

Statewide Quarterly Report Template

Tab 1: Ex Ante Results

Draft (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.

**Peoples 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
<b>Commercial &amp; Industrial Programs</b>											
Commercial & Industrial Program	206,464	2,659,137	2,661,759	2,661,759	8%	\$ 591,866	\$ 159,500	\$ 432,367	\$ 4,751,228	\$ 4,751,228	12%
Small Business	295,913	778,974	797,806	797,806	37%	\$ 514,338	\$ 184,162	\$ 330,176	\$ 1,259,707	\$ 1,259,707	41%
Public Sector	181,034	1,156,894	1,166,521	1,166,521	16%	\$ 321,950	\$ 163,425	\$ 158,525	\$ 2,749,256	\$ 2,749,256	12%
<b>C&amp;I Programs Subtotal</b>	<b>683,411</b>	<b>4,595,005</b>	<b>4,626,086</b>	<b>4,626,086</b>	<b>15%</b>	<b>\$ 1,428,155</b>	<b>\$ 507,086</b>	<b>\$ 921,069</b>	<b>\$ 8,760,191</b>	<b>\$ 8,760,191</b>	<b>16%</b>
<i>C&amp;I Programs - Private Sector Total</i>	502,377	3,438,111	3,459,565	3,459,565	15%	\$ 1,106,204	\$ 343,661	\$ 762,543	\$ 6,010,934	\$ 6,010,934	18%
<i>C&amp;I Programs - Public Sector Total</i>	181,034	1,156,894	1,166,521	1,166,521	16%	\$ 321,950	\$ 163,425	\$ 158,525	\$ 2,749,256	\$ 2,749,256	12%
<b>Residential Programs</b>						<b>\$ -</b>					
Single Family	355,999	1,425,510	1,371,109	1,371,109	26%	\$ 383,257	\$ 122,374	\$ 260,882	\$ 3,135,905	\$ 3,135,905	12%
Multi-Family	471,104	1,952,387	1,834,391	1,834,391	26%	\$ 884,560	\$ 568,342	\$ 316,219	\$ 2,544,791	\$ 2,544,791	35%
<b>Residential Programs Subtotal</b>	<b>827,103</b>	<b>3,377,897</b>	<b>3,205,500</b>	<b>3,205,500</b>	<b>26%</b>	<b>\$ 1,267,817</b>	<b>\$ 690,716</b>	<b>\$ 577,101</b>	<b>\$ 5,680,696</b>	<b>\$ 5,680,696</b>	<b>22%</b>
<b>Income Qualified Programs</b>											
IHWAP - SF	15,122	30,310	N/A	N/A	N/A	\$ 203,597	\$ 148,702	\$ 54,895	N/A	N/A	N/A
Non IHWAP - SF	89,935	679,159	N/A	N/A	N/A	\$ 976,141	\$ 909,441	\$ 66,700	N/A	N/A	N/A
<i>Single Family Subtotal</i>	105,057	709,469	698,913	698,913	15%	\$ 1,179,738	\$ 1,058,143	\$ 121,595	\$ 5,028,483	\$ 5,028,483	23%
IHWAP - MF	-	30,097	N/A	N/A	N/A	\$ 71,953	\$ -	\$ 71,953	N/A	N/A	N/A
Non IHWAP - MF	152,127	745,073	N/A	N/A	N/A	\$ 527,651	\$ 315,274	\$ 212,377	N/A	N/A	N/A
<i>Multi Family Subtotal</i>	152,127	775,170	761,437	761,437	20%	\$ 599,604	\$ 315,274	\$ 284,330	\$ 3,784,384	\$ 3,784,384	16%
<b>Income Qualified Programs Subtotal</b>	<b>257,184</b>	<b>1,484,639</b>	<b>1,460,350</b>	<b>1,460,350</b>	<b>18%</b>	<b>\$ 1,779,342</b>	<b>\$ 1,373,417</b>	<b>\$ 405,925</b>	<b>\$ 8,812,867</b>	<b>\$ 8,812,867</b>	<b>20%</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	-					\$ 64,784	\$ -	\$ 64,784	\$ 524,777	\$ 524,777	12%
Market Transformation	-					\$ 64,494	\$ -	\$ 64,494	\$ 174,926	\$ 174,926	37%
<b>Demonstration of Breakthrough Equipment and Devices Subtotal</b>						<b>\$ 129,278</b>	<b>\$ -</b>	<b>\$ 129,278</b>	<b>\$ 699,703</b>	<b>\$ 699,703</b>	<b>18%</b>
<b>Overall Total Peoples Gas Section 8-103B/8-104 (EEPS) Programs</b>	<b>1,767,698</b>	<b>9,457,541</b>	<b>9,291,937</b>	<b>9,291,937</b>	<b>19%</b>	<b>\$ 4,604,591</b>	<b>\$ 2,571,220</b>	<b>\$ 2,033,372</b>	<b>\$ 23,953,456</b>	<b>\$ 23,953,456</b>	<b>19%</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**

