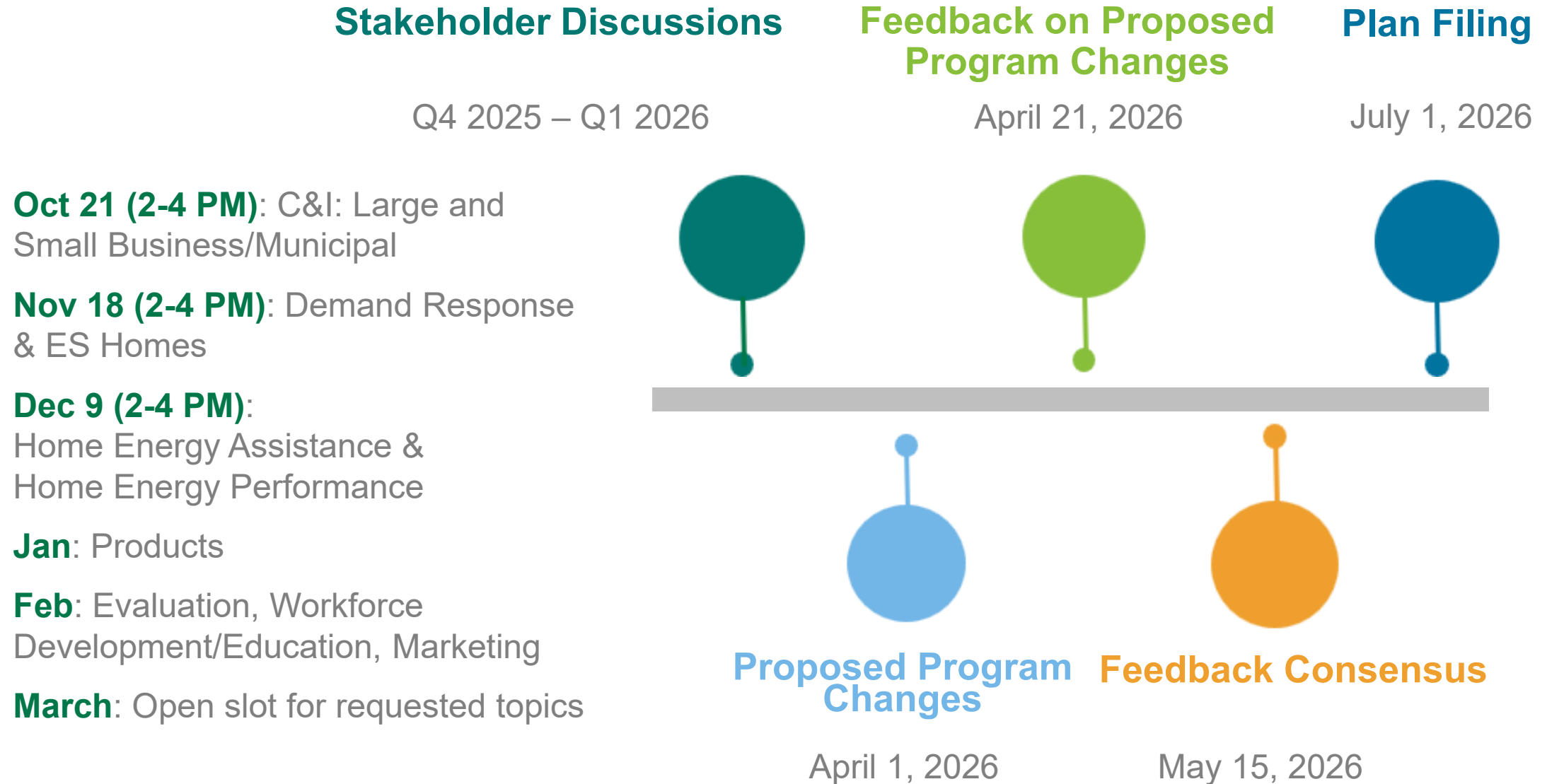
Municipal (30 min: 15 min presentation + 15 min discussion)

