

Statewide Quarterly Report Template
Tab 1: Ex Ante Results

Background:

*Definitions used within this template correspond to IL Energy Efficiency Policy Manual Version 1.1.
 *Footnotes have been added where clarifying information may be helpful.
 *See Section 6.5 of IL Energy Efficiency Policy Manual Version 1.1 for a full list of requirements for Program Administrator Quarterly Reports.

Instructions:

**Sector-level refers to residential and commercial and industrial Programs pursuant to Section 8-103B and 8-104; and Third-Party Energy Efficiency Implementation Program pursuant to Section 8-103B(g)(4).
 *If a utility offers Demand Response, information should be listed separately in this table as a separate program.
 *If Program Administrators want to include historical spend information, they can do so. ICC Staff appreciates this information. However, providing historical spend data is not a requirement for Quarterly Reports; it is a requirement for Annual Reports.
 *For Program Costs Year to Date (YTD), each Program Administrator should include actual costs incurred from the beginning of the Program Year through the end of the applicable quarter, regardless of what Program Year the costs are associated with.
 *Program Administrators will also report information on low income, public sector, public housing, and market transformation consistent with Program delivery requirements of Sections 8-103B and 8-104 of the Act.
 *Program Administrators are encouraged to report public sector savings at the program-level, where available.
 *Program Administrators should add a footnote specifying if there are non-rider energy efficiency costs that are not reported in the Quarterly Reports.

North Shore Gas Ex Ante Results - Section 8-103B/8-104 (EEPS) Programs Q1 2019

Section 8-103B/8-104 (EEPS) Program	Net Energy Savings Achieved (therms)	2019 Original Plan Savings Goal (therms)****	Approved Net Energy Savings Goal (therms)***	Implementation Plan Savings Goal (therms)	% Savings Achieved Compared to Implementation Plan Savings Goal	Program Costs YTD	Incentive Costs YTD	Non-Incentive Costs YTD	2019 Original Plan Budget*	2019 Approved Budget**	% of Costs YTD Compared to Approved Budget
Commercial & Industrial Programs											
Commercial & Industrial Program	0	819,600	819,600	819,600	0%	\$ 51,184	\$ 14,761	\$ 36,423	\$ 1,165,373	\$ 1,165,373	4%
Small Business	10,335	77,379	77,379	77,379	13%	\$ 47,690	\$ 14,086	\$ 33,604	\$ 78,434	\$ 78,434	61%
Public Sector	19,147	261,557	261,557	261,557	7%	\$ 65,927	\$ 28,465	\$ 37,462	\$ 414,104	\$ 414,104	16%
C&I Programs Subtotal	29,482	1,158,536	1,158,536	1,158,536	3%	\$ 164,801	\$ 57,312	\$ 107,489	\$ 1,657,911	\$ 1,657,911	10%
<i>C&I Programs - Private Sector Total</i>	10,335	896,979	896,979	896,979	1%	\$ 98,874	\$ 28,847	\$ 70,027	\$ 1,243,806	\$ 1,243,806	8%
<i>C&I Programs - Public Sector Total</i>	19,147	261,557	261,557	261,557	7%	\$ 65,927	\$ 28,465	\$ 37,462	\$ 414,104	\$ 414,104	16%
Residential Programs											
Single Family	269,952	670,145	670,145	670,145	40%	\$ 262,639	\$ 111,588	\$ 151,051	\$ 1,252,454	\$ 1,252,454	21%
Multi-Family	4,814	31,837	31,837	31,837	15%	\$ 47,449	\$ 7,677	\$ 39,772	\$ 102,165	\$ 102,165	46%
Residential Programs Subtotal	274,766	701,982	701,982	701,982	39%	\$ 310,088	\$ 119,265	\$ 190,823	\$ 1,354,619	\$ 1,354,619	23%
Income Qualified Programs											
Single Family	3,152	38,110	38,110	38,110	8%	\$ 320,207	\$ 313,912	\$ 6,295	\$ 271,339	\$ 271,339	118%
Multi Family	24,398	43,090	43,090	43,090	57%	\$ 24,009	\$ 11,362	\$ 12,648	\$ 194,609	\$ 194,609	12%
Income Qualified Programs Subtotal	27,550	81,201	81,201	81,201	34%	\$ 344,216	\$ 325,273	\$ 18,943	\$ 465,948	\$ 465,948	74%
Third Party Programs (Section 8-103B - Beginning in 2019)											
Third Party Programs (Section 8-103B - Beginning in 2019) Subtotal											
Demonstration of Breakthrough Equipment and Devices											
Research and Development						\$ 36,803	\$ -	\$ 36,803	\$ 124,231	\$ 124,231	30%
Market Transformation						\$ 11,371	\$ -	\$ 11,371	\$ 41,410	\$ 41,410	27%
Demonstration of Breakthrough Equipment and Devices Subtotal						\$ 48,174	\$ -	\$ 48,174	\$ 165,641	\$ 165,641	29%
Overall Total North Shore Gas Section 8-103B/8-104 (EEPS) Programs	331,799	1,941,719	1,941,719	1,941,719	17%	\$ 867,280	\$ 501,850	\$ 365,429	\$ 3,644,118	\$ 3,644,118	24%

