

STATE OF ILLINOIS
ILLINOIS COMMERCE COMMISSION

Illinois Commerce Commission)	
vs.)	
North Shore Gas Company)	Docket No. 24-0831
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
SAM ADDISON

- 1 **Q. Please state your name and business address.**
- 2 A. Sam Addison, 200 East Randolph Street, Chicago, Illinois 60601.
- 3 **Q. By whom are you employed?**
- 4 A. WEC Business Services LLC.
- 5 **Q. What position do you hold with WEC Business Services LLC?**
- 6 A. I am a Project Specialist 3 in Regulatory Affairs.
- 7 **Q. What are your responsibilities in that position?**
- 8 A. I am responsible for performing activities related to regulatory research, rate
- 9 and tariff administration, billing and rate impact studies, accounting and
- 10 reporting requirements for The Peoples Gas Light and Coke Company
- 11 “Peoples Gas” or the “Company”), and its sister utility, North Shore Gas
- 12 Company (“North Shore”). I also have managed and coordinated the
- 13 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 Commission's rules (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. I was hired by Integrys Business Services in 2014 on the Finance team, where I worked 6 years across multiple positions of increased responsibility, including support of the 2020 North Shore Gas Rate Case. In January 2022, I left WEC Energy Group to join ComEd as a Senior Financial Analyst supporting Financial Operations. In October 2022, I rejoined WBS as a Project Specialist 3 on the Regulatory Affairs team.

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.

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

42 **Q. Please describe the subject matter of this proceeding.**

43 A. North Shore's and Peoples Gas' Schedule of Rates for Gas Service each
44 includes Rider EOA, Energy Efficiency and On-Bill Financing Adjustment.
45 The Commission approved Rider EOA in Docket No. 10-0564. Rider EOA
46 became effective June 20, 2011. Each year, Rider EOA calls for North Shore
47 and Peoples Gas to file charges (called the "Effective Component") with the
48 Commission. The Rider EOA Effective Component is a per-therm charge to
49 cover the costs of the energy efficiency program and the On-Bill Financing
50 ("OBF") program. The portions of the Effective Component associated with
51 energy efficiency and OBF are based on the four year budgets from the fourth
52 plan filed with the Commission in Docket 21-0159. Rider EOA is applicable
53 to all Service Classifications ("S.C."); however, for energy efficiency, certain
54 large customers have been identified as "exempt" or "self-directing" by the
55 Department of Commerce and Economic Development ("DCEO") per criteria
56 set forth in Section 8-104(m) of the Public Utilities Act. Such customers are
57 not subject to Rider EOA and do not participate in North Shore's and Peoples
58 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 prudence 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 2024, 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 2024, 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, 2024, through December 31, 2024.

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.

104 A. NSG-PGL Exhibit 1.1N is a statement of the RA components that will apply
 105 for each month of the nine-month reconciliation amortization period
 106 beginning April 1, 2025 and ending December 31, 2025 ("Statement") for all
 107 service classifications.

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

109 A. Yes, it was.

110 **Q. What is the purpose of the Statement?**

111 A. The Statement shows the applicable RA for customers served under North
 112 Shore's S.C. Nos. 1, 2 and combined 2, 4, 5 and 7 who are not classified as
 113 exempt or self-directing, for the North Shore programs¹. It also shows the
 114 derivation of each RA component and provides supporting data.

115 **Q. Please describe the elements of the Statement.**

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

- 117 • Page 1 shows the RA that will be billed over the nine-month
 118 reconciliation amortization period beginning April 1, 2025 for each
 119 Service Classification. The RA represents per-therm charges or
 120 refunds.
- 121 • Page 2 through 4 Column [B] show the determination of the RA as
 122 described under Section D(2) of Rider EOA for S.C. Nos. 1 and 2 for
 123 residential programs, and combined S.C. Nos. 2, 4, 5 and 7 for
 124 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. 23-0804. For calendar year 2025, the applicable interest rate established by the Commission is 4.5 percent pursuant to the order in Docket No. 24-0932. 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. 23-0804. 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,

171 Line 30 for Commercial and Industrial Energy Efficiency, and Line 45
 172 for OBF.

173 • Page 6 shows the forecasted total therm deliveries for the
 174 reconciliation amortization period of April 2025 through December
 175 2025. The total therm deliveries for S.C. No. 2 and combined S.C.
 176 Nos. 4, 5 and 7 are adjusted to exclude therm deliveries to individual
 177 customers reported by DCEO as exempt or self-directing who are not
 178 subject to Rider EOA. Therm totals used in calculations of per-therm
 179 charges are:

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

184 **Q. How much was calculated as refundable or recoverable from S.C. No. 1**
 185 **customers over the nine-month period beginning April 1, 2025, for**
 186 **residential energy efficiency and OBF?**

187 A. As shown on NSG-PGL Exhibit 1.1N, the reconciliation result is a refund of
 188 \$196,381.80 to customers (NSG-PGL Exhibit 1.1N, Page 2, Column B, Line
 189 13 plus Line 27).

190 **Q. What is the RA component that will be effective for S.C. No. 1 beginning**
 191 **April 1, 2025?**

192 A. The RA component for S.C. No. 1 customers will be a refund of \$0.0018 per
 193 therm (NSG-PGL Exhibit 1.1N, Page 1, Column B, Line 4).

194 **Q. How much was calculated as refundable or recoverable from S.C. No. 2**
 195 **customers over the nine-month period beginning April 1, 2025, for**
 196 **residential energy efficiency and OBF?**

197 A. As shown on NSG-PGL Exhibit 1.1N the reconciliation results in a charge of
 198 \$376,272.91 to customers (NSG-PGL Exhibit 1.1N, Page 3, Column B, Line
 199 13 plus Line 27).

200 **Q. How much was calculated as refundable or recoverable from combined**
 201 **S.C. Nos. 2, 4, 5 and 7 customers over the nine-month period beginning**
 202 **April 1, 2025, for commercial and industrial energy efficiency**
 203 **programs?**

204 A. As shown on NSG-PGL Exhibit 1.1N the reconciliation results in a charge of
 205 \$294,333.81 to customers (NSG-PGL Exhibit 1.1N, Page 4, Column B, Line
 206 13).

207 **Q. What is the RA component that will be effective for S.C. No. 2 beginning**
 208 **April 1, 2025, for residential, commercial and industrial energy**
 209 **efficiency and OBF?**

210 A. The RA component for S.C. No. 2 customers will be a charge of \$0.0098 per
 211 therm (NSG-PGL Exhibit 1.1N, Page 1, Column C, Line 4).

212 **Q. What is the RA component that will be effective for S.C. Nos. 4, 5, and 7**
 213 **beginning April 1, 2025, for commercial and industrial energy**
 214 **efficiency?**

215 A. The RA component for S.C. Nos. 4, 5 and 7 customers will be a charge of
 216 \$0.0036 per therm (NSG-PGL Exhibit 1.1N, Page 1, Column D, Line 4).

