STATE OF ILLINOIS

ILLINOIS COMMERCE COMMISSION

Illinois Commerce Commission	)
vs.	)
North Shore Gas Company The Peoples Gas Light and Coke Company	) Docket No. 25-0966)
Reconciliation of Revenues Collected under Riders EOA with the actual costs associated with energy efficiency and on-bill financing programs	))))

DIRECT TESTIMONY
OF
SAM ADDISON

Q. Please state your name and business address.

A. Sam Addison, 200 East Randolph Street, Chicago, Illinois 60601.

Q. By whom are you employed?

A. WEC Business Services LLC.

Q. What position do you hold with WEC Business Services LLC?

A. I am Manager, State Regulatory Affairs, with WEC Business Services LLC.

Q. What are your responsibilities in that position?

A. I am responsible for performing activities related to regulatory research, rate and tariff administration, billing and rate impact studies, accounting and reporting requirements for The Peoples Gas Light and Coke Company ("Peoples Gas" or the "Company"), and its sister utility, North Shore Gas Company ("North Shore"). I also have managed and coordinated the preparation and review of testimonies and exhibits pertaining to rate case filings for Peoples Gas and North Shore pursuant to provisions of Part 285, 286, and 287 of the rules of the Illinois Commerce Commission ("ICC" or "Commission") (83 Ill. Admin. Code Parts 285, 286, and 287).

Q. Please summarize your educational background and experience.

A. I received a Bachelor of Science in Finance from the Driehaus College of Business at DePaul University in 2013. In 2014, I joined Integrys Business Services and worked in the Finance for six years, serving in several positions of increasing responsibility and supporting, among other matters, the 2020 North Shore Gas Rate Case. In January 2022, I joined Common Wealth Edison Company as a Senior Financial Analyst supporting Financial Operations. In October 2022, I returned to WBS as a Project Specialist 3 in Regulatory Affairs team, where I support regulatory proceedings and related matters for Peoples Gas and North Shore.

Q. Please give a brief description of the operations and status of North Shore.

A. North Shore is a corporation organized and existing under the laws of the State of Illinois, having its principal office at 200 East Randolph Street, Chicago, Illinois 60601. It is engaged in the business of purchasing, distributing and selling natural gas to more than 168,000 customers in Cook and Lake Counties, Illinois. North Shore is a public utility within the meaning of the Public Utilities Act.

Q. Please give a brief description of the operations and status of Peoples Gas.

A. Peoples Gas is a corporation organized and existing under the laws of the State of Illinois, having its principal office at 200 East Randolph Street, Chicago, Illinois 60601. It is engaged in the business of purchasing, distributing and selling natural gas to more than 889,000 customers in the City of Chicago. Peoples Gas is a public utility within the meaning of the Public Utilities Act.

Q. Please describe the subject matter of this proceeding.

A. North Shore's and Peoples Gas' Schedule of Rates for Gas Service each includes Rider EOA, Energy Efficiency and On-Bill Financing Adjustment. The Commission approved Rider EOA in Docket No. 10-0564. Rider EOA became effective June 20, 2011. Each year, Rider EOA calls for North Shore and Peoples Gas to file charges (called the "Effective Component") with the Commission. The Rider EOA Effective Component is a per-therm charge to cover the costs of the energy efficiency program and the On-Bill Financing ("OBF") program. The portions of the Effective Component associated with energy efficiency and OBF are based on the four year budgets from the fourth plan filed with the Commission in Docket 21-0159. Rider EOA is applicable to all Service Classifications ("S.C."); however, for energy efficiency, certain large customers have been identified as "exempt" or "self-directing" by the Department of Commerce and Economic Development ("DCEO") per criteria set forth in Section 8-104(m) of the Public Utilities Act. Such customers are not subject to Rider EOA and do not participate in North Shore's and Peoples Gas' energy efficiency programs or the OBF program, which is directed to residential customers. For North Shore, there is a separate Effective Component for:

- S.C. No. 1, which includes amounts for Residential Energy Efficiency and OBF programs;
- S.C. No. 2, which includes amounts for Residential Energy Efficiency, Commercial and Industrial Energy Efficiency, and OBF programs; and
- Combined S.C. Nos. 4, 5 and 7 (currently there are no customers under S.C. Nos. 5 or 7), which includes amounts for Commercial and Industrial Energy Efficiency programs.

For Peoples Gas, there is a separate Effective Component for:

- S.C. No. 1, which includes amounts for Residential Energy Efficiency and OBF programs;
- S.C. No. 2, which includes amounts for Residential Energy Efficiency, Commercial and Industrial Energy Efficiency, and OBF programs; and
- Combined S.C. Nos. 4, 5, 7 and 8, which includes amounts for Commercial and Industrial Energy Efficiency programs.

For Program Year beginning June 1, 2016 and extending through December 31, 2017, and then afterwards January 1 through December 31 of each year, Section E of Rider EOA require North Shore and Peoples Gas to file annually no later than March 31 a reconciliation of amounts billed in the Previous Program Year to the actual costs, as well as Reconciliation Adjustments ("RA") for any amounts over or under collected from customers per the reconciliation. Such Reconciliation Adjustments would apply to a nine-month reconciliation amortization period beginning April 1. This reconciliation also includes a reconciliation of amounts collected or refunded through the previous year's RA.

Section E of Rider EOA also requires that the Commission initiate an annual review. North Shore and Peoples Gas must file testimony addressing its reconciliation statement and the prudency and reasonableness of costs incurred and recovered under Rider EOA during the Program Year that is the subject of the reconciliation statement. Testimony of North Shore and Peoples Gas witness Christina Frank (NSG-PGL Exhibit 2.0) addresses the energy efficiency plan, programs implemented in the Program Year 2025, reasonableness and prudence of costs incurred, and costs incurred under the OBF program.

Q. Please describe the period that will be reconciled.

A. For Program Year 2025, Rider EOA requires a reconciliation of revenues for a twelve-month period. The reconciliation period, which is the subject of my testimony, is for the Program Period January 1, 2025, through December 31, 2025.

Q. Has North Shore and Peoples Gas published public notice as required in the Order in Docket No. 14-0640?

A. Yes. Public notice was published timely in the Lake County News-Sun and Chicago Tribune.

Q. Please describe NSG-PGL Exhibit 1.1N.

A. NSG-PGL Exhibit 1.1N is a statement of the RA components that will apply for each month of the nine-month reconciliation amortization period beginning April 1, 2026 and ending December 31, 2026 (“Statement”) for all service classifications.

Q. Was the Statement prepared under your supervision and direction?

A. Yes, it was.

Q. What is the purpose of the Statement?

A. The Statement shows the applicable RA for customers served under North Shore’s S.C. Nos. 1, 2 and combined 2, 4, 5 and 7 who are not classified as exempt or self-directing, for the North Shore programs[1]. It also shows the derivation of each RA component and provides supporting data.

Q. Please describe the elements of the Statement.

A. In general, the Statement includes the following information:

- Page 1 shows the RA that will be billed over the nine-month reconciliation amortization period beginning April 1, 2026 for each Service Classification. The RA represents per-therm charges or refunds.
- Page 2 through 4 Column [B] show the determination of the RA as described under Section D(2) of Rider EOA for S.C. Nos. 1 and 2 for residential programs, and combined S.C. Nos. 2, 4, 5 and 7 for commercial and industrial programs..

[1] In Final Order ICC Docket No. 17-0212, DCEO’s responsibility for the funding of certain energy efficiency programs was eliminated. Per that order, North Shore continued with certain energy efficiency programs previously responsible under DCEO.

- Page 2 shows the determination of the RA for S.C. No. 1. Lines 2 through 13 represent the calculation of the Total Reconciliation Dollar amounts, including Interest, for Residential Energy Efficiency. This amount, shown on Line 13, is the result of deducting EOA Revenues (EREV) from EOA Expenses (EEXP), adding the RA amount for the previous program year RA to be recovered or refunded (ERA2), adding the applicable Interest, and if any, adding the Factor O adjustment per the Order in Docket No. 24-0831. For calendar year 2026, the applicable interest rate established by the Commission is 3.5 percent pursuant to the order in Docket No. 25-1083. Line 14 represents the dollars-per-therm RA. It is derived by dividing the Total Reconciliation Dollar amount on Line 13 by the Total Therm Deliveries forecasted for the nine-month reconciliation amortization period (Line 3) that the RA will be in effect. An RA must calculate to $0.0001 per therm or more for North Shore to include it on customer bills.

  Lines 16 through 27 represent the calculation of the Total Reconciliation Dollar amounts, including Interest, for the portion of Rider EOA attributable to OBF. This amount, shown on Line 27, is the result of deducting EOA Revenues related to OBF (OREV) from EOA Expenses related to OBF (OEXP), adding the RA related to OBF to be recovered or refunded for the previous program year RA (ORA2), adding the applicable Interest, and if any, adding the Factor O adjustment per the Order in Docket No. 24-0831. Line 28 represents the dollars-per-therm RA. It is derived by dividing the Total Reconciliation Dollar amount on Line 27 by the Total Therm Deliveries forecasted for the nine-month reconciliation amortization period (Line 17) that the RA will be in effect. Similar calculations are performed for S.C. No. 2 Residential Energy Efficiency and OBF on Page 3, and combined S.C. Nos. 2, 4, 5 and 7 Commercial and Industrial Energy Efficiency on Page 4.

- Page 5 shows the North Shore program aggregation of monthly EOA Expenses (EEXP and OEXP), Revenues (EREV and OREV) and previous program year Reconciliation Adjustment (ERA1 and ORA1) amounts recovered or refunded. EEXP and OEXP represent the actual amount of expenses incurred by North Shore during the previous Program Period for energy efficiency and OBF. EREV represents 100% of billed revenues arising from application of the Effective Component during the previous Program Period for energy efficiency that are applicable to North Shore as allowed under the Rider. OREV represents billed revenues for OBF. The Reconciliation Adjustment ERA1 and ORA1 amounts represent the amounts collected or refunded during the previous reconciliation amortization period arising from the application of the RA from the Previous Program Period for energy efficiency and OBF. The totals for Expenses, Revenues, and RA amounts for each applicable service classification are shown on Line 15 for Residential Energy Efficiency, Line 30 for Commercial and Industrial Energy Efficiency, and Line 45 for OBF.

- Page 6 shows the forecasted total therm deliveries for the reconciliation amortization period of April 2026 through December 2026. The total therm deliveries for S.C. No. 2 and combined S.C. Nos. 4, 5 and 7 are adjusted to exclude therm deliveries to individual customers reported by DCEO as exempt or self-directing who are not subject to Rider EOA. Therm totals used in calculations of per-therm charges are:
    - Column C, Line 10 for S.C. No. 1 residential programs;
    - Column F, Line 10 for S.C. No. 2 residential programs; and
    - Columns F + I, Line 10 for combined S.C. Nos. 2, 4, 5 and 7 commercial and industrial programs.

Q. How much was calculated as refundable or recoverable from S.C. No. 1 customers over the nine-month period beginning April 1, 2026, for residential energy efficiency and OBF?

A. As shown on NSG-PGL Exhibit 1.1N, the reconciliation result is a charge of $30,26.37 to customers (NSG-PGL Exhibit 1.1N, Page 2, Column B, Line 13 plus Line 27).

Q. What is the RA component that will be effective for S.C. No. 1 beginning April 1, 2026?

A. The RA component for S.C. No. 1 customers will be a charge of $0.0003 per therm (NSG-PGL Exhibit 1.1N, Page 1, Column B, Line 4).

Q. How much was calculated as refundable or recoverable from S.C. No. 2 customers over the nine-month period beginning April 1, 2026, for residential energy efficiency and OBF?

A. As shown on NSG-PGL Exhibit1.1N the reconciliation results in a charge of $621,370.17 to customers (NSG-PGL Exhibit 1.1N, Page 3, Column B, Line 13 plus Line 27).

Q. How much was calculated as refundable or recoverable from combined S.C. Nos. 2, 4, 5 and 7 customers over the nine-month period beginning April 1, 2026, for commercial and industrial energy efficiency programs?

A. As shown on NSG-PGL Exhibit1.1N the reconciliation results in a charge of $58,482.14 to customers (NSG-PGL Exhibit 1.1N, Page 4, Column B, Line 13).

Q. What is the RA component that will be effective for S.C. No. 2 beginning April 1, 2026, for residential, commercial and industrial energy efficiency and OBF?

A. The RA component for S.C. No. 2 customers will be a charge of $0.0114 per therm (NSG-PGL Exhibit 1.1N, Page 1, Column C, Line 4).

Q. What is the RA component that will be effective for S.C. Nos. 4, 5, and 7 beginning April 1, 2026, for commercial and industrial energy efficiency?

A. The RA component for S.C. Nos. 4, 5 and 7 customers will be a charge of $0.0008 per therm (NSG-PGL Exhibit 1.1N, Page 1, Column D, Line 4).

Q. Please describe how the RA components will be included on customers' bills.

A. The RA components were filed with the Commission on Information Sheet No. 34 and are added to the Effective Component adjustment amounts for the 2026 program year and billed as a single adjustment for each service classification effective April 1, 2026.

Q. Please describe NSG-PGL Exhibit 1.1P.

A. NSG-PGL Exhibit 1.1P is a statement of the RA components that will apply for each month of the nine-month reconciliation amortization period beginning April 1, 2026, and ending December 31, 2026 ("Statement") for all service classifications.

Q. Was the Statement prepared under your supervision and direction?

A. Yes, it was.

Q. What is the purpose of the Statement?

A. The Statement shows the applicable RA for customers served under Peoples Gas' S.C. Nos. 1, 2 and combined 2, 4, 5, 7 and 8 who are not classified as exempt or self-directing, for the Peoples Gas programs[2]. It also shows the derivation of each RA component and provides supporting data.

Q. Please describe the elements of the Statement.

A. In general, the Statement includes the following information:

[2] In Final Order ICC Docket No. 17-0212, DCEO's responsibility for the funding of certain energy efficiency programs was eliminated. Per that order, Peoples Gas continued with certain energy efficiency programs previously responsible under DCEO.

- Page 1 shows the RA that will be billed over the nine-month reconciliation amortization period beginning April 1, 2026, for each Service Classification. The RA represents per-therm charges or refunds.
- Page 2 through 4 Column [B] show the determination of the RA as described under Section D(2) of Rider EOA for S.C. Nos. 1 and 2 for residential programs, and combined S.C. Nos. 2, 4, 5, 7 and 8 for commercial and industrial programs.
- Page 2 shows the determination of the RA for S.C. No. 1. Lines 2 through 13 represent the calculation of the Total Reconciliation Dollar amounts, including Interest, for Residential Energy Efficiency. This amount, shown on Line 13, is the result of deducting EOA Revenues (EREV) from EOA Expenses (EEXP), adding the RA amount for the previous program year RA to be recovered or refunded (ERA2), adding the applicable Interest, and adding the Factor O adjustment per the Order in Docket No. 24-0831, if any. For calendar year 2026, the applicable interest rate established by the Commission is 3.5 percent pursuant to the order in Docket No. 25-1083. Line 14 represents the dollars-per-therm RA. It is derived by dividing the Total Reconciliation Dollar amount on Line 13 by the Total Therm Deliveries forecasted for the nine-month reconciliation amortization period (Line 3) that the RA will be in effect. An RA must calculate to $0.0001 per therm or more for Peoples Gas to include it on customer bills. Lines

16 through 27 represent the calculation of the Total Reconciliation Dollar amounts, including Interest, for the portion of Rider EOA attributable to OBF. This amount, shown on Line 27, is the result of deducting EOA Revenues related to OBF (OREV) from EOA Expenses related to OBF (OEXP), adding the RA related to OBF to be recovered or refunded for the previous reconciliation amortization period (ORA2), adding the applicable Interest, and if any, adding the Factor O adjustment per the Order in Docket No. 24-0831, if any. Line 28 represents the dollars-per-therm RA. It is derived by dividing the Total Reconciliation Dollar amount on Line 27 by the Total Therm Deliveries forecasted for the nine-month reconciliation amortization period (Line 17) that the RA will be in effect. Similar calculations are performed for S.C. No. 2 Residential Energy Efficiency and OBF on Page 3, and combined 2, 4, 5, 7 and 8 Commercial and Industrial Energy Efficiency on Page 4.

- Page 5 shows the Peoples Gas program aggregation of monthly EOA Expenses (EEXP and OEXP), Revenues (EREV and OREV) and previous reconciliation amortization period Reconciliation Adjustment (ERA1 and ORA1) amounts recovered or refunded. EEXP and OEXP represent the actual amount of expenses incurred by Peoples Gas during the previous Program Period for energy efficiency and OBF. EREV represents 100% of billed revenues arising from application of the Effective Component during the previous Program Period for energy efficiency that are applicable to Peoples Gas as allowed under the Rider. OREV represents billed revenues for OBF. The Reconciliation Adjustment ERA1 and ORA1 amounts represent the amounts collected or refunded during the previous Program Period arising from the application of the RA from the Previous Program Period for energy efficiency and OBF. The totals for Expenses, Revenues, and RA amounts for each applicable service classification are shown on Line 15 for Residential Energy Efficiency, Line 30 for Commercial and Industrial Energy Efficiency, and Line 45 for OBF.

- Page 6 shows the forecasted total therm deliveries for the reconciliation amortization period of April 2026 through December 2026. The total therm deliveries for S.C. No. 2 and combined S.C. Nos. 4, 5, 7 and 8 are adjusted to exclude therm deliveries to individual customers reported by DCEO as exempt or self-directing who are not subject to Rider EOA.

  Therm totals used in calculations of per-therm charges are:

  - Column C, Line 10 for S.C. No. 1 residential programs;
  - Column F, Line 10 for S.C. No. 2 residential programs; and
  - Columns F + I, Line 10 for combined S.C. Nos. 2, 4, 5, 7 and 8 for commercial and industrial programs.

Q. How much was calculated as refundable or recoverable from S.C. No. 1 customers over the nine-month period beginning April 1, 2026, for residential energy efficiency and OBF?

A. As shown on NSG-PGL Exhibit1.1P the reconciliation result is a refund of $5,984,241.92 to customers (NSG-PGL Exhibit 1.1P, Page 2, Column B, Line 13 plus Line 27).

Q. What is the RA component that will be effective for S.C. No. 1 beginning April 1, 2026?

A. The RA component for S.C. No. 1 customers will be a refund of $0.0161 per therm (NSG-PGL Exhibit 1.1P, Page 1, Column B, Line 4).

Q. How much was calculated as refundable or recoverable from S.C. No. 2 customers over the nine-month period beginning April 1, 2026, for residential energy efficiency and OBF?

A. As shown on NSG-PGL Exhibit1.1P the reconciliation results in a charge of $3,004,224.77 to customers (NSG-PGL Exhibit 1.1P, Page 3, Column B, Line 13 plus Line 27).

Q. How much was calculated as refundable or recoverable from combined S.C. Nos. 2, 4, 5, 7 and 8 customers over the nine-month period beginning April 1, 2026, for commercial and industrial energy efficiency programs?

A. As shown on NSG-PGL Exhibit1.1P the reconciliation result is a charge of $6,363,547.88 to customers (NSG-PGL Exhibit 1.1P, Page 4, Column B, Line 13).

Q. What is the RA component that will be effective for S.C. No. 2 beginning April 1, 2026, for residential, commercial and industrial energy efficiency and OBF?

A. The RA component for S.C. No. 2 customers will be a charge of $0.0211 per therm (NSG-PGL Exhibit 1.1P, Page 1, Column C, Line 4).

Q. What is the RA component that will be effective for S.C. Nos. 4, 5, 7 and 8 beginning April 1, 2026, for commercial and industrial energy efficiency?

A. The RA component for S.C. Nos. 4, 5, 7 and 8 customers will be a charge of $0.0128 per therm (NSG-PGL Exhibit 1.1P, Page 1, Column D, Line 4).

Q. Please describe how the RA components will be included on customers' bills.

A. The RA components were filed with the Commission on Information Sheet No. 33 and are added to the Effective Component adjustment amounts for the 2026 program year and billed as a single adjustment for each service classification effective April 1, 2026.

Q. **In accordance to Section E of Riders EOA of Peoples Gas' and North Shore's Schedule of Rates, an internal audit report dated July 25, 2026 was filed to the ICC on August 1, 2026. Were there any observations related to the Program Year 2025 period in the report?**

A. According to the internal audit report, the review of the reconciliation adjustment revealed these calculations to be accurate, and expenses were properly identified and recorded. The findings are detailed in the table below attached the internal audit report as NSG-PGL Exhibit 1.2

Q. Please explain NSG-PGL Exhibit 1.3N.

A. NSG-PGL Exhibit 1.3N reflects the reconciliation of North Shore Gas energy efficiency program expenses including On Bill Financing between NSG-PGL Exhibit 1.1N and NSG-PGL Exhibit 2.1 which is sponsored by Company witness Christina Frank. Exhibit 2.1-North Shore Gas 2025 Quarter 4 ICC Report was filed to the ICC on February 17, 2026 and Exhibit 1.1N was filed to the ICC for Rider EOA reconciliation rates in effect April 1, 2026.

Q. Please explain NSG-PGL Exhibit 1.3P.

A. NSG-PGL Exhibit 1.3P reflects the reconciliation of Peoples Gas Energy Efficiency program expenses including On Bill Financing between NSG-PGL Exhibit 1.1P and NSG-PGL Exhibit 2.2 which is sponsored by Company witness Christina Frank. Exhibit 2.2-Peoples Gas 2025 Quarter 4 ICC Report was filed to the ICC on February 17, 2026 and Exhibit 1.1P was filed to the ICC for Rider EOA reconciliation rates in effect April 1, 2026. Upon reconciliation of the two Exhibits, items were identified related to (a) adjustment for actuals costs reflected in the 2025 Quarter 4 ICC Report that were 2025 expenses.