Footnotes:

*Original Plan Budget refers to the budget contained in the approved EE Plan, which could be the original filed EE Plan or a compliance EE Plan.
 **Approved Budget refers to the Program Administrator's current budget for this Program Year, that may have been modified in light of the flexibility policy. This may also be the Implementation Plan Budget.
 ***The Approved Net Energy Savings Goal refers to the most updated portfolio-level savings goal. In the case of Section 8-104 programs, the values in this column should match the Adjusted Energy Savings Goal contained in the Program Administrator's updated Adjustable Savings Goal Template.
 ****Original Plan Savings Goal refers to the original savings goal approved in the Commission's Final Order approving the EE Plan. For Section 8-104 programs, this value should match the Plan Energy Savings Goal set forth in the completed Adjustable Savings Goal Template.

Statewide Quarterly Report Template

Tab 2: Costs

Instructions:
 *For Program and Portfolio-Level Costs, each Program Administrator should include actual costs incurred from the beginning of the Program Year through the end of the applicable quarter, regardless of what Program Year the costs are associated with.
 *Program Administrators should add a footnote specifying if there are non-rider energy efficiency costs that are not reported in the Quarterly Reports.

North Shore Gas Section 8-103B/8-104 (EEPS) Costs - Q1 2019

Section 8-103B/8-104 (EEPS) Cost Category	2019 Actual Costs YTD	2019 Approved Budget	% of Costs YTD Compared to Approved Budget
Program Expenditures by Sector			
C&I Programs (private sector)	\$ 98,874	\$ 1,243,806	8%
Public Sector Programs	\$ 65,927	\$ 414,104	16%
Residential Programs	\$ 310,088	\$ 1,354,619	23%
Income Qualified Programs	\$ 344,216	\$ 465,948	74%
Market Transformation Programs	\$ 11,371	\$ 41,410	27%
Third Party Programs (Beginning in 2019)	\$ -	\$ -	N/A
Total North Shore Gas Program Costs	\$ 830,477	\$ 3,519,887	24%
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)			
Demonstration of Breakthrough Equipment and Devices Costs	\$ 36,803	\$ 124,231	30%
Evaluation Costs	\$ 18,486	\$ 124,231	15%
Marketing Costs(including education and outreach)	\$ 19,327	\$ 124,231	16%
Portfolio Administrative Costs	\$ 77,105	\$ 248,463	31%
Total North Shore Gas Portfolio-Level Costs	\$ 151,720	\$ 621,156	24%
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 982,197	\$ 4,141,043	24%

Section 8-103B/8-104 (EEPS) Costs North Shore Gas - Q1 2019

Overall Total Costs	2019 Actual Costs YTD	2019 Approved Budget	% of Costs YTD Compared to Approved Budget
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 982,197	\$ 4,141,043	24%

Statewide Quarterly Report Template
 Tab 3: Historical Energy Saved

Instructions:
 *Each Program Administrator will fill out the historical "Energy Saved" table for Quarterly Reports. The "IL Department of Commerce Energy Saved" historical table may also be added to each utility's Quarterly Report.
 *Program Administrators are encouraged to provide source references for greater transparency.