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

219 A. The RA components were filed with the Commission on Information Sheet
 220 No. 32 and are added to the Effective Component adjustment amounts for
 221 the 2025 program year and billed as a single adjustment for each service
 222 classification effective April 1, 2025.

223 **Q. Please describe NSG-PGL Exhibit 1.1P.**

224 A. NSG-PGL Exhibit 1.1P is a statement of the RA components that will apply
 225 for each month of the nine-month reconciliation amortization period
 226 beginning April 1, 2025, and ending December 31, 2025 ("Statement") for all
 227 service classifications.

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

229 A. Yes, it was.

230 **Q. What is the purpose of the Statement?**

231 A. The Statement shows the applicable RA for customers served under Peoples
 232 Gas' S.C. Nos. 1, 2 and combined 2, 4, 5, 7 and 8 who are not classified as
 233 exempt or self-directing, for the Peoples Gas programs². It also shows the
 234 derivation of each RA component and provides supporting data.

235 **Q. Please describe the elements of the Statement.**

236 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, 2025, 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. 23-0804, if any. For calendar year 2025, the applicable interest rate established by the Commission is 4.5 percent pursuant to the order in Docket No. 24-0932. 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. 23-0804, 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 2025 through December 2025. 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, 2025, for residential energy efficiency and OBF?

306 A. As shown on NSG-PGL Exhibit1.1P the reconciliation result is a refund of
307 \$3,094,045.97 to customers (NSG-PGL Exhibit 1.1P, Page 2, Column B, Line
308 13 plus Line 27).

309 **Q. What is the RA component that will be effective for S.C. No. 1 beginning**
310 **April 1, 2025?**

311 A. The RA component for S.C. No. 1 customers will be a refund of \$0.0085 per
312 therm (NSG-PGL Exhibit 1.1P, Page 1, Column B, Line 4).

313 **Q. How much was calculated as refundable or recoverable from S.C. No. 2**
314 **customers over the nine-month period beginning April 1, 2025, for**
315 **residential energy efficiency and OBF?**

316 A. As shown on NSG-PGL Exhibit1.1P the reconciliation results in a charge of
317 \$2,819,380.94 to customers (NSG-PGL Exhibit 1.1P, Page 3, Column B, Line
318 13 plus Line 27).

319 **Q. How much was calculated as refundable or recoverable from combined**
320 **S.C. Nos. 2, 4, 5, 7 and 8 customers over the nine-month period**
321 **beginning April 1, 2025, for commercial and industrial energy efficiency**
322 **programs?**

323 A. As shown on NSG-PGL Exhibit1.1P the reconciliation result is a charge of
324 \$5,647,188.01 to customers (NSG-PGL Exhibit 1.1P, Page 4, Column B, Line
325 13).

326 **Q. What is the RA component that will be effective for S.C. No. 2 beginning**
327 **April 1, 2025, for residential, commercial and industrial energy**
328 **efficiency and OBF?**

329 A. The RA component for S.C. No. 2 customers will be a charge of \$0.0188 per
330 therm (NSG-PGL Exhibit 1.1P, Page 1, Column C, Line 4).

331 **Q. What is the RA component that will be effective for S.C. Nos. 4, 5, 7 and**
332 **8 beginning April 1, 2025, for commercial and industrial energy**
333 **efficiency?**

334 A. The RA component for S.C. Nos. 4, 5, 7 and 8 customers will be a charge of
335 \$0.0112 per therm (NSG-PGL Exhibit 1.1P, Page 1, Column D, Line 4).

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

338 A. The RA components were filed with the Commission on Information Sheet
339 No. 31 and are added to the Effective Component adjustment amounts for
340 the 2025 program year and billed as a single adjustment for each service
341 classification effective April 1, 2025.

342 **Q. In accordance to Section E of Riders EOA of Peoples Gas' and North**
343 **Shore's Schedule of Rates, an internal audit report dated July 25, 2025**
344 **was filed to the ICC on August 1, 2025. Were there any observations**
345 **related to the Program Year 2024 period in the report?**

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

350 **Q. Please explain NSG-PGL Exhibit 1.3N.**

351 A. NSG-PGL Exhibit 1.3N reflects the reconciliation of North Shore Gas energy
352 efficiency program expenses including On Bill Financing between NSG-PGL
353 Exhibit 1.1N and NSG-PGL Exhibit 2.1 which is sponsored by Company
354 witness Christina Frank. Exhibit 2.1-North Shore Gas 2024 Quarter 4 ICC
355 Report was filed to the ICC on February 14, 2025 and Exhibit 1.1N was filed
356 to the ICC for Rider EOA reconciliation rates in effect April 1, 2025. Upon
357 reconciliation of the two Exhibits, items were identified related to (a)
358 adjustment for actuals costs reflected in the 2023 Quarter 4 ICC Report that
359 were 2024 expenses.

360 **Q. Please explain NSG-PGL Exhibit 1.3P.**

361 A. NSG-PGL Exhibit 1.3P reflects the reconciliation of Peoples Gas Energy
362 Efficiency program expenses including On Bill Financing between NSG-PGL
363 Exhibit 1.1P and NSG-PGL Exhibit 2.2 which is sponsored by Company
364 witness Christina Frank. Exhibit 2.2-Peoples Gas 2024 Quarter 4 ICC Report
365 was filed to the ICC on February 14, 2025 and Exhibit 1.1P was filed to the
366 ICC for Rider EOA reconciliation rates in effect April 1, 2025. Upon
367 reconciliation of the two Exhibits, items were identified related to (a)
368 adjustment for actuals costs reflected in the 2023 Quarter 4 ICC Report that
369 were 2024 expenses.

370

371 **Q. Does this conclude your direct testimony?**

372 A. Yes, it does.

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, 2025**

Line No.	Adjustments [A]	Amount per Therm		
		Service Classification No. 1 [B]	Service Classification No. 2 [C]	Service Classification Nos. 4, 5, 7 and 8 [D]
1	Residential Energy Efficiency Adjustments	\$ (0.0086) ¹	\$ 0.0076 ²	
2	Commercial/Industrial Energy Efficiency Adjustments		\$ 0.0112 ³	\$ 0.0112 ³
3	On-Bill Financing Adjustments	\$ 0.0001 ⁴	\$ - ⁵	
4	Total Reconciliation Adjustment (Sum of Lines 1-3)	<u>\$ (0.0085)</u>	<u>\$ 0.0188</u>	<u>\$ 0.0112</u>