Q. Does this conclude your direct testimony?

A. Yes, it does.

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The Peoples Gas Light and Coke Company

Energy Efficiency and On-Bill Financing Adjustment
Under Rider EOA
Schedule of Rates, ILL. C.C. No. 28

Applicable to All Service Classifications

Statement of Reconciliation Adjustment

Effective With Service Rendered
On and After April 1, 2026

		Amount per Therm		
Line No.	Adjustments	Service Classification No. 1	Service Classification No. 2	Service Classification Nos. 4, 5, 7 and 8
	[A]	[B]	[C]	[D]
1	Residential Energy Efficiency Adjustments	$ (0.0162) [1]	$ 0.0083 [2]	
2	Commercial/Industrial Energy Efficiency Adjustments		$ 0.0128 [3]	$ 0.0128 [3]
3	On-Bill Financing Adjustments	$ 0.0001 [4]	$ - [5]	
4	Total Reconciliation Adjustment (Sum of Lines 1-3)	$ (0.0161)	$ 0.0211	$ 0.0128

Notes:

[1] Page 2, Column B, Line 14
[2] Page 3, Column B, Line 14
[3] Page 4, Column B, Line 14
[4] Page 2, Column B, Line 28
[5] Page 3, Column B, Line 28

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The Peoples Gas Light and Coke Company
Annual Reconciliation Calculation for Rider EOA
Fourteenth Program Year (January 1, 2025 - December 31, 2025)
Service Classification No. 1

Line No.	Item Description		Total Peoples Gas	Notes
	[A]		[B]	[C]
1	**Calculation of Reconciliation Adjustment (RA)**			
2	Calculation of Residential Energy Efficiency $ERA1_1$			
3	Total therms		370,815,523	P. 6, Col. C, Line 10
4	Energy Efficiency Expenses (EEXP)	$	9,269,012.87	P. 5, Col. C, Line 15 for Peoples Gas
5	Energy Efficiency Revenues (EREV)		15,112,528.90	P. 5, Col. G, Line 15 for Peoples Gas
6	Subtotal Residential $ERA1_1$		(5,843,516.03)	Line 4 - Line 5
7	Calculation of Residential Energy Efficiency $ERA2_1$			
8	$ERA1_1$ Previous Year		(3,138,215.88)	Previous Year Filing - Reconciliation Adjustment, p 2 line 13 (PY13)
9	$ERA1_1$ Previous Year Collections/(Refunds)		(3,118,469.31)	P. 5, Col. K, Line 15 for Peoples Gas
10	Subtotal Residential $ERA2_1$		(19,746.57)	Line 8 - Line 9
11	Calculation of Interest (3.5% annually)(1)		(153,910.64)	(Lines 6 + 10) x Interest Rate x 9 / 12
12	Factor O Adjustment		-	
13	Total Reconciliation Dollars	$	(6,017,173.24)	Line 6 + Line 10 + Line 11 + Line 12
14	Total Residential Energy Efficiency ERA	$	(0.0162)	Line 13 / Line 3
15				
16	Calculation of Residential On-Bill Financing $ORA1_1$			
17	Total Therms		370,815,523	P. 7, Col. C, Line 10
18	On-Bill Financing Expenses (OEXP)	$	79,005.17	P. 5, Col. C, Line 47
19	On-Bill Financing Revenues (OREV)		61,948.21	P. 5, Col. G, Line 47
20	Subtotal Residential $ORA1_1$		17,056.96	Line 18 - Line 19
21	Calculation of Residential On-Bill Financing $ORA2_1$			
22	$ORA1_1$ Previous Year		44,169.91	Previous Year Filing - Reconciliation Adjustment, p 2 line 27 (PY13)
23	$ORA1_1$ Previous Year Collections/(Refunds)		29,137.89	P. 5, Col. K, Line 47
24	Subtotal Residential $ORA2_1$		15,032.02	Line 22 - Line 23
25	Calculation of Interest (3.5% annually)(1)		842.34	(Lines 20 + 24) x Interest Rate x 9 / 12
26	Factor O Adjustment		-	
27	Total Reconciliation Dollars	$	32,931.32	Line 20 + Line 24 + Line 25 + Line 26
28	Total Residential On-Bill financing ORA	$	0.0001	Line 27 / Line 17
29				
30	Notes:			
31	(1) The interest rate set by the Illinois Commerce Commission for Calendar 2026 is:			3.5%

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The Peoples Gas Light and Coke Company
Annual Reconciliation Calculation for Rider EOA
Fourteenth Program Year (January 1, 2025 - December 31, 2025)
Service Classification No. 2 Residential Programs

Line No.	**Item Description**	**Total Peoples Gas**	**Notes**
	[A]	[B]	[C]
1	**Calculation of Reconciliation Adjustment (RA)**		
2	Calculation of Residential Energy Efficiency $ERA1_1$		
3	Total therms	362,739,156	P. 6, Col. F, Line 10
4	Energy Efficiency Expenses (EEXP)	$ 6,731,806.97	P. 5, Col. D, Line 15 for Peoples Gas
5	Energy Efficiency Revenues (EREV)	3,883,263.72	P. 5, Col. H, Line 15 for Peoples Gas
6	Subtotal Residential $ERA1_1$	2,848,543.25	Line 4 - Line 5
7	Calculation of Residential Energy Efficiency $ERA2_1$		
8	$ERA1_1$ Previous Year	2,824,076.19	Previous Year Filing - Reconciliation Adjustment, p 3 line 13 (PY13)
9	$ERA1_1$ Previous Year Collections/(Refunds)	2,745,238.42	P. 5, Col. L, Line 15 for Peoples Gas
10	Subtotal Residential $ERA2_1$	78,837.77	Line 8 - Line 9
11	Calculation of Interest (3.5% annually)(1)	76,843.75	(Lines 6 + 10) x Interest Rate x 9 / 12
12	Factor O Adjustment	-	
13	Total Reconciliation Dollars	$ 3,004,224.77	Line 6 + Line 10 + Line 11 + Line 12
14	Total Residential Energy Efficiency ERA	$ 0.0083	Line 13 / Line 3
15			
16	Calculation of Residential On-Bill Financing $ORA1_1$		
17	Total Therms	362,739,156	P. 7, Col. F, Line 10
18	On-Bill Financing Expenses (OEXP)	$ 1,612.37	P. 5, Col. D, Line 47
19	On-Bill Financing Revenues (OREV)	(310.00)	P. 5, Col. H, Line 47
20	Subtotal Residential $ORA1_1$	1,922.37	Line 18 - Line 19
21	Calculation of Residential On-Bill Financing $ORA2_1$		
22	$ORA1_1$ Previous Year	(4,695.25)	Previous Year Filing - Reconciliation Adjustment, p 3 line 27 (PY13)
23	$ORA1_1$ Previous Year Collections/(Refunds)	(255.54)	P. 5, Col. L, Line 47
24	Subtotal Residential $ORA2_1$	(4,439.71)	Line 22 - Line 23
25	Calculation of Interest (3.5% annually)(1)	(66.08)	(Lines 20 + 24) x Interest Rate x 9 / 12
26	Factor O Adjustment	-	
27	Total Reconciliation Dollars	$ (2,583.42)	Line 20 + Line 24 + Line 25 + Line 26
28	Total Residential On-Bill financing ORA	$ -	Line 27 / Line 17
29			
30	Notes:		
31	(1) The interest rate set by the Illinois Commerce Commission for Calendar 2026 is:		3.5%

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The Peoples Gas Light and Coke Company
Annual Reconciliation Calculation for Rider EOA
Fourteenth Program Year (January 1, 2025 - December 31, 2025)
S.C. Nos. 2, 4, 5, 7 and 8 - Commercial and Industrial Programs

Line No.	Item Description	Total Peoples Gas	Notes
	[A]	[B]	[C]
1	**Calculation of Reconciliation Adjustment (RA)**		
2	Calculation of C&I Energy Efficiency $ERA1_1$		
3	Total therms	496,243,253	P. 6, Line 10, Cols. F+I
4	Energy Efficiency Expenses (EEXP)	$ 15,506,544.21	P. 5, Col. F, Line 31 for Peoples Gas
5	Energy Efficiency Revenues (EREV)	9,403,410.99	P. 5, Col. J, Line 31 for Peoples Gas
6	Subtotal C&I $ERA1_1$	6,103,133.22	Line 4 - Line 5
7	Calculation of C&I Energy Efficiency $ERA2_1$		
8	$ERA1_1$ Previous Year	5,647,188.01	Previous Year Filing - Reconciliation Adjustment, p 4 line 13 (PY13)
9	$ERA1_1$ Previous Year Collections/(Refunds)	5,549,543.76	P. 5, Col. N, Line 31 for Peoples Gas
10	Subtotal C&I $ERA2_1$	97,644.25	Line 8 - Line 9
11	Calculation of Interest (3.5% annually)(1)	162,770.41	(Lines 6 + 10) x Interest Rate x 9 / 12
12	Factor O Adjustment	-	
13	Total Reconciliation Dollars	$ 6,363,547.88	Line 6 + Line 10 + Line 11 + Line 12
14	Total C&I Energy Efficiency ERA	$ 0.0128	Line 13 / Line 3
15			
16	Notes:		
17	(1) The interest rate set by the Illinois Commerce Commission for Calendar 2026 is:		3.5%

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The Peoples Gas Light and Coke Company

Peoples Gas Energy Efficiency and On-Bill Financing Programs

Program Year Revenues and Expenses
Fourteenth Program Year (January 1, 2025 - December 31, 2025)

			Expenses[1]				Revenues[2]				RA1 Collections/(Refunds)[3]				
Line No.	Month	Year	Service Classification No. 1	Service Classification No. 2	Service Classification Nos. 4, 5, 7, 8	Total	Service Classification No. 1	Service Classification No. 2	Service Classification Nos. 4, 5, 7, 8	Total	Service Classification No. 1	Service Classification No. 2	Service Classification Nos. 4, 5, 7, 8	Total	Line No.
	[A]	[B]	[C]	[D]	[E]	[F] [C]+[D]+[E]	[G]	[H]	[I]	[J] [G]+[H]+[I]	[K]	[L]	[M]	[N] [K]+[L]+[M]	
1	Residential Energy Efficiency														1
2	Jan	2025	$ 109,430.58	$ 160,466.87	$ -	$ 269,897.45	$ 3,159,586.31	$ 767,922.56	$ -	$ 3,927,508.87	$ (52,575.67)	$ 1,845.31	$ -	$ (50,730.36)	2
3	Feb	2025	$ 974,554.88	$ 524,695.58	-	1,499,250.46	2,454,255.95	670,684.90	-	3,124,940.85	52.44	(572.68)	-	(520.24)	3
4	Mar	2025	$ 1,284,964.25	$ 480,725.08	-	1,765,689.34	1,695,746.25	387,597.42	-	2,083,343.67	252.86	486.44	-	739.30	4
5	Apr	2025	$ 1,200,669.68	$ 520,765.18	-	1,721,434.86	1,206,744.40	261,829.40	-	1,468,573.80	(444,297.26)	399,573.41	-	(44,723.85)	5
6	May	2025	$ 722,971.52	$ 524,227.01	-	1,247,198.54	647,247.24	191,295.60	-	838,542.84	(253,832.24)	253,014.47	-	(817.77)	6
7	June	2025	$ 1,049,682.92	$ 567,146.93	-	1,616,829.85	302,058.97	96,820.51	-	398,879.48	(119,849.17)	123,628.40	-	3,779.23	7
8	July	2025	$ 820,220.44	$ 968,364.55	-	1,788,584.99	243,183.99	87,727.32	-	330,911.31	(96,536.31)	113,601.28	-	17,064.97	8
9	August	2025	$ 401,180.74	$ 878,498.16	-	1,279,678.90	250,831.49	79,998.14	-	330,829.63	(98,725.22)	105,448.66	-	6,723.44	9
10	Septembe	2025	$ 547,139.00	$ 522,718.68	-	1,069,857.67	231,641.85	89,005.03	-	320,646.88	(97,411.79)	121,952.43	-	24,540.64	10
11	October	2025	$ 664,667.76	$ 480,327.40	-	1,144,995.16	529,766.36	191,023.24	-	720,789.60	(203,614.95)	239,844.04	-	36,229.09	11
12	Novembe	2025	$ 384,796.59	$ 300,096.44	-	684,893.02	1,551,658.17	388,892.13	-	1,940,550.30	(617,393.36)	506,492.03	-	(110,901.33)	12
13	Decembe	2025	$ 304,952.92	$ 259,239.48	-	564,192.41	2,839,807.92	670,467.47	-	3,510,275.39	(1,134,538.64)	879,924.63	-	(254,614.01)	13
14	Adjustments		$ 803,781.59	$ 544,535.59	-	1,348,317.18	-	-	-	-	-	-	-	-	14
15	Total		$ 9,269,012.87	$ 6,731,806.97	$ -	$ 16,000,819.84	$ 15,112,528.90	$ 3,883,263.72	$ -	$ 18,995,792.62	$ (3,118,469.31)	$ 2,745,238.42	$ -	$ (373,230.89)	15
						-	-	-	-	-	-	-	-	-	0
16	Commercial and Industrial Energy Efficiency														16
17	Jan	2025				197,850.26	-	1,430,963.58	345,396.35	1,776,359.93	-	2,845.62	11,740.10	14,585.72	17
18	Feb	2025				1,141,602.66	-	1,248,854.41	264,750.68	1,513,605.09	-	(961.94)	(836.10)	(1,798.04)	18
19	Mar	2025				994,891.02	-	713,427.33	172,317.91	885,745.24	-	625.14	-	625.14	19
20	Apr	2025				932,968.78	-	483,034.71	199,621.17	682,655.88	-	588,910.93	198,982.11	787,893.04	20
21	May	2025				1,302,459.87	-	352,914.99	144,524.45	497,439.44	-	372,767.71	153,822.90	526,590.61	21
22	June	2025				1,230,208.36	-	178,615.63	104,518.32	283,133.95	-	182,459.76	109,428.53	291,888.29	22
23	July	2025				1,700,679.81	-	161,930.46	111,654.09	273,584.55	-	168,237.86	116,231.26	284,469.12	23
24	August	2025				1,756,069.71	-	147,584.74	118,392.82	265,977.56	-	155,370.76	123,925.22	279,295.98	24
25	Septembe	2025				1,370,556.44	-	164,163.57	130,715.83	294,879.40	-	179,829.77	136,824.15	316,653.92	25
26	October	2025				1,175,932.96	-	352,407.99	157,577.75	509,985.74	-	353,468.73	164,941.14	518,409.87	26
27	Novembe	2025				699,871.45	-	717,415.64	192,426.77	909,842.41	-	746,366.87	201,418.50	947,785.37	27
28	Decembe	2025				641,507.03	-	1,236,563.45	273,638.35	1,510,201.80	-	1,296,719.51	286,425.23	1,583,144.74	28
29	Adjustments					2,361,945.86	-	-	-	-	-			-	29
30	Total					$ 15,506,544.21	$ -	$ 7,187,876.50	$ 2,215,534.49	$ 9,403,410.99	$ -	$ 4,046,640.72	$ 1,502,903.04	$ 5,549,543.76	30
						-	-	-	-	-	-	-	-	-	0
31	On-Bill Financing														31
32	Jan	2025	-	-	-	-	14,870.75	(310.00)	-	14,560.75	652.79	(255.00)	-	397.79	32
33	Feb	2025	7,533.82	153.75	-	7,687.57	11,028.75	-		11,028.75	(822.16)	-	-	(822.16)	33
34	Mar	2025	6,814.72	139.08	-	6,953.80	6,922.05	-		6,922.05	821.14	-	-	821.14	34
35	Apr	2025	6,415.84	130.94	-	6,546.78	8,384.14	-		8,384.14	3,873.79	-	-	3,873.79	35
36	May	2025	6,350.95	129.61	-	6,480.56	(3,051.33)	-		(3,051.33)	2,170.41	-	-	2,170.41	36
37	June	2025	6,504.39	132.74	-	6,637.13	429.59	-		429.59	667.27	-	-	667.27	37
38	July	2025	6,604.56	134.78	-	6,739.34	263.60	-		263.60	138.57	-	-	138.57	38
39	August	2025	6,435.83	131.34	-	6,567.17	(121.33)	-		(121.33)	136.95	-	-	136.95	39
40	Septembe	2025	6,590.45	134.52	-	6,724.97	5,914.30	-		5,914.30	126.17	(0.54)	-	125.63	40
41	October	2025	6,367.87	129.96	-	6,497.83	(5,590.95)	-		(5,590.95)	857.10	-	-	857.10	41
42	Novembe	2025	6,414.82	130.92	-	6,545.74	5,984.43	-		5,984.43	7,368.46	-	-	7,368.46	42
43	Decembe	2025	6,354.33	129.68	-	6,484.01	16,914.21	-		16,914.21	13,147.40	-	-	13,147.40	43
44	Adjustment		6,617.59	135.05	-	6,752.64	-	-	-	-	-	-	-	-	44
45	Total		$ 79,005.17	$ 1,612.37	$ -	$ 80,617.54	$ 61,948.21	$ (310.00)	$ -	$ 61,638.21	$ 29,137.89	$ (255.54)	$ -	$ 28,882.35	45
						-				-	-	-		-	

Notes:

1 Represents factors EEXP for energy efficiency, and OEXP for On-Bill Financing, as defined in Rider EOA.

2 Represents factors EREV for energy efficiency, and OREV for On-Bill Financing, as defined in Rider EOA.

3 Represents factors ERA1 for energy efficiency, and ORA1 for On-Bill Financing, based on the prior year, as defined in Rider EOA.

The Peoples Gas Light and Coke Company

Energy Efficiency and On-Bill Financing Adjustment

Forecasted Total Therm Deliveries for Reconciliation Period[1]
April 2026 through December 2026

			Forecasted Total Therm Deliveries							
Line No.	Month	Year	Service Classification No. 1	Service Classification No. 2	Exempt and Self-Directing Customers	Adjusted Service Classification No. 2	Service Classification Nos. 4, 5, 7 & 8	Exempt and Self-Directing Customers	Adjusted Service Classification Nos. 4, 5, 7 & 8	*Line No.*
	[A]	[B]	[C]	[D]	[E]	[F]	[G]	[H]	[I]	
						[D] - [E]			[G] - [H]	
1	Apr	2026	59,218,780	49,812,249			21,142,720			*1*
2	May	2026	32,898,679	33,091,633			16,603,073			*2*
3	June	2026	16,539,764	16,830,114			13,205,670			*3*
4	July	2026	10,601,259	14,476,441			12,231,239			*4*
5	Aug	2026	11,403,535	13,980,288			11,963,836			*5*
6	Sept	2026	11,913,851	16,951,748			13,023,069			*6*
7	Oct	2026	35,657,592	40,504,104			16,014,347			*7*
8	Nov	2026	75,163,757	75,092,292			20,218,508			*8*
9	Dec	2026	117,418,305	102,165,298			22,532,856			*9*
10	Total		370,815,523	362,904,167	165,011	362,739,156	146,935,318	13,431,221	133,504,097	*10*

[1] Therms are adjusted to exclude exempt and self-directing customers not subject to Rider EOA.

WEC Energy Group

Rider Energy Efficiency and On-Bill Financing Adjustment Annual Audit

Prepared by Audit Services
July 9, 2026

Rider Energy Efficiency and On-Bill Financing Adjustment Annual Audit
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Rider Energy Efficiency and On-Bill Financing Adjustment Annual Audit

INTRODUCTION

A review of the Rider Energy Efficiency and On-Bill Financing Adjustment (Rider EOA) was performed by Audit Services. Rider EOA applies to both The Peoples Gas Light and Coke Company (PGL) and North Shore Gas Company (NSG), collectively referred to as the "Utilities". The objective of this review was to verify the Utilities' compliance with Rider EOA as required in the audit steps defined in the tariff. The Utilities are required to submit an internal audit report to the Illinois Commerce Commission (ICC) annually by August 1.

BACKGROUND

The Rider EOA adjustments recover expenses related to the Utilities' energy efficiency and on-bill financing programs for a specific Calendar Year. The Rider EOA adjustments are comprised of two components, the Effective Component and the Reconciliation Adjustment. The Effective Component, billed from January to December, is a per-therm adjustment based on the budgeted expenses for the energy efficiency and on-bill financing programs for the current Calendar Year for each of the Utilities. The Reconciliation Adjustment, billed from April to December, is a per-therm adjustment used to reconcile the Effective Component revenues received to the actual energy efficiency and on-bill financing expenses for the prior Calendar Year.

Both Utilities determine separate Rider EOA adjustments for residential programs for Service Classifications (SC) No. 1 (Small Residential Service) and No. 2 (General Service). The Utilities also determine combined adjustments for commercial & industrial programs for SC No. 2, SC No. 4 (Large Volume Demand Service), SC No. 5 (Contract Service Electric Generation), SC No. 7 (Contract Service to Prevent Bypass), and SC No. 8 (PGL only – Compressed Natural Gas Service).

SCOPE

The scope of the audit included the Reconciliation Adjustment calculations and customer bills for Calendar Year 2025. The scope also included the Utilities' Effective Component calculations for Calendar Year 2026.

To verify the accuracy of these calculations, we performed the steps required per Rider EOA. We verified:

- Expenses recovered through Rider EOA were not recovered through other approved tariffs,
- Rider EOA adjustments were properly billed to customers in the proper period,
- Rider EOA revenues were properly stated,
- Actual expenses were being identified and recorded properly to be reflected in the calculation of the Reconciliation Adjustment, and
- The percent increase in connection with gas service bills for the four-year reporting period for energy efficiency was within the statutory cap.

CONCLUSION

We determined the Effective Component calculations were accurate, except for a minor formula error that did not impact the calculated rates. During a review of the Reconciliation Adjustment, we identified immaterial invoicing errors, which did not impact the calculated rates. Other than the immaterial errors, we determined the rates were accurate and expenses were properly identified and recorded.

We determined that Rider EOA expenses were not recovered through other approved tariffs, Rider EOA adjustments were properly billed to customers in the correct period, and Rider EOA revenues were properly stated in the correct general ledger accounts. In addition, the Utilities were in compliance with the 2% statutory cap.

Appendix A is attached to detail the specific approach used to execute each of the testing steps. We thank all those involved in this audit for their assistance and support.

APPENDIX A

This Appendix provides additional details and results of the steps performed during the audit.

1. **Accuracy of Effective Component Calculations**

   Annually, the Utilities are required to file an Effective Component based on the budgeted expenses for the energy efficiency and on-bill financing programs for that Calendar Year. To verify the accuracy of the Calendar Year 2026 Effective Component calculations filed on December 20, 2025, we compared the calculation spreadsheets to supporting documentation. We compared the budgeted expenses to those submitted to the ICC, and the forecasted therms to the Utilities' forecasting model and exempt customer extract. We also compared the formula used to calculate the Effective Component to the formula outlined in Rider EOA. The NSG Effective Component calculation spreadsheet contained a minor formula error, which did not impact the rates filed with the ICC.

