

Statewide Quarterly Report Template

Tab 1: Ex Ante Results

8.14.20

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 - Q2 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	480,974	2,659,137	2,661,759	2,661,759	18%	\$ 1,460,056	660,685	\$ 799,371	\$ 4,751,228	\$ 4,751,228	31%
Small Business	794,629	778,974	797,806	797,806	100%	\$ 1,214,742	\$ 621,014	\$ 593,728	\$ 1,259,707	\$ 1,259,707	96%
Public Sector	497,711	1,156,894	1,166,521	1,166,521	43%	\$ 733,459	\$ 402,115	\$ 331,344	\$ 2,749,256	\$ 2,749,256	27%
C&I Programs Subtotal	1,773,314	4,595,005	4,626,086	4,626,086	38%	\$ 3,408,257	\$ 1,683,814	\$ 1,724,443	\$ 8,760,191	\$ 8,760,191	39%
<i>C&I Programs - Private Sector Total</i>	1,275,603	3,438,111	3,459,565	3,459,565	37%	\$ 2,674,798	\$ 1,281,699	\$ 1,393,099	\$ 6,010,934	\$ 6,010,934	44%
<i>C&I Programs - Public Sector Total</i>	497,711	1,156,894	1,166,521	1,166,521	43%	\$ 733,459	\$ 402,115	\$ 331,344	\$ 2,749,256	\$ 2,749,256	27%
Residential Programs											
Single Family	517,648	1,425,510	1,371,109	1,371,109	38%	\$ 1,273,042	\$ 739,288	\$ 533,754	\$ 3,135,905	\$ 3,135,905	41%
Multi-Family	883,234	1,952,387	1,834,391	1,834,391	48%	\$ 1,595,858	\$ 962,231	\$ 633,627	\$ 2,544,791	\$ 2,544,791	63%
Residential Programs Subtotal	1,400,882	3,377,897	3,205,500	3,205,500	44%	\$ 2,868,900	\$ 1,701,519	\$ 1,167,381	\$ 5,680,696	\$ 5,680,696	51%
Income Qualified Programs											
IHWAP - SF	24,692	30,310	N/A	N/A	N/A	\$ 337,846	\$ 225,655	\$ 112,191	N/A	N/A	N/A
Non IHWAP - SF	89,592	679,159	N/A	N/A	N/A	\$ 1,058,245	\$ 924,845	\$ 133,400	N/A	N/A	N/A
<i>Single Family Subtotal</i>	114,284	709,469	698,913	698,913	16%	\$ 1,396,091	\$ 1,150,500	\$ 245,591	\$ 5,028,483	\$ 5,028,483	28%
IHWAP - MF	-	30,097	N/A	N/A	N/A	\$ 141,843	\$ -	\$ 141,843	N/A	N/A	N/A
Non IHWAP - MF	598,116	745,073	N/A	N/A	N/A	\$ 1,442,212	\$ 1,020,321	\$ 421,892	N/A	N/A	N/A
<i>Multi Family Subtotal</i>	598,116	775,170	761,437	761,437	79%	\$ 1,584,055	\$ 1,020,321	\$ 563,734	\$ 3,784,384	\$ 3,784,384	42%
Income Qualified Programs Subtotal	712,400	1,484,639	1,460,350	1,460,350	49%	\$ 2,980,146	\$ 2,170,821	\$ 809,325	\$ 8,812,867	\$ 8,812,867	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	-					\$ 173,008	\$ -	\$ 173,008	\$ 524,777	\$ 524,777	33%
Market Transformation	-					\$ 150,742	\$ -	\$ 150,742	\$ 174,926	\$ 174,926	86%
Demonstration of Breakthrough Equipment and Devices Subtotal						\$ 323,749	\$ -	\$ 323,749	\$ 699,703	\$ 699,703	46%
Overall Total Peoples Gas Section 8-103B/8-104 (EEPS) Programs	3,886,596	9,457,541	9,291,937	9,291,937	42%	\$ 9,581,053	\$ 5,556,154	\$ 4,024,898	\$ 23,953,456	\$ 23,953,456	40%

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

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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 - Q2 2020

Section 8-103B/8-104 (EEPS) Cost Category	2020 Actual Costs YTD
Program Expenditures by Sector	
C&I Programs (private sector)	\$ 2,674,798
Public Sector Programs	\$ 733,459
Residential Programs	\$ 2,868,900
Income Qualified Programs	\$ 2,980,146
Market Transformation Programs	\$ 150,742
Third Party Programs (Beginning in 2019)	\$ -
Total Peoples Gas Program Costs	\$ 9,408,045
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)	
Demonstration of Breakthrough Equipment and Devices Costs	\$ 173,008
Evaluation Costs	\$ 549,738
Marketing Costs(including education and outreach)	\$ 249,190
Portfolio Administrative Costs	\$ 1,177,350
Total Peoples Gas Portfolio-Level Costs	\$ 2,149,285
Total Peoples Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 11,557,330

Section 8-103B/8-104 (EEPS) Costs - Q2 2020

Overall Total Costs	2020 Actual Costs YTD	2020 Approved Budget	% of Costs YTD Compared to Approved Budget
Total Peoples Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 11,557,330	\$ 27,492,564	42%

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Tab 3: Historical Energy Saved

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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 (EES) Energy Saved (therms) as of Q2 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	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%
Electric Plan 2/Gas Plan 1 Total	ICC Approved	21,586,878	16,840,268	16,840,268	128%
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%
Electric Plan 3/Gas Plan 2 Total	--	28,752,612	22,308,681	26,646,481	129%
2018	Verified	7,347,413	9,868,975	9,868,975	74%
2019	Ex Ante	9,639,343	9,505,670	9,291,954	101%
2020	Ex Ante	3,886,596	9,457,541	9,291,937	41%
2021			9,493,167	9,323,496	0%
2018-2021 Plan Total		20,873,352	38,325,353	37,776,362	55%

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	DCEO Summary Impact Evaluation Report EPY7-9 GPY4-6	EPY6-9/GPY4-6 DCEO Evaluation	EPY6-9/GPY4-6 DCEO Evaluation

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
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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 Q2 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	9,639,343	3,886,596
Carbon reduction (tons)				21,524	47,687	78,896	63,006	45,936	67,155	35,591	51,002	20,564
Cars removed from the road				4,570	10,125	16,751	13,377	9,753	14,258	7,557	11,019	4,443
Acres of trees planted				28,109	62,278	103,035	82,283	59,990	87,702	41,888	66,606	26,856
Number of homes powered for 1 year*^				2,484	5,503	9,104	7,271	5,301	7,749	4,262	5,885	2,373
Direct Portfolio Jobs *****											59	83
Income qualified homes served***									668	6905	9,889	770

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

8.14.20

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 Q2

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	\$ -	\$ -	\$ -	\$ -	\$ -
Electric Plan 1 Total	\$ -	\$ -	\$ -	\$ -	\$ -
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
Electric Plan 2/Gas Plan 1 Total	\$ 43,116,108	\$ 12,716,974	\$ 55,833,082	\$ -	\$ 55,833,082
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
Electric Plan 3/Gas Plan 2 Total	\$ 63,033,781	\$ 14,395,943	\$ 77,429,724	\$ -	\$ 77,429,724
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	\$ 11,557,330	\$ 27,492,564	42%		
2020	\$ -	\$ 27,492,564	0%		
2021	\$ -	\$ 27,492,564	0%		
2018-2021 Plan Total	\$ 36,182,775	\$ 109,970,256	33%		