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

The Peoples Gas Light and Coke Company
Annual Reconciliation Calculation for Rider EOA
Thirteenth Program Year (January 1, 2024 - December 31, 2024)
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	363,388,984	P. 6, Col. C, Line 10
4	Energy Efficiency Expenses (EEXP)	\$ 9,305,385.76	P. 5, Col. C, Line 15 for Peoples Gas
5	Energy Efficiency Revenues (EREV)	11,870,575.57	P. 5, Col. G, Line 15 for Peoples Gas
6	Subtotal Residential ERA1 ₁	(2,565,189.81)	Line 4 - Line 5
7	Calculation of Residential Energy Efficiency ERA2 ₁		
8	ERA1 ₁ Previous Year	(3,384,988.90)	Previous Year Filing - Reconciliation Adjustment, p 2 line 13 (PY11)
9	ERA1 ₁ Previous Year Collections/(Refunds)	(3,004,288.62)	P. 5, Col. K, Line 15 for Peoples Gas
10	Subtotal Residential ERA2 ₁	(380,700.28)	Line 8 - Line 9
11	Calculation of Interest (4.5% annually)(1)	(99,423.79)	(Lines 6 + 10) x Interest Rate x 9 / 12
12	Factor O Adjustment	(92,902.00)	Staff Ex. 1.0, Schedule 1.06 P, Line 1, Column B - Docket No. 23-0804
13	Total Reconciliation Dollars	\$ (3,138,215.88)	Line 6 + Line 10 + Line 11 + Line 12
14	Total Residential Energy Efficiency ERA	\$ (0.0086)	Line 13 / Line 3
15			
16	Calculation of Residential On-Bill Financing ORA1 ₁		
17	Total Therms	363,388,984	P. 7, Col. C, Line 10
18	On-Bill Financing Expenses (OEXP)	\$ 80,530.27	P. 5, Col. C, Line 47
19	On-Bill Financing Revenues (OREV)	48,773.86	P. 5, Col. G, Line 47
20	Subtotal Residential ORA1 ₁	31,756.41	Line 18 - Line 19
21	Calculation of Residential On-Bill Financing ORA2 ₁		
22	ORA1 ₁ Previous Year	34,456.24	Previous Year Filing - Reconciliation Adjustment, p 2 line 27 (PY11)
23	ORA1 ₁ Previous Year Collections/(Refunds)	23,484.80	P. 5, Col. K, Line 47
24	Subtotal Residential ORA2 ₁	10,971.44	Line 22 - Line 23
25	Calculation of Interest (4.5% annually)(1)	1,442.06	(Lines 20 + 24) x Interest Rate x 9 / 12
26	Factor O Adjustment	-	
27	Total Reconciliation Dollars	\$ 44,169.91	Line 20 + Line 24 + Line 25 + Line 26
28	Total Residential On-Bill financing ORA	\$ 0.0001	Line 27 / Line 17
29			
30	<u>Notes:</u>		
31	(1) The interest rate set by the Illinois Commerce Commission for Calendar 2025 is:	4.5%	

The Peoples Gas Light and Coke Company
Annual Reconciliation Calculation for Rider EOA
Thirteenth Program Year (January 1, 2024 - December 31, 2024)
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	371,762,016	P. 6, Col. F, Line 10
4	Energy Efficiency Expenses (EEXP)	\$ 6,255,172.68	P. 5, Col. D, Line 15 for Peoples Gas
5	Energy Efficiency Revenues (EREV)	3,768,195.82	P. 5, Col. H, Line 15 for Peoples Gas
6	Subtotal Residential ERA1 ₁	2,486,976.86	Line 4 - Line 5
7	Calculation of Residential Energy Efficiency ERA2 ₁		
8	ERA1 ₁ Previous Year	1,843,230.20	Previous Year Filing - Reconciliation Adjustment, p 3 line 13 (PY11)
9	ERA1 ₁ Previous Year Collections/(Refunds)	1,648,656.21	P. 5, Col. L, Line 15 for Peoples Gas
10	Subtotal Residential ERA2 ₁	194,573.99	Line 8 - Line 9
11	Calculation of Interest (4.5% annually)(1)	90,502.34	(Lines 6 + 10) x Interest Rate x 9 / 12
12	Factor O Adjustment	52,023.00	Staff Ex. 1.0, Schedule 1.06 P, Line 1, Column C - Docket No. 23-0804
13	Total Reconciliation Dollars	\$ 2,824,076.19	Line 6 + Line 10 + Line 11 + Line 12
14	Total Residential Energy Efficiency ERA	\$ 0.0076	Line 13 / Line 3
15			
16	Calculation of Residential On-Bill Financing ORA1 ₁		
17	Total Therms	371,762,016	P. 7, Col. F, Line 10
18	On-Bill Financing Expenses (OEXP)	\$ 1,643.46	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	1,333.46	Line 18 - Line 19
21	Calculation of Residential On-Bill Financing ORA2 ₁		
22	ORA1 ₁ Previous Year	(5,620.42)	Previous Year Filing - Reconciliation Adjustment, p 3 line 27 (PY11)
23	ORA1 ₁ Previous Year Collections/(Refunds)	255.00	P. 5, Col. L, Line 47
24	Subtotal Residential ORA2 ₁	(5,875.42)	Line 22 - Line 23
25	Calculation of Interest (4.5% annually)(1)	(153.29)	(Lines 20 + 24) x Interest Rate x 9 / 12
26	Factor O Adjustment	-	
27	Total Reconciliation Dollars	\$ (4,695.25)	Line 20 + Line 24 + Line 25 + Line 26
28	Total Residential On-Bill financing ORA	\$ -	Line 27 / Line 17
29			
30	<u>Notes:</u>		
31	(1) The interest rate set by the Illinois Commerce Commission for Calendar 2025 is:	4.5%	

The Peoples Gas Light and Coke Company
Annual Reconciliation Calculation for Rider EOA
Thirteenth Program Year (January 1, 2024 - December 31, 2024)
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	506,032,552	P. 6, Line 10, Cols. F+I
4	Energy Efficiency Expenses (EEXP)	\$ 14,335,294.96	P. 5, Col. F, Line 31 for Peoples Gas
5	Energy Efficiency Revenues (EREV)	9,202,652.87	P. 5, Col. J, Line 31 for Peoples Gas
6	Subtotal C&I ERA1 ₁	5,132,642.09	Line 4 - Line 5
7	Calculation of C&I Energy Efficiency ERA2 ₁		
8	ERA1 ₁ Previous Year	3,529,638.18	Previous Year Filing - Reconciliation Adjustment, p 4 line 13 (PY12)
9	ERA1 ₁ Previous Year Collections/(Refunds)	3,236,356.20	P. 5, Col. N, Line 31 for Peoples Gas
10	Subtotal C&I ERA2 ₁	293,281.98	Line 8 - Line 9
11	Calculation of Interest (4.5% annually)(1)	183,124.94	(Lines 6 + 10) x Interest Rate x 9 / 12
12	Factor O Adjustment	38,139.00	Staff Ex. 1.0, Schedule 1.06 P, Line 1, Column D - Docket No. 23-0804
13	Total Reconciliation Dollars	\$ 5,647,188.01	Line 6 + Line 10 + Line 11 + Line 12
14	Total C&I Energy Efficiency ERA	\$ 0.0112	Line 13 / Line 3
15			
16	<u>Notes:</u>		
17	(1) The interest rate set by the Illinois Commerce Commission for Calendar 2025 is:	4.5%	