   Other than the error noted above, we determined the Calendar Year 2026 Effective Component calculations were accurate and in compliance with Rider EOA.

2. **Accuracy of Reconciliation Adjustment Calculations**

   Annually, the Utilities are required to file a Reconciliation Adjustment, which reconciles the Effective Component revenues received to the actual energy efficiency and on-bill financing expenses for the Calendar Year. To verify the accuracy of the Calendar Year 2025 Reconciliation Adjustments filed on March 31, 2026, we compared the calculation spreadsheets to supporting documentation. We compared the Effective Component and Reconciliation Adjustment revenues to Business Warehouse revenue reports, the expenses to various invoice queries, and the forecasted therms to the Utilities' forecasting model and exempt customer extract. We also compared the formula used to calculate the Reconciliation Adjustments to the formula outlined in Rider EOA.

   Other than the immaterial invoice errors noted in the Accuracy of Invoices section below, we determined the Calendar Year 2025 Reconciliation Adjustment calculations were accurate and in compliance with Rider EOA.

3. **Accuracy of Invoices**

   Rider EOA expenses are recorded to specified Rider EOA general ledger accounts and WBS Cost Elements are used to classify an expense as either residential-SC No. 1, residential-SC No. 2, or commercial & industrial. To verify that invoices were supported and accurately recorded, we performed testing for two Rider EOA vendors. Franklin Energy Services, LLC (Franklin Energy) and Erthe Energy Solutions (Erthe) provide consulting services to facilitate the energy efficiency program on behalf of the Utilities. Calendar Year 2025 expenses were approximately $29.0 million for Franklin Energy and $3.7 million for Erthe out of $36.4 million of total expenses related to Rider EOA.

   We agreed the Calendar Year 2025 invoices to supporting documentation, including listings of incentive and rebate payments made, subcontractor invoices, and direct installation and labor summaries. We verified the correct allocation rates were used to classify expenses between PGL and NSG and between service classes, and compared billing rates to the contract, where applicable. We determined the invoices were accurate and properly recorded to be included in the Reconciliation Adjustment calculations, except for two immaterial invoicing errors that did not impact the calculated and filed Reconciliation Adjustment rates.

4. Accuracy of Rider EOA Adjustments and Expenses Not Recovered Through Other Approved Tariffs

The Utilities' customer information system (CIS) uses unique revenue codes to classify revenue which are then used to identify revenues for the Rider EOA calculations. We verified the total Rider EOA revenues included in the calculation agreed to the total Rider EOA revenues per the CIS for the months of January to December 2025. Based on our review, we determined the Rider EOA revenues were not recovered through other approved tariffs.

5. Accuracy of Rider EOA Adjustments on Customer Bills

To verify the accuracy of Rider EOA adjustments on customer bills, we recalculated the Rider EOA adjustment on 38 customer bills, including one bill for each customer offering. We also verified that the rates were accurately entered into the CIS for the effective dates of January 1, 2026 (initial Effective Component) and April 1, 2026 (Reconciliation Adjustment). Based on our analysis, we concluded the CIS accurately calculated the Rider EOA adjustments on the customer bills.

6. Accuracy of Rider EOA Revenues Properly Recorded in Appropriate General Ledger Accounts

CIS revenue information was used to record Rider-related entries in SAP, the Utilities' general ledger system. To verify Rider EOA revenues were recorded in appropriate accounts in SAP, we compared the total Rider EOA revenues per the CIS to the balances in SAP for the period of January to December 2025. We determined revenues were recorded in the appropriate SAP accounts.

7. Accuracy of Four-Year Statutory Cap Calculation

Per Rider EOA, the cost of energy efficiency programs implemented in any multi-year reporting period shall be limited to an amount that limits the estimated average increase in connection with gas service to no more than 2% in the applicable four-year reporting period. Costs related to the on-bill financing program are excluded from the determination of the limitation.

Taking into account Calendar Year 2022-2025 actual expenses, Regulatory Affairs determined that total expenses over the four-year reporting period were within the 2% cap based on the Fourth Multiyear Program Plan budget. As such, both Utilities met the 2% statutory cap. We also determined the calculation of the statutory cap was accurate.

Peoples Gas Section 8-103B/8-104 (EEPS) Costs - Program Reconciliation
Calendar 2025

Section 8-103B/8-104 (EEPS) Cost Category	NS-PGL Ex. 2.1: 2025 Actual Costs January 1 to December 31			NS-PGL Ex. 1.1P: 2025 Actual Costs -Adjusted to recover in Rider EOA RA rates filed March 31, 2026		2025 (AUDITED) Actual Costs YTD
Source:	ICC Q4 Report filed February 17, 2026 under ICC Docket 21-0159					
	[A]	[B]	[C]	[D] = Sum of [A] to [C]	[E]	[F] = [D] +[E]
Program Expenditures by Sector						
C&I Programs (private sector)	$ 5,164,717			$ 5,164,717	$ -	$ 5,164,717
Public Sector Programs	$ 2,975,440			$ 2,975,440		$ 2,975,440
Residential Programs	$ 3,229,715			$ 3,229,715	$ -	$ 3,229,715
Income Qualified Programs	$ 13,197,558			$ 13,197,558		$ 13,197,558
Market Development Initiative	$ 940,161			$ 940,161		$ 940,161
Third Party Programs (Beginning in 2019)				$ -		$ -
Total Peoples Gas Program Costs	**$ 25,507,590**	**$ -**	**$ -**	**$ 25,507,590**	**$ -**	**$ 25,507,590**
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)						
Demonstration of BreakthroughEquipment and Devices Costs	$ 128,619			$ 128,619		$ 128,619
Market Transformation Programs	$ 1,485,901			$ 1,485,901		$ 1,485,901
Evaluation Costs	$ 697,422			$ 697,422		$ 697,422
Marketing Costs(including education and outreach)	$ 1,188,677	$ -		$ 1,188,677		$ 1,188,677
Portfolio Administrative Costs	$ 2,579,772			$ 2,579,772	$ -	$ 2,579,772
Total Peoples Gas Portfolio-Level Costs	**$ 6,080,391**	**$ -**	**$ -**	**$ 6,080,391**	**$ -**	**$ 6,080,391**
Total Peoples Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	**$ 31,587,982**	**$ -**	**$ -**	**$ 31,587,982**	**$ -**	**$ 31,587,982**

Rider EOA reconcilation program expenses filed March 31, 2026 - Exhibit 1.1P

		Energy Efficiency Expenses	On-Bill Financing Expenses	Total
	page 2, col B, lines 4 and 18: SC. No. 1 Residential	$ 9,269,013	$ 79,005	$ 9,348,018
	page 3, col B, lines 4 and 18: SC. No. 2 Residential	$ 6,731,807	$ 1,612	$ 6,733,419
	page 4, col D, lines 4 : SC. No. 2, 4, 5, 7 & 8 Commercial and Industrial	$ 15,506,544		$ 15,506,544
1	**Calendar 2025 Energy Efficiency Program Costs-Exhibit 1.1P**	**$ 31,507,364**	**$ 80,618**	**$ 31,587,982**
2	**NS-PGL Ex. 2.1: 2025 Actual Costs January 1 to December 31**			**$ 31,587,982**
3				**$ -**
4				**$ -**
5				
6				
7				
8	**Sum of Line 2 to Line 6- Calendar 2025 Energy Efficiency Program Costs -Recover in EOA RA rates-Exhibit 1.1P**			**$ 31,587,982**
9		-		**$ -**
10	**Line 7 + Line 8 - Calendar 2025 Energy Efficiency Program Costs incurred**			**$ 31,587,982**

The Peoples Gas Light and Coke Company

Peoples Gas Energy Efficiency and On-Bill Financing Programs

Program Year Revenues and Expenses
Fourteenth Program Year (January 1, 2025 - December 31, 2025)

			Expenses[1]				Revenues[2]				RA1 Collections/(Refunds)[3]				
Line No.	Month	Year	Service Classification No. 1	Service Classification No. 2	Service Classification Nos. 4, 5, 7, 8	Total	Service Classification No. 1	Service Classification No. 2	Service Classification Nos. 4, 5, 7, 8	Total	Service Classification No. 1	Service Classification No. 2	Service Classification Nos. 4, 5, 7, 8	Total	Line No.
	[A]	[B]	[C]	[D]	[E]	[F] [C]+[D]+[E]	[G]	[H]	[I]	[J] [G]+[H]+[I]	[K]	[L]	[M]	[N] [K]+[L]+[M]	
1	Residential Energy Efficiency														1
2	Jan	2025	$ 109,430.58	$ 160,466.87	$ -	$ 269,897.45	$ 3,159,586.31	$ 767,922.56	$ -	$ 3,927,508.87	$ (52,575.67)	$ 1,845.31	$ -	$ (50,730.36)	2
3	Feb	2025	$ 974,554.88	$ 524,695.58	-	1,499,250.46	2,454,255.95	670,684.90	-	3,124,940.85	52.44	(572.68)	-	(520.24)	3
4	Mar	2025	$ 1,284,964.25	$ 480,725.08	-	1,765,689.34	1,695,746.25	387,597.42	-	2,083,343.67	252.86	486.44	-	739.30	4
5	Apr	2025	$ 1,200,669.68	$ 520,765.18	-	1,721,434.86	1,206,744.40	261,829.40	-	1,468,573.80	(444,297.26)	399,573.41	-	(44,723.85)	5
6	May	2025	$ 722,971.52	$ 524,227.01	-	1,247,198.54	647,247.24	191,295.60	-	838,542.84	(253,832.24)	253,014.47	-	(817.77)	6
7	June	2025	$ 1,049,682.92	$ 567,146.93	-	1,616,829.85	302,058.97	96,820.51	-	398,879.48	(119,849.17)	123,628.40	-	3,779.23	7
8	July	2025	$ 820,220.44	$ 968,364.55	-	1,788,584.99	243,183.99	87,727.32	-	330,911.31	(96,536.31)	113,601.28	-	17,064.97	8
9	August	2025	$ 401,180.74	$ 878,498.16	-	1,279,678.90	250,831.49	79,998.14	-	330,829.63	(98,725.22)	105,448.66	-	6,723.44	9
10	September	2025	$ 547,139.00	$ 522,718.68	-	1,069,857.67	231,641.85	89,005.03	-	320,646.88	(97,411.79)	121,952.43	-	24,540.64	10
11	October	2025	$ 664,667.76	$ 480,327.40	-	1,144,995.16	529,766.36	191,023.24	-	720,789.60	(203,614.95)	239,844.04	-	36,229.09	11
12	November	2025	$ 384,796.59	$ 300,096.44	-	684,893.02	1,551,658.17	388,892.13	-	1,940,550.30	(617,393.36)	506,492.03	-	(110,901.33)	12
13	December	2025	$ 304,952.92	$ 259,239.48	-	564,192.41	2,839,807.92	670,467.47	-	3,510,275.39	(1,134,538.64)	879,924.63	-	(254,614.01)	13
14	Adjustments		$ 803,781.59	$ 544,535.59	-	1,348,317.18	-	-	-	-	-	-	-	-	14
15	Total		$ 9,269,012.87	$ 6,731,806.97	$ -	$ 16,000,819.84	$ 15,112,528.90	$ 3,883,263.72	$ -	$ 18,995,792.62	$ (3,118,469.31)	$ 2,745,238.42	$ -	$ (373,230.89)	15
16	Ex. 1.2 Adjustments from Audit Findings		$ -	$ -		-				-				-	16
17	Total - adjusted for Audit findings		$ 9,269,012.87	$ 6,731,806.97	$ -	$ 16,000,819.84	$ 15,112,528.90	$ 3,883,263.72	$ -	$ 18,995,792.62	$ (3,118,469.31)	$ 2,745,238.42	$ -	$ (373,230.89)	17
							-	-	-	-	-	-	-	-	
18	Commercial and Industrial Energy Efficiency														18
19	Jan	2025				197,850.26	-	1,430,963.58	345,396.35	1,776,359.93	-	2,845.62	11,740.10	14,585.72	19
20	Feb	2025				1,141,602.66	-	1,248,854.41	264,750.68	1,513,605.09	-	(961.94)	(836.10)	(1,798.04)	20
21	Mar	2025				994,891.02	-	713,427.33	172,317.91	885,745.24	-	625.14	-	625.14	21
22	Apr	2025				932,968.78	-	483,034.71	199,621.17	682,655.88	-	588,910.93	198,982.11	787,893.04	22
23	May	2025				1,302,459.87	-	352,914.99	144,524.45	497,439.44	-	372,767.71	153,822.90	526,590.61	23
24	June	2025				1,230,208.36	-	178,615.63	104,518.32	283,133.95	-	182,459.76	109,428.53	291,888.29	24
25	July	2025				1,700,679.81	-	161,930.46	111,654.09	273,584.55	-	168,237.86	116,231.26	284,469.12	25
26	August	2025				1,756,069.71	-	147,584.74	118,392.82	265,977.56	-	155,370.76	123,925.22	279,295.98	26
27	September	2025				1,370,556.44	-	164,163.57	130,715.83	294,879.40	-	179,829.77	136,824.15	316,653.92	27
28	October	2025				1,175,932.96	-	352,407.99	157,577.75	509,985.74	-	353,468.73	164,941.14	518,409.87	28
29	November	2025				699,871.45	-	717,415.64	192,426.77	909,842.41	-	746,366.87	201,418.50	947,785.37	29
30	December	2025				641,507.03	-	1,236,563.45	273,638.35	1,510,201.80	-	1,296,719.51	286,425.23	1,583,144.74	30
31	Adjustments					2,361,945.86	-	-	-	-	-				31
32	Total					$ 15,506,544.21	$ -	$ 7,187,876.50	$ 2,215,534.49	$ 9,403,410.99	$ -	$ 4,046,640.72	$ 1,502,903.04	$ 5,549,543.76	32
33	Ex. 1.2 Adjustments from Audit Findings					-								-	33
34	Total - adjusted for Audit findings		$ -	$ -	$ -	$ 15,506,544.21	$ -	$ 7,187,876.50	$ 2,215,534.49	$ 9,403,410.99	$ -	$ 4,046,640.72	$ 1,502,903.04	$ 5,549,543.76	34
35	On-Bill Financing														35
36	Jan	2025	-	-	-	-	14,870.75	(310.00)	-	14,560.75	652.79	(255.00)	-	397.79	36
37	Feb	2025	7,533.82	153.75	-	7,687.57	11,028.75	-		11,028.75	(822.16)	-	-	(822.16)	37
38	Mar	2025	6,814.72	139.08	-	6,953.80	6,922.05	-		6,922.05	821.14	-	-	821.14	38
39	Apr	2025	6,415.84	130.94	-	6,546.78	8,384.14	-		8,384.14	3,873.79	-	-	3,873.79	39
40	May	2025	6,350.95	129.61	-	6,480.56	(3,051.33)	-		(3,051.33)	2,170.41	-	-	2,170.41	40
41	June	2025	6,504.39	132.74	-	6,637.13	429.59	-		429.59	667.27	-	-	667.27	41
42	July	2025	6,604.56	134.78	-	6,739.34	263.60	-		263.60	138.57	-	-	138.57	42
43	August	2025	6,435.83	131.34	-	6,567.17	(121.33)	-		(121.33)	136.95	-	-	136.95	43
44	September	2025	6,590.45	134.52	-	6,724.97	5,914.30	-		5,914.30	126.17	(0.54)	-	125.63	44
45	October	2025	6,367.87	129.96	-	6,497.83	(5,590.95)	-		(5,590.95)	857.10	-	-	857.10	45
46	November	2025	6,414.82	130.92	-	6,545.74	5,984.43	-		5,984.43	7,368.46	-	-	7,368.46	46
47	December	2025	6,354.33	129.68	-	6,484.01	16,914.21	-		16,914.21	13,147.40	-	-	13,147.40	47
48	Adjustment		6,617.59	135.05	-	6,752.64	-	-	-	-	-	-	-	-	48
49	Total		$ 79,005.17	$ 1,612.37	$ -	$ 80,617.54	$ 61,948.21	$ (310.00)	$ -	$ 61,638.21	$ 29,137.89	$ (255.54)	$ -	$ 28,882.35	49
50	Ex. 1.2 Adjustments from Audit Findings					-				-				-	50
49	Total - adjusted for Audit findings		$ 79,005.17	$ 1,612.37	$ -	$ 80,617.54	$ 61,948.21	$ (310.00)	$ -	$ 61,638.21	$ 29,137.89	$ (255.54)	$ -	$ 28,882.35	49
	Total		**9,348,018.04**	**6,733,419.34**	**-**	**31,587,981.59**									
	Ex. 1.2 Adjustments from Audit Findings		-	-	-	-									
	Total - adjusted for Audit findings		**9,348,018.04**	**6,733,419.34**	**-**	**31,587,981.59**									
			(0.00)	**0.00**	**-**	**(0.00)**									

Notes:
1 Represents factors EEXP for energy efficiency, and OEXP for On-Bill Financing, as defined in Rider EOA.
2 Represents factors EREV for energy efficiency, and OREV for On-Bill Financing, as defined in Rider EOA.
3 Represents factors ERA1 for energy efficiency, and ORA1 for On-Bill Financing, based on the prior year, as defined in Rider EOA.

STATE OF ILLINOIS

ILLINOIS COMMERCE COMMISSION

Illinois Commerce Commission	)	
	)	
vs.	)	
	)	
North Shore Gas Company	)	Docket No. 25-0966
The Peoples Gas Light and Coke Company	)	
	)	
Reconciliation of revenues collected	)	
under Riders EOA with the actual costs	)	
associated with energy efficiency and	)	
on-bill financing programs	)	

Direct Testimony of Christina Frank

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DIRECT TESTIMONY
OF
CHRISTINA FRANK

I. INTRODUCTION

Q. Please state your name and business address.

A. My name is Christina Frank. My business address is 200 East Randolph, Chicago, Illinois, 60601.

Q. By whom are you employed?

A. WEC Business Services LLC ("WBS").

Q. What position do you hold?

A. I am the Director Energy Efficiency and C&I Customer Strategy

Q. What are your responsibilities in that position?

A. I am responsible for the administration of the North Shore Gas Company's ("North Shore") and The Peoples Gas Light and Coke Company's ("Peoples Gas") natural gas energy efficiency programs. I will sometimes refer to North Shore Gas and Peoples Gas collectively as "the Utilities" or alternatively NS/PGL. I manage our contractors and oversee energy savings results and budget expenditures, manage program strategy and design to ensure results, coordinate activities with neighboring utilities including joint programs with Commonwealth Edison Company ("ComEd"), and interface with third-party evaluators and the Illinois Stakeholder Advisory Group ("SAG").

Q. Please summarize your educational background and experience.

A. I have a Bachelors degree in Political Science from the University of Missouri. I have been working in the energy efficiency industry since 2007 and during that time I have led energy efficiency program administration and implementation of programs serving C&I, multi-family, residential and small business customers. Prior to my current role with WBS, I held positions with a non-profit organization and a consulting firm where I oversaw energy efficiency program delivery and provided strategic direction and leadership to cross-functional teams.

Q. On whose behalf are you providing testimony?

A. I am testifying on behalf of North Shore Gas and Peoples Gas.

Q. What is the purpose of your testimony?

A. The purpose of my testimony is to: provide information about the Fourth Energy Efficiency Plan (the “Plan”) that the Utilities implemented pursuant to the Illinois Commerce Commission’s (“Commission”) Order in Docket No. 21-0159, describe the programs that the Utilities implemented in 2025, describe the costs that the Utilities incurred during the 2025 reconciliation period, demonstrate that the incurred programs were, in general, consistent with the approved Plan, and the costs of those programs were properly incurred to ensure the Utilities work toward achieving the Plan net therm savings goals. I also address an overview of the on-bill financing (“OBF”) program that the Commission approved in Docket No. 10-0090. North Shore Gas and Peoples Gas witness Sam Addison addresses North Shore Gas’ and Peoples Gas’ Rider EOA reconciliation statements (NSG-PGL Ex. 1.0).

Q. Does your testimony have any attachments?

A. Yes. I am providing four attachments which breakout individual program results as follows:

NSG-PGL Exhibit 2.1 - North Shore Gas 2025 Quarter 4 ICC Report

NSG-PGL Exhibit 2.2 - Peoples Gas 2025 Quarter 4 ICC Report

NSG-PGL Exhibit 2.3 - North Shore Gas / Peoples Gas Net to Gross Values

NSG-PGL Exhibit 2.3 provides the North Shore Gas and Peoples Gas net-to-gross ("NTG") ratios from September 18, 2024 as updated through evaluation, measurement, and verification ("EM&V") findings from final third party evaluation reports and the SAG consensus process.

Q. What is the reconciliation period for 2025?

A. This reconciliation applies to the 2025 Program Year, January 1, 2025 through December 31, 2025, for the program approved by the Commission in its final order in Docket No. 21-0159.

Q. Please summarize the conclusions from your testimony.

A. While I am not an attorney, I believe the costs incurred during 2025 for the development and implementation of the Utilities' energy efficiency program were prudent and reasonable. The 2025 spending and corresponding program activity continued activities in the Income Qualified and Public Sector programs and achievement of therm savings towards the Plan savings goals within the budgets available. Note, while the Utilities' compliance with the final order in Docket No. 21-0159 are based on achieving the savings goals for the Fourth Plan Period, for planning and execution purposes, internal operational budgets and internal goals for therm savings are calculated annually. In 2025,

- Per the Fourth Quarter Report for 2025 (NSG Ex. 2.1), North Shore Gas achieved 120% of the internal 2025 savings goal utilizing 100% of the 2025 annual budget.
- Per the Fourth Quarter Report for 2025 (PGL Ex. 2.2), Peoples Gas achieved 119% of the internal 2025 savings goal utilizing 99% of the 2025 annual budget.

In 2025 the On Bill Financing (OBF) program provided 3 new loans and continued 36 existing loans to Peoples Gas customers. In 2025 the OBF program provided 1 new loan and continued 26 existing loans to North Shore Gas customers.

