

Statewide Quarterly Report Template

**Tab 1: Ex Ante Results
Q2 2021**

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.

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 Q2 2021

Section 8-103B/8-104 (EEPS) Program	Net Energy Savings Achieved (therms)	2021 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	2021 Original Plan Budget*	2021 Approved Budget**	% of Costs YTD Compared to Approved Budget
Business Programs											
Commercial & Industrial Program	97,898	819,600	821,894	821,894	12%	\$ 172,424	\$ 101,348	\$ 71,076	\$ 1,165,373	\$ 1,165,373	15%
Small Business	99,678	77,379	71,290	71,290	140%	\$ 154,214	\$ 94,869	\$ 59,345	\$ 78,434	\$ 78,434	197%
Public Sector	160,943	261,556	266,004	266,004	61%	\$ 266,942	\$ 160,821	\$ 106,121	\$ 414,104	\$ 414,104	64%
Business Programs Subtotal	358,519	1,158,535	1,159,188	1,159,188	31%	\$ 593,580	\$ 357,038	\$ 236,542	\$ 1,657,911	\$ 1,657,911	36%
<i>Business Programs - Private Sector Total</i>	197,576	896,979	893,184	893,184	22%	\$ 326,638	\$ 196,217	\$ 130,421	\$ 1,243,806	\$ 1,243,806	26%
<i>Business Programs - Public Sector Total</i>	160,943	261,556	266,004	266,004	61%	\$ 266,942	\$ 160,821	\$ 106,121	\$ 414,104	\$ 414,104	64%
Residential Programs											
Single Family	394,866	659,866	663,712	663,712	59%	\$ 266,281	\$ 185,823	\$ 80,459	\$ 1,252,454	\$ 1,252,454	21%
Multi-Family	19,968	31,837	30,241	30,241	66%	\$ 112,720	\$ 34,261	\$ 78,459	\$ 102,165	\$ 102,165	110%
Residential Programs Subtotal	414,834	691,703	693,953	693,953	60%	\$ 379,001	\$ 220,083	\$ 158,918	\$ 1,354,619	\$ 1,354,619	28%
Income Qualified Programs											
IHWAP - SF	2,740	2,790	N/A	N/A	N/A	\$ 132,530	\$ 118,720	\$ 13,810	N/A	N/A	N/A
Non IHWAP - SF	-	35,321	N/A	N/A	N/A	\$ 12,588	\$ -	\$ 12,588	N/A	N/A	N/A
<i>Single Family Subtotal</i>	2,740	38,111	37,668	37,668	7%	\$ 145,118	\$ 118,720	\$ 26,398	\$ 271,339	\$ 271,339	53%
IHWAP - MF	186	17,649	N/A	N/A	N/A	\$ 4,595	\$ -	\$ 4,595	N/A	N/A	N/A
Non IHWAP - MF	-	25,441	N/A	N/A	N/A	\$ 6,595	\$ -	\$ 6,595	N/A	N/A	N/A
<i>Multi Family Subtotal</i>	186	43,090	42,353	42,353	0%	\$ 11,190	\$ -	\$ 11,190	\$ 194,609	\$ 194,609	6%
Income Qualified Programs Subtotal	2,926	81,201	80,021	80,021	4%	\$ 156,308	\$ 118,720	\$ 37,588	\$ 465,948	\$ 465,948	34%
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						\$ 11,766	\$ -	\$ 11,766	\$ 124,231	\$ 124,231	9%
Market Transformation						\$ 15,746	\$ -	\$ 15,746	\$ 41,410	\$ 41,410	38%
Demonstration of Breakthrough Equipment and Devices Subtotal						\$ 27,512	\$ -	\$ 27,512	\$ 165,641	\$ 165,641	17%
Overall Total North Shore Gas Section 8-103B/8-104 (EEPS) Programs	776,279	1,931,439	1,933,162	1,933,162	40%	\$ 1,156,401	\$ 695,841	\$ 460,560	\$ 3,644,118	\$ 3,644,118	32%

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
Q2 2021**

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.**

- *"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.

North Shore Gas Section 8-103B/8-104 (EEPS) Costs - Q2 2021

Section 8-103B/8-104 (EEPS) Cost Category	2021 Actual Costs YTD
Program Expenditures by Sector	
Business Programs (private sector)	\$ 326,638
Public Sector Programs	\$ 266,942
Residential Programs	\$ 379,001
Income Qualified Programs	\$ 156,308
Market Transformation Programs	\$ 15,746
Third Party Programs (Beginning in 2019)	\$ -
Total North Shore Gas Program Costs	\$ 1,144,635
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)	
Demonstration of Breakthrough Equipment and Devices Costs	\$ 11,766
Evaluation Costs	\$ 64,829
Marketing Costs(including education and outreach)	\$ 29,380
Portfolio Administrative Costs	\$ 218,779
Total North Shore Gas Portfolio-Level Costs	\$ 324,753
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 1,469,388

Section 8-103B/8-104 (EEPS) Costs North Shore Gas - Q1 2021

Overall Total Costs	2021 Actual Costs YTD	2021 Approved Budget	% of Costs YTD Compared to Approved Budget
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 1,469,388	\$ 4,141,043	35%

Statewide Quarterly Report Template
Tab 3: Historical Energy Saved
Q2 2021

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 Q2 2021

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	Verified	2,050,609	1,941,718	1,918,175	107%
2020	Verified	2,285,299	1,790,399	1,771,603	129%
2021	Ex Ante	776,279	1,931,439	1,912,269	41%
2018-2021 Plan Total		6,667,058	7,860,096	7,798,587	85%

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
				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.
Source	--	--	--						

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
Q2 2021**

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 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.

Environmental and Economic Impacts for the North Shore Gas Service Territory as of Q2 2021

Performance Metrics (Equivalents)*	EPY1	EPY2	EPY3	EPY4/ GPY1	EPY5/ GPY2	EPY6/ GPY3	EPY7/ GPY4	EPY8/ GPY5	EPY9/ GPY6****	2018	2019	2020	2021
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	2,028,509	2,130,342	776,279
Carbon reduction (tons)				2,574	6,790	14,829	11,876	10,109	9,613	7,346	10,733	11,272	4,107
Cars removed from the road				547	1,442	3,148	2,521	2,146	2,041	1,560	2,319	2,435	893
Acres of trees planted				3,362	8,868	19,366	15,510	13,202	12,554	8,646	14,017	14,720	5,032
Number of homes powered for 1 year*^				297	784	1,711	1,370	1,167	1,109	880	1,239	1,301	495
Direct Portfolio Jobs *****											9	12	11
Income qualified homes served***									25	414	341	2038	6

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>

Statewide Quarterly Report Template
Tab 6: Historical Costs
Q2 2021

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 Q2 2021

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	\$ 3,710,087	\$ 4,141,043	90%		
2021	\$ 1,469,388	\$ 4,141,043	35%		
2018-2021 Plan Total	\$ 13,170,126	\$ 16,564,172	80%		