The Peoples Gas Light and Coke Company

Peoples Gas Energy Efficiency and On-Bill Financing Programs

Program Year Revenues and Expenses
Thirteenth Program Year (January 1, 2024 - December 31, 2024)

Line No.	Month	Year	Expenses ¹				Revenues ²				RA1 Collections/(Refunds) ³				Line No.
			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	
			[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	2024	\$ 22,776.49	\$ 69,310.56	\$ -	\$ 92,087.05	\$ 2,553,001.42	\$ 751,744.04	\$ -	\$ 3,304,745.46	\$ (76,564.11)	\$ (21,068.52)	\$ -	\$ (97,632.63)	2
3	Feb	2024	\$ 1,713,905.11	\$ 508,271.88	-	2,222,176.99	1,644,879.49	542,437.77	-	2,187,317.26	395.48	1,756.37	-	2,151.85	3
4	Mar	2024	\$ 898,507.07	\$ 561,209.52	-	1,459,716.59	1,463,224.87	461,391.69	-	1,924,616.56	111.17	(891.23)	-	(780.06)	4
5	Apr	2024	\$ 965,292.66	\$ 445,516.16	-	1,410,808.82	998,382.51	264,882.78	-	1,263,265.29	(430,229.27)	238,019.38	-	(192,209.89)	5
6	May	2024	\$ 1,534,516.01	\$ 653,940.97	-	2,188,456.98	359,885.28	138,670.84	-	498,556.12	(176,111.78)	114,652.83	-	(61,458.95)	6
7	June	2024	\$ 457,597.05	\$ 765,592.63	-	1,223,189.68	297,944.90	118,766.12	-	416,711.02	(142,620.28)	97,919.48	-	(44,700.80)	7
8	July	2024	\$ 493,966.45	\$ 711,130.13	-	1,205,096.58	214,253.28	100,332.37	-	314,585.65	(102,524.29)	79,127.78	-	(23,396.51)	8
9	August	2024	\$ 498,338.12	\$ 484,299.48	-	982,637.60	228,204.14	93,135.00	-	321,339.14	(108,914.54)	77,081.16	-	(31,833.38)	9
10	Septembe	2024	\$ 398,413.16	\$ 386,217.61	-	784,630.77	203,721.46	94,637.75	-	298,359.21	(97,675.93)	76,686.65	-	(20,989.28)	10
11	October	2024	\$ 588,129.89	\$ 477,469.40	-	1,065,599.29	425,173.81	183,814.15	-	608,987.96	(202,466.67)	151,177.86	-	(51,288.81)	11
12	November	2024	\$ 444,413.82	\$ 495,806.45	-	940,220.27	1,173,989.80	376,827.04	-	1,550,816.84	(561,352.50)	306,006.12	-	(255,346.38)	12
13	December	2024	\$ 514,923.62	\$ 278,844.29	-	793,767.91	2,307,914.61	641,556.27	-	2,949,470.88	(1,106,335.90)	528,188.33	-	(578,147.57)	13
14	Adjustments		\$ 774,606.31	\$ 417,563.61	-	1,192,169.92	-	-	-	-	-	-	-	-	14
15	Total		\$ 9,305,385.76	\$ 6,255,172.68	\$ -	\$ 15,560,558.44	\$ 11,870,575.57	\$ 3,768,195.82	\$ -	\$ 15,638,771.39	\$ (3,004,288.62)	\$ 1,648,656.21	\$ -	\$ (1,355,632.41)	15
	Commercial and Industrial Energy Efficiency														0
16	Jan	2024				95,236.24	-	1,397,013.86	273,474.52	1,670,488.38	-	7,015.82	(5,427.30)	1,588.52	16
17	Feb	2024				1,090,757.89	-	1,005,968.00	255,265.98	1,261,233.98	-	(512.61)	4,633.43	4,120.82	17
18	Mar	2024				978,311.83	-	855,936.50	212,416.30	1,068,352.80	-	412.59	-	412.59	18
19	Apr	2024				984,586.09	-	491,421.50	195,757.08	687,178.58	-	332,479.77	113,236.18	445,715.95	19
20	May	2024				1,415,288.59	-	257,332.21	139,038.36	396,370.57	-	161,906.55	88,772.25	250,678.80	20
21	June	2024				973,165.41	-	220,164.51	124,499.42	344,663.93	-	135,034.38	74,887.25	209,921.63	21
22	July	2024				847,944.51	-	186,215.53	124,958.21	311,173.74	-	111,809.46	77,148.22	188,957.68	22
23	August	2024				1,352,555.96	-	172,787.36	127,433.38	300,220.74	-	107,890.27	78,676.15	186,566.42	23
24	September	2024				1,072,867.10	-	175,549.71	131,611.72	307,161.43	-	107,122.15	81,041.74	188,163.89	24
25	October	2024				1,317,486.31	-	340,934.68	160,007.12	500,941.80	-	210,540.84	98,787.05	309,327.89	25
26	November	2024				1,224,084.01	-	687,096.10	218,169.30	905,265.40	-	421,888.83	134,695.86	556,584.69	26
27	December	2024				801,628.67	-	1,200,890.35	248,711.17	1,449,601.52	-	740,765.10	153,552.22	894,317.32	27
28	Adjustments					2,181,382.35	-	-	-	-	-	-	-	-	28
29	Total					\$ 14,335,294.96	\$ -	\$ 6,991,310.31	\$ 2,211,342.56	\$ 9,202,652.87	\$ -	\$ 2,336,353.15	\$ 900,003.05	\$ 3,236,356.20	29
30	On-Bill Financing														0
31	Jan	2024	-	-	-	-	12,761.91	-	-	12,761.91	(0.68)	-	-	(0.68)	31
32	Feb	2024	7,521.16	153.49	-	7,674.65	8,129.69	-	-	8,129.69	(2.38)	-	-	(2.38)	32
33	Mar	2024	6,513.00	132.92	-	6,645.92	6,922.48	-	-	6,922.48	(0.36)	-	-	(0.36)	33
34	Apr	2024	6,612.38	134.95	-	6,747.33	3,585.31	-	-	3,585.31	3,186.37	-	-	3,186.37	34
35	May	2024	6,550.19	133.68	-	6,683.87	277.58	-	-	277.58	1,143.14	-	-	1,143.14	35
36	June	2024	6,542.07	133.51	-	6,675.58	585.95	-	-	585.95	616.69	-	-	616.69	36
37	July	2024	6,588.04	134.45	-	6,722.49	119.58	-	-	119.58	173.96	-	-	173.96	37
38	August	2024	6,972.20	142.29	-	7,114.49	79.94	-	-	79.94	123.84	-	-	123.84	38
39	September	2024	7,072.26	144.33	-	7,216.59	75.06	-	-	75.06	117.54	-	-	117.54	39
40	October	2024	6,456.96	131.77	-	6,588.73	404.62	-	-	404.62	610.47	-	-	610.47	40
41	November	2024	6,664.82	136.01	-	6,800.83	4,123.15	3,472.00	-	7,595.15	5,703.46	2,856.00	-	8,559.46	41
42	December	2024	6,549.35	133.66	-	6,683.01	11,708.59	(3,162.00)	-	8,546.59	11,812.75	(2,601.00)	-	9,211.75	42
43	Adjustment		6,487.84	132.40	-	6,620.24	-	-	-	-	-	-	-	-	43
44	Total		\$ 80,530.27	\$ 1,643.46	\$ -	\$ 82,173.73	\$ 48,773.86	\$ 310.00	\$ -	\$ 49,083.86	\$ 23,484.80	\$ 255.00	\$ -	\$ 23,739.80	44