II. NORTH SHORE GAS COMPANY

A. ENERGY EFFICIENCY OVERVIEW

Q. Please provide an overview of the Plan as described in the compliance filing for North Shore Gas in Docket No. 21-0159.

A. The overriding objectives of the Plan are to achieve the savings goals as approved in the final order in Docket No. 21-0159 in a cost-effective manner while providing programs to residential, income eligible and business customers. North Shore Gas designed flexible, scalable, best practice programs that allowed for partnering with ComEd, the electric utility operating within the North Shore Gas service territory, streamlining administration, and delivery while maximizing customer participation. In the reconciliation period, the North Shore Gas portfolio included three programs: 1) Residential Programs, 2) Business Programs, and 3) Income Qualified Programs. Each program is addressed in detail later in my testimony. The Plan also specified the budgets for support of EM&V; Research and Development and Market Transformation; Market Development Initiative; and the On Bill Financing program.

Q. Can the Plan be modified during the course of a Plan period?

A. Yes. Once the Plan is approved, North Shore Gas is allowed to make appropriate changes in response to changing market conditions and other factors. Those changes are discussed in quarterly reports filed in Docket No. 21-0159 and, in certain cases, are brought to SAG for review.

Q. Were there changes to the TRM that had any impact on measures offered in 2025?

A. There were a total of 155 changes which included: 26 Errata changes, 119 measure revisions, 8 new additional measures, and two measure retirements. This is summarized on Table 1.2, of section 1.2, of Volume 1 of Version 13 of the IL-TRM (approved by the Commission in Docket No. 24-0750). Some of these changes impacted measure savings in the Peoples Gas and North Shore Gas business, multi-family and single family residential programs.

Q. Does North Shore Gas participate in SAG?

A. Yes, pursuant to the final order in Docket No. 21-0159, North Shore Gas and Peoples Gas participate in the SAG.

Q. You listed one Residential program North Shore Gas offered in 2025. Did North Shore Gas incur any costs for Residential programs that were not implemented in the reconciliation period?

A. No.

Q. You listed one Business program North Shore Gas offered in 2025. Did North Shore Gas incur any costs for C&I programs that were not implemented in the reconciliation period?

A. No.

Q. You listed one Income Qualified program North Shore Gas offered in 2025. Did North Shore Gas incur any costs for income eligible programs that were not implemented in the reconciliation period?

A. No.

Q. What costs did North Shore Gas incur during the 2025 reconciliation period for these programs?

A. A detailed breakdown of the costs, by category, is shown on NSG-PGL Exhibit 2.1 - North Shore Gas 2025 Quarter 4 ICC Report. Costs are categorized in the sections that follow and include the total North Shore Gas Energy Efficiency Portfolio ("EEP") costs. Costs are allocated into the following categories:

(1) Administrative costs include time and expense associated with portfolio oversight, management, and planning. These are costs required for overall portfolio management that are not specifically tied to one program. Administrative costs also include time and expense associated with SAG meetings and TRM activities. 2025 total administrative costs were $623,569 or 13% of North Shore Gas total Utility EEP costs (NSG-PGL Exhibit 2.1, page 2).

(2) Non-incentive program costs includes program management, program reporting, customer assistance, and quality control checks performed by energy

experts, call center operations, application processing and fulfillment, and building and maintaining trade ally partnerships. Non-incentive costs also include costs incurred for the Market Development Initiative , as defined in the North Shore Gas stipulated agreement for Plan Four. 2025 total non-incentive program costs were $1,710,300 or 36% of North Shore Gas total Utility EEP costs (NSG-PGL Exhibit 2.1, page 1).

(3) Marketing costs support those activities associated with program outreach and portfolio awareness. They include brochures and other collateral materials needed to support individual programs including application forms, development and placement of advertisements and campaigns, website creation and management, email newsletters, memberships, and subscriptions. 2025 total marketing costs were $165,016 or 3% of North Shore Gas total Utility EEP costs (NSG-PGL Exhibit 2.1, page 2).

(5) Incentive costs refer to rebates that are paid to customers or contractors to offset the costs of installed qualifying equipment. This line item is titled “Incentive Costs” in NSG-PGL Exhibit 2.1. Rebates are an income transfer cost from one party to another (i.e., program administrator to customer). 2025 total incentive costs comprised $1,982,434 or 42% of North Shore Gas total Utility EEP costs (NSG-PGL Exhibit 2.1, page 1).

(6) Evaluation costs (EM&V) are costs incurred for the impact and process evaluations by an independent third party provider, referred to herein as the third party evaluator. Performance of EM&V is a requirement under 220 ILCS 5/8-104(f) (8). This line item is titled “Evaluation Costs” in the Plan. 2025 total EM&V

costs were $100,092 or 2% of North Shore Gas total Utility EEP costs (NSG-PGL Exhibit 2.1, Page 2).

Q. What are the total costs for the 2025 reconciliation period?

A. The total North Shore Gas EEP costs for the reconciliation period are $4,768,759 .

Q. What are the total therm savings associated with the North Shore Gas program in 2025?

A. Total net therm savings for North Shore Gas' Utility EEP Programs in 2025 were 1,817,838 pending final third party evaluation results (NSG-PGL Exhibit 2.1 Page 1).

Q. Please describe the TRM that you used in your calculations and that you reference in your testimony.

A. TRM version 13 dated September 20, 2024 with an effective date of January 1, 2025, as approved by the Commission in its final order in Docket No. 24-0750, was used in 2025.

Q. What is the basis for the therm savings?

A. Savings are based on third party evaluator's 2025 deemed net-to-gross values and evaluated realization rates for each program offered. This is consistent with the prior requirements of the Commission's Orders in Docket Nos. 12-0528 and 13-0077, the most recent Commission final order on the TRM Policy Document in Docket No. 24-0750, the latest TRM applicable to 2025 and consensus in the SAG process. NSG-PGL Exhibit 2.3, which lists these values by program and describes their application for 2025.

Q. Will these savings numbers be adjusted in the future for 2025?

A. Yes. The savings values for 2025 will be retroactively adjusted to correspond with finalized 2025 evaluation reports in accordance with the Utilities' interpretation of the Commission's Order and input from SAG; specifically, the realization rates by program.

B. RESIDENTIAL PROGRAMS

Q. What are the Residential Programs?

A. The Residential Programs contain two offerings: Single Family and Multi-Family. Within the Single Family offering, residential customers are provided access to energy efficiency via two paths – Home Energy Rebates and Home Energy Assessments. Home Energy Rebates offers rebates on energy-efficient heating, ventilation, air conditioning and water heating equipment and qualifying weatherization projects. Home Energy Assessments offers energy-saving products installed in homes at no-cost to the customer. The Home Energy Assessment program is a joint program offering provided in partnership with ComEd. Homeowners can reduce their energy and water use with the installation of products available to owners of single-family homes, two-flats, and individually metered condos and townhomes. Renters are also eligible with permission from their landlords. Offerings within the Multi-Family path include Multi-Family Energy Savings, Prescriptive and Custom Rebates, and Partner Trade Ally programs. The Multi-Family Energy Savings program is a joint program offering provided in partnership with ComEd. The program offers free direct installation of energy-saving measures for multi-family buildings. Prescriptive rebates are standard incentive amounts for common types of energy efficiency measures. Custom incentives are awarded for the non-standard technologies or for projects that do not include a one-for-one replacement. The Partner Trade Ally offering is provided in partnership with select trade allies who have been vetted by the program.

Q. What are the total costs that North Shore Gas incurred in connection with these programs during the reconciliation period?

A. Total costs incurred for the Residential Programs in 2025 were $774,362 (NSG-PGL Exhibit 2.1, page 1).

Q. Were the costs reasonable?

A. Yes. The Residential Programs achieved 107% of the annual savings goal using 97% of the 2025 Residential Program budget

Q. What were the therm savings from the Residential Programs during the reconciliation period?

A. Preliminary therm savings from the Residential Programs were 339,847 net therms (NSG-PGL Exhibit 2.1, page 1).

C. BUSINESS PROGRAMS

Q. What is the Small and Midsize Business Program?

A. The Small and Midsize Business Program offers free energy assessments and free direct installation of energy saving measures to qualifying customers via program energy advisors. Additional recommended energy saving measures are installed by trade allies, who leverage program rebates to reduce project costs.

Customers with North Shore Gas rate Service Class 2 accounts, that use less than 400,000 therms per year, are eligible to participate in this program.

Q. What are the total costs that North Shore Gas incurred in connection with this program during the reconciliation period?

A. North Shore Gas incurred $281,149 for this program during the reconciliation period (NSG-PGL Exhibit 2.1, Page 1).

Q. Were the costs reasonable?

A. Yes. The Small and Midsize Business Program achieved 218% of its therm savings goal, utilizing 81% of the program budget (NSG-PGL Exhibit 2.1, Page 1).

Q. What were the therm savings from the Small Business Program during the reconciliation period?

A. Preliminary therm savings from the Small Business Program were 327,699 therms (NSG-PGL Exhibit 2.1, page 1).

Q. What is the C&I Program?

A. The Commercial & Industrial (C&I) Program offers several paths for C&I customers with North Shore Gas' rate Service Class 2 or larger accounts. These paths include Prescriptive and Custom Rebates, Gas Optimization Studies, Retro-commissioning, Engineering Studies, and Staffing Grants. Each path is described briefly below.

Prescriptive rebates are provided for common types of energy efficiency measures in C&I buildings, including demand control ventilation, steam trap testing and repairs, boiler tune-ups, and pipe insulation. Custom rebates are available to customers with energy saving projects outside the prescriptive rebates and with variables that can affect the savings of those projects. Custom rebates may include boiler and burner retrofits and replacements, heat exchangers, heat recovery (blow down and economizers), as well as pipe insulation. Gas Optimization Studies provide customers with an analysis of energy-using systems to help identify no- and low-cost improvements to achieve natural gas savings in C&I buildings. Retro-commissioning offers a full-building tune-up through a systematic evaluation of mechanical and electrical systems to help facilities perform optimally and is offered in partnership with ComEd. Engineering Studies provide an analysis of a single system within a facility's operations to support implementation of a natural gas saving project. Staffing Grants offer up to $50,000 per customer per year to fund a project manager to guide projects to completion for customers who have energy efficiency projects that cannot be completed due to lack of staff time or availability.

Q. What are the total costs that North Shore Gas incurred in connection with this program during the reconciliation period?

A. North Shore Gas incurred $909,406 for the C&I Program during the reconciliation period (NSG-PGL Exhibit 2.1, page 1).

Q. Were the costs reasonable?

A. Yes. The program reached 123% of its annual therm savings goal using 96% of its 2025 budget.

Q. What were the therm savings from the C&I Program during the reconciliation period?

A. Preliminary net natural gas savings from the C&I Program were 859,905 therms (NSG-PGL Exhibit 2.1, page 1).

Q. What is the Public Sector Program?

A. The Public Sector Program offers the same exact paths as the C&I program but targets Public Sector customers as defined by Future Energy Jobs Act (Public Act 99-0906) which includes local government, municipal corporations, school districts, and community college districts. See above C&I section for program descriptions for Public Sector customers.

Q. What are the total costs that North Shore Gas incurred in connection with this program during the reconciliation period?

A. North Shore Gas incurred $355,759 for the Public Sector Program during the reconciliation period (NSG-PGL Exhibit 2.1, page 1).

Q. Were the costs reasonable?

A. Yes. The program reached 98% of its 2025 therm savings goal using 96% of its 2025 budget.

Q. What were the therm savings from the Public Sector Program during the reconciliation period?

A. Preliminary net natural gas savings from the Public Sector Program were 147,245 therms (NSG-PGL Exhibit 2.1, page 1).

D. INCOME QUALIFIED PROGRAMS

Q. What are the Income Qualified Programs?

A. Income Eligible Programs target the underserved income eligible market, providing services designed to make it easy for single-family and multi-family income eligible customers to take advantage of cost-effective energy saving retrofits. Within the Income Eligible Programs, there are paths for single-family and multi-family customers. Within Single Family, North Shore Gas offers Home Energy Assessment, Home Energy Savings Retrofits, and the Illinois Home Weatherization Assistance Program (IHWAP). IHWAP Weatherization services are provided to low-income residents through local community action agencies or not for profit agencies. IHWAP leverages state and federal funds to supplement incentives from the utility programs. Home Energy Assessment offers energy-saving products installed in homes at no-cost to the customer. The Home Energy Assessment program is a joint program offering provided in partnership with ComEd. Homeowners can reduce their energy and water use with the installation of products available to owners of single-family homes, two-flats, and individually metered condos and townhomes. Renters are also eligible with permission from their landlords. Home Energy Retrofits offers direct install products and no-cost weatherization services for Income-Eligible Single-Family home customers. It is delivered jointly with ComEd through approved agencies or partners. Within Multi-Family programs, North Shore Gas offers Income Eligible Multi-family Savings Program, Public Housing Energy Savings, Multi-family Income Eligible Partner Trade Ally, and Income Eligible Kits programs. The Income Eligible Multi-family Savings program provides building owners with free technical assistance to identify energy efficiency opportunities and install measures. Expenses are fully covered by the program, from the direct installation of energy efficiency products into tenants' units (light bulbs, aerators, showerheads, etc.), to common area measures, and more extensive measures requiring building owner co-pay. This program is a joint offering in partnership with ComEd. The Public Housing Energy Savings program offers prescriptive and custom rebates for gas measures in housing owned by Public Housing Authorities. This program is a joint program offering provided in partnership with ComEd. The Multi-family Income Eligible Partner Trade Ally program is a program delivered by vetted Partner Trade Allies. These Trade Allies are given higher rebate amounts to serve geographically income-eligible customers with retrofit measures. Income Eligible Kits provides income-qualified customers with a kit of energy efficiency measures to self-install. The Income Eligible Kits are distributed by ground mail to qualified customers vetted by the Low-Income Home Energy Assistance Program (LIHEAP) and is provided in partnership with ComEd.

Q. What are the total costs that North Shore Gas incurred in connection with these programs during the reconciliation period?

A. North Shore Gas incurred $1,181,642 in costs for the Income Qualified Programs during the reconciliation period (NSG-PGL Exhibit 2.1, page 1).

Q. What were the therm savings from the Income Qualified Programs during the reconciliation period?

A. Preliminary net natural gas savings from the Income Qualified Programs were 143,142 therms (NSG-PGL Exhibit 2.1, page 1).

III. THE PEOPLES GAS LIGHT AND COKE COMPANY

A. ENERGY EFFICIENCY OVERVIEW

Q. Please provide an overview of the Plan as described in the compliance filing of Peoples Gas filed in Docket No. 21-0159.

A. The overriding objectives of this Plan are to achieve the savings goals as approved in the final order in Docket No. 21-0159 in a cost-effective manner while providing programs to residential, income eligible and business customers. Peoples Gas designed flexible, scalable, best practice programs that allowed for partnering with ComEd, the electric utility operating within the Peoples Gas service territory, streamlining administration and delivery while maximizing customer participation. In the reconciliation period, the Peoples Gas portfolio included three programs: 1) Residential Programs, 2) Business Programs, and 3) Income Qualified Programs. Each program is addressed in detail later in my testimony. The Plan also specified the budgets for support of the EM&V; Research and Development and Market Transformation; Market Development Initiative; and the OBF program.

Q. Can the Plan be modified during the course of a Plan period?

A. Yes. Once the Plan is approved, Peoples Gas is allowed to make appropriate changes in response to changing market conditions and other factors. Those changes are discussed in quarterly reports filed in Docket No. 21-0159 and, in certain cases, are brought to SAG for review.

Q. Did changes to the TRM have any impact on measures offered in 2025?

A. There were a total of 155 changes which included: 26 Errata changes, 119 measure revisions, 8 new additional measures, and two measure retirements.

This is summarized on Table 1.2, of section 1.2, of Volume 1 of the Version 13 IL-TRM (approved by the Commission in Docket No. 24-0750). Some of these changes impacted measure savings in the Peoples Gas and North Shore Gas business, multi-family and single family residential programs.

Q. Does Peoples Gas participate in SAG?

A. Yes, pursuant to the final order in Docket No. 21-0159, North Shore Gas and Peoples Gas participate in the SAG.

Q. You listed one Residential program Peoples Gas offered in 2025. Did Peoples Gas incur any costs for Residential programs that were not implemented in the reconciliation period?

A. No.

Q. You listed one Business program Peoples Gas offered in 2025. Did Peoples Gas incur any costs for Business programs that were not implemented in the reconciliation period?

A. No.

Q. You listed one Income Qualified program Peoples Gas offered in 2025. Did Peoples Gas incur any costs for Income Qualified programs that were not implemented in the reconciliation period?

A. No.

Q. What costs did Peoples Gas incur during the 2025 reconciliation period for these programs?

A. A detailed breakdown of the costs, by category, is shown on NSG-PGL Exhibit 2.2 - Peoples Gas 2025 Quarter 4 ICC Report. Costs are categorized in the sections that follow and include the total Peoples Gas EEP costs. The costs are allocated into the following categories:

(1) Administrative costs include time and expense associated with portfolio oversight, management, and planning. These are costs required for overall portfolio management that are not specifically tied to one program. Administrative costs also include time and expense associated with SAG meetings and TRM activities. 2025 total administrative costs were $2,579,772, or 8% of Peoples Gas total Utility EEP costs (NSG-PGL Exhibit 2.2, page 2).

(2) Non-incentive costs include program management, program reporting, customer assistance and quality control checks performed by energy experts, call center operations, application processing and fulfillment, and building and maintaining trade ally partnerships. Non-incentive costs also include costs incurred for the Market Development Initiative, as defined in the Peoples Gas stipulated agreement for Plan Four. 2025 total non-incentive costs were $10,838,632, or 34% of Peoples Gas total Utility EEP costs (NSG-PGL Exhibit 2.2, page 1).

(3) Marketing costs support those activities associated with program outreach and awareness. They include brochures and other collateral materials needed to support individual programs including application forms, development and placement of advertisements and campaigns, website creation and management, email newsletters, memberships, and subscriptions. 2025 total marketing costs were $1,188,677, or 4% of Peoples Gas total Utility EEP costs (NSG-PGL Exhibit 2.2, page 2).

(5) Incentive costs refer to rebates that are paid to customers or contractors to offset the costs of installed qualifying equipment. This line item is titled “Incentive Costs” in NSG-PGL Exhibit 2.2. Rebates are an income transfer cost from one party to another (i.e., program administrator to customer). 2025 total incentive costs were $14,668,959, or 46% of Peoples Gas total Utility EEP costs (NSG-PGL Exhibit 2.2, page 1).

(6) EM&V costs are costs incurred for the impact and process evaluations by an independent third party provider, referred to herein as the third party evaluator. Performance of EM&V is a requirement under 220 ILCS 5/8-104(f)(8). This line item is titled “Evaluation Costs” in the Plan. 2025 total EM&V costs were $697,422, or 2% of Peoples Gas total Utility EEP costs (NSG-PGL Exhibit 2.2, page 2).

Q. What are the total costs for the 2025 reconciliation period?

A. The total Peoples Gas EEP costs that I address in my testimony for the reconciliation period were $31,587,982 (NSG-PGL Exhibit 2.2, page 2).

Q. What are the total therm savings associated with the Peoples Gas program in 2025?

A. Total net therm savings for Peoples Gas’ Utility EEP Programs in 2025 were 8,068,819 pending final third party evaluation results (NSG-PGL Exhibit 2.2., page 1).

Q. Please describe the TRM that you used in your calculations and that you reference in your testimony.

A. TRM Version 13 dated September 20, 2024 with an effective date of January 1, 2025, as approved by the Commission in its final order in Docket No. 24-0750, was used in 2025.

Q. What is the basis for the therm savings?

A. Savings are based on third party evaluator’s 2025 deemed net-to-gross values and evaluated realization rates for each program offered. This is consistent with the prior requirements of the Commission’s Orders in Docket Nos. 12-0528 and 13-0077, the most recent Commission final order on the TRM applicable to 2025 in Docket No. 24-0750 and consensus in the SAG process. NSG-PGL Exhibit 2.3, which lists these values by program and describes their application for 2025.

Q. Will these savings numbers be adjusted in the future for 2025?

A. Yes. The savings values for 2025 will be retroactively adjusted to correspond with finalized 2025 evaluation reports in accordance with the Utilities’ interpretation of the Commission’s Order and input from SAG; specifically, the realization rates by program.

B. RESIDENTIAL PROGRAMS

Q. What are the Residential Programs?

A. The Residential Programs contain two offerings: Single Family and Multi-Family. Within the Single Family offering, residential customers are provided access to energy efficiency via two paths – Home Energy Rebates and Home Energy Assessments. Home Energy Rebates offers rebates on energy-efficient heating, ventilation, air conditioning and water heating equipment and qualifying weatherization projects. Home Energy Assessments offers energy-saving products installed in homes at no-cost to the customer. The Home Energy Assessment program is a joint program offering provided in partnership with ComEd. Homeowners can reduce their energy and water use with the installation of products available to owners of single-family homes, two-flats, and individually metered condos and townhomes. Renters are also eligible with permission from their landlords. Offerings within the Multi-Family path include Multi-Family Energy Savings, Prescriptive and Custom Rebates, and Partner Trade Ally programs. The Multi-Family Energy Savings program is a joint program offering provided in partnership with ComEd. The program offers free direct installation of energy-saving measures for multi-family buildings. Prescriptive rebates are standard incentive amounts for common types of energy efficiency measures. Custom incentives are awarded for the non-standard technologies or for projects that do not include a one-for-one replacement. The Partner Trade Ally offering is provided in partnership with select trade allies who have been vetted by the program.

Q. What are the total costs that Peoples Gas incurred in connection with these programs during the reconciliation period?

A. Total costs incurred for the Residential Programs in 2025 were $3,229,715 (NSG-PGL Exhibit 2.2, page 1).

Q. Were the costs reasonable?

A. Yes. The Residential Programs achieved 113% of the annual savings goal while using 107% of the annual program budget. NSG-PGL Exhibit 2.2, page 1.

Q. What were the therm savings from the Residential Programs during the reconciliation period?

A. Preliminary therm savings from the Residential Programs were 1,429,863 net therms (NSG-PGL Exhibit 2.2, page 1).

C. BUSINESS PROGRAMS

Q. What is the Small and Midsize Business Program?

A. The Small and Midsize Business Program offers free energy assessments and free direct installation of energy saving measures to qualifying customers via program energy advisors. Additional recommended energy saving measures are installed by trade allies, who leverage program rebates to reduce project costs. Customers with Peoples Gas rate Service Class 2 accounts, that use less than 400,000 therms per year, are eligible to participate in this program.