3

Additional Open Discussion (15)

Intros and Process Reminder

Plan Development Timeline



High Level Process Notes

- We genuinely want your feedback. You may have different experiences and perspectives to add to the discussion.
- This is a safe space for discussion and ideas. We are not recording conversations nor holding anyone to what is conveyed during these sessions.
- Come prepared to discuss the agenda, and feel free to attend or skip meetings based on your availability and interest in specific areas.
- Can access materials on website:
<https://nhsaves.com/utility-partner-update/>
 - Includes Stakeholder feedback to date attributed to authors at their discretion.
- Written feedback posted publicly on website, authors to decide if their names are posted.
 - Send feedback by 10/28 to laureng@apexanalyticsllc.com and/or stakeholdercomments@NHSaves.com



Stakeholder Feedback

- Topics received from feedback:
 - Evaluation timing & transparency
 - Potential pilot opportunities
 - Equity and accessibility enhancements
 - Additional suggested approach to financing
- Utilities actively reviewing feedback to determine inclusion in future meetings.



EM&V Studies

Status of EM&V Studies	Vendor	Status
Energy Star Products Impact and Process Evaluation	NMR	Feb 2026
Energy Star Homes Impact and Process Evaluation	NMR	Feb 2026
TRM Update Study	DNV	Apr 2026
Home Energy Assistance Impact and Process Study	NMR	Finalizing
Home Energy Performance Impact and Process Study	NMR	Finalizing
Small Business Energy Solutions Impact and Process Evaluation	DSA	Complete
Residential Non-Participant Research	DNV	Finalizing
Commercial & Industrial New Construction Evaluation	DSA	Apr 2026
Home Energy Reports Evaluation (Liberty, Unitil Only)	NMR	Complete
Commercial & Industrial Existing Building Baselines Evaluation	DSA	Complete
Commercial & Industrial Beyond Lighting	DSA	Complete
2023 Summer C&I ADR Stage 3 Evaluation Work Plan (tri-state)	DNV	Complete
Delivered Energy Insights Program PY 2023 Impact Evaluation (two state study, Eversource only)	Guidehouse	Complete
Large Business Impact & Process Evaluation	DNV	Complete
Benefits of Load Reduction	DNV	Complete

Evaluations available at:

<https://www.energy.nh.gov/energy-information/completed-monitoring-evaluation-studies>

Small Business

2024-2026 Plan Section 3.2

<https://www.puc.nh.gov/VirtualFileRoom/ShowDocument.aspx?DocumentId=76b6732e-95d1-4412-8956-dadff1cba1d7>

Small Business – Barriers and Design

Common Barriers in the Program

- Shortage of capital
- Staffing
- Lack of time
- Lack of expertise and awareness of EE opportunities
- Difficulty finding reputable vendors
- Split incentives

Program Design

- Flexible incentive structures: prescriptive & custom incentives
- Multiple delivery pathways: turnkey direct installations, customer-directed installations, and midstream incentives
- Turnkey approach: vetted contractors to handle everything from assessment to installation
- Market transformation: use data analytics to identify underserved segments and employ midstream incentives to influence broader marketplace

Small Business – Strengths and Challenges

Strengths

- Main Streets approach
- Vendor-driven strategy
- Promotions and offers
- Flexible incentive structure

Challenges

- Identifying eligible businesses
- Application and process complexity
- Vendors concentrated on quick-turnaround lighting projects
- Different utilities and states use varying rules, tools, and documentation requirements
- Economic uncertainty affecting businesses (such as increased costs)

Small Business - Potential Changes and Considerations



- Increase focus on and accessibility of Main Streets pathway.
- Consider statewide Turnkey vendors
- Create a prescriptive refrigeration pathway
- Create a prescriptive weatherization pathway
- Publish uniform statewide calculation tools for TRM measures

- Any clarifications we can provide?
- Do you see additional opportunities for the Small C&I programs?