North Shore Gas Section 8-103B/8-104 (EEPS) Energy Saved (therms) as of Q1 2019

Program Year	Evaluation Status (Ex Ante, Verified***, or ICC Approved)	Net Energy Savings Achieved (therms)	Original Plan Savings Goal** (therms)	Net Energy Savings Goal* (therms)	% of Net Energy Savings Goal Achieved
EPY1- 6/1/08-5/31/09	--	--			
EPY2- 6/1/09-5/31/10	--	--			
EPY3- 6/1/10-5/31/11	--	--			
Electric Plan 1 Total	--	--	--	--	--
EPY4/GPY1- 6/1/11-5/31/12	ICC Approved	370,075	555,036	555,036	67%
EPY5/GPY2- 6/1/12-5/31/13	ICC Approved	1,011,467	1,110,072	1,110,072	91%
EPY6/GPY3- 6/1/13-5/31/14	ICC Approved	2,514,260	1,665,107	1,665,107	151%
Electric Plan 2/Gas Plan 1 Total	ICC Approved	3,895,802	3,330,215	3,330,215	117%
EPY7/GPY4- 6/1/14-5/31/15	Verified	2,071,497	1,401,317	1,401,317	148%
EPY8/GPY5- 6/1/15-5/31/16	Verified	1,899,591	1,407,703	1,407,703	135%
EPY9/GPY6- 6/1/16-12/31/17	Ex Ante	1,400,160	1,369,034	2,181,433	64%
Electric Plan 3/Gas Plan 2 Total		5,371,248	4,178,054	4,990,453	108%
2018	Ex Ante	1,545,512	2,196,540	2,196,540	70%
2019	Ex Ante	331,799	1,941,718	1,941,718	17%
2020			1,790,399	1,790,399	0%
2021			1,931,439	1,931,439	0%
2018-2021 Plan Total		1,877,311	7,860,096	7,860,096	24%

Footnotes:

*Net Energy Savings Goal refers to the most updated portfolio-level savings goal. In the case of Section 8-104 programs, the values in this column should match the Adjusted Energy Savings Goal contained in the Program Administrator's updated Adjustable Savings Goal Template.

**Original Plan Savings Goal refers to the original savings goal approved in the Commission's Final Order approving the EE Plan. For Section 8-104 programs, this value should match the Plan Energy Savings Goal set forth in the completed Adjustable Savings Goal Template.

***Verified savings refer to evaluator estimated savings that are intended to count toward compliance with a Program Administrator's energy savings goal. Verified savings generally utilize deemed net-to-gross ratios and IL-TRM algorithms, where applicable. See also the definition of 'savings verification' in the IL-TRM Policy Document.

IL Department of Commerce and Economic Opportunity Energy Saved (or therms)

Department	EPY1	EPY2	EPY3	EPY4/ GPY1	EPY5/ GPY2	EPY6/ GPY3	EPY7/ GPY4	EPY8/ GPY5	EPY9/ GPY6*
Net Savings Achieved (MWh or therms)	--	--	--	116,426	271,864	288,363	173,094		
Evaluation Status (Ex Ante, Verified**, or ICC Approved)	--	--	--	ICC Approved	ICC Approved	ICC Approved	Verified		
Source	--	--	--	Docket 15-0298	Docket 15-0298	Docket 15-0298	EPY7/GPY4 DCEO Cost Effectiveness S		

Footnotes:

*Electric Program Year 9 (EPY9) and Gas Program Year 6 (GPY6) covers energy efficiency programs offered from June 1, 2016 to May 31, 2017.

**Verified savings refer to evaluator estimated savings that are intended to count toward compliance with a Program Administrator's energy savings goal. Verified savings generally utilize deemed net-to-gross ratios and IL-TRM algorithms, where applicable. See also the definition of 'savings verification' in the IL-TRM Policy Document.

Statewide Quarterly Report Template

Tab 4: Historical Other - Environmental and Economic Impacts

Instructions:

*Each Program Administrator should complete the Environmental and Economic Impacts table for Quarterly Reports.

*Each Program Administrator should include a footnote to explain how performance metrics are derived (for example: the calculation for "Direct Portfolio Jobs.")

Environmental and Economic Impacts for the North Shore Gas Service Territory as of Q1 2019

Performance Metrics (Equivalents)*	EPY1	EPY2	EPY3	EPY4/ GPY1	EPY5/ GPY2	EPY6/ GPY3	EPY7/ GPY4	EPY8/ GPY5	EPY9/ GPY6****	2018	2019
Net Energy Savings Achieved (therms)**				370,075	1,011,467	2,514,260	2,071,497	1,899,591	1,400,160	1,545,512	331,799
Carbon reduction (tons)				1,942	5,347	13,331	10,983	10,072	7,424	7,346	1,759
Cars removed from the road				416	1,145	2,855	2,352	2,157	1,590	1,560	374
Acres of trees planted				2,287	6,299	15,702	12,936	11,863	8,744	8,646	2,070
Number of homes powered for 1 year*^				210	577	1,439	1,186	1,088	802	880	211
Direct Portfolio Jobs											
Income qualified homes served***									25	414	74