Q. What are the total costs that Peoples Gas incurred in connection with this program during the reconciliation period?

A. Peoples Gas incurred $2,165,844 for this program during the reconciliation period (NSG-PGL Exhibit 2.2, page 1).

Q. Were the costs reasonable?

A. Yes. The Small and Midsize Business Program achieved 91% of its annual therm savings goal, utilizing 122% of the annual program budget (NSG-PGL Exhibit 2.2, page 1).

Q. What were the therm savings from the Small and Midsize Business Program during the reconciliation period?

A. Preliminary therm savings from the Small and Midsize Business Program were 698,225 net therms (NSG-PGL Exhibit 2.2, page 1).

Q. What is the C&I Program?

A. The Commercial & Industrial (C&I) Program offers several paths for C&I customers within Peoples Gas Service Class 2 or larger accounts. These paths include Prescriptive and Custom Rebates, Gas Optimization Studies, Retro-commissioning, Engineering Studies, and Staffing Grants. Each path is described briefly below.

Prescriptive rebates are provided for common types of energy efficiency measures in C&I buildings, including demand control ventilation, steam trap testing and repairs, boiler tune-ups, and pipe insulation. Custom rebates are provided to customers with energy saving projects outside the prescriptive rebates and with variables that can affect the savings of those projects such as boiler and burner retrofits and replacements, heat exchangers, heat recovery (blow down and economizers), as well as pipe insulation. Gas Optimization Studies provide customers with an analysis of energy-using systems to help identify no- and low-cost improvements to achieve natural gas savings in C&I buildings. Retro-commissioning offers a full-building tune-up through a systematic evaluation of mechanical and electrical systems to help facilities to perform optimally. Low-cost energy-saving operational improvements that can pay for themselves in 18 months or less are identified. Engineering Studies provide an analysis of a single system within a facility’s operations to support implementation of natural gas saving project. Staffing Grants offer up to $50,000 per customer per year to fund a project manager to guide projects to completion for customers who have energy efficiency projects that cannot be completed due to lack of staff time or availability.

Q. What are the total costs that Peoples Gas incurred in connection with this program during the reconciliation period?

A. Peoples Gas incurred $2,998,872 for the C&I Program during the reconciliation period (NSG-PGL Exhibit 2.2, page 1).

Q. Were the costs reasonable?

A. Yes. The program reached 89% of its annual therm savings goal using 72% of its annual budget.

Q. What were the therm savings from the C&I Program during the 2025 reconciliation period?

A. Preliminary net natural gas savings from the C&I Program were 1,730,286 therms (NSG-PGL Exhibit 2.2, page 1).

Q. What is the Public Sector Program?

A. The Public Sector Program offers the same exact paths as the C&I program but targets Public Sector customers as defined by Future Energy Jobs Act (Public Act 99-0906) which includes local government, municipal corporations, school districts, and community college districts. See the above C&I section for program descriptions for Public Sector customers.

Q. What are the total costs that Peoples Gas incurred in connection with this program during the reconciliation period?

A. Peoples Gas incurred $2,975,440 for the Public Sector Program during the reconciliation period (NSG-PGL Exhibit 2.1, page 1).

Q. Were the costs reasonable?

A. Yes. The program reached 153% of its 2025 therm savings goal using 117% of the annual budget (NSG-PGL Exhibit 2.2, page 2).

Q. What were the therm savings from the Public Sector Program during the reconciliation period?

A. Preliminary net natural gas savings from the Public Sector Program were 1,629,230 therms (NSG-PGL Exhibit 2.1, page 1).

D. INCOME QUALIFIED PROGRAMS

Q. What are the Income Qualified Programs?

A. Income Eligible Programs target the underserved income eligible market, providing services designed to make it easy for single-family and multi-family income eligible customers to take advantage of cost-effective energy saving retrofits. Within the Income Eligible Programs, there are paths for single-family and multi-family customers. Within Single Family, Peoples Gas offers Home Energy Assessment, Home Energy Savings Retrofits, and the Illinois Home Weatherization Assistance Program (IHWAP). IHWAP Weatherization services are provided to low-income residents through local community action agencies or not for profit agencies. IHWAP leverages state and federal funds to supplement incentives from the utility programs. Home Energy Assessment offers energy-saving products installed in homes at no-cost to the customer. The Home Energy Assessment program is a joint program offering provided in partnership with

ComEd. Homeowners can reduce their energy and water use with the installation of products available to owners of single-family homes, two-flats, and individually metered condos and townhomes. Renters are also eligible with permission from their landlords. Home Energy Retrofits offers direct install products and no-cost weatherization services for Income-Eligible Single-Family home customers. It is delivered jointly with ComEd through approved agencies or partners. Within Multi-Family programs, Peoples Gas offers Income Eligible Multi-family Savings Program, Public Housing Energy Savings, Multi-family Income Eligible Partner Trade Ally, and Income Eligible Kits programs. The Income Eligible Multi-family Savings program provides building owners with free technical assistance to identify energy efficiency opportunities and install measures. Expenses are fully covered by the program, from the direct installation of energy efficiency products into tenants' units (light bulbs, aerators, showerheads, etc.), to common area measures, and more extensive measures requiring building owner co-pay. This program is a joint offering in partnership with ComEd. The Public Housing Energy Savings program offers prescriptive and custom rebates for gas measures in housing owned by Public Housing Authorities. This program is a joint program offering provided in partnership with ComEd. The Multi-family Income Eligible Partner Trade Ally program is a program delivered by vetted Partner Trade Allies. These Trade Allies are given higher rebate amounts to serve geographically income-eligible customers with retrofit measures. Income Eligible Kits provides income-qualified customers with a kit of energy efficiency measures to self-install. The Income Eligible Kits are distributed by ground mail to qualified customers vetted by the Low-Income Home Energy Assistance Program (LIHEAP) and is provided in partnership with ComEd.

Q. What are the total costs that Peoples Gas incurred in connection with these programs during the reconciliation period?

A. Peoples Gas incurred $13,197,558 for the Income Qualified Programs during the reconciliation period (NSG-PGL Exhibit 2.2, page 1).

Q. What were the therm savings from the Income Qualified Programs during the reconciliation period?

A. Preliminary net natural gas savings from the Income Eligible Programs were 2,581,215 therms (NSG-PGL Exhibit 2.2, page 1).

IV. OTHER PROGRAM IMPLEMENTATION MATTERS

Q. How did NSG-PGL participate in SAG?

A. At least one NSG-PGL representative attended every SAG meeting during 2025. In addition to attending and participating in SAG meetings, the Utilities had a representative fully participate in the development of the Illinois TRM. This representative was also a participant in the SAG Technical Advisory Committee. Additionally, NSG-PGL participated in the SAG Planning process for the 2026-2029 Energy Efficiency Plan in 2025. As noted above, the costs of these activities are classified as administrative costs.

Q. Did the Utilities present to the SAG regarding the programs and overall portfolio progress, successes, and challenges during 2025?

A. In addition to our participation in every SAG meeting, the Utilities provided an update to the SAG each time an update was requested.

V. ON BILL FINANCING

Q. Please describe the Utilities' OBF programs.

A. Section 19-140 of the Public Utilities Act requires the Utilities to implement an OBF program. Costs are recovered for the Utilities OBF programs through residential, multi-family, and small business customers and cost recovery is through the same mechanism as for the energy efficiency programs. The idea behind the OBF program is to make it easier for consumers to invest in measures to save energy by allowing customers to pay for the measure over time on their monthly utility bill. Mirroring the requirements of the energy efficiency rebate programs, eligible customers can finance high efficiency furnaces, boilers, and weatherization measures through their utility bill.

Q. How did the Utilities determine qualifying measures under the OBF program?

A. A measure screening tool is used.

Q. Why were some customers declined from participating?

A. Reasons for declining applications included bankruptcy, low credit scores, and delinquency on current obligations.

Q. Did any customers default on payments during the reconciliation period?

A. There were no bankruptcies filed in 2025 for PGL and NSG.

Q. What were the total costs that the Utilities incurred during the reconciliation period?

A. North Shore Gas incurred $67,138 and Peoples Gas incurred $80,618 for the OBF program during the reconciliation period. NSG-PGL Exhibit 1.3N and NSG-PGL 1.3P respectively.

Q. What types of costs did the Utilities incur during the reconciliation period?

A. The types of costs incurred for OBF were for measure qualification and coordination, financial institution costs, and EM&V.

Q. Were these costs reasonable?

A. Yes. The OBF program, both the law and the Commission-approved tariff, include many requirements governing participation, including requirements governing customers leaving the program. Preparing to offer and administering the OBF program requires significant resources.

VI. CONCLUSION

Q. Does this complete your direct testimony?

A. Yes.

Statewide Quarterly Report Template
Tab 1: Ex Ante Results
Q4 2025

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 - Q4 2025

Section 8-103B/8-104 (EEPS) Program	Net Energy Savings Achieved (therms)	2025 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	2025 Original Plan Budget*	2025 Approved Budget**	% of Costs YTD Compared to Approved Budget
Business Programs											
Commercial & Industrial Program (Includes Commercial Food Service)	859,905	633,565	688,898	698,000	123%	$ 909,406	$ 620,254	$ 289,153	$ 858,429	$ 946,874	96%
Small Business	327,699	167,151	175,847	150,000	218%	$ 281,149	$ 95,577	$ 185,573	$ 326,106	$ 347,578	81%
Public Sector	147,245	48,311	50,730	150,000	98%	$ 355,759	$ 108,327	$ 247,432	$ 344,690	$ 370,622	96%
Business Programs Subtotal	**1,334,849**	**849,027**	**915,474**	**998,000**	**134%**	**$ 1,546,315**	**$ 824,157**	**$ 722,158**	**$ 1,529,225**	**$ 1,665,074**	**93%**
Business Programs - Private Sector Total	1,187,604	800,716	864,745	848,000	140%	$ 1,190,556	$ 715,830	$ 474,725	$ 1,184,535	$ 1,294,453	92%
Business Programs - Public Sector Total	147,245	48,311	50,730	150,000	98%	$ 355,759	$ 108,327	$ 247,432	$ 344,690	$ 370,622	96%
Residential Programs											
Single Family	324,783	422,460	445,346	307,585	106%	$ 699,585	$ 448,800	$ 250,785	$ 818,502	$ 720,471	97%
Multi-Family	15,064	82,118	82,187	11,482	131%	$ 74,776	$ 21,537	$ 53,239	$ 172,795	$ 76,215	98%
Residential Programs Subtotal	**339,847**	**504,578**	**527,534**	**319,067**	**107%**	**$ 774,362**	**$ 470,337**	**$ 304,024**	**$ 991,297**	**$ 796,687**	**97%**
Income Qualified Programs											
IHWAP-braided - Single Family	1,940			-	N/A	$ 64,262	$ 36,490	$ 27,772	N/A	$ 27,831	N/A
IHWAP Utility-only - Single Family	N/A			N/A	N/A	-	N/A	N/A	N/A	N/A	N/A
Non-IHWAP - Single Family	107,237			119,797	N/A	$ 548,143	$ 334,575	$ 213,568	N/A	$ 552,292	N/A
Single Family Subtotal	109,176	72,200	76,192	119,797	91%	$ 612,405	$ 371,065	$ 241,340	$ 426,282	$ 580,123	106%
IHWAP-braided - Multi-Family	-			-	N/A	$ -	$ -	$ -	N/A	$ -	N/A
IHWAP Utility-only - Multi-Family	N/A			N/A	N/A	-	N/A	N/A	N/A	N/A	N/A
Non-IHWAP - Multi-Family	33,965			75,441	N/A	$ 569,237	$ 316,874	$ 252,363	N/A	$ 452,079	N/A
Gas-only-TA - Multi-Family	-			-	N/A	$ -	$ -	$ -	N/A	$ -	N/A
Multi Family Subtotal	33,965	37,060	39,241	75,441	45%	$ 569,237	$ 316,874	$ 252,363	$ 397,079	$ 452,079	126%
Income Qualified Programs Subtotal	**143,142**	**109,260**	**115,433**	**195,238**	**73%**	**$ 1,181,642**	**$ 687,940**	**$ 493,703**	**$ 823,361**	**$ 1,032,201**	**114%**
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	-	3,846	3,873	-							
Research and Development and Market Transformation					N/A	-	N/A	N/A	N/A	N/A	N/A
Demonstration of Breakthrough Equipment and Devices Subtotal	**-**	**3,846**	**3,873**	**-**		**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**N/A**
Market Development Initiative						190,416	$ -	$ 190,416	$ 100,000	$ 188,445	
Market Development Initiative Subtotal	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**$ 190,416**	**$ -**	**$ 190,416**	**$ 100,000**	**$ 188,445**	**101%**
Overall Total North Shore Gas Section 8-103B/8-104 (EEPS) Programs	**1,817,838**	**1,466,712**	**1,562,315**	**1,512,305**	**120%**	**$ 3,692,734**	**$ 1,982,434**	**$ 1,710,300**	**$ 3,443,883**	**$ 3,682,408**	**100%**

*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
Q4 2025

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.
*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 Section 8-103B/8-104 (EEPS) Costs - Q4 2025

Section 8-103B/8-104 (EEPS) Cost Category	2025 Actual Costs YTD
Program Expenditures by Sector	
C&I Programs (private sector)	$ 1,190,556
Public Sector Programs	$ 355,759
Residential Programs	$ 774,362
Income Qualified Programs	$ 1,181,642
Market Development Initiative	$ 190,416
Third Party Programs (Beginning in 2019)	
Total North Shore Gas Program Costs	**$ 3,692,734**
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)	
Research and Development - Demonstration of Breakthrough Equipment and Devices Costs	$ 34,616
Market Transformation Programs	$ 152,733
Evaluation Costs	$ 100,092
Marketing Costs (including education and outreach)	$ 165,016
Portfolio Administrative Costs	$ 623,569
Total North Shore Gas Portfolio-Level Costs	**$ 1,076,025**
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	**$ 4,768,759**

Section 8-103B/8-104 (EEPS) Costs - Q4 2025

Overall Total Costs	2025 Actual Costs YTD	2025 Approved Budget	% of Costs YTD Compared to Approved Budget
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	**$ 4,768,759**	**$ 4,720,756**	**101%**

Statewide Quarterly Report Template
Tab 3: Historical Energy Saved
Q4 2025

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 2025

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 - 2/17/22	1,554,872	2,196,540	2,196,540	71%
2019	Verified - 2/17/22	2,216,396	1,941,718	1,918,175	116%
2020	Verified - 2/17/22	2,285,299	1,790,399	1,771,603	129%
2021	Verified - 10/11/22	2,591,449	1,931,439	1,933,162	134%
2018-2021 Plan Total		**8,648,015**	**7,860,096**	**7,819,480**	**111%**
2022	Verified - 11/27/23	1,652,678	1,664,853	1,700,148	97%
2023	Verified - 11/18/24	1,998,927	1,612,313	1,744,403	115%
2024	Ex Ante	1,786,467	1,504,589	1,604,783	111%
2025	Ex Ante	1,817,838	1,466,712	1,562,315	116%
2022-2025 Plan Total		**7,255,910**	**6,248,466**	**6,611,648**	**110%**

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.

****The % Net Energy Savings Achieved reflects the percent to the Adjusted Energy Savings Goal, which may vary from the Implementation Plan Savings Goal and percentage shown on Tab 1.

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
Source	--	--	--	Docket 15-0298	Docket 15-0298	Docket 15-0298	DCEO Summary	EPY7/GPY4 DCEO Cost Effectiveness	EPY7/GPY4 DCEO Cost Effectiveness

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
Q4 2025

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 Q4 2025

Performance Metrics (Equivalents)*	EPY1	EPY2	EPY3	EPY4/ GPY1	EPY5/ GPY2	EPY6/ GPY3	EPY7/ GPY4	EPY8/ GPY5	EPY9/ GPY6****	2018	2019	2020	2021	2022	2023	2024	2025
Net Energy Savings Achieved (therms)**				486,501	1,283,331	2,802,623	2,244,590	1,910,583	1,816,873	1,554,872	2,216,396	2,285,299	2,591,449	1,656,048	1,968,266	1,786,467	1,817,838
Carbon reduction (tons)				2,574	6,790	14,829	11,876	10,109	9,613	7,346	10,733	11,272	12,898	8,762	10,414	9,452	9,618
Cars removed from the road				547	1,442	3,148	2,521	2,146	2,041	1,560	2,319	2,435	2,805	1,888	2,317	2,205	2,243
Acres of trees planted				3,362	8,868	19,366	15,510	13,202	12,554	8,646	14,017	14,720	15,802	10,369	12,419	9,481	9,648
Number of homes powered for 1 year*^				297	784	1,711	1,370	1,167	1,109	880	1,239	1,301	1,553	1,104	1,313	1,269	1,292
Direct Portfolio Jobs *****											9	12	11	10	12	11	9
Income qualified homes served***									25	108	138	2,087	1,577	3,504	2,528	2,502	2,198

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:

**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
Q4 2025

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 Q4 2025

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 - Verified 2/17/22	$ 4,026,594	$ 4,141,043	97%
2019 - Verified 2/17/22	$ 3,951,074	$ 4,141,043	95%
2020 - Verified 2/17/22	$ 3,586,530	$ 4,141,043	87%
2021 - Verified 10/11/22	$ 3,950,330	$ 4,141,043	95%
2018-2021 Plan Total	**$ 15,514,528**	**$ 16,564,172**	**94%**
2022 - Verified 11/27/23	$ 3,342,408	$ 4,098,601	82%
2023 - Verified 11/18/24	$ 4,113,884	$ 4,098,601	100%
2024	$ 4,013,457	$ 4,098,601	98%
2025	$ 4,768,759	$ 4,098,601	116%
2022-2025 Plan Total	**$ 16,238,508**	**$ 16,394,404**	**99%**

*The % of Costs YTD Compared to the Approved Budget reflects the percent to the Plan Budget, which may vary from the annual Approved Implementation Budget and percentage shown on Tab 1.

Statewide Quarterly Report Template
Tab 7: Historical Other - IQ Multi-Family Participation
Q4 2025

Instructions: *Each Program Administrator should complete the IQ Multi-Family Participation table for Quarterly Reports. *Gas-Only Program Administrator should complete the Trade-Ally-Driven IQ Multi-Family Participation table for Quarterly Reports
Instructions: Other to be completed by SAG

IQ Multi-Family Participation for the North Shore Gas Service Territory as of Q4 2025

	2022		2023		2024		2025	
Zip Code	Quantity of Buildings Served	Quantity of Apartment/ Condo Units	Quantity of Buildings Served	Quantity of Apartment/ Condo Units	Quantity of Buildings Served	Quantity of Apartment/ Condo Units	Quantity of Buildings Served	Quantity of Apartment/ Condo Units
60002	0	0	0	0	0	0	0	0
60015	0	0	0	0	0	0	0	0
60022	0	0	0	0	0	0	0	0
60030	0	0	0	0	1	148	0	0
60031	0	0	0	0	4	51	0	0
60035	0	0	1	209	1	4	0	0
60037	209	209	0	0	0	0	0	0
60040	0	0	0	0	0	0	0	0
60044	0	0	0	0	0	0	0	0
60045	0	0	0	0	0	0	0	0
60046	0	0	0	0	0	0	0	0
60047	0	0	0	0	0	0	0	0
60048	0	0	0	0	0	0	0	0
60060	0	0	0	0	0	0	0	0
60061	0	0	0	0	0	0	15	216
60062	0	0	0	0	0	0	0	0
60064	11	58	4	46	1	20	1	6
60069	0	0	0	0	0	0	0	0
60075	0	0	0	0	0	0	0	0
60079	0	0	0	0	0	0	0	0
60083	0	0	1	6	0	0	0	0
60085	54	926	9	112	23	536	3	168
60087	26	961	1	1	9	414	0	0
60088	0	0	1	819	1	819	0	0
60089	0	0	0	0	0	0	0	0
60093	0	0	0	0	0	0	0	0
60096	0	0	0	0	0	0	0	0
60099	7	53	1	139	2	139	1	59

IQ Trade-Ally-Driven Multi-Family Participation for the North Shore Gas Service Territory as of Q4 2025

Participation Metrics	2022	2023	2024	2025
Quantity of Buildings Served	0	0	0	0
Quantity of (Apartment/Cond) Units Served	0	0	0	0
Quantity of Buildings Assessed	0	0	0	0
Quantity of Units Assessed	0	0	0	0
Quantity of Buildings with Direct Installations Only	0	0	0	0
Quantity of Units with Direct Installations Only	0	0	0	0
Quantity of Buildings with Direct Installs and Major Meas	0	0	0	0
Quantity of Units with Direct Installs and Major Measures	0	0	0	0

Statewide Quarterly Report Template
Tab 8: Historical Other - IQ Participation and Measures
2025

Instructions: *Each Program Administrator should complete the tables for the Annual Reports.
Instructions: Other to be completed by SAG