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 Period¹
April 2025 through December 2025**

Line No.	Month	Year	Forecasted Total Therm Deliveries						Adjusted Service Classification Nos. 4, 5, 7 & 8	Line No.
			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		
	[A]	[B]	[C]	[D]	[E]	[F] [D] - [E]	[G]	[H]	[I] [G] - [H]	
1	Apr	2025	55,162,422	54,283,800			20,407,312			1
2	May	2025	33,796,925	30,872,493			13,961,384			2
3	June	2025	16,848,854	19,161,386			14,596,837			3
4	July	2025	11,189,655	16,920,697			13,283,795			4
5	Aug	2025	8,378,995	17,566,053			12,800,646			5
6	Sept	2025	12,550,540	20,553,958			13,163,023			6
7	Oct	2025	33,909,784	38,467,340			15,864,690			7
8	Nov	2025	72,936,760	73,197,690			19,226,568			8
9	Dec	2025	118,615,049	100,890,103			24,176,915			9
10	Total		363,388,984	371,913,519	151,504	371,762,016	147,481,169	13,210,633	134,270,537	10

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



Rider Energy Efficiency and On-Bill Financing Adjustment Annual Audit

**Prepared by Audit Services
July 25, 2025**

**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 2024. The scope also included the Utilities’ Effective Component calculations for Calendar Year 2025.

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 Reconciliation Adjustment calculations were accurate, and expenses were properly identified and recorded. During a review of the Effective Component calculation we identified formula errors within the spreadsheets impacting rates for all PGL and NSG service classes, with the exception of SC No.1. The Effective Component rates were corrected and refiled with the ICC on March 1.

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. In order to verify the accuracy of the Calendar Year 2025 Effective Component calculations filed on December 20, 2024, 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 PGL and NSG Effective Component calculation spreadsheets contained formula errors, which resulted in incorrect rates included in the Information Sheets filed with the ICC effective January 1; however, the errors were corrected in a refiling of Information Sheets effective March 1, 2025. The total dollars over-collected in January and February 2025 will be reconciled during the Reconciliation Adjustment filing in March 2026.

Other than the error noted above, we determined the Calendar Year 2025 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. In order to verify the accuracy of the Calendar Year 2024 Reconciliation Adjustments filed on March 31, 2025, 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. We determined the Calendar Year 2024 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 three Rider EOA vendors. Franklin Energy Services, LLC (Franklin Energy), Erthe Energy Solutions (Erthe), and Guidehouse Inc. (Guidehouse) provide consulting services to facilitate the energy efficiency program on behalf of the Utilities. Calendar Year 2024 expenses were approximately \$27.2 million for Franklin Energy, \$3.2 million for Erthe, and \$1.2 million for Guidehouse out of \$34.0 million of total expenses related to Rider EOA.

We agreed the Calendar Year 2024 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.

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 2024. 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, 2025 (initial Effective Component), March 1, 2025 (refiled Effective Component) and April 1, 2025 (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 2024. 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 2022-2024 actual expenses, and Calendar Year 2025 budget 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 8-1038/8-104 (EEPS) Costs - Program Reconciliation
Calendar 2024

NSG-PGL Exhibit 1.3P
Page 1 of 2

Section 8-1038/8-104 (EEPS) Cost Category	NS-PGL Ex. 2.1: 2024 Actual Costs January 1 to December 31	Vendor Questline Inadvertently Included in ICC Q4 2023 Report		NS-PGL Ex. 1.1P: 2024 Actual Costs - Adjusted to recover in Rider EOA RA rates filed March 31, 2025		2024 (AUDITED) Actual Costs YTD
Source:	ICC Q4 Report filed February 14, 2025 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)	\$ 4,390,940			\$ 4,390,940	\$ -	\$ 4,390,940
Public Sector Programs	\$ 2,870,245			\$ 2,870,245		\$ 2,870,245
Residential Programs	\$ 2,946,730			\$ 2,946,730	\$ -	\$ 2,946,730
Income Qualified Programs	\$ 13,580,388			\$ 13,580,388		\$ 13,580,388
Market Development Initiative	\$ 990,732			\$ 990,732		\$ 990,732
Third Party Programs (Beginning in 2019)				\$ -		\$ -
Total Peoples Gas Program Costs	\$ 24,779,033	\$ -	\$ -	\$ 24,779,033	\$ -	\$ 24,779,033
Portfolio-Level Costs by Portfolio Cost Category (Section 8-1038/8-104 EEPS)						
Demonstration of Breakthrough Equipment and Devices Costs	\$ 302,902			\$ 302,902		\$ 302,902
Market Transformation Programs	\$ 558,707			\$ 558,707		\$ 558,707
Evaluation Costs	\$ 1,138,342			\$ 1,138,342		\$ 1,138,342
Marketing Costs (including education and outreach)	\$ 729,390	\$ 9,347		\$ 738,737		\$ 738,737
Portfolio Administrative Costs	\$ 2,440,306			\$ 2,440,306	\$ -	\$ 2,440,306
Total Peoples Gas Portfolio-Level Costs	\$ 5,169,646	\$ 9,347	\$ -	\$ 5,178,993	\$ -	\$ 5,178,993
Total Peoples Gas Program and Portfolio-Level Section 8-1038/8-104 (EEPS) Costs	\$ 29,948,679	\$ 9,347	\$ -	\$ 29,978,026	\$ -	\$ 29,978,026

Rider EOA reconciliation program expenses filed March 31, 2025 - Exhibit 1.1P

Energy Efficiency Expenses	On-Bill Financing Expenses	Total
\$ 9,305,386	\$ 80,530	\$ 9,385,916
\$ 6,255,173	\$ 1,643	\$ 6,256,816
\$ 14,335,295	\$ -	\$ 14,335,295
\$ 29,895,853	\$ 82,174	\$ 29,978,027

page 2, col 8, lines 4 and 18: SC. No. 1 Residential
page 3, col 8, lines 4 and 18: SC. No. 2 Residential
page 4, col D, lines 4 : SC. No. 2, 4, 5, 7 & 8 Commercial and Industrial

