

Statewide Quarterly Report Template

Tab 1: Ex Ante Results

Background:
 *Definitions used within this template correspond to IL Energy Efficiency Policy Manual Version 1.1.
 **Footnotes have been added where clarifying information may be helpful.
 *See Section 6.5 of IL Energy Efficiency Policy Manual Version 1.1 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 Q4 2018

Section 8-103B/8-104 (EEPS) Program	Net Energy Savings Achieved (therms)	2018 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	2018 Original Plan Budget*	2018 Approved Budget**	% of Costs YTD Compared to Approved Budget
Commercial & Industrial Programs											
Commercial & Industrial Program	229,432	819,600	819,600	819,600	28%	\$ 603,519	\$ 416,244	\$ 187,275	\$ 1,165,373	\$ 1,165,373	52%
Small Business	145,358	77,379	77,379	77,379	188%	\$ 200,209	\$ 95,926	\$ 104,283	\$ 78,434	\$ 78,434	255%
Public Sector	197,697	261,557	261,557	261,557	76%	\$ 423,608	\$ 231,011	\$ 192,597	\$ 414,104	\$ 414,104	102%
C&I Programs Subtotal	572,487	1,158,536	1,158,536	1,158,536	49%	\$ 1,227,336	\$ 743,181	\$ 484,155	\$ 1,657,911	\$ 1,657,911	74%
<i>C&I Programs - Private Sector Total</i>	374,790	896,979	896,979	896,979	42%	\$ 803,728	\$ 512,170	\$ 291,558	\$ 1,243,806	\$ 1,243,806	65%
<i>C&I Programs - Public Sector Total</i>	197,697	261,557	261,557	261,557	76%	\$ 423,608	\$ 231,011	\$ 192,597	\$ 414,104	\$ 414,104	102%
Residential Programs											
Single Family	750,698	924,966	924,966	924,966	81%	\$ 1,400,918	\$ 767,519	\$ 633,398	\$ 1,252,454	\$ 1,252,454	112%
Multi-Family	26,088	31,837	31,837	31,837	82%	\$ 214,194	\$ 55,792	\$ 158,402	\$ 102,165	\$ 102,165	210%
Residential Programs Subtotal	776,786	956,803	956,803	956,803	81%	\$ 1,615,112	\$ 823,311	\$ 791,800	\$ 1,354,619	\$ 1,354,619	119%
Income Qualified Programs											
Single Family	25,935	38,110	38,110	38,110	68%	\$ 425,915	\$ 399,066	\$ 26,849	\$ 271,339	\$ 271,339	157%
Multi Family	10,305	43,090	43,090	43,090	24%	\$ 74,544	\$ 19,672	\$ 54,871	\$ 194,609	\$ 194,609	38%
Income Qualified Programs Subtotal	36,240	81,201	81,201	81,201	45%	\$ 500,459	\$ 418,738	\$ 81,721	\$ 465,948	\$ 465,948	107%
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						\$ 106,433	\$ -	\$ 106,433	\$ 124,231	\$ 124,231	86%
Market Transformation						\$ 37,664	\$ -	\$ 37,664	\$ 41,410	\$ 41,410	91%
Demonstration of Breakthrough Equipment and Devices Subtotal						\$ 144,096	\$ -	\$ 144,096	\$ 165,641	\$ 165,641	87%
Overall Total North Shore Gas Section 8-103B/8-104 (EEPS) Programs	1,385,513	2,196,540	2,196,540	2,196,540	63%	\$ 3,487,003	\$ 1,985,230	\$ 1,501,772	\$ 3,644,118	\$ 3,644,118	96%

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

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.

North Shore Gas Section 8-103B/8-104 (EEPS) Costs - Q4 2018

Section 8-103B/8-104 (EEPS) Cost Category	2018 Actual Costs YTD
Program Expenditures by Sector	
C&I Programs (private sector)	\$ 803,728
Public Sector Programs	\$ 423,608
Residential Programs	\$ 1,615,112
Income Qualified Programs	\$ 500,459
Market Transformation Programs	\$ 37,664
Third Party Programs (Beginning in 2019)	\$ -
Total North Shore Gas Program Costs	\$ 3,380,570
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)	
Demonstration of Breakthrough Equipment and Devices Costs	\$ 106,433
Evaluation Costs	\$ 106,933
Marketing Costs(including education and outreach)	\$ 71,754
Portfolio Administrative Costs	\$ 269,845
Total North Shore Gas Portfolio-Level Costs	\$ 554,964
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 3,935,534

Section 8-103B/8-104 (EEPS) Costs North Shore Gas - Q4 2018

Overall Total Costs	2018 Actual Costs YTD
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 3,935,534

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 Tab 3: Historical Energy Saved

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 Q4 2018

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	Ex Ante	1,400,160	1,369,034	2,181,433	64%
Electric Plan 3/Gas Plan 2 Total		5,371,248	4,178,054	4,990,453	108%
2018	Ex Ante	1,385,513	2,196,540	2,196,540	63%
2019			1,941,718	1,941,718	0%
2020			1,790,399	1,790,399	0%
2021			1,931,439	1,931,439	0%
2018-2021 Plan Total		1,385,513	7,860,096	7,860,096	18%

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 (or 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	173,094		
Evaluation Status (Ex Ante, Verified**, or ICC Approved)	--	--	--	ICC Approved	ICC Approved	ICC Approved	Verified		
Source	--	--	--	Docket 15-0298	Docket 15-0298	Docket 15-0298	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

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.")

Environmental and Economic Impacts for the North Shore Gas Service Territory as of Q4 2018

Performance Metrics (Equivalents)*	EPY1	EPY2	EPY3	EPY4/ GPY1	EPY5/ GPY2	EPY6/ GPY3	EPY7/ GPY4	EPY8/ GPY5	EPY9/ GPY6****	2018 Q4
Net Energy Savings Achieved (therms)**				370,075	1,011,467	2,514,260	2,071,497	1,899,591	1,400,160	1,385,513
Carbon reduction (tons)				1,942	5,347	13,331	10,983	10,072	7,424	7,346
Cars removed from the road				416	1,145	2,855	2,352	2,157	1,590	1,560
Acres of trees planted				2,287	6,299	15,702	12,936	11,863	8,744	8,646
Number of homes powered for 1 year*^				210	577	1,439	1,186	1,088	802	880
Direct Portfolio Jobs										
Income qualified homes served***									25	414

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.

*^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>