

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 Q3 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	526,417	819,600	819,600	819,600	64%	\$ 358,321	\$ 222,379	\$ 135,943	\$ 1,165,373	\$ 1,165,373	31%
Small Business	112,303	77,379	77,379	77,379	145%	\$ 188,242	\$ 62,727	\$ 125,515	\$ 78,434	\$ 78,434	240%
Public Sector	19,147	261,557	261,557	261,557	7%	\$ 122,321	\$ 43,758	\$ 78,563	\$ 414,104	\$ 414,104	30%
C&I Programs Subtotal	657,867	1,158,536	1,158,536	1,158,536	57%	\$ 668,884	\$ 328,863	\$ 340,021	\$ 1,657,911	\$ 1,657,911	40%
<i>C&I Programs - Private Sector Total</i>	638,720	896,979	896,979	896,979	71%	\$ 546,563	\$ 285,106	\$ 261,458	\$ 1,243,806	\$ 1,243,806	44%
<i>C&I Programs - Public Sector Total</i>	19,147	261,557	261,557	261,557	7%	\$ 122,321	\$ 43,758	\$ 78,563	\$ 414,104	\$ 414,104	30%
Residential Programs											
Single Family	425,031	670,145	670,145	670,145	63%	\$ 981,468	\$ 523,017	\$ 458,451	\$ 1,252,454	\$ 1,252,454	78%
Multi-Family	43,041	31,837	31,837	31,837	135%	\$ 201,677	\$ 82,085	\$ 119,592	\$ 102,165	\$ 102,165	197%
Residential Programs Subtotal	468,071	701,982	701,982	701,982	67%	\$ 1,183,145	\$ 605,103	\$ 578,042	\$ 1,354,619	\$ 1,354,619	87%
Income Qualified Programs											
Single Family	3,151	38,110	38,110	38,110	8%	\$ 333,686	\$ 314,800	\$ 18,886	\$ 271,339	\$ 271,339	123%
Multi Family	28,283	43,090	43,090	43,090	66%	\$ 57,611	\$ 21,570	\$ 36,041	\$ 194,609	\$ 194,609	30%
Income Qualified Programs Subtotal	31,434	81,201	81,201	81,201	39%	\$ 391,297	\$ 336,371	\$ 54,926	\$ 465,948	\$ 465,948	84%
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						\$ 80,790	\$ -	\$ 80,790	\$ 124,231	\$ 124,231	65%
Market Transformation						\$ 33,580	\$ -	\$ 33,580	\$ 41,410	\$ 41,410	81%
Demonstration of Breakthrough Equipment and Devices Subtotal						\$ 114,370	\$ -	\$ 114,370	\$ 165,641	\$ 165,641	69%
Overall Total North Shore Gas Section 8-103B/8-104 (EEPS) Programs	1,157,372	1,941,719	1,941,719	1,941,719	60%	\$ 2,357,696	\$ 1,270,337	\$ 1,087,359	\$ 3,644,118	\$ 3,644,118	65%

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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 - Q3 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)	\$ 546,563	\$ 1,243,806	44%
Public Sector Programs	\$ 122,321	\$ 414,104	30%
Residential Programs	\$ 1,183,145	\$ 1,354,619	87%
Income Qualified Programs	\$ 391,297	\$ 465,948	84%
Market Transformation Programs	\$ 33,580	\$ 41,410	81%
Third Party Programs (Beginning in 2019)	\$ -	\$ -	N/A
Total North Shore Gas Program Costs	\$ 2,276,906	\$ 3,519,887	65%
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)			
Demonstration of Breakthrough Equipment and Devices Costs	\$ 80,790	\$ 124,231	65%
Evaluation Costs	\$ 96,336	\$ 124,231	78%
Marketing Costs(including education and outreach)	\$ 42,642	\$ 124,231	34%
Portfolio Administrative Costs	\$ 233,927	\$ 248,463	94%
Total North Shore Gas Portfolio-Level Costs	\$ 453,696	\$ 621,156	73%
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 2,730,602	\$ 4,141,043	66%

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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	\$ 2,730,602	\$ 4,141,043	66%

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 Q3 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	Verified	1,531,692	1,369,034	2,181,433	70%
Electric Plan 3/Gas Plan 2 Total		5,502,780	4,178,054	4,990,453	110%
2018	Verified	1,554,872	2,196,540	2,196,540	71%
2019	Ex Ante	1,157,372	1,941,718	1,941,718	60%
2020			1,790,399	1,790,399	0%
2021			1,931,439	1,931,439	0%
2018-2021 Plan Total		2,712,244	7,860,096	7,860,096	35%

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	10,992	285,181
Evaluation Status (Ex Ante, Verified**, or ICC Approved)	--	--	--	ICC Approved	ICC Approved	ICC Approved	Verified	Verified	Verified
Source	--	--	--	Docket 15-0298	Docket 15-0298	Docket 15-0298	EPY7/GPY4 DCEO Cost Effectiveness Summary Report, p. 7.	EPY7/GPY4 DCEO Cost Effectiveness Summary Report, p. 7.	EPY7/GPY4 DCEO Cost Effectiveness Summary Report, p. 7.

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 Q3 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	1,531,692	1,554,872	1,157,372
Carbon reduction (tons)				1,942	5,347	13,331	10,983	10,072	7,424	7,346	6,136
Cars removed from the road				416	1,145	2,855	2,352	2,157	1,590	1,560	1,303
Acres of trees planted				2,287	6,299	15,702	12,936	11,863	8,744	8,646	7,222
Number of homes powered for 1 year**^				210	577	1,439	1,186	1,088	802	880	735
Direct Portfolio Jobs **^^											9
Income qualified homes served***								25		414	303

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>

**^^Number of Direct Portfolio Jobs reflects the number of positions held by North Shore Gas and its contractors that are part of the Rider EEP

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.

North Shore Gas Service Territory Historical Energy Efficiency Costs as of 2019 Q3

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	\$ 2,730,602	\$ 4,141,043	66%		
2020	\$ -	\$ 4,141,043	0%		
2021	\$ -	\$ 4,141,043	0%		
2018-2021 Plan Total	\$ 6,765,335	\$ 16,564,172	41%		