1 Calendar 2024 Energy Efficiency Program Costs-Exhibit 1.1P

2 NS-PGL Ex. 2.1: 2024 Actual Costs January 1 to December 31

3 Vendor Questline inadvertently included in ICC Q4 2023 Report

4

5

6

7

8 Sum of Line 2 to Line 6- Calendar 2024 Energy Efficiency Program Costs -Recover in EOA RA rates-Exhibit 1.1P

9 0

10 Line 7 + Line 8 - Calendar 2024 Energy Efficiency Program Costs incurred

The Peoples Gas Light and Coke Company

Peoples Gas Energy Efficiency and On-Bill Financing Programs

Program Year Revenues and Expenses
Eleventh Program Year (January 1, 2024 - December 31, 2024)

			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]	[G]	[H]	[I]	[J]	[K]	[L]	[M]	[N]	
						[C]+[D]+[E]				[G]+[H]+[I]				[K]+[L]+[M]	
1	Residential														1
	Energy Efficiency														
2	Jan	2024	\$ 22,776.49	\$ 69,310.56	\$ -	\$ 92,087.05	\$ 2,553,001.42	\$ 751,744.04	\$ -	\$ 3,304,745.46	\$ (76,564.11)	\$ (21,068.52)	\$ -	\$ (97,632.63)	2
3	Feb	2024	\$ 1,713,905.11	\$ 508,271.88	-	2,222,176.99	1,644,879.49	542,437.77	-	2,187,317.26	395.48	1,756.37	-	2,151.85	3
4	Mar	2024	\$ 898,507.07	\$ 561,209.52	-	1,459,716.59	1,463,224.87	461,391.69	-	1,924,616.56	111.17	(891.23)	-	(780.06)	4
5	Apr	2024	\$ 965,292.66	\$ 445,516.16	-	1,410,808.82	998,382.51	264,882.78	-	1,263,265.29	(430,229.27)	238,019.38	-	(192,209.89)	5
6	May	2024	\$ 1,534,516.01	\$ 653,940.97	-	2,188,456.98	359,885.28	138,670.84	-	498,556.12	(176,111.78)	114,652.83	-	(61,458.95)	6
7	June	2024	\$ 457,597.05	\$ 765,592.63	-	1,223,189.68	297,944.90	118,766.12	-	416,711.02	(142,620.28)	97,919.48	-	(44,700.80)	7
8	July	2024	\$ 493,966.45	\$ 711,130.13	-	1,205,096.58	214,253.28	100,332.37	-	314,585.65	(102,524.29)	79,127.78	-	(23,396.51)	8
9	August	2024	\$ 498,338.12	\$ 484,299.48	-	982,637.60	228,204.14	93,135.00	-	321,339.14	(108,914.54)	77,081.16	-	(31,833.38)	9
10	September	2024	\$ 398,413.16	\$ 386,217.61	-	784,630.77	203,721.46	94,637.75	-	298,359.21	(97,675.93)	76,686.65	-	(20,989.28)	10
11	October	2024	\$ 588,129.89	\$ 477,469.40	-	1,065,599.29	425,173.81	183,814.15	-	608,987.96	(202,466.67)	151,177.86	-	(51,288.81)	11
12	November	2024	\$ 444,413.82	\$ 495,806.45	-	940,220.27	1,173,989.80	376,827.04	-	1,550,816.84	(561,352.50)	306,006.12	-	(255,346.38)	12
13	December	2024	\$ 514,923.62	\$ 278,844.29	-	793,767.91	2,307,914.61	641,556.27	-	2,949,470.88	(1,106,335.90)	528,188.33	-	(578,147.57)	13
14	Adjustments		\$ 774,606.31	\$ 417,563.61	-	1,192,169.92	-	-	-	-	-	-	-	-	14
15	Total-filed under Ex. 1.1P EOA RA rates		\$ 9,305,385.76	\$ 6,255,172.68	\$ -	\$ 15,560,558.44	11,870,575.57	3,768,195.82	-	15,638,771.39	(3,004,288.62)	1,648,656.21	-	(1,355,632.41)	15
17	Ex. 1.2 Adjustments from Audit Findings		\$ -	\$ -	-	-	-	-	-	-	-	-	-	-	17
18	Total - adjusted for Audit findings		\$ 9,305,385.76	\$ 6,255,172.68	\$ -	\$ 15,560,558.44	\$ 11,870,575.57	\$ 3,768,195.82	\$ -	\$ 15,638,771.39	\$ (3,004,288.62)	\$ 1,648,656.21	\$ -	\$ (1,355,632.41)	18
	Commercial and Industrial														19
	Energy Efficiency														
19	Jan	2024				95,236.24	-	1,397,013.86	273,474.52	1,670,488.38	-	7,015.82	(5,427.30)	1,588.52	20
20	Feb	2024				1,090,757.89	-	1,005,968.00	255,265.98	1,261,233.98	-	(512.61)	4,633.43	4,120.82	21
22	Mar	2024				978,311.83	-	855,936.50	212,416.30	1,068,352.80	-	412.59	-	412.59	22
23	Apr	2024				984,586.09	-	491,421.50	195,757.08	687,178.58	-	332,479.77	113,236.18	445,715.95	23
24	May	2024				1,415,288.59	-	257,332.21	139,038.36	396,370.57	-	161,906.55	88,772.25	250,678.80	24
25	June	2024				973,165.41	-	220,164.51	124,499.42	344,663.93	-	135,034.38	74,887.25	209,921.63	25
26	July	2024				847,944.51	-	186,215.53	124,958.21	311,173.74	-	111,809.46	77,148.22	188,957.68	26
27	August	2024				1,352,555.96	-	172,787.36	127,433.38	300,220.74	-	107,890.27	78,676.15	186,566.42	27
28	September	2024				1,072,867.10	-	175,549.71	131,611.72	307,161.43	-	107,122.15	81,041.74	188,163.89	28
29	October	2024				1,317,486.31	-	340,934.68	160,007.12	500,941.80	-	210,540.84	98,787.05	309,327.89	29
30	November	2024				1,224,084.01	-	687,096.10	218,169.30	905,265.40	-	421,888.83	134,695.86	556,584.69	30
31	December	2024				801,628.67	-	1,200,890.35	248,711.17	1,449,601.52	-	740,765.10	153,552.22	894,317.32	31
32	Adjustments					2,181,382.35	-	-	-	-	-	-	-	-	32
33	Total-filed under Ex. 1.1P EOA RA rates		-	-	-	14,335,294.96	\$ -	\$ 6,991,310.31	\$ 2,211,342.56	\$ 9,202,652.87	\$ -	\$ 2,336,353.15	\$ 900,003.05	\$ 3,236,356.20	33
34	Ex. 1.2 Adjustments from Audit Findings		-	-	-	-	-	-	-	-	-	-	-	-	34
35	Total - adjusted for Audit findings		\$ -	\$ -	\$ -	\$ 14,335,294.96	\$ -	\$ 6,991,310.31	\$ 2,211,342.56	\$ 9,202,652.87	\$ -	\$ 2,336,353.15	\$ 900,003.05	\$ 3,236,356.20	35
	On-Bill Financing														36
36	Jan	2024	-	-	-	-	12,761.91	-	-	12,761.91	(0.68)	-	-	(0.68)	37
38	Feb	2024	7,521.16	153.49	-	7,674.65	8,129.69	-	-	8,129.69	(2.38)	-	-	(2.38)	38
39	Mar	2024	6,513.00	132.92	-	6,645.92	6,922.48	-	-	6,922.48	(0.36)	-	-	(0.36)	39
40	Apr	2024	6,612.38	134.95	-	6,747.33	3,585.31	-	-	3,585.31	3,186.37	-	-	3,186.37	40
41	May	2024	6,550.19	133.68	-	6,683.87	277.58	-	-	277.58	1,143.14	-	-	1,143.14	41
42	June	2024	6,542.07	133.51	-	6,675.58	585.95	-	-	585.95	616.69	-	-	616.69	42
43	July	2024	6,588.04	134.45	-	6,722.49	119.58	-	-	119.58	173.96	-	-	173.96	43
44	August	2024	6,972.20	142.29	-	7,114.49	79.94	-	-	79.94	123.84	-	-	123.84	44
45	September	2024	7,072.26	144.33	-	7,216.59	75.06	-	-	75.06	117.54	-	-	117.54	45
46	October	2024	6,456.96	131.77	-	6,588.73	404.62	-	-	404.62	610.47	-	-	610.47	46
47	November	2024	6,664.82	136.01	-	6,800.83	4,123.15	3,472.00	-	7,595.15	5,703.46	2,856.00	-	8,559.46	47
48	December	2024	6,549.35	133.66	-	6,683.01	11,708.59	(3,162.00)	-	8,546.59	11,812.75	(2,601.00)	-	9,211.75	48
49	Adjustment		6,487.84	132.40	-	6,620.24	-	-	-	-	-	-	-	-	49
50	Total-filed under Ex. 1.1P EOA RA rates		80,530.27	1,643.46	-	82,173.73	48,773.86	310.00	-	49,083.86	23,484.80	255.00	-	23,739.80	50
51	Ex. 1.2 Adjustments from Audit Findings		-	-	-	-	-	-	-	-	-	-	-	-	
50	Total - adjusted for Audit findings		\$ 80,530.27	\$ 1,643.46	\$ -	\$ 82,173.73	\$ 48,773.86	\$ 310.00	\$ -	\$ 49,083.86	\$ 23,484.80	\$ 255.00	\$ -	\$ 23,739.80	50
	Total-filed under Ex. 1.1P EOA RA rates		9,385,916.03	6,256,816.14	-	29,978,027.13									
	Ex. 1.2 Adjustments from Audit Findings		-	-	-	-									
	Total - adjusted for Audit findings		9,385,916.03	6,256,816.14	-	29,978,027.13									
			(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. 24-0831
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