IQ Program Participation for the North Shore Gas Service Territory in 2025

		2022*					2023*				
Zip Code	Economically Disadvantaged Area (Y/N)	IQ - Quantity of Program Participants (Buildings)	IQ - Quantity of Whole Building Assessments	IQ - Quantity of DI Only Installations	IQ - Quantity of In-Unit Service Installations	IQ - Quantity of Major Measure Installations	IQ - Quantity of Program Participants (Buildings)	IQ - Quantity of Whole Building Assessments	IQ - Quantity of DI Only Installations	IQ - Quantity of In-Unit Service Installations	IQ - Quantity of Major Measure Installations
60002	Y	8	0	4	4	0	3	0	3	0	0
60015	Y	48	0	77	77	0	97	1	96	0	2
60022	N	4	0	26	26	0	18	0	18	0	0
60030	Y	74	0	40	40	0	42	2	40	0	4
60031	Y	653	0	57	57	0	46	1	45	0	0
60035	Y	53	1	89	89	1	68	4	272	209	16
60037	N	209	1	179	179	0	0	0	0	0	0
60040	N	10	0	0	0	0	1	0	1	0	0
60044	Y	19	0	21	21	0	17	2	15	0	5
60045	Y	14	1	38	38	1	32	4	29	0	7
60046	Y	35	0	27	27	0	20	0	20	0	0
60047	Y	0	0	0	0	0	4	0	4	0	0
60048	Y	27	0	42	42	0	30	0	30	0	0
60060	Y	105	0	33	33	0	28	1	27	0	0
60061	Y	55	0	59	59	0	0	0	0	0	0
60062	Y	0	0	0	0	0	18	1	17	0	0
60064	Y	208	12	52	52	3	17	3	45	31	3
60069	N	12	0	15	15	0	0	0	0	0	0
60075	N	0	0	0	0	0	0	0	0	0	0
60079	N	0	0	0	0	0	15	0	15	0	2
60083	N	31	0	18	18	0	73	5	67	0	8
60085	Y	1.288	18	179	182	16	24	3	16	0	0
60087	Y	217	3	125	125	4	36	1	37	1	1
60088	Y	0	0	0	0	0	5	0	823	819	4
60089	Y	26	0	38	38	0	5	0	5	0	4
60093	Y	0	0	0	0	0	52	3	49	0	0
60096	Y	32	0	5	5	0	0	0	0	0	0
60099	Y	375	10	85	86	2	6	1	139	139	0

	2024							
	SINGLE FAMILY & MULTI-FAMILY*					SF ONLY*		MF ONLY
Zip Code	IQ - Quantity of Program Participants	IQ - Quantity of Whole Building Assessments	IQ - Quantity of DI Only Installations	IQ - Quantity of In-Unit Service Installations	IQ - Quantity of Major Measure Installations	IQ SF - Quantity of Participants	IQ SF - Incentive Spend	IQ MF - Incentive Spend
60002	2	2	0	0	0	2	$0	$0
60015	21	21	0	0	0	21	$5,048	$0
60022	4	4	0	0	0	4	$0	$0
60030	24	24	1	70	0	23	$18,901	$1,206
60031	44	40	0	0	1	40	$1,446	$8,925
60035	45	45	1	68	0	44	$9,054	$2,405
60037	0	0	0	0	0	0	$0	$0
60040	5	5	0	0	0	5	$13,642	$0
60044	10	10	0	0	0	10	$7,659	$0
60045	11	11	0	0	0	11	$1,360	$0
60046	21	21	0	0	0	21	$5,951	$0
60047	3	3	0	0	0	3	$88	$0
60048	21	21	0	0	0	21	$240	$0
60060	22	22	0	0	0	22	$15,334	$0
60061	24	24	0	0	0	24	$12,930	$0
60062	0	0	0	0	0	0	$0	$0
60064	17	16	1	2	0	16	$1,132	$92
60069	7	7	0	0	0	7	$7	$0
60075	1	1	0	0	0	1	$4,450	$0
60079	0	0	0	0	0	0	$0	$0
60083	7	7	0	0	0	7	$134	$0
60085	59	43	1	249	12	38	$43,952	$91,712
60087	31	31	9	374	0	22	$16,599	$4,933
60088	1	0	0	0	4	0	$0	$118,612
60089	12	12	0	0	0	12	$43	$0
60093	2	2	0	0	0	2	$7	$0
60096	6	6	0	0	0	6	$256	$0
60099	33	31	0	0	2	31	$9,739	$8,008

	2025							
	SINGLE FAMILY & MULTI-FAMILY					SF ONLY*		MF ONLY
Zip Code	IQ - Quantity of Program Participants	IQ - Quantity of Whole Building Assessments	IQ - Quantity of DI Only Installations	IQ - Quantity of In-Unit Service Installations	IQ - Quantity of Major Measure Installations	IQ SF - Quantity of Participants	IQ SF - Incentive Spend	IQ MF - Incentive Spend
60002	5	0	5	0	0	2	$208	$0
60015	32	0	32	0	0	6	$947	$0
60022	1	0	1	0	0	0	$0	$0
60030	58	4	55	0	3	9	$19,749	$0
60031	105	5	101	0	8	13	$24,977	$0
60035	28	4	25	0	3	8	$12,793	$0
60037	0	0	0	0	0	0	$0	$0
60040	4	0	4	0	0	1	$177	$0
60044	12	2	10	0	4	4	$18,415	$0
60045	10	0	10	0	0	4	$127	$0
60046	24	3	24	0	0	6	$824	$0
60047	1	0	1	0	0	0	$0	$0
60048	20	3	19	0	2	6	$11,391	$0
60060	86	3	84	0	3	9	$13,672	$0
60061	35	3	34	0	15	11	$595	$302,034
60062	0	0	0	0	0	0	$0	$0
60064	197	3	195	0	2	12	$7,762	$5,880
60069	2	0	2	0	0	0	$0	$0
60075	1	2	0	0	1	1	$10,605	$0
60079	0	0	0	0	0	0	$0	$0
60083	22	2	20	0	4	4	$15,287	$0
60085	1,015	20	1,008	0	10	29	$58,690	$6,860
60087	99	7	94	0	7	13	$24,843	$0
60088	0	0	0	0	0	0	$0	$0
60089	28	0	28	0	0	1	$122	$0
60093	2	0	2	0	0	2	$422	$0
60096	27	1	26	0	1	7	$5,246	$0
60099	384	6	379	0	8	14	$51,862	$2,100

Footnote:
*Single Family particpants and incentive spend exclude kits.

IQ Building Retrofit Materials Used for the North Shore Gas Service Territory in 2025

IQ Retrofit Materials Metrics	2022	2023	2024	2025
Quantity of Projects with the following predominant Insulation Materials:				
Insulation - Fiberglass	3	0	1	2
Insulation - Cellulose	16	4	3	0
Insulation - Spray Foam	5	0	1	2
Insulation - Rigid Foam	3	0	0	1
Pipe Insulation - Foam	0	0	0	2
Pipe Insulation - Wool (Glass, Mineral)	0	0	0	0
Pipe Insulation - Tape	0	0	0	0
Insulation - Other	0	0	5	0
Quantity of Projects with the following predominant Sealants/Caulks in general:				
General Sealant Material - Tape	0	0	0	0
General Sealant Material - Mastic	0	0	0	0
General Sealant Material - Latex	0	0	0	0
General Sealant Material - Silicone	0	0	0	0
General Sealant Material - Polyurethane	0	2	3	0
General Sealant Material - Other	0	0	3	1
Quantity of Projects with the following predominant Sealants/Caulks in HVAC Ductwork:				
HVAC Ductwork Sealant Material - Tape	0	0	0	0
HVAC Ductwork Sealant Material - Mastic	0	0	0	0
HVAC Ductwork Sealant Material - Latex	0	0	0	0
HVAC Ductwork Sealant Material - Silicone	0	0	0	0
HVAC Ductwork Sealant Material - Polyurethane	0	0	0	0
HVAC Ductwork Sealant Material - Other	0	0	0	0

Statewide Quarterly Report Template
Tab 9: Historical Other - Health & Safety
2025

Instructions:
*Each Program Administrator should complete for Quarterly Reports.

Instructions:
Other to be completed by SAG

IQ Whole Building Retrofit Heath & Safety Spend for the North Shore Gas Service Territory

Health & Safety Spend	2022	2023	2024	2025
Single Family			$8,650	$19,597
Multi-Family			$9,311	$76,650

IQ Whole Building Retrofit Heath & Safety Metrics for the North Shore Gas Service Territory in 2025

Health & Safety Metrics	2022	2023	2024	2025
Number of Properties Assessed - Single Family	7	32	21	52
Number of Properties Assessed - Multi-Family	39	2	15	22
Number of Properties with identified Health & Safety Issues	11	32	17	34
Number of Properties deferred due to Health & Safety Issues	0	13	1	5
Quantity of Properties with the following Health and Safety Issues Identified:				
Electrical Safety	0	1	0	0
Natural Gas Safety	0	13	0	10
Fire Safety	7	6	2	6
Indoor Air Quality	7	20	0	6
Other	4	6	17	25

IQ Whole Building Retrofit Health & Safety Narrative for the North Shore Gas Service Territory

Qualitative Narrative	
Q1 2025	**Single Family** -13 total Single Family properties were assessed -9 of these properties had health and safety issues identified: (2) fire safety, (3) removing moisture damage, (2) vapor barriers, (1) mold remediation and (1) mouse infestation **Multi-Family** -Three health and safety projects enabled a large weatherization project. The health and safety project included 4,200 square foot of ceiling mitigation and insulating 408 flex ducts and roof caps. The effort focused on 15 buildings serving 216 units representing a health and safety investment of $355/unit
Q2 2025	**Single Family** -In Q2, 8 single family properties were assessed, and 6 of these properties had H&S issues identified, including: 10 natural gas safety, 2 fire safety, 6 indoor air quality, 2 vapor barriers, 1 mold remediation and 1 leak **Multi-Family** -In Q2, 19 H&S assessments were conducted with no H&S needs. The North Shore Gas offering goals were achieved in Q1, so no further projects were completed
Q3 2025	**Single Family** -In Q3, 12 single family properties were assessed, and 7 of those properties had H&S issues identified, including: 2 fire safety, 2 vapor barriers, 1 dryer vent, 1 ceiling repair, and 1 mold remediation. **Multi-Family** -In Q3, 2 assessments were conducted; however, those assessments did not identify any H&S issues. The North Shore Gas offering goals were achieved in Q1, so no further projects were completed.
Q4 2025	**Single Family** - In Q4, 19 single family properties were assessed, and 12 of those properties had H&S issues. **Multi-Family** - N/A

Instructions:
*Each Program Administrator should complete for Quarter 2 Reports for the previous year. North Shore Gas reports this information in the Quarter 4 Report of the same year.

IQ Whole Building Retrofit Heath & Safety Spend by Zip Code for 2025

Zip Code	Economically Disadvantaged Area (Y/N)	Health & Safety Spend
60002	Y	$0
60015	Y	$0
60022	N	$0
60030	Y	$812
60031	Y	$553
60035	Y	$678
60037	N	$0
60040	N	$0
60044	Y	$855
60045	Y	$0
60046	Y	$0
60047	Y	$0
60048	Y	$126
60060	Y	$678
60061	Y	$76,650
60062	Y	$0
60064	Y	$500
60069	N	$0
60075	N	$9,000
60079	N	$0
60083	N	$115
60085	Y	$2,497
60087	Y	$1,928
60088	Y	$0
60089	Y	$0
60093	Y	$0
60096	Y	$129
60099	Y	$1,728

Statewide Quarterly Report Template
Tab 10: Diverse Contracting
2025

Instructions:
*Each Program Administrator should complete for Q2 and Q4 Reports.
**If a Program Administrator has two (2) or less diverse contractors in a tier level and/or diverse category, this reporting requirement will be waived to protect the confidentiality of contract values.

Quantity of Diverse Contractors

	Quantity of Diverse Contractors		
	Primary Contractors	Secondary Contractors	Total Contractors
Women-owned businesses	3	6	9
Minority-owned businesses			
Veteran-owned businesses	0	0	0
Woman and minority-owned business			
Woman and veteran-owned business	0	0	0
		Total	**12**

Diverse Contractor Spend

	Diverse Primary Contractor Spend			Diverse Secondary Contractor Spend			All Diverse Contractor Spend		
	Implementation, Bundle Management, and Marketing	Incentives and Other Fees	Total Spend	Implementation, Bundle Management, and Marketing	Incentives and Other Fees	Total Spend	Implementation, Bundle Management, and Marketing	Incentives and Other Fees	Total Spend
Women-owned businesses	20.06%	0.00%	11.72%	8.05%	0.00%	4.70%	28.10%	0.00%	16.42%
Minority-owned businesses									
Veteran-owned businesses	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Woman and minority-owned business									
Woman and veteran-owned business	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
						Total	**32.20%**	**6.68%**	**21.59%**

Statewide Quarterly Report Template
Tab 1: Ex Ante Results
Q4 2025

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 - Q4 2025

Section 8-103B/8-104 (EEPS) Program	Net Energy Savings Achieved (therms)	2025 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	2025 Original Plan Budget*	2025 Approved Budget**	% of Costs YTD Compared to Approved Budget
Business Programs											
Commercial & Industrial Program (Includes Commercial Food Service)	1,730,286	1,296,728	1,363,170	1,934,403	89%	$ 2,998,872	$ 1,400,736	$ 1,598,136	$ 2,133,564	$ 4,140,599	72%
Small Business	698,225	1,185,352	1,349,557	765,000	91%	$ 2,165,844	$ 1,138,985	$ 1,026,859	$ 1,886,221	$ 1,778,096	122%
Public Sector	1,629,230	534,270	621,462	1,065,000	153%	$ 2,975,440	$ 1,608,453	$ 1,366,987	$ 2,430,247	$ 2,534,940	117%
Business Programs Subtotal	**4,057,741**	**3,016,351**	**3,334,189**	**3,764,403**	**108%**	**$ 8,140,156**	**$ 4,148,174**	**$ 3,991,983**	**$ 6,450,032**	**$ 8,453,634**	**96%**
Business Programs - Private Sector Total	2,428,511	2,482,081	2,712,727	2,699,403	90%	$ 5,164,717	$ 2,539,721	$ 2,624,996	$ 4,019,785	$ 5,918,694	87%
Business Programs - Public Sector Total	1,629,230	534,270	621,462	1,065,000	153%	$ 2,975,440	$ 1,608,453	$ 1,366,987	$ 2,430,247	$ 2,534,940	117%
Residential Programs											
Single Family	427,409	895,861	952,257	353,687	121%	$ 1,342,989	$ 430,107	$ 912,882	$ 1,646,321	$ 1,387,028	97%
Multi-Family	1,002,454	1,210,837	1,231,644	909,713	110%	$ 1,886,726	$ 1,336,357	$ 550,369	$ 1,797,355	$ 1,643,388	115%
Residential Programs Subtotal	**1,429,863**	**2,106,698**	**2,183,901**	**1,263,400**	**113%**	**$ 3,229,715**	**$ 1,766,464**	**$ 1,463,251**	**$ 3,443,676**	**$ 3,030,416**	**107%**
Income Qualified Programs											
IHWAP-braided - Single Family	40,603			39,685	N/A	$ 569,203	$ 450,053	$ 119,150	N/A	$ 569,893	N/A
IHWAP Utility-only - Single Family	N/A			N/A	N/A	-	N/A	N/A	N/A	N/A	N/A
Non-IHWAP - Single Family	880,392			877,289	N/A	$ 4,549,477	$ 3,190,767	$ 1,358,710	N/A	$ 4,575,122	N/A
Single Family Subtotal	920,995	895,896	934,393	916,974	100%	$ 5,118,680	$ 3,640,821	$ 1,477,860	$ 5,685,910	$ 5,145,015	99%
IHWAP-braided - Multi-Family	50,220			25,000	N/A	$ 1,319,764	$ 1,018,377	$ 301,386	N/A	$ 1,315,354	N/A
IHWAP Utility-only - Multi-Family	N/A			N/A	N/A	-	N/A	N/A	N/A	N/A	N/A
Non-IHWAP - Multi-Family	1,610,000			797,895	N/A	$ 6,759,114	$ 4,095,123	$ 2,663,991	N/A	$ 6,936,063	N/A
Gas-only-TA - Multi-Family	-			-	N/A	$ -	$ -	$ -	N/A	$ -	N/A
Multi Family Subtotal	1,660,220	1,061,496	1,107,801	822,895	202%	$ 8,078,878	$ 5,113,501	$ 2,965,377	$ 8,097,617	$ 8,251,418	98%
Income Qualified Programs Subtotal	**2,581,215**	**1,957,391**	**2,042,194**	**1,739,869**	**148%**	**$ 13,197,558**	**$ 8,754,321**	**$ 4,443,237**	**$ 13,783,527**	**$ 13,396,433**	**99%**
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 and Market Transformation	-	12,182	12,370	-	N/A	-	N/A	N/A	N/A	N/A	N/A
Demonstration of Breakthrough Equipment and Devices Subtotal	**-**	**12,182**	**12,370**	**-**		**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**N/A**
Market Development Initiative	N/A	N/A	N/A	N/A	N/A	$ 940,161	$ -	$ 940,161	$ 700,000	$ 927,231	
Market Development Initiative Subtotal	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**$ 940,161**	**$ -**	**$ 940,161**	**$ 700,000**	**$ 927,231**	**101%**
Overall Total Peoples Gas Section 8-103B/8-104 (EEPS) Programs	**8,068,819**	**7,092,622**	**7,572,654**	**6,767,672**	**119%**	**$ 25,507,590**	**$ 14,668,959**	**$ 10,838,632**	**$ 24,377,234**	**$ 25,807,714**	**99%**

*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
Q4 2025

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.
*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 Section 8-103B/8-104 (EEPS) Costs - Q4 2025

Section 8-103B/8-104 (EEPS) Cost Category	2025 Actual Costs YTD
Program Expenditures by Sector	
C&I Programs (private sector)	$ 5,164,717
Public Sector Programs	$ 2,975,440
Residential Programs	$ 3,229,715
Income Qualified Programs	$ 13,197,558
Market Development Initiative	$ 940,161
Third Party Programs (Beginning in 2019)	
Total Peoples Gas Program Costs	**$ 25,507,590**
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)	
Research and Development - Demonstration of Breakthrough Equipment and Devices Costs	$ 128,619
Market Transformation Programs	$ 1,485,901
Evaluation Costs	$ 697,422
Marketing Costs (including education and outreach)	$ 1,188,677
Portfolio Administrative Costs	$ 2,579,772
Total Peoples Gas Portfolio-Level Costs	**$ 6,080,391**
Total Peoples Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	$ 31,587,982

Section 8-103B/8-104 (EEPS) Costs - Q4 2025

Overall Total Costs	2025 Actual Costs YTD	2025 Approved Budget	% of Costs YTD Compared to Approved Budget
Total Peoples Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	**$ 31,587,982**	**$ 32,345,403**	**98%**

Statewide Quarterly Report Template
Tab 3: Historical Energy Saved
Q4 2025

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 2025

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**	**108%**
2018	Verified - 2/17/22	7,347,414	9,868,975	9,868,975	74%
2019	Verified - 2/17/22	10,073,462	9,505,670	9,291,954	108%
2020	Verified - 2/17/22	14,054,624	9,457,541	9,291,937	151%
2021	Verified - 10/11/23	11,273,139	9,493,167	9,375,596	120%
2018-2021 Plan Total		**42,748,639**	**38,325,353**	**37,828,462**	**113%**
2022	Verified - 11/27/23	9,699,484	8,907,711	9,084,005	107%
2023	Verified - 11/18/24	9,839,935	8,467,378	9,040,516	109%
2024	Ex Ante	8,979,021	7,825,528	8,278,884	108%
2025	Ex Ante	8,068,819	7,092,622	7,572,654	107%
2022-2025 Plan Total		**36,587,259**	**32,293,240**	**33,976,058**	**108%**

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.

****The % Net Energy Savings Achieved reflects the percent to the Adjusted Energy Savings Goal, which may vary from the Implementation Plan Savings Goal and percentage shown on Tab 1.

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.

Statewide Quarterly Report Template
Tab 4: Historical Other - Environmental and Economic Impacts
Q4 2025

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 Peoples Gas Service Territory as of Q4 2025

Performance Metrics (Equivalents)*	EPY1	EPY2	EPY3	EPY4/ GPY1	EPY5/ GPY2	EPY6/ GPY3	EPY7/ GPY4	EPY8/ GPY5	EPY9/ GPY6****	2018	2019	2020	2021	2022	2023	2024	2025
Net Energy Savings Achieved (therms)**				4,067,981	9,012,941	14,911,422	11,908,192	8,681,834	12,692,382	7,347,414	10,073,462	14,054,624	11,273,139	9,064,409	9,917,359	8,979,021	8,068,819
Carbon reduction (tons)				21,524	47,687	78,896	63,006	45,936	67,155	35,591	51,002	72,330	58,705	47,960	52,473	47,508	42,692
Cars removed from the road				4,570	10,125	16,751	13,377	9,753	14,258	7,557	11,019	15,633	12,767	10,334	11,677	11,081	9,958
Acres of trees planted				28,109	62,278	103,035	82,283	59,990	87,702	41,888	66,606	94,498	71,923	56,757	62,575	47,653	42,823
Number of homes powered for 1 year*^				2,484	5,503	9,104	7,271	5,301	7,749	4,262	5,885	8,350	7,069	6,041	6,613	6,380	5,733
Direct Portfolio Jobs *****											59	83	79	67	71	59	49
Income qualified homes served***									668	1,327	4,724	22,395	19,223	59,602	39,989	32,902	17,334

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:

**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
Q4 2025

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 Q4 2025

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 - Verified 2/17/22	$ 24,646,499	$ 27,492,564	90%
2019 - Verified 2/17/22	$ 26,918,182	$ 27,492,564	98%
2020 - Verified 2/17/22	$ 29,237,648	$ 27,492,564	106%
2021 - Verified 10/11/22	$ 24,475,164	$ 27,492,564	89%
2018-2021 Plan Total	**$ 105,277,493**	**$ 109,970,256**	**96%**
2022 - Verified 11/27/23	$ 25,005,836	$ 29,049,031	86%
2023 - Verified 11/18/24	$ 28,231,254	$ 29,049,031	97%
2024	$ 29,968,679	$ 29,049,031	103%
2025	$ 31,587,982	$ 29,049,031	109%
2022-2025 Plan Total	**$ 114,793,752**	**$ 116,196,124**	**99%**

*The % of Costs YTD Compared to the Approved Budget reflects the percent to the Plan Budget, which may vary from the annual Approved Implementation Budget and percentage shown on Tab 1.

