

Statewide Quarterly Report Template

Tab 1: Ex Ante Results

Final (updated 2-7-2020)

Background:

*Definitions used within this template correspond to IL Energy Efficiency Policy Manual Version 2.0.
 *Footnotes have been added where clarifying information may be helpful.
 *See Section 6.6 of IL Energy Efficiency Policy Manual Version 2.0 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 2020

Section 8-103B/8-104 (EEPS) Program	Net Energy Savings Achieved (therms)	2020 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	2020 Original Plan Budget*	2020 Approved Budget**	% of Costs YTD Compared to Approved Budget
Commercial & Industrial Programs											
Commercial & Industrial Program	254	681,693	682,403	682,403	0%	\$ 88,799	\$ 24,192	\$ 64,607	\$ 958,496	\$ 958,496	9%
Small Business	52,937	73,515	74,157	74,157	71%	\$ 78,696	\$ 29,359	\$ 49,337	\$ 73,367	\$ 73,367	107%
Public Sector	4,982	261,557	263,371	263,371	2%	\$ 26,488	\$ 2,800	\$ 23,688	\$ 414,104	\$ 414,104	6%
C&I Programs Subtotal	58,173	1,016,765	1,019,930	1,019,930	6%	\$ 193,982	\$ 56,351	\$ 137,631	\$ 1,445,967	\$ 1,445,967	13%
C&I Programs - Private Sector Total	53,191	755,208	756,560	756,560	7%	\$ 167,494	\$ 53,551	\$ 113,943	\$ 1,031,862	\$ 1,031,862	16%
C&I Programs - Public Sector Total	4,982	261,557	263,371	263,371	2%	\$ 26,488	\$ 2,800	\$ 23,688	\$ 414,104	\$ 414,104	6%
Residential Programs											
Single Family	214,406	663,621	644,704	644,704	33%	\$ 108,532	\$ 69,550	\$ 38,982	\$ 1,252,454	\$ 1,252,454	9%
Multi-Family	4,110	28,812	27,119	27,119	15%	\$ 55,142	\$ 7,891	\$ 47,251	\$ 102,165	\$ 102,165	54%
Residential Programs Subtotal	218,516	692,433	671,823	671,823	33%	\$ 163,674	\$ 77,440	\$ 86,233	\$ 1,354,619	\$ 1,354,619	12%
Income Qualified Programs											
IHWAP - SF	1,811	2,790	N/A	N/A	N/A	\$ 2,889	\$ -	\$ 2,889	N/A	N/A	N/A
Non IHWAP - SF		35,321	N/A	N/A	N/A					\$ -	
Single Family Subtotal	1,811	38,111	37,602	37,602	5%	\$ 2,889	\$ -	\$ 2,889	\$ 271,339	\$ 271,339	1%
IHWAP - MF	-	17,649	N/A	N/A	N/A	\$ 3,787	\$ -	\$ 3,787	N/A	N/A	N/A
Non IHWAP - MF	459	25,441	N/A	N/A	N/A	\$ 7,758	\$ 1,221	\$ 6,537	N/A	N/A	N/A
Multi Family Subtotal	459	43,090	42,249	42,249	1%	\$ 11,545	\$ 1,221	\$ 10,324	\$ 194,609	\$ 194,609	6%
Income Qualified Programs Subtotal	2,270	81,201	79,850	79,850	3%	\$ 14,434	\$ 1,221	\$ 13,213	\$ 465,948	\$ 465,948	3%
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						\$ 9,680	\$ -	\$ 9,680	\$ 124,231	\$ 124,231	8%
Market Transformation						\$ 9,637	\$ -	\$ 9,637	\$ 41,410	\$ 41,410	23%
Demonstration of Breakthrough Equipment and Devices Subtotal						\$ 19,317	\$ -	\$ 19,317	\$ 165,641	\$ 165,641	12%
Overall Total North Shore Gas Section 8-103B/8-104 (EEPS) Programs	278,959	1,790,399	1,771,603	1,771,603	16%	\$ 391,407	\$ 135,012	\$ 256,395	\$ 3,432,174	\$ 3,432,174	11%

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.

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Tab 2: Costs

Final (updated 10-18-18)

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.

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).

North Shore Gas Section 8-103B/8-104 (EEPS) Costs - Q1 2020

Section 8-103B/8-104 (EEPS) Cost Category	2020 Actual Costs YTD
Program Expenditures by Sector	
C&I Programs (private sector)	\$ 167,494
Public Sector Programs	\$ 26,488
Residential Programs	\$ 163,674
Income Qualified Programs	\$ 14,434
Market Transformation Programs	\$ 9,637
Third Party Programs (Beginning in 2019)	\$ -
Total North Shore Gas Program Costs	\$ 381,727
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)	
Demonstration of Breakthrough Equipment and Devices Costs	\$ 9,680
Evaluation Costs	\$ 23,615
Marketing Costs(including education and outreach)	\$ 14,261
Portfolio Administrative Costs	\$ 92,489
Total North Shore Gas Portfolio-Level Costs	\$ 140,045
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 521,772

Section 8-103B/8-104 (EEPS) Costs North Shore Gas - Q1 2020

Overall Total Costs	2020 Actual Costs YTD	2020 Approved Budget	% of Costs YTD Compared to Approved Budget
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 521,772	\$ 4,141,043	13%

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 Tab 3: Historical Energy Saved
 Final (updated 10-18-18)

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 8-1038/8-104 (EEPS) Energy Saved (therms) as of Q1 2020

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	1,554,871	2,196,540	2,196,540	71%
2019	Ex Ante	1,994,441	1,941,718	1,918,175	104%
2020	Ex Ante	278,959	1,790,399	1,771,603	16%
2021			1,931,439	1,912,269	0%
2018-2021 Plan Total		3,828,271	7,860,096	7,798,587	49%

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 (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.

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Tab 4: Historical Other - Environmental and Economic Impacts

Final (updated 2-7-2020)

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.")

Instructions.

**Sector-level" refers to residential and

Environmental and Economic Impacts for the North Shore Gas Service Territory as of Q1 2020

Performance Metrics (Equivalents)*	EPY1	EPY2	EPY3	EPY4/ GPY1	EPY5/ GPY2	EPY6/ GPY3	EPY7/ GPY4	EPY8/ GPY5	EPY9/ GPY6****	2018	2019	2020
Net Energy Savings Achieved (therms)**				486,501	1,283,331	2,802,623	2,244,590	1,910,583	1,816,873	1,554,871	1,981,706	278,959
Carbon reduction (tons)				2,574	6,790	14,829	11,876	10,109	9,613	7,346	10,485	1,476
Cars removed from the road				547	1,442	3,148	2,521	2,146	2,041	1,560	2,226	319
Acres of trees planted				3,362	8,868	19,366	15,510	13,202	12,554	8,646	13,693	1,928
Number of homes powered for 1 year*^				297	784	1,711	1,370	1,167	1,109	880	1,210	170
Direct Portfolio Jobs *****											9	12
Income qualified homes served***									25	414	341	5

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.

*****Direct Portfolio Jobs will be updated at least once per year.

*^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>

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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 Reports.

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	\$ 3,835,547	105%		
2019	\$ 521,772	\$ 3,835,547	14%		
2020	\$ -	\$ 3,835,547	0%		
2021	\$ -	\$ 3,835,547	0%		
2018-2021 Plan Total	\$ 4,556,505	\$ 15,342,188	30%		