1 **I. INTRODUCTION**

2 Q. Please state your name and business address.

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

5 Q. By whom are you employed?

6 A. WEC Business Services LLC (“WBS”).

7 Q. What position do you hold?

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

9 Q. What are your responsibilities in that position?

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

19 Q. Please summarize your educational background and experience.

20 A. I have a Bachelors degree in Political Science from the University of
21 Missouri. I have been working in the energy efficiency industry since 2007 and
22 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. Additionally I am currently serving on the Board of Directors for the Midwest Energy Efficiency Alliance, a non-profit organization working to advance energy efficiency in the Midwest.

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 2024, describe the costs that the Utilities incurred during the 2024 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 2024 Quarter 4 ICC Report

NSG-PGL Exhibit 2.2 - Peoples Gas 2024 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 27, 2023 as updated through evaluation, measurement, and verification ("EM&V") findings from final 2022 third party evaluation reports and the SAG consensus process.

Q. What is the reconciliation period for 2024?

A. This reconciliation applies to the 2024 Program Year, January 1, 2024 through December 31, 2024, 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 2024 for the development and implementation of the Utilities' energy efficiency program were prudent and reasonable. The 2024 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 2024,

• Per the Fourth Quarter Report for 2024 (NSG Ex. 2.1), North Shore Gas achieved 124% of the internal 2024 savings goal utilizing 95% of the 2024 annual budget.

• Per the Fourth Quarter Report for 2024 (PGL Ex. 2.2), Peoples Gas achieved 111% of the internal 2024 savings goal utilizing 97% of the 2024 annual budget.

In 2024 the On Bill Financing (OBF) program provided 1 new loan and continued 54 existing loans to Peoples Gas customers. In 2024 the OBF program provided 2 new loans and continued 37 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

94 and Development and Market Transformation; Market Development Initiative;
95 and the On Bill Financing program.

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

97 A. Yes. Once the Plan is approved, North Shore Gas is allowed to make
98 appropriate changes in response to changing market conditions and other
99 factors. Those changes are discussed in quarterly reports filed in Docket No. 21-
100 0159 and, in certain cases, are brought to SAG for review.

101 Q. Were there changes to the TRM that had any impact on measures offered
102 in 2024?

103 A. There were a total of 155 changes which included: 16 Errata changes, 124
104 measure revisions, 14 new additional measures, and four measure retirements.
105 This is summarized on Table 1.2, of section 1.2, of Volume 1 of the Version 12
106 of the IL-TRM (approved by the Commission in Docket No. 23-0709). Some of
107 these changes impacted measure savings in the Peoples Gas and North Shore
108 Gas business, multi-family and single family residential programs.

109 Q. Does North Shore Gas participate in SAG?

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

112 Q. You listed one Residential program North Shore Gas offered in 2024. Did
113 North Shore Gas incur any costs for Residential programs that were not
114 implemented in the reconciliation period?

115 A. No.

116 Q. You listed one Business program North Shore Gas offered in 2024. Did
117 North Shore Gas incur any costs for C&I programs that were not implemented in
118 the reconciliation period?

119 A. No.

120 Q. You listed one Income Qualified program North Shore Gas offered in
121 2024. Did North Shore Gas incur any costs for income eligible programs that
122 were not implemented in the reconciliation period?

123 A. No.

124 Q. What costs did North Shore Gas incur during the 2024 reconciliation period for
125 these programs?

126 A. A detailed breakdown of the costs, by category, is shown on NSG-PGL
127 Exhibit 2.1 - North Shore Gas 2024 Quarter 4 ICC Report. Costs are categorized
128 in the sections that follow and include the total North Shore Gas Energy
129 Efficiency Portfolio ("EEP") costs. Costs are allocated into the following
130 categories:

131 (1) Administrative costs include time and expense associated with portfolio
132 oversight, management, and planning. These are costs required for overall
133 portfolio management that are not specifically tied to one program. Administrative
134 costs also include time and expense associated with SAG meetings and TRM
135 activities. 2024 total administrative costs were \$566,876 or 14% of North Shore
136 Gas total Utility EEP costs (NSG-PGL Exhibit 2.1, page 2).