**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).

**Peoples Gas Section 8-103B/8-104 (EEPS) Costs - Q1 2020**

Section 8-103B/8-104 (EEPS) Cost Category	2020 Actual Costs YTD
<b>Program Expenditures by Sector</b>	
C&I Programs (private sector)	\$ 1,106,204
Public Sector Programs	\$ 321,950
Residential Programs	\$ 1,267,817
Income Qualified Programs	\$ 1,779,342
Market Transformation Programs	\$ 64,494
Third Party Programs (Beginning in 2019)	\$ -
<b>Total Peoples Gas Program Costs</b>	<b>\$ 4,539,808</b>
<b>Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)</b>	
Demonstration of Breakthrough Equipment and Devices Costs	\$ 64,784
Evaluation Costs	\$ 156,783
Marketing Costs(including education and outreach)	\$ 95,440
Portfolio Administrative Costs	\$ 509,328
<b>Total Peoples Gas Portfolio-Level Costs</b>	<b>\$ 826,334</b>
<b>Total Peoples Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs</b>	<b>\$ 5,366,142</b>

**Section 8-103B/8-104 (EEPS) Costs - Q4 2020**

Overall Total Costs	2020 Actual Costs YTD	2020 Approved Budget	% of Costs YTD Compared to Approved Budget
<b>Total Peoples Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs</b>	<b>\$ 5,366,142</b>	<b>\$ 27,492,564</b>	<b>20%</b>

Statewide Quarterly Report Template  
 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.

Peoples Gas Section 8-103B/8-104 (EEPS) Energy Saved (therms) as of Q4 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					
<b>Electric Plan 1 Total</b>	--	--	--	--	--
EPY4/GPY1- 6/1/11-5/31/12	ICC Approved	2,053,902	2,806,711	2,806,711	73%
EPY5/GPY2- 6/1/12-5/31/13	ICC Approved	8,127,906	5,613,423	5,613,423	145%
EPY6/GPY3- 6/1/13-5/31/14	ICC Approved	11,405,070	8,420,134	8,420,134	135%
<b>Electric Plan 2/Gas Plan 1 Total</b>	<b>ICC Approved</b>	<b>21,586,878</b>	<b>16,840,268</b>	<b>16,840,268</b>	<b>128%</b>
EPY7/GPY4- 6/1/14-5/31/15	Verified	10,209,732	7,585,865	7,585,865	135%
EPY8/GPY5- 6/1/15-5/31/16	Verified	8,015,976	7,476,068	7,476,068	107%
EPY9/GPY6- 6/1/16-12/31/17	Verified	10,526,904	7,246,748	11,584,548	91%
<b>Electric Plan 3/Gas Plan 2 Total</b>	--	<b>28,752,612</b>	<b>22,308,681</b>	<b>26,646,481</b>	<b>129%</b>
2018	Verified	7,347,413	9,868,975	9,868,975	74%
2019	Ex Ante	9,768,515	9,505,670	9,291,954	103%
2020	Ex Ante	1,767,698	9,457,541	9,291,937	19%
2021			9,493,167	9,323,496	0%
<b>2018-2021 Plan Total</b>		18,883,626	38,325,353	37,776,362	50%