Footnotes:

*Unless otherwise noted, performance metrics for carbon reduction, cars removed from the road, and acres of trees planted are derived from the U.S. EPA Greenhouse Gas Equivalencies Calculator: <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>

**This includes Sections 8-103, 8-103B, 8-104, and 16-111.5B savings achieved. In addition, this includes Illinois Department of Commerce and Economic Opportunity program savings achieved through May 31, 2017.

***To the extent the portfolio offers a low income program and tracks participation. Low income customers were previously served by the IL Department of Commerce and Economic Opportunity until May 31, 2017. Utilities began serving both low income and public sector customers on June 1, 2017.

****Electric Program Year 9 (EPY9) and Gas Program Year 6 (GPY6) covers energy efficiency programs offered from June 1, 2016 to December 31, 2017.

*^Number of homes powered for 1 year is derived from the U.S. EPA Greenhouse Gas Equivalencies Calculator: <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>

Statewide Quarterly Report Template

Tab 6: Historical Costs

Final (updated 10-18-18)

INSTRUCTIONS.

*Each Program Administrator will fill out the "Historical Energy Efficiency Costs" table for Quarterly Reports.

*For Costs, each Program Administrator should include actual costs incurred from the beginning of the Program Year through the end of the applicable quarter or Program Year, regardless of what Program Year the costs are associated with. Costs include both Program and Portfolio-Level Costs as well as On-Bill Financing costs.

*Program Administrators should add a footnote specifying if there are non-rider energy efficiency costs that are not reported in the Quarterly

North Shore Gas Service Territory Historical Energy Efficiency Costs as of 2019 Q1

Program Year	Actual North Shore Gas EEPS Costs	Actual DCEO EEPS Costs	Total Actual EEPS Costs (North Shore Gas + DCEO)	Actual Section 16-111.5B Costs	Total Actual EEPS + Section 16-111.5B Costs
EPY1- 6/1/08-5/31/09	\$ -	\$ -	\$ -	\$ -	\$ -
EPY2- 6/1/09-5/31/10	\$ -	\$ -	\$ -	\$ -	\$ -
EPY3- 6/1/10-5/31/11	\$ -	\$ -	\$ -	\$ -	\$ -
Electric Plan 1 Total	\$ -	\$ -	\$ -	\$ -	\$ -
EPY4/GPY1- 6/1/11-5/31/12	\$ 1,000,041	\$ 273,915	\$ 1,273,956	\$ -	\$ 1,273,956
EPY5/GPY2- 6/1/12-5/31/13	\$ 2,413,861	\$ 534,455	\$ 2,948,316	\$ -	\$ 2,948,316
EPY6/GPY3- 6/1/13-5/31/14	\$ 5,349,947	\$ 700,570	\$ 6,050,517	\$ -	\$ 6,050,517
Electric Plan 2/Gas Plan 1 Total	\$ 8,763,849	\$ 1,508,940	\$ 10,272,789	\$ -	\$ 10,272,789
EPY7/GPY4- 6/1/14-5/31/15	\$ 3,201,124	\$ 866,273	\$ 4,067,397	\$ -	\$ 4,067,397
EPY8/GPY5- 6/1/15-5/31/16	\$ 3,084,511	\$ 762,187	\$ 3,846,698	\$ -	\$ 3,846,698
EPY9/GPY6- 6/1/16-12/31/17	\$ 6,107,762	\$ 722,450	\$ 6,830,212	\$ -	\$ 6,830,212
Electric Plan 3/Gas Plan 2 Total	\$ 12,393,397	\$ 2,350,910	\$ 14,744,307	\$ -	\$ 14,744,307
Program Year	Actual North Shore Gas EEPS Costs YTD	Approved North Shore Gas EEPS Budget	% of Costs YTD Compared to Approved Budget		
2018	\$ 4,034,733	\$ 4,141,043	97%		
2019	\$ 982,197	\$ 4,141,043	24%		
2020	\$ -	\$ 4,141,043	0%		
2021	\$ -	\$ 4,141,043	0%		
2018-2021 Plan Total	\$ 5,016,930	\$ 16,564,172	30%		