137 (2) Non-incentive program costs includes program management, program
138 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 research project, as defined in the North Shore Gas stipulated agreement for Plan Four. 2024 total non-incentive program costs were \$1,523,124 or 38% 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. 2024 total marketing costs were \$142,577 or 4% 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). 2024 total incentive costs comprised \$1,517,260 or 38% 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. 2024 total EM&V

162 costs were \$162,872 or 4% of North Shore Gas total Utility EEP costs (NSG-PGL
163 Exhibit 2.1, Page 2).

164 Q. What are the total costs for the 2024 reconciliation period?

165 A. The total North Shore Gas EEP costs for the reconciliation period are
166 \$4,013,457.

167 Q. What are the total therm savings associated with the North Shore Gas
168 program in 2024?

169 A. Total net therm savings for North Shore Gas' Utility EEP Programs in
170 2024 are 1,786,467 pending final third party evaluation results (NSG-PGL Exhibit
171 2.1 Page 1).

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

174 A. TRM version 12 dated September 22, 2023 with an effective date of
175 January 1, 2024, as approved by the Commission in its final order in Docket No.
176 23-0709, was used in 2024.

177 Q. What is the basis for the therm savings?

178 A. Savings are based on third party evaluator's 2024 deemed net-to-gross
179 values and evaluated realization rates for each program offered. This is
180 consistent with the prior requirements of the Commission's Orders in Docket
181 Nos. 12-0528 and 13-0077, the most recent Commission final order on the TRM
182 Policy Document in Docket No. 22-0005, the latest TRM applicable to 2024 and
183 consensus in the SAG process. NSG-PGL Exhibit 2.3, which lists these values
184 by program and describes their application for 2024.

185 Q. Will these savings numbers be adjusted in the future for 2024?

186 A. Yes. The savings values for 2024 will be retroactively adjusted to
187 correspond with finalized 2024 evaluation reports in accordance with the Utilities'
188 interpretation of the Commission's Order and input from SAG; specifically, the
189 realization rates by program.

190 **B. RESIDENTIAL PROGRAMS**

191 Q. What are the Residential Programs?

192 A. The Residential Programs contain two offerings: Single Family and Multi-
193 Family. Within the Single Family offering, residential customers are provided
194 access to energy efficiency via two paths – Home Energy Rebates and Home
195 Energy Assessments. Home Energy Rebates offers rebates on energy-efficient
196 heating, ventilation, air conditioning and water heating equipment and qualifying
197 weatherization projects. Home Energy Assessments offers energy-saving
198 products installed in homes at no-cost to the customer. The Home Energy
199 Assessment program is a joint program offering provided in partnership with
200 ComEd. Homeowners can reduce their energy and water use with the installation
201 of products available to owners of single-family homes, two-flats, and individually
202 metered condos and townhomes. Renters are also eligible with permission from
203 their landlords. Offerings within the Multi-Family path include Multi-Family Energy
204 Savings, Prescriptive and Custom Rebates, and Partner Trade Ally programs.
205 The Multi-Family Energy Savings program is a joint program offering provided in
206 partnership with ComEd. The program offers free direct installation of energy-
207 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 2024 were \$570,894 (NSG-PGL Exhibit 2.1, page 1).

Q. Were the costs reasonable?

A. Yes. The Residential Programs achieved 104% of the annual savings goal using 108% of the 2024 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 297,125 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.

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

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

234 A. North Shore Gas incurred \$271,673 for this program during the
235 reconciliation period (NSG-PGL Exhibit 2.1, Page 1).

236 Q. Were the costs reasonable?

237 A. Yes. The Small and Midsize Business Program achieved 137% of its
238 therm savings goal, utilizing 84% of the program budget (NSG-PGL Exhibit 2.1,
239 Page 1).

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

242 A. Preliminary therm savings from the Small Business Program were
243 232,558 therms (NSG-PGL Exhibit 2.1, page 1).

244 Q. What is the C&I Program?

245 A. The Commercial & Industrial (C&I) Program offers several paths for C&I
246 customers with North Shore Gas' rate Service Class 2 or larger accounts. These
247 paths include Prescriptive and Custom Rebates, New Construction Rebates, Gas
248 Optimization Studies, Retro-commissioning, Engineering Studies, Smart Check
249 Studies, Staffing Grants, and Strategic Energy Management. Each path is
250 described briefly below.

251 Prescriptive rebates are provided for common types of energy efficiency
252 measures in C&I buildings, including demand control ventilation, steam trap

253 testing and repairs, boiler tune-ups, and pipe insulation. Custom rebates are
254 available to customers with energy saving projects outside the prescriptive
255 rebates and with variables that can affect the savings of those projects. Custom
256 rebates may include boiler and burner retrofits and replacements, heat
257 exchangers, heat recovery (blow down and economizers), as well as pipe
258 insulation. Gas Optimization Studies provide customers with an analysis of
259 energy-using systems to help identify no- and low-cost improvements to achieve
260 natural gas savings in C&I buildings. New Construction is offered in partnership
261 with ComEd and rebates provide incentives for new construction projects that
262 surpass the region's building codes to improve energy efficiency. Retro-
263 commissioning offers a full-building tune-up through a systematic evaluation of
264 mechanical and electrical systems to help facilities perform optimally and is
265 offered in partnership with ComEd. Engineering Studies provide an analysis of a
266 single system within a facility's operations to support implementation of a natural
267 gas saving project. Staffing Grants offer up to \$50,000 per customer per year to
268 fund a project manager to guide projects to completion for customers who have
269 energy efficiency projects that cannot be completed due to lack of staff time or
270 availability. Lastly, the Strategic Energy Management program engages
271 customers to deliver a continuous improvement approach to energy efficiency by
272 engaging site management, leveraging data, and by promoting best practices at
273 the site. New Construction and Retro-commissioning are offered in partnership
274 with ComEd.

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

277 A. North Shore Gas incurred \$486,164 for the C&I Program during the
278 reconciliation period (NSG-PGL Exhibit 2.1, page 1).

279 Q. Were the costs reasonable?

280 A. Yes. The program reached 115% of its annual therm savings goal using
281 52% of its 2024 budget.

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

284 A. Preliminary net natural gas savings from the C&I Program were 818,410
285 therms (NSG-PGL Exhibit 2.1, page 1).

286 Q. What is the Public Sector Program?

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

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

294 A. North Shore Gas incurred \$606,606 for the Public Sector Program during
295 the reconciliation period (NSG-PGL Exhibit 2.1, page 1).

296 Q. Were the costs reasonable?

297 A. Yes. The program reached 339% of its 2024 therm savings goal using
298 192% of its 2024 budget.

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

301 A. Preliminary net natural gas savings from the Public Sector Program were
302 271,254 therms (NSG-PGL Exhibit 2.1, page 1).

303

304 **D. INCOME QUALIFIED PROGRAMS**

305 Q. What are the Income Qualified Programs?

306 