

Statewide Quarterly Report Template

Tab 1: Ex Ante Results  
Q3 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.  
 \*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 Q3 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
<b>Business Programs</b>											
Commercial & Industrial Program	106,103	819,600	821,894	821,894	13%	\$ 220,721	\$ 125,110	\$ 95,611	\$ 1,165,373	\$ 1,165,373	19%
Small Business	155,755	77,379	71,290	71,290	218%	\$ 196,340	\$ 117,227	\$ 79,113	\$ 78,434	\$ 78,434	250%
Public Sector	175,255	261,556	266,004	266,004	66%	\$ 400,918	\$ 222,638	\$ 178,280	\$ 414,104	\$ 414,104	97%
<b>Business Programs Subtotal</b>	<b>437,113</b>	<b>1,158,535</b>	<b>1,159,188</b>	<b>1,159,188</b>	<b>38%</b>	<b>\$ 817,979</b>	<b>\$ 464,975</b>	<b>\$ 353,004</b>	<b>\$ 1,657,911</b>	<b>\$ 1,657,911</b>	<b>49%</b>
<i>Business Programs - Private Sector Total</i>	261,859	896,979	893,184	893,184	29%	\$ 417,061	\$ 242,337	\$ 174,723	\$ 1,243,806	\$ 1,243,806	34%
<i>Business Programs - Public Sector Total</i>	175,255	261,556	266,004	266,004	66%	\$ 400,918	\$ 222,638	\$ 178,280	\$ 414,104	\$ 414,104	97%
<b>Residential Programs</b>											
Single Family	492,037	659,866	663,712	663,712	74%	\$ 654,186	\$ 530,729	\$ 123,457	\$ 1,252,454	\$ 1,252,454	52%
Multi-Family	23,838	31,837	30,241	30,241	79%	\$ 162,471	\$ 45,193	\$ 117,278	\$ 102,165	\$ 102,165	159%
<b>Residential Programs Subtotal</b>	<b>515,875</b>	<b>691,703</b>	<b>693,953</b>	<b>693,953</b>	<b>74%</b>	<b>\$ 816,657</b>	<b>\$ 575,921</b>	<b>\$ 240,736</b>	<b>\$ 1,354,619</b>	<b>\$ 1,354,619</b>	<b>60%</b>
<b>Income Qualified Programs</b>											
IHWAP - SF	5,059	2,790	N/A	N/A	N/A	\$ 20,715	\$ -	\$ 20,715	N/A	N/A	N/A
Non IHWAP - SF	-	35,321	N/A	N/A	N/A	\$ 83,941	\$ 65,100	\$ 18,841	N/A	N/A	N/A
<i>Single Family Subtotal</i>	5,059	38,111	37,668	37,668	13%	\$ 104,655	\$ 65,100	\$ 39,555	\$ 271,339	\$ 271,339	39%
IHWAP - MF	187	17,649	N/A	N/A	N/A	\$ 6,893	\$ -	\$ 6,893	N/A	N/A	N/A
Non IHWAP - MF	-	25,441	N/A	N/A	N/A	\$ 136,335	\$ 126,466	\$ 9,869	N/A	N/A	N/A
<i>Multi Family Subtotal</i>	187	43,090	42,353	42,353	0%	\$ 143,227	\$ 126,466	\$ 16,762	\$ 194,609	\$ 194,609	74%
<b>Income Qualified Programs Subtotal</b>	<b>5,246</b>	<b>81,201</b>	<b>80,021</b>	<b>80,021</b>	<b>7%</b>	<b>\$ 247,883</b>	<b>\$ 191,566</b>	<b>\$ 56,317</b>	<b>\$ 465,948</b>	<b>\$ 465,948</b>	<b>53%</b>
<b>Third Party Programs (Section 8-103B - Beginning in 2019)</b>											
<b>Third Party Programs (Section 8-103B - Beginning in 2019) Subtotal</b>											
<b>Demonstration of Breakthrough Equipment and Devices</b>											
Research and Development						\$ 17,395	\$ -	\$ 17,395	\$ 124,231	\$ 124,231	14%
Market Transformation						\$ 22,366	\$ -	\$ 22,366	\$ 41,410	\$ 41,410	54%
<b>Demonstration of Breakthrough Equipment and Devices Subtotal</b>						<b>\$ 39,761</b>	<b>\$ -</b>	<b>\$ 39,761</b>	<b>\$ 165,641</b>	<b>\$ 165,641</b>	<b>24%</b>
<b>Overall Total North Shore Gas Section 8-103B/8-104 (EEPS) Programs</b>	<b>958,235</b>	<b>1,931,439</b>	<b>1,933,162</b>	<b>1,933,162</b>	<b>50%</b>	<b>\$ 1,922,280</b>	<b>\$ 1,232,462</b>	<b>\$ 689,817</b>	<b>\$ 3,644,118</b>	<b>\$ 3,644,118</b>	<b>53%</b>

**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**

Q3 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.**

- 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.