Statewide Quarterly Report Template
Tab 7: Historical Other - IQ Multi-Family Participation
Q4 2025

Instructions:
*Each Program Administrator should complete the IQ Multi-Family Participation table for Quarterly Reports.
*Gas-Only Program Administrator should complete the Trade-Ally-Driven IQ Multi-Family Participation table for Quarterly Reports
Instructions:
Other to be completed by SAG

IQ Multi-Family Participation for the Peoples Gas Service Territory as of Q4 2025

	2022		2023		2024		2025	
Zip Code	Quantity of Buildings Served	Quantity of Apartment/ Condo Units	Quantity of Buildings Served	Quantity of Apartment/ Condo Units	Quantity of Buildings Served	Quantity of Apartment/ Condo Units	Quantity of Buildings Served	Quantity of Apartment/ Condo Units
60601	0	0	0	0	0	0	0	0
60602	0	0	0	0	0	0	0	0
60604	0	0	0	0	0	0	0	0
60605	0	0	0	0	0	0	1	207
60606	0	0	0	0	0	0	0	0
60607	2	6	1	3	1	20	1	200
60608	36	405	3	243	44	3,821	3	16
60609	1	3	1	5	3	29	3	68
60610	0	0	2	444	11	648	1	59
60611	0	0	0	0	15	383	0	0
60612	4	33	7	998	24	672	3	56
60613	7	504	3	134	7	615	7	600
60614	1	40	2	172	36	1,002	11	585
60615	32	1,239	34	1,342	61	4,154	52	1,667
60616	14	713	11	1,853	15	2,279	12	1,886
60617	19	677	8	368	74	678	11	100
60618	9	109	6	67	23	251	5	64
60619	72	949	55	986	104	1,245	29	431
60620	60	1,147	43	752	34	412	27	275
60621	15	257	15	335	11	88	20	652
60622	1	18	4	503	5	50	2	103
60623	19	131	16	314	13	109	15	92
60624	22	321	11	435	8	234	6	223
60625	29	501	16	301	13	415	8	101
60626	77	2,341	37	997	51	1,042	38	1,460
60628	127	1,110	9	349	39	535	13	257
60629	23	330	37	554	15	179	13	110
60630	1	25	3	59	0	0	0	0
60631	0	0	0	0	3	23	1	11
60632	2	7	6	32	6	53	2	6
60633	0	0	0	0	1	4	0	0
60634	1	44	0	0	2	7	14	152
60636	3	18	2	7	17	379	1	9
60637	42	1,104	37	806	18	366	31	714
60638	1	3	0	0	3	123	1	12
60639	13	227	5	51	11	310	11	284
60640	21	958	17	1,136	20	978	6	595
60641	10	232	3	69	14	242	8	150
60642	1	324	0	0	1	6	2	90
60643	5	123	5	114	10	265	4	58
60644	44	964	21	726	21	795	27	754
60645	22	394	10	258	10	181	7	324
60646	0	0	0	0	3	107	1	10
60647	11	183	3	79	32	1,001	4	61
60649	80	1,657	93	2,625	64	1,480	35	1,099
60651	15	528	6	100	9	96	6	236
60652	1	11	0	0	10	609	1	6
60653	20	670	16	851	7	246	11	444
60654	0	0	0	0	0	0	0	0
60655	0	0	3	40	0	0	0	0
60656	0	0	0	0	0	0	1	6
60657	0	0	0	0	5	282	7	258
60659	21	427	13	258	14	750	10	224
60660	29	1,703	18	984	21	1,059	12	707
60661	0	0	0	0	0	0	0	0
60707	0	0	0	0	2	1,547	1	6
60827	0	0	0	0	0	0	0	0

IQ Trade-Ally-Driven Multi-Family Participation for the Peoples Gas Service Territory as of Q4 2025

Participation Metrics	2022	2023	2024	2025
Quantity of Buildings Served	11	0	0	0
Quantity of (Apartment/Cond) Units Served	0	0	0	0
Quantity of Buildings Assessed	11	0	0	0
Quantity of Units Assessed	0	0	0	0
Quantity of Buildings with Direct Installations Only	0	0	0	0
Quantity of Units with Direct Installations Only	0	0	0	0
Quantity of Buildings with Direct Installs and Major Meas	11	0	0	0
Quantity of Units with Direct Installs and Major Measures	0	0	0	0

Instructions:
*Each Program Administrator should complete for Quarter 4 Reports.

IQ Multi-Family Building Types Treated in the Peoples Gas Service Territory

		Number of Buildings		Number of Apartments	
Size	Housing Type	Central Heating System	Individual Heating System	Central Heating System	Individual Heating System
Buildings <20 Units	Public Housing	1		12	
	Subsidized Housing	7	3	57	18
	Unsubsidized Housing	219	59	1,800	297
Buildings 20-49 Units	Public Housing				
	Subsidized Housing	5		158	
	Unsubsidized Housing	92	5	2,862	145
Buildings w/50+ Units	Public Housing	2		126	
	Subsidized Housing	4		510	
	Unsubsidized Housing	83	18	9,016	584

IQ Multi-Family Funding Sources for the Peoples Gas Service Territory
Report on any funding sources leveraged or combined for the IQ MF EE program where a Program Administrator leverages over $500,000 or more per year.

Additional Funding Source	
Funding Source	Illinois Home Weatherization Assistance Program and ComEd
Amount of Funding	$1,146,061 from IHWAP state funds and $629,851 from ComEd
What was the funding used for?	To support IHWAP projects to install energy efficiency measures at CHA and Mercey Housing locations.
Was there any joint or coordinated implementation with the leveraged funding entity and/or any constraints or program modifications resulting from leveraging?	Franklin Energy coordinated this work with CEDA (Community Economic Development Association of Cook County.)
Was there any required owner co-pays or financing? If yes, include detail on what measures require copays and the amounts required.	No copays were needed for these projects.

NSG-PGL Ex. 2.2

Statewide Quarterly Report Template
Tab B: Historical Other - IQ Participation and Measures
2025

Instructions:
*Each Program Administrator should complete the tables for the Annual Reports.

Instructions:
Other to be completed by SAG

IQ Program Participation for the Peoples Gas Service Territory in 2025

Zip Code	Economically Disadvantaged Area (Y/N)	2022* IQ - Quantity of Program Participants (Buildings)	2022* IQ - Quantity of Whole Building Assessments	2022* IQ - Quantity of DI Only Installations	2022* IQ - Quantity of In-Unit Service Installations	2022* IQ - Quantity of Major Measure Installations	2023* IQ - Quantity of Program Participants (Buildings)	2023* IQ - Quantity of Whole Building Assessments	2023* IQ - Quantity of DI Only Installations	2023* IQ - Quantity of In-Unit Service Installations	2023* IQ - Quantity of Major Measure Installations
60601	N	6	0	0	0	0	1	0	0	0	0
60602	N	0	0	0	0	0	0	0	0	0	0
60604	N	0	0	0	0	0	0	0	0	0	0
60605	N	7	0	0	0	0	10	0	10	0	0
60606	N	1	0	0	0	0	1	0	1	0	0
60607	N	116	5	28	30	3	24	1	23	3	1
60608	N	1,760	16	83	88	15	383	4	99	34	2
60609	N	2,302	22	66	85	19	511	6	59	0	5
60610	N	94	1	21	21	0	20	1	23	14	2
60611	N	0	0	0	0	0	4	0	4	0	0
60612	N	1,390	3	46	48	6	497	8	63	3	9
60613	N	61	4	273	273	6	34	0	26	0	0
60614	N	55	1	105	105	0	33	0	30	0	0
60615	N	758	15	307	304	23	331	30	203	158	26
60616	N	1,513	10	154	156	31	467	0	61	26	10
60617	N	3,536	148	229	362	157	1,187	42	308	9	78
60618	N	725	13	115	121	13	156	8	79	13	4
60619	N	2,459	182	352	502	207	935	65	328	39	153
60620	N	3,156	253	583	808	285	1,096	66	419	83	183
60621	N	1,511	38	256	283	32	423	15	226	166	18
60622	N	572	3	67	68	1	90	0	35	0	2
60623	N	3,188	29	80	91	25	710	13	79	9	28
60624	N	1,778	22	273	284	25	568	9	61	0	9
60625	N	818	19	104	114	46	168	9	155	107	18
60626	N	282	22	176	177	94	161	7	114	67	24
60628	N	3,287	146	721	853	147	1,021	41	585	216	92
60629	N	2,977	201	190	353	186	918	51	495	368	103
60630	N	396	10	55	65	11	93	5	42	0	7
60631	N	82	14	35	48	14	40	2	32	0	8
60632	N	3,427	48	58	102	44	685	22	88	28	45
60633	N	367	2	9	11	2	144	3	22	0	6
60634	N	1,030	28	73	96	26	148	10	61	0	24
60636	N	1,387	40	73	108	37	356	24	104	4	48
60637	N	1,480	68	692	684	49	370	16	194	109	26
60638	N	974	60	59	119	61	236	14	53	0	25
60639	N	2,450	46	87	124	63	586	19	118	34	25
60640	N	533	7	117	114	27	182	8	262	218	9
60641	N	1,154	36	84	108	38	231	12	75	0	23
60642	N	244	1	251	251	0	29	0	13	0	0
60643	N	1,207	104	238	337	106	401	38	155	0	85
60644	N	1,805	45	312	343	47	557	19	121	33	38
60645	N	981	17	124	132	32	608	8	87	27	10
60646	N	118	12	37	38	1	42	1	22	0	3
60647	N	1,668	12	156	159	13	373	4	64	0	4
60649	N	1,202	96	575	603	103	448	43	421	317	89
60651	N	2,565	66	163	220	68	732	26	131	6	37
60652	N	803	82	92	169	82	222	28	79	0	68
60653	N	1,227	18	527	527	12	283	9	349	257	14
60654	N	1	0	0	0	0	8	0	8	0	0
60655	N	120	25	33	58	25	55	7	36	0	13
60656	N	311	5	20	24	5	21	1	8	0	2
60657	N	63	1	52	52	1	41	1	35	0	4
60659	N	567	11	68	74	19	155	3	50	3	15
60660	N	497	3	63	66	37	252	1	22	0	15
60661	N	1	0	0	0	0	4	0	4	0	0
60707	N	209	14	32	46	14	46	2	22	0	6
60827	N	186	4	4	7	3	19	1	5	0	0

Zip Code	2024 SINGLE FAMILY & MULTI-FAMILY* IQ - Quantity of Program Participants	2024 IQ - Quantity of Whole Building Assessments	2024 IQ - Quantity of DI Only Installations	2024 IQ - Quantity of In-Unit Service Installations	2024 IQ - Quantity of Major Measure Installations	2024 SF ONLY* IQ SF - Quantity of Participants	2024 SF ONLY* IQ SF - Incentive Spend	2024 MF ONLY IQ MF - Incentive Spend	2025 SINGLE FAMILY & MULTI-FAMILY IQ - Quantity of Program Participants	2025 IQ - Quantity of Whole Building Assessments	2025 IQ - Quantity of DI Only Installations	2025 IQ - Quantity of In-Unit Service Installations	2025 IQ - Quantity of Major Measure Installations	2025 SF ONLY* IQ SF - Quantity of Participants	2025 SF ONLY* IQ SF - Incentive Spend	2025 MF ONLY IQ MF - Incentive Spend
60601	0	0	0	0	0	0	$0	$0	1	0	1	0	0	1	$15	$0
60602	0	0	0	0	0	0	$0	$0	1	0	1	0	0	1	$11	$0
60604	0	0	0	0	0	0	$0	$0	0	0	0	0	0	0	$0	$0
60605	3	3	0	0	0	3	$7	$0	16	0	15	0	1	7	$474	$502,167
60606	0	0	0	0	0	0	$0	$0	0	0	0	0	0	0	$0	$0
60607	8	8	8	95	0	7	$196	$2,206	23	0	23	200	0	5	$404	$2,842
60608	70	41	9	34	31	27	$21,424	$191,784	252	6	248	3	5	16	$24,077	$8,724
60609	42	42	4	13	0	39	$19,459	$656	631	10	622	3	11	47	$75,099	$9,475
60610	16	6	10	694	1	5	$7	$15,748	15	0	15	59	0	5	$89	$6,552
60611	2	2	0	0	0	2	$7	$0	5	0	5	0	0	5	$56	$0
60612	39	24	17	278	5	18	$1,390	$15,397	365	0	362	3	3	16	$1,379	$16,667
60613	16	9	0	0	15	8	$243	$193,404	30	6	26	384	4	5	$345	$37,451
60614	19	18	1	53	5	16	$296	$203,772	41	11	39	487	2	7	$438	$537,457
60615	96	72	29	1,359	56	23	$1,174	$881,652	221	16	172	382	50	14	$31,507	$923,118
60616	32	25	3	1,680	24	16	$304	$436,008	88	1	77	3	11	11	$850	$540,912
60617	317	256	7	89	25	244	$208,523	$287,593	904	38	876	74	29	195	$146,565	$19,554
60618	56	53	6	107	8	45	$1,164	$34,847	127	8	122	39	7	23	$32,475	$24,123
60619	378	299	59	350	46	282	$273,327	$267,332	858	62	804	237	57	208	$203,295	$161,411
60620	377	343	16	74	59	324	$449,433	$274,271	1,171	60	1,110	93	62	229	$301,749	$107,941
60621	88	88	10	45	8	73	$11,506	$83,953	484	20	475	570	13	36	$49,905	$69,219
60622	15	13	1	3	1	12	$430	$8,920	86	0	85	103	1	12	$880	$7,510
60623	55	48	9	56	7	39	$27,732	$81,903	1,213	15	1,206	53	9	47	$20,106	$58,941
60624	68	63	2	127	5	61	$47,455	$47,225	484	11	480	223	6	39	$51,369	$5,351
60625	39	37	3	15	9	32	$26,051	$18,414	104	2	99	6	6	15	$1,761	$48,474
60626	51	16	1	65	44	11	$290	$483,702	291	16	262	822	30	18	$1,591	$420,719
60628	402	393	14	209	29	377	$303,227	$99,603	808	66	754	214	54	243	$291,741	$56,567
60629	222	200	11	50	35	187	$279,353	$61,183	1,077	48	1,033	93	54	123	$281,819	$57,239
60630	43	43	0	0	1	43	$30,704	$0	104	6	98	0	7	33	$49,142	$0
60631	17	17	0	0	0	17	$8,691	$0	53	4	49	0	5	37	$23,208	$1,412
60632	59	54	3	15	8	52	$66,688	$34,675	964	7	959	6	8	37	$45,815	$545
60633	23	23	1	4	1	22	$19,444	$1,297	65	1	65	0	0	8	$633	$0
60634	81	80	2	3	0	80	$39,699	$170	181	20	187	152	7	47	$55,611	$21,555
60636	91	86	2	5	8	85	$103,070	$37,817	308	13	299	9	8	71	$52,533	$95
60637	85	70	8	68	23	56	$36,459	$234,290	591	27	570	301	23	40	$58,200	$190,540
60638	107	105	0	0	5	105	$74,030	$700	163	19	144	0	24	73	$128,977	$14,033
60639	87	82	5	112	8	77	$69,160	$23,263	806	14	788	65	23	70	$74,168	$122,307
60640	33	25	1	106	19	18	$522	$246,659	57	3	53	131	4	9	$495	$96,227
60641	72	58	2	6	26	57	$57,619	$262,323	173	8	160	42	13	38	$66,381	$30,029
60642	5	6	0	0	0	5	$198	$0	34	2	33	6	1	4	$469	$12,262
60643	259	258	5	10	7	255	$270,387	$7,891	407	43	374	20	42	214	$233,566	$8,310
60644	98	80	6	114	24	74	$128,525	$203,652	478	14	457	146	21	57	$43,706	$258,380
60645	39	24	0	12	22	24	$6,450	$128,035	535	5	527	3	7	15	$8,456	$67,111
60646	26	26	0	0	0	26	$5,762	$0	31	7	23	0	9	14	$33,180	$2,400
60647	57	50	7	225	9	43	$11,516	$52,122	170	6	164	29	7	15	$23,510	$18,298
60649	136	76	14	269	74	58	$106,896	$511,671	489	31	465	444	25	52	$57,559	$297,106
60651	87	80	6	95	7	76	$85,343	$72,556	882	20	866	224	22	83	$121,706	$16,660
60652	157	157	2	3	6	156	$225,160	$1,323	221	28	196	0	33	131	$184,188	$8,045
60653	49	48	10	212	11	33	$15,644	$130,569	334	16	327	246	7	22	$30,113	$107,725
60654	2	2	0	0	0	2	$25	$0	0	0	3	0	0	0	$0	$0
60655	64	64	2	0	0	64	$103,064	$0	109	25	87	0	31	98	$167,931	$0
60656	28	28	0	0	0	28	$14,231	$0	30	2	28	0	3	13	$5,664	$5,452
60657	9	8	3	11	1	6	$62	$30,507	26	8	28	258	0	5	$378	$5,215
60659	37	30	0	0	8	30	$24,058	$41,255	422	5	413	12	10	8	$16,917	$28,842
60660	42	14	1	16	36	10	$204	$230,016	314	0	303	6	13	6	$8,652	$178,234
60661	0	0	0	0	0	0	$0	$0	0	0	0	0	0	0	$0	$0
60707	24	23	0	0	1	23	$1,306	$6,448	64	4	61	6	4	22	$21,880	$304
60827	8	7	0	0	1	7	$815	$252,000	27	3	26	0	1	7	$7,905	$0

Footnote:
*Single Family participants and incentive spend exclude kits.

IQ Building Retrofit Materials Used for the Peoples Gas Service Territory in 2025

IQ Retrofit Materials Metrics	2022	2023	2024	2025
Quantity of Projects with the following predominant Insulation Materials:				
Insulation - Fiberglass	376	0	127	12
Insulation - Cellulose	900	142	224	221
Insulation - Spray Foam	604	0	0	3
Insulation - Rigid Foam	685	0	0	136
Pipe Insulation - Foam	2	0	0	226
Pipe Insulation - Wool (Glass, Mineral)	0	0	0	0
Pipe Insulation - Tape	0	0	0	0
Insulation - Other	279	0	12	3
Quantity of Projects with the following predominant Sealants/Caulks in general:				
General Sealant Material - Tape	0	216	0	0
General Sealant Material - Mastic	10	0	0	0
General Sealant Material - Latex	0	0	4	7
General Sealant Material - Silicone	1	0	0	0
General Sealant Material - Polyurethane	0	139	220	124
General Sealant Material - Other	0	0	14	2
Quantity of Projects with the following predominant Sealants/Caulks in HVAC Ductwork:				
HVAC Ductwork Sealant Material - Tape	0	0	0	2
HVAC Ductwork Sealant Material - Mastic	0	0	0	0
HVAC Ductwork Sealant Material - Latex	0	0	0	0
HVAC Ductwork Sealant Material - Silicone	0	0	0	0
HVAC Ductwork Sealant Material - Polyurethane	0	0	0	0
HVAC Ductwork Sealant Material - Other	0	0	0	0

Statewide Quarterly Report Template
Tab 9: Historical Other - Health & Safety
2025

Instructions:
*Each Program Administrator should complete for Quarterly Reports.

Instructions:
Other to be completed by SAG

IQ Whole Building Retrofit Heath & Safety Spend for the Peoples Gas Service Territory

Health & Safety Spend	2022	2023	2024	2025
Single Family			$88,164	$80,659
Multi-Family			$44,229	$24,795

IQ Whole Building Retrofit Heath & Safety Metrics for the Peoples Gas Service Territory in 2025

Health & Safety Metrics	2022	2023	2024	2025
Number of Properties Assessed - Single Family	1,590	1,266	363	485
Number of Properties Assessed - Multi-Family	426	285	256	218
Number of Properties with identified Health & Safety Issues	787	919	321	420
Number of Properties deferred due to Health & Safety Issues	109	165	15	83
Quantity of Properties with the following Health and Safety Issues Identified:				
Electrical Safety	7	1	8	19
Natural Gas Safety	1	241	5	24
Fire Safety	403	520	194	123
Indoor Air Quality	592	449	18	14
Other	386	451	87	241

IQ Whole Building Retrofit Health & Safety Narrative for the Peoples Gas Service Territory

Qualitative Narrative	
Q1 2025	**Single Family** -310 total Single Family properties were assessed -238 health and safety issues were identified: (4) electrical safety, (7) natural gas safety and (80) fire safety (smoke detectors) -The remaining 147 being other, which included (96) dryer vent, with the remaining being mold, pests, vermiculite and leaks **Multi-Family** -60 assessments were completed with health and safety issues identified at 14 locations -Two health and safety projects were supported to complete pipe insulation and a tune-up at one site and weatherization at a different site -The $5,950 investment in health and safety enabled $23,966 in energy efficiency incentives and the achievement of 13,965 therms
Q2 2025	**Single Family** -In Q2, 175 single family properties were assessed and 148 H&S issues were identified: 5 electrical safety, 8 natural gas safety and 43 fire safety -The other issues identified included bulk moisture leaks, suspected mold, pests and dryer vent issues **Multi-Family** -In Q2, H&S issues were identified at 16 locations -Eleven H&S projects were supported to enable weatherization projects and natural gas mechanical projects -The H&S investment enabled $36,798 in energy efficiency incentives, achieved 12,823 therms and paved the way for more projects that will occur later in 2025
Q3 2025	**Single Family** -In Q3, no single family properties were assessed since offering goals have been achieved. **Multi-Family** -In Q3, MFES conducted 58 assessments in the Peoples Gas territory and none of those assessments identified H&S issues. However, MFES completed four projects that required H&S improvements that were contractor referrals without a program assessment. Three of four projects involved weatherization and one involved gas mechanicals.
Q4 2025	**Single Family** - N/A **Multi-Family** - N/A

Instructions:
*Each Program Administrator should complete for Quarter 2 Reports for the previous year. Peoples Gas reports this information in the Quarter 4 Report of the same year.

IQ Whole Building Retrofit Heath & Safety Spend by Zip Code for 2025

Zip Code	Economically Disadvantaged Area (Y/N)	Health & Safety Spend
60601	Y	$0
60602	N	$0
60604	N	$0
60605	Y	$0
60606	N	$0
60607	Y	$0
60608	Y	$810
60609	Y	$2,025
60610	Y	$0
60611	Y	$0
60612	Y	$510
60613	Y	$0
60614	Y	$0
60615	Y	$448
60616	Y	$0
60617	Y	$3,690
60618	Y	$1,305
60619	Y	$6,817
60620	Y	$10,782
60621	Y	$864
60622	Y	$0
60623	Y	$903
60624	Y	$1,531
60625	Y	$0
60626	Y	$0
60628	Y	$14,398
60629	Y	$6,627
60630	Y	$1,328
60631	Y	$590
60632	Y	$916
60633	Y	$0
60634	Y	$1,744
60636	Y	$1,546
60637	Y	$2,215
60638	Y	$8,121
60639	Y	$1,645
60640	Y	$0
60641	Y	$1,736
60642	Y	$0
60643	Y	$14,869
60644	Y	$940
60645	Y	$30
60646	Y	$703
60647	Y	$1,343
60649	Y	$1,019
60651	Y	$2,918
60652	Y	$6,501
60653	Y	$487
60654	Y	$0
60655	Y	$2,363
60656	Y	$130
60657	Y	$0
60659	Y	$1,420
60660	Y	$722
60661	N	$0
60707	Y	$1,196
60827	Y	$260

Statewide Quarterly Report Template
Tab 10: Diverse Contracting
2025

Instructions:
*Each Program Administrator should complete for Q2 and Q4 Reports.
**If a Program Administrator has two (2) or less diverse contractors in a tier level and/or diverse category, this reporting requirement will be waived to protect the confidentiality of contract values.

