

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.

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.

North Shore Gas Ex Ante Results - Section 8-103B/8-104 (EEPS) Programs Q4 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	783,264	819,600	819,600	819,600	96%	\$ 498,472	\$ 303,890	\$ 194,582	\$ 1,165,373	\$ 1,165,373	43%
Small Business	181,229	77,379	77,307	77,307	234%	\$ 290,574	\$ 106,214	\$ 184,360	\$ 78,434	\$ 78,434	370%
Public Sector	55,747	261,557	261,557	261,557	21%	\$ 281,080	\$ 180,991	\$ 100,089	\$ 414,104	\$ 414,104	68%
C&I Programs Subtotal	1,020,240	1,158,536	1,158,464	1,158,464	88%	\$ 1,070,126	\$ 591,095	\$ 479,031	\$ 1,657,911	\$ 1,657,911	65%
<i>C&I Programs - Private Sector Total</i>	<i>964,493</i>	<i>896,979</i>	<i>896,907</i>	<i>896,907</i>	<i>108%</i>	<i>\$ 789,046</i>	<i>\$ 410,104</i>	<i>\$ 378,942</i>	<i>\$ 1,243,806</i>	<i>\$ 1,243,806</i>	<i>63%</i>
<i>C&I Programs - Public Sector Total</i>	<i>55,747</i>	<i>261,557</i>	<i>261,557</i>	<i>261,557</i>	<i>21%</i>	<i>\$ 281,080</i>	<i>\$ 180,991</i>	<i>\$ 100,089</i>	<i>\$ 414,104</i>	<i>\$ 414,104</i>	<i>68%</i>
Residential Programs											
\$ -											
Single Family	869,423	670,145	651,302	651,302	133%	\$ 1,443,986	\$ 823,516	\$ 620,470	\$ 1,252,454	\$ 1,252,454	115%
Multi-Family	57,914	31,837	29,748	29,748	195%	\$ 256,714	\$ 95,667	\$ 161,046	\$ 102,165	\$ 102,165	251%
Residential Programs Subtotal	927,337	701,982	681,049	681,049	136%	\$ 1,700,700	\$ 919,183	\$ 781,517	\$ 1,354,619	\$ 1,354,619	126%
Income Qualified Programs											
Single Family	4,298	38,110	36,412	36,412	12%	\$ 380,159	\$ 354,978	\$ 25,181	\$ 271,339	\$ 271,339	140%
Multi Family	29,831	43,090	42,249	42,249	71%	\$ 93,498	\$ 45,267	\$ 48,232	\$ 194,609	\$ 194,609	48%
Income Qualified Programs Subtotal	34,129	81,201	78,661	78,661	43%	\$ 473,657	\$ 400,245	\$ 73,412	\$ 465,948	\$ 465,948	102%
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						\$ 103,867	\$ -	\$ 103,867	\$ 124,231	\$ 124,231	84%
Market Transformation						\$ 57,086	\$ -	\$ 57,086	\$ 41,410	\$ 41,410	138%
Demonstration of Breakthrough Equipment and Devices Subtotal						\$ 160,953	\$ -	\$ 160,953	\$ 165,641	\$ 165,641	97%
Overall Total North Shore Gas Section 8-103B/8-104 (EEPS) Programs	1,981,706	1,941,719	1,918,175	1,918,175	103%	\$ 3,405,436	\$ 1,910,523	\$ 1,494,913	\$ 3,644,118	\$ 3,644,118	93%

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 - Q4 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)	\$ 789,046	\$ 1,243,806	63%
Public Sector Programs	\$ 281,080	\$ 414,104	68%
Residential Programs	\$ 1,700,700	\$ 1,354,619	126%
Income Qualified Programs	\$ 473,657	\$ 465,948	102%
Market Transformation Programs	\$ 57,086	\$ 41,410	138%
Third Party Programs (Beginning in 2019)	\$ -	\$ -	N/A
Total North Shore Gas Program Costs	\$ 3,301,569	\$ 3,519,887	94%
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)			
Demonstration of Breakthrough Equipment and Devices Costs	\$ 103,867	\$ 124,231	84%
Evaluation Costs	\$ 149,002	\$ 124,231	120%
Marketing Costs(including education and outreach)	\$ 82,607	\$ 124,231	66%
Portfolio Administrative Costs	\$ 318,873	\$ 248,463	128%
Total North Shore Gas Portfolio-Level Costs	\$ 654,349	\$ 621,156	105%
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 3,955,918	\$ 4,141,043	96%

\$ -

Section 8-103B/8-104 (EEPS) Costs North Shore Gas - Q4 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	\$ 3,955,918	\$ 4,141,043	96%

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 Q4 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)**				486,501	1,283,331	2,802,623	2,244,590	1,910,583	1,816,873	1,554,872	1,981,706
Carbon reduction (tons)				2,574	6,790	14,829	11,876	10,109	9,613	7,346	10,485
Cars removed from the road				547	1,442	3,148	2,521	2,146	2,041	1,560	2,226
Acres of trees planted				3,362	8,868	19,366	15,510	13,202	12,554	8,646	13,693
Number of homes powered for 1 year*^				297	784	1,711	1,370	1,167	1,109	880	1,210
Direct Portfolio Jobs *^^											9
Income qualified homes served***								25		414	341

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 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 Q4 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	1,981,706	1,941,718	1,918,175	103%
2020			1,790,399	1,771,603	0%
2021			1,931,439	1,912,269	0%
2018-2021 Plan Total		3,536,578	7,860,096	7,798,587	45%

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	173,093	10,992	285,181
Evaluation Status (Ex Ante, Verified**, or ICC Approved)	--	--	--	ICC Approved	ICC Approved	ICC Approved	ICC Approved	ICC Approved	ICC Approved
Source	--	--	--	Docket 15-0298	Docket 15-0298	Docket 15-0298	DCEO Summary Impact Evaluation Report EPY7-9.GPY4-6	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 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 Q4

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	\$ 3,955,918	\$ 4,141,043	96%		
2020	\$ -	\$ 4,141,043	0%		
2021	\$ -	\$ 4,141,043	0%		
2018-2021 Plan Total	\$ 7,990,651	\$ 16,564,172	48%		