**North Shore Gas Section 8-103B/8-104 (EEPS) Costs - Q3 2021**

Section 8-103B/8-104 (EEPS) Cost Category	2021 Actual Costs YTD
<b>Program Expenditures by Sector</b>	
C&I Programs (private sector)	\$ 417,061
Public Sector Programs	\$ 400,918
Residential Programs	\$ 816,657
Income Qualified Programs	\$ 247,883
Market Transformation Programs	\$ 22,366
Third Party Programs (Beginning in 2019)	\$ -
<b>Total North Shore Gas Program Costs</b>	<b>\$ 1,904,885</b>
<b>Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)</b>	
Demonstration of Breakthrough Equipment and Devices Costs	\$ 17,395
Evaluation Costs	\$ 88,543
Marketing Costs(including education and outreach)	\$ 29,087
Portfolio Administrative Costs	\$ 334,203
<b>Total North Shore Gas Portfolio-Level Costs</b>	<b>\$ 469,228</b>
<b>Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs</b>	<b>\$ 2,374,113</b>

**Section 8-103B/8-104 (EEPS) Costs North Shore Gas - Q3 2021**

Overall Total Costs	2021 Actual Costs YTD	2021 Approved Budget	% of Costs YTD Compared to Approved Budget
<b>Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs</b>	<b>\$ 2,374,113</b>	<b>\$ 4,141,043</b>	<b>57%</b>

**Statewide Quarterly Report Template**  
**Tab 3: Historical Energy Saved**  
 Q3 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 Q3 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					
	--	--			
<b>Electric Plan 1 Total</b>	--	--	--	--	--
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%
<b>Electric Plan 2/Gas Plan 1 Total</b>	<b>ICC Approved</b>	<b>3,895,802</b>	<b>3,330,215</b>	<b>3,330,215</b>	<b>117%</b>
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%
<b>Electric Plan 3/Gas Plan 2 Total</b>		<b>5,502,780</b>	<b>4,178,054</b>	<b>4,990,453</b>	<b>110%</b>
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	958,235	1,931,439	1,912,269	50%
<b>2018-2021 Plan Total</b>		<b>6,849,014</b>	<b>7,860,096</b>	<b>7,798,587</b>	<b>88%</b>

**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	<a href="#">DCEO Summary Impact Evaluation Report EPY7-9 GPY4-6</a>	<a href="#">EPY7/GPY4 DCEO Cost Effectiveness Summary Report, p. 7.</a>	<a href="#">EPY7/GPY4 DCEO Cost Effectiveness Summary Report, p. 7.</a>
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.

**Statewide Quarterly Report Template**

**Tab 4: Historical Other - Environmental and Economic Impacts**

Q3 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.  
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 \*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.  
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**Environmental and Economic Impacts for the North Shore Gas Service Territory as of Q3 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	958,235
Carbon reduction (tons)				2,574	6,790	14,829	11,876	10,109	9,613	7,346	10,733	11,272	5,070
Cars removed from the road				547	1,442	3,148	2,521	2,146	2,041	1,560	2,319	2,435	1,103
Acres of trees planted				3,362	8,868	19,366	15,510	13,202	12,554	8,646	14,017	14,720	6,212
Number of homes powered for 1 year*^				297	784	1,711	1,370	1,167	1,109	880	1,239	1,301	611
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**

Q3 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 Q3 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	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Electric Plan 1 Total</b>	\$ -	\$ -	\$ -	\$ -	\$ -
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
<b>Electric Plan 2/Gas Plan 1 Total</b>	\$ <b>8,763,849</b>	\$ <b>1,508,940</b>	\$ <b>10,272,789</b>	\$ -	\$ <b>10,272,789</b>
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
<b>Electric Plan 3/Gas Plan 2 Total</b>	\$ <b>12,393,397</b>	\$ <b>2,350,910</b>	\$ <b>14,744,307</b>	\$ -	\$ <b>14,744,307</b>
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	\$ 2,374,113	\$ 4,141,043	57%		
<b>2018-2021 Plan Total</b>	\$ <b>14,074,851</b>	\$ <b>16,564,172</b>	<b>85%</b>		