Quantity of Diverse Contractors

	Quantity of Diverse Contractors		
	Primary Contractors	Secondary Contractors	Total Contractors
Women-owned businesses	3	5	8
Minority-owned businesses			
Veteran-owned businesses	0	0	0
Woman and minority-owned business			
Woman and veteran-owned business	0	0	0
		Total	**11**

Diverse Contractor Spend

	Diverse Primary Contractor Spend			Diverse Secondary Contractor Spend			All Diverse Contractor Spend		
	Implementation, Bundle Management, and Marketing	Incentives and Other Fees	Total Primary Contractor Spend	Implementation, Bundle Management, and Marketing	Incentives and Other Fees	Total Secondary Contractor Spend	Implementation, Bundle Management, and Marketing	Incentives and Other Fees	Total Diverse Contractor Spend
Women-owned businesses	19.36%	0.00%	10.37%	1.28%	0.00%	0.69%	21%	0%	11%
Minority-owned businesses									
Veteran-owned businesses	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0%	0%	0%
Woman and minority-owned business									
Woman and veteran-owned business	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0%	0%	0%
						Total	**23%**	**5%**	**15%**

Peoples Gas (PGL) and North Shore Gas (NSG)
Final 2025 NTG Values Please note DAC NTG deemed values described in the EE Policy Manual Section 7.4
18-Sep-24

Sector	Program/Path/Measures	New NTG Research Since Final 2024 Recommendations	Free Ridership (FR)	Participant Spillover (PSO)	Non-Participant Spillover (NPSO)	2025 NTG Value	Gas Source(s)
		Final 2025 NTG Values					
Income Eligible	Single Family Retrofits and Kits	No				1.00	NTG value for this Income Eligible program is 1.00
Income Eligible	Multi-Family Retrofit and Kits	No				1.00	NTG value for this Income Eligible program is 1.00
Income Eligible	Advanced Thermostats	No				1.00	NTG value for this measure in Income Eligible programs is 1.00
Income Eligible	Public Housing Authority (PHA)	No				1.00	NTG value for this Income Eligible program is 1.00
Income Eligible	New Construction	No				1.00	NTG value for this Income Eligible program is 1.00
Residential	HEJ - Advanced (Smart) Thermostats: Direct Install or Reprogram	No	0.12			0.94	The heating savings factor for residential advanced thermostats is based on a consumption data analysis using matching to non-participants. The values are therefore between net and gross with respect to free ridership. Like all consumption data analyses, they are net with respect to participant spillover and gross with respect to non-participant spillover. For more detail, see Table 5-3 in Volume 4 of the IL-TRM. Guidehouse recommends NTG = 1 - FR/2 + NPSO for residential advanced thermostats. Here FR is based on Guidehouse research conducted in 2023 with PGL/NSG customers who participated in HEJ between Q2 2022 and Q1 2023. Guidehouse memo: PLG NSG Advanced Thermostat FR Memo 2023-08-31. (Note that net savings achieved by advanced thermostats are included when calculating residential non-participant spillover with the multiplier, described below.)
Residential	HEJ - Faucet Aerators	No	0.00	0.09		1.09	The IL TRM specifies that the free ridership for aerators be set at zero when estimating gross savings using a baseline average flow rate that includes the effect of existing low flow fixtures. PSO: 2023 Survey of 2021-3participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
Residential	HEJ - Showerheads	No	0.00	0.09		1.09	The IL TRM specifies that the free ridership for showerheads be set at zero when estimating gross savings using a baseline average flow rate that includes the effect of existing low flow fixtures. PSO: 2023 Survey of 2021-3participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
Residential	HEJ - Programmable Thermostat	No	0.10	0.09		0.99	FR and PSO: 2023 Survey of 2021-3participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
Residential	HEJ - Re-Programming Thermostat	No	0.10	0.09		0.99	FR and PSO: 2023 Survey of 2021-3participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
Residential	HEJ - Boiler Pipe Insulation, DHW Pipe Insulation	No	0.10	0.09		0.99	FR and PSO: 2023 Survey of 2021-3participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
Residential	HEJ - Leave-Behind Kit (Measures are Shower Timer, Cell Foam Weatherstripping, and Door Sweep)	No	0.10	0.09		0.99	FR and PSO: 2023 Survey of 2021-3participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
Residential	All scenarios of Air Sealing plus added Attic Insulation Installed in the Same Project (whether or not additional measures are installed in the same project)	No				0.88 Air Sealing 0.89 Attic Insul.	Applies only in scenarios where air sealing and attic insulation are installed at the same time, and only if the savings for natural gas heating are estimated using the Illinois TRM, Section 5.6.1 (Air Sealing) and Section 5.6.5 (Ceiling/Attic Insulation) adjustment factor of 72% that was derived from air sealing and insulation research by Navigant (2018). See Navigant (2018) ComEd and Nicor Gas Air Sealing and Insulation Research Report. The savings adjustment factor is based on a consumption data analysis using matching to non-participants. The values are therefore between net and gross with respect to free ridership. Like all consumption data analyses, they are net with respect to participant spillover and gross with respect to non-participant spillover. For more detail, see Table 5-3 in Volume 4 of the IL-TRM. Consistent with Section 7.2 of the Illinois EE Policy Manual, applicable net-to-gross adjustments to the savings will be determined as part of the annual SAG net-to-gross process. Considering the guidance of TRM Table 5.3, the evaluators recommend a NTG that is 1 minus 50% of the researched free ridership rate plus non-participant spillover.
Residential	Air Sealing (conducted without adding Attic Insulation)	No	0.24	0.01		0.77	FR: Navigant research of free ridership from a telephone survey administered to ComEd EPY9/GPY6 and CY2018 Weatherization Rebates Program participants that were joint with PGL, NSG and Nicor Gas. Navigant conducted the net-to-gross (NTG) research in Fall 2018 with EPY9/GPY6 and CY2018 participants and in Spring 2019 with only CY2018 duct sealing participants. Analyzed completes: Attic Insulation (61), Air Sealing (68), Duct Sealing (79). Wall insulation FR is a weighted average value. Survey was fuel neutral and used TRM v7.0 protocols. Navigant recommended updating older gas research with these newer joint values, described in Navigant memo to ComEd July 19, 2019.
Residential	Insulation measures, excluding ceiling/attic insulation, including Wall, Floor Above Crawlspace, Basement Sidewall; Rim/Band Joist	No	0.22	0.01		0.79	
Residential	Duct Sealing	No	0.14	0.01		0.87	PSO: 2017 Survey of 86 GPY6 Air Sealing, Duct Sealing, and Insulation participants and 60 participating
Residential	Online Marketplace Advanced (Smart) Thermostats	No	0.10			0.95	Guidehouse recommends NTG = 1 - FR/2 + NPSO for residential advanced thermostat. Here FR is based on Guidehouse research conducted in 2023 with PGL/NSG customers who purchased a discounted advanced thermostat through the Online Marketplace between Q2 2022 and Q1 2023. Guidehouse memo: PLG NSG Advanced Thermostat FR Memo 2023-08-31. (Note that net savings achieved by advanced thermostats are included when calculating residential non-participant spillover with the multiplier, described below.)
Residential	Home Energy Rebate Advanced (Smart) Thermostats	No	0.22			0.89	Guidehouse recommends NTG = 1 - FR/2 + NPSO for residential advanced thermostat. Here FR is based on Guidehouse research conducted in 2023 with PGL/NSG customers who purchased a discounted advanced thermostat through the Home Energy Rebate program between Q2 2022 and Q1 2023. Guidehouse memo: PLG NSG Advanced Thermostat FR Memo 2023-08-31. (Note that net savings achieved by advanced thermostats are included when calculating residential non-participant spillover with the multiplier, described below.)
Residential	Home Energy Rebate (HVAC and other equipment, excluding Advanced Thermostats, Duct Sealing, Air Sealing, and Insulation Measures)	No	0.44	0.02	ATSO: 0.05 IATSO: 0.11	0.74	FR and PSO: Guidehouse 2020 survey of 100 analyzed completes from 2018 participants (any measure) for PSO; 63 analyzed completes from 2019 for FR (HE furnace participants); and 41 analyzed completes of 2019 active participating trade allies. Since HE furnaces comprise 92% of HVAC equipment savings, Guidehouse recommends applying FR results to other HVAC equipment (predominantly HE boilers and tankless water heaters) NPSO: IATSO (0.11): 2013 Survey of 59 non-participating trade allies. Residential Prescriptive Rebate Program GPY2 Evaluation Report, Navigant, 2/10/14 ATSO (0.05): The spillover measures reported by participants (PSO: 0.02) and active trade allies (ATSO: 0.05) in the 2020 survey research did not overlap, therefore the spillover results are additive. The inactive trade allies spillover estimate (IATSO): 0.11) does not overlap with either participants or active trade allies.
Residential Outreach & Educ.	Home Energy Reports	No				NTG is not applied	No NTG adjustment is applied to savings derived from a consumption data analysis with an experimental design that does not require further net savings adjustment per Table 5-3 in Volume 4 of the IL-TRM.
Residential Outreach & Educ.	Elementary Energy Ed	No				1.00	Program value applies to all natural gas saving measures offered through the program, including Water Efficient Showerheads; Water Efficient Kitchen Aerators; Water Efficient Bath Aerators; Water Heater Setback, and Shower Timers.
Multi-Family DI In-Unit and Common Areas (starting 2020)	Direct Install (DI) In-Unit and Common Area (all DI measures except in-unit DI faucet aerators and in-unit DI showerheads)	No	0.05	0.01	0.00	0.96	Navigant research with CY2018 participants for FR and GPY6 participants for PSO. The free ridership results meet a 90% confidence interval within 5% precision, based on 15 respondents receiving pipe insulation or programmable thermostats from a population of 95 unique direct installation participants (property owners and managers) from 2018 from Nicor Gas, Peoples Gas, and North Shore Gas, excluding accounts that only installed showerheads and aerators. Participant Spillover from survey of 65 participants from a sample of Nicor Gas, Peoples Gas, and North Shore Gas GPY6 multi-family program participants.
Multi-Family DI In-Unit	Direct Install In-Unit Showerheads (when meeting TRM specifications for zero free ridership treatment)	No	0.00	0.01	0.00	1.01	The IL TRM specifies that the free ridership for showerheads be set at zero when estimating gross savings using a baseline average flow rate that includes the effect of existing low flow fixtures. Participant Spillover from survey of 65 participants from a sample of Nicor Gas, Peoples Gas, and North Shore Gas GPY6 multi-family program participants.
Multi-Family DI In-Unit	Direct Install In-Unit Faucet Aerators (when meeting TRM specifications for zero free ridership treatment)	No	0.00	0.01	0.00	1.01	The IL TRM specifies that the free ridership for aerators be set at zero when estimating gross savings using a baseline average flow rate that includes the effect of existing low flow fixtures. Participant Spillover from survey of 65 participants from a sample of Nicor Gas, Peoples Gas, and North Shore Gas GPY6 multi-family program participants.
Multi-Family Comprehensive - Path-Based Estimates	Prescriptive Rebates	No	0.14	0.01		0.87	Free ridership from Navigant analysis of 23 participant interviews conducted in 2019 of 2018 MF Program participants (C/P 90/9). Sample size not large enough for path-based estimates. Participant Spillover from survey of 65 participants from a sample of Nicor Gas, Peoples Gas, and North Shore Gas GPY6 multi-family program participants. NPSO applies to Participating Trade Ally path from 2023 survey of PTA, memo PGL NSG Multifamily Participating Trade Ally Spillover Memo Draft 08-30-2023.
Multi-Family Comprehensive - Path-Based Estimates	Partner Trade Allies	No	0.14	0.01	0.01	0.88	
Multi-Family Comprehensive - Path-Based Estimates	Custom Incentives	No	0.14	0.01		0.87	
Multi-Family Comprehensive - Path-Based Estimates	Gas Optimization	No	0.06	0.00	0.00	0.94	(Guidehouse Research, 2021) Evaluation research consisting of 2019 and 2020 participating customers. Participant free-ridership of 6% and participant spillover of 0% from 5 participating customer NTG interviews completed from a population of 15 contacts from 11 accounts (representing 79% of population therm savings). Respondents did not include large multi-family buildings but large hotels were represented in the respondents, which have similar characteristics.
Residential	Sector-wide, non-income-eligible residential customers	No			0.083	1.083 (Multiplier on net residential sector therms)	> The objective of the research was to estimate non-income-eligible-residential sector-wide non-participant spillover (NPSO) for PGL NSG using Illinois TRM version 11 Attachment A, Section 4.1.3 Nonparticipant Spillover Measured from Customers. The study scope was limited to PGL NSG. The NPSO survey was fielded in 2023 through an online survey sent to 49,895 randomly selected non-participants. > The 1.083 NPSO NTG rate is a multiplier on residential sector net savings and the NPSO value is not additive to individual program-level NTG values (e.g., a HER program NTG of 0.80 does not become 0.883). At program year-end, the NPSO multiplier of 1.083 will be multiplied by the sum of the non-income eligible residential sector program-level verified net therms saved, and the resulting net therms will be the total residential sector verified net therms. > Previously researched HER NPSO values represent high efficiency furnaces and boilers - these measures are not present in the qualifying residential sector NPSO results and are not double-counted. > The value provided here is presented in a memo from Guidehouse: PGL NSG Residential NPSO Research Results Memo 2023-08-25 Draft.
Business	Prescriptive Rebates including Thermostats	No	0.22	0.11	0.02	0.91 All Other Measures 0.91 Thermostats	Method: Evaluation research consisting of 2018 and 2019 participating customer and trade ally self-reports. Free-ridership of 27% and participant spillover of 11% from 20 participating customer NTG interviews completed from a population of 80 (a relative precision of 7.5% at the 90% confidence level). Free Ridership of 13% and participant spillover of 8% from 4 participating trade ally interviews (representing 38% of program savings). Final free ridership value of 22% weighted average of 61% customer value and 39% trade ally value. The trade ally spillover of 8% was not applicable in preference for the 11% customer participant value (to exclude the potential for double counting). Non-participant spillover of 2% for Business/Private Sector only, from 5 non-participating trade ally interviews conducted in GPY2 as part of evaluation research, no double counting with participant spillover due to different measure types. This survey research did not include Public Sector Prescriptive participants, which accounted for approximately 16% of Prescriptive Rebate program savings in 2018 and 2019. Evaluators plan to conduct separate survey research with the relatively small number of Public Sector participants that participate in multiple programs. We recommend the results for the business participants be used for the public sector until new research is completed. Further justification and explanation is provided in the 2020 NTG research memo. The Thermostat NTG is 1 minus 50% of the program level free ridership plus NPSO, because the TRM heating savings was based on a consumption data analysis using matching to non-participants.
Public Sector	Prescriptive Rebates including Thermostats	No	Participant: 0.16 TA: 0.13 Wgt: 60%P / 40%TA FR = 0.15	Participant: 0.00 TA: 0.07	0.00	0.92 All Other Measures 0.93 Thermostats	(Guidehouse Research, 2021) Evaluation research consisting of 2019 and 2020 participating Public Sector customers and 2018 and 2019 trade allies that had completed prescriptive and custom rebate projects. Participant free-ridership of 16% and participant spillover of 0% from 4 participating customer NTG interviews completed from a population of 15 (representing 78% of population therm savings). Free Ridership of 13% and participant spillover of 7% from 3 participating trade ally interviews (representing 58% of program savings). Final free ridership value of 15% is a weighted average of 60% customer value and 40% trade ally value. The trade ally spillover of 7% was applicable to Public Sector participants. Non-participant spillover conducted in GPY2 was not applicable to the Public Sector. The Thermostat NTG is 1 minus 50% of the program level free ridership plus NPSO, because the TRM heating savings was based on a consumption data analysis using matching to non-participants. > Consider multi-year samples given the small population
Business	Custom Rebates	Yes	0.07	0.00		0.93	FR: Guidehouse 2024 survey with customers who participated in 2023. PSO: Guidehouse 2024 survey with customer who participated in 2022.
Public Sector	Custom Rebates	No	0.15	0.07	0.00	0.92	(Guidehouse Research, 2021) Evaluation research consisting of 2019 and 2020 participating Public Sector customers and 2018 and 2019 trade allies that had completed prescriptive and custom rebate projects. Participant free-ridership of 16% and participant spillover of 0% from 4 participating customer NTG interviews completed from a population of 15 (representing 78% of population therm savings). Free Ridership of 13% and participant spillover of 7% from 3 participating trade ally interviews (representing 58% of program savings). Final free ridership value of 15% is a weighted average of 60% customer value and 40% trade ally value. The trade ally spillover of 7% was applicable to Public Sector participants. > Consider multi-year samples given the small population
Business and Public Sector	Gas Optimization	No	0.06	0.00	0.00	0.94	(Guidehouse Research, 2021) Evaluation research consisting of 2019 and 2020 participating customers. Participant free-ridership of 6% and participant spillover of 0% from 5 participating customer NTG interviews completed from a population of 15 contacts from 11 accounts (representing 79% of population therm savings). > Consider multi-year samples given the small population
Business and Public Sector	Joint Retro-Commissioning	Yes	0.14	0.00	0.00	0.86	FR and PSO: Guidehouse 2024 survey with customers and trade allies who participated in the program in 2023 (FR) and 2022 (PSO).
Business and Public Sector	Joint Non-Residential New Construction Program	No	2023 FR =0.51	0.00	0.00	0.43	NTG is the average of previous 4 program years of research CY2018 (0.45); CY2019 (0.39); CY2020 (NA); CY2021 (0.39); CY2022(NA), and CY2023 (0.49). The 2023 FR estimate from Opinion Dynamics CY2023 research, based on 37 completed interviews from a population of 81 projects representing 41% of therm savings.
Business and Public Sector	Non-Joint Non-Residential New Construction - Comprehensive Custom Projects	No				0.43	Apply the same NTG as the joint program until utility-specific research produces a value. Assumes the program delivery approach and targeted decisionmakers are similar to the Joint Non-Res New Construction Program. This NTG value does not apply to Prescriptive program rebates for equipment (e.g., a rebate for a high efficiency furnace purchased for a new commercial building specified through a Prescriptive program delivery approach without design assistance).
Business and Public Sector	Strategic Energy Management	No				0.97	Program NTG value would apply to other cohorts (for example, healthcare) as well as industrial. For equipment measures identified through SEM that are channeled through other incentive programs, use the NTG of the program processing the equipment incentive.
Business and Public Sector	Combined Heat and Power (CHP)	No				Project-Specific	Project-specific NTG values to be determined by evaluation early in each project. If that is not possible, default of 0.8 NTG to be used.
Small/Mid-Sized Business	Assessment/Direct Install/Efficiency Kits	No	Participant: 0.05 TA: 0.09 Wgt: 39%P / 61%TA FR = 0.07	Participant: 0.00 TA: 0.00		All Measures (except Thermostats) = 0.93 Thermostats = 0.97	>FR (Guidehouse research conducted in 2021): FR based on responses from 2020 participants and TAs. Participant free ridership reported by 31 responses from sample of 260 Small Business participants from 2020. Trade Ally FR reported by 17 TAs from sample of 50 TAs(38% of savings) that participated in 2020. FR results weighted 39% participants and 61% TA. Single NTG value applies to DI/Assessment, Prescriptive, and Custom delivery approaches (DI and Custom population savings too small for separate estimates). >Participant and Trade Ally spillover of 0.00 from same sample as FR (Guidehouse, 2021 research). >The Thermostat NTG is 1 minus 50% of the program level free ridership plus NPSO, because the TRM heating savings was based on a consumption data analysis using matching to non-participants.
Small/Mid-Sized Business	Prescriptive and Custom rebates, including Thermostats						
Business and Public Sector	Commercial Food Service (CFS) Midstream Pilot Program	No				0.80	The evaluation team recommends a deemed NTG of 0.80 for the CFS Program for all utility partners until research can be conducted.
Business and Public Sector	Sector-wide, non-residential customers	No			0.00	0.00	> The NPSO NTG rate is a multiplier on non-residential sector net savings and the NPSO value is not additive to individual program-level NTG values. At program year-end, the NPSO multiplier will be multiplied by the sum of the non-residential sector program-level verified net therms saved, and the resulting net therms will be the total non-residential sector verified net therms.
Portfolio	Market Transformation Pilot Programs and Research Projects	No				Pilot-Specific	Pilot program-specific NTG values to be determined by evaluation early in each pilot/program. If primary research is not possible, we will conduct secondary research. If research is inconclusive, the default value of 0.80 will apply.
Portfolio	Building Operator Certification	No				1.00	In previous years, net savings was estimated directly through participant sampling and interviews. No further NTG adjustment is applied if deemed savings are based on historical results.
Portfolio	Emerging Technology Pilot Programs and Research Projects	No				Pilot-Specific	Pilot program-specific NTG values to be determined by evaluation early in each pilot/program. If primary research is not possible, we will conduct secondary research. If research is inconclusive, the default value of 0.80 will apply.
Portfolio	Virtual Assessment (VA) / Remote Assessment (RA) and Independent/Self-Installation (guided or unguided by a program representative)	No				For a given program or measure, use the same NTG as the on-site direct installation approach by a Program Representative	Several programs that previously offered direct installation (DI) by a program representative at the site are offering customers the option of a "Remote" or "Virtual" Assessment combined with independent/self - installation. There is no new research to suggest these RA/VA participants have a NTG that is different from the on-site Direct Installation participants that were previously surveyed for NTG. We recommend that RA/VA savings use the same NTG as the corresponding DI participants.