Large Business

2024-2026 Plan Section 3.4

<https://www.puc.nh.gov/VirtualFileRoom/ShowDocument.aspx?DocumentId=76b6732e-95d1-4412-8956-dadff1cba1d7>

Large Business – Barriers and Design

Common Barriers in the Program

- Upfront costs
- Operating costs
- Realizing non-energy impacts

Program Design

- Three incentive types: Prescriptive, custom, performance-based
- Targets specific customer types with tailored approaches: national retail chains (regional coordination), manufacturers (cost-cutting focus), municipal/higher education (long-term structured decisions), and seasonal operations (off-season timing).
- Four pathways: utility direct technical assistance, energy service companies perform EE services, engineering firms conduct comprehensive audits, and midstream incentives beyond lighting to influence market.

Large Business – Strengths and Challenges

Strengths

- Technical resources like engineering support
- Outreach works well once contact is identified
- Existing customer/partner relationships
- Strong program awareness among largest business customers

Challenges

- Identifying then engaging the right contact at businesses
- Can be time consuming to participate
- Decision-making in business is complex
- High project costs, some incentives may be low esp. for large custom
- Economic uncertainty affecting businesses (such as increased costs)
- Largest businesses are familiar, but not all businesses are

Large Business - Potential Changes and Considerations

- Encourage more comprehensive, deeper projects.
- Cross promote ConnectedSolutions with applicable projects, such as Building Management Systems and Comprehensive HVAC improvements.
- Increase number of prescriptive measures, where applicable.
- Standardized engineering tools, where applicable.



- Any clarifications we can provide?
- Do you see additional opportunities for the Large C&I programs?



Municipal

2024-2026 Plan Section 3.3

<https://www.puc.nh.gov/VirtualFileRoom/ShowDocument.aspx?DocumentId=76b6732e-95d1-4412-8956-dadff1cba1d7>

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Municipal – Barriers and Design

Common Barriers in the Program

- Lack of time
- Upfront costs
- Minimal expertise and awareness of EE programs and opportunities
- Shorter operating hours that reduce cost-benefit savings
- Long-term budgeting and approval process of municipals for capital improvements
- Cyclic turnover of municipal representatives

Program Design

- Prescriptive, custom, and targeted incentives (up to 100% of incremental costs for schools/specific measures)
- Provides end-to-end assistance from energy audits to project completion, helping staff understand findings, select solutions, and leverage financing options, including specialized assessments for historical buildings.
- Both turnkey vendor installations and customer-directed installations are available

Municipal – Strengths and Challenges

Strengths

- Dedicated staff that build relationships
- Relationships with various municipal roles provide backup when staff turnover occurs
- Municipalities can use utility RFP process for contractors
- Electric utilities can provide fuel neutral Wx unavailable in other C&I programs
- Projects can move between municipal and C&I programs for funding
- On-bill financing can help bypass municipal voting/budget approval processes

Challenges

- Lack of awareness among some cities/towns
- Town spending decisions occur in Feb/Mar town meetings, requiring earlier preparation
- Energy Committees lack spending ability to implement projects
- Small towns lack dedicated personnel for projects
- Historic building concerns
- Federal funding uncertainty
- Finding and maintaining the right contact for each city/town



Municipal - Potential Changes and Considerations

- Develop calendar/list of key dates to better align our outreach with opportune times in city/town budget cycles.
- Create and deploy education and training for town energy committees and staff.
- Increase number of prescriptive measures, where applicable.

- Any clarifications we can provide?
- Do you see additional opportunities for the Municipal programs?



Questions & Discussion

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Next Steps

- Send written feedback on process/approach by Tuesday, 10/28 using the feedback matrix.
(<https://nhsaves.com/utility-partner-update/>)
- November Meeting: Tuesday, 11/18 2-4PM
- Agenda will cover Demand Response & ES Homes
- If needed, please review Chapter 5 and Section 4.2 of our 2024-2026 Plan as a refresher prior to the meeting:
<https://www.puc.nh.gov/VirtualFileRoom/ShowDocument.aspx?DocumentId=76b6732e-95d1-4412-8956-dadff1cba1d7>

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