**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 (kWh or therms)	--	--	--	2,014,079	885,035	3,506,352	1,698,460	665,858	2,165,478
Evaluation Status [Ex Ante, Ex Post, 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	<a href="#">DCEO Summary Impact Evaluation Report EPY7-9, GPY4-6</a>	<a href="#">EPY6-9/GPY4-6 DCEO Evaluation</a>	<a href="#">EPY6-9/GPY4-6 DCEO Evaluation</a>

**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**

**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.")

**\*\*Sector-level" refers to residential and commercial and industrial Programs pursuant Environmental and Economic Impacts for the Peoples 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)**				4,067,981	9,012,941	14,911,422	11,908,192	8,681,834	12,692,382	7,347,413	9,750,506	1,767,698
Carbon reduction (tons)				21,524	47,687	78,896	63,006	45,936	67,155	35,591	51,590	9,353
Cars removed from the road				4,570	10,125	16,751	13,377	9,753	14,258	7,557	10,953	2,021
Acres of trees planted				28,109	62,278	103,035	82,283	59,990	87,702	41,888	67,374	12,214
Number of homes powered for 1 year*^				2,484	5,503	9,104	7,271	5,301	7,749	4,262	5,953	1,079
Direct Portfolio Jobs *****											59	83
Income qualified homes served***									668	6905	9,889	508

**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**

**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.

**Peoples Gas Service Territory Historical Energy Efficiency Costs as of 2020 Q1**

Program Year	Actual Peoples Gas EEPS Costs	Actual DCEO EEPS Costs	Total Actual EEPS Costs (Peoples 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	\$ 4,720,309	\$ 2,338,766	\$ 7,059,075	\$ -	\$ 7,059,075
EPY5/GPY2- 6/1/12-5/31/13	\$ 17,413,390	\$ 3,068,743	\$ 20,482,133	\$ -	\$ 20,482,133
EPY6/GPY3- 6/1/13-5/31/14	\$ 20,982,409	\$ 7,309,465	\$ 28,291,874	\$ -	\$ 28,291,874
<b>Electric Plan 2/Gas Plan 1 Total</b>	<b>\$ 43,116,108</b>	<b>\$ 12,716,974</b>	<b>\$ 55,833,082</b>	\$ -	<b>\$ 55,833,082</b>
EPY7/GPY4- 6/1/14-5/31/15	\$ 15,552,645	\$ 5,265,253	\$ 20,817,898	\$ -	\$ 20,817,898
EPY8/GPY5- 6/1/15-5/31/16	\$ 14,385,731	\$ 4,864,207	\$ 19,249,938	\$ -	\$ 19,249,938
EPY9/GPY6- 6/1/16-12/31/17	\$ 33,095,405	\$ 4,266,483	\$ 37,361,888	\$ -	\$ 37,361,888
<b>Electric Plan 3/Gas Plan 2 Total</b>	<b>\$ 63,033,781</b>	<b>\$ 14,395,943</b>	<b>\$ 77,429,724</b>	\$ -	<b>\$ 77,429,724</b>
Program Year	Actual Peoples Gas EEPS Costs YTD	Approved Peoples Gas EEPS Budget	% of Costs YTD Compared to Approved Budget		
2018	\$ 24,625,445	\$ 27,492,564	90%		
2019	\$ 5,366,142	\$ 27,492,564	20%		
2020	\$ -	\$ 27,492,564	0%		
2021	\$ -	\$ 27,492,564	0%		
<b>2018-2021 Plan Total</b>	<b>\$ 29,991,587</b>	<b>\$ 109,970,256</b>	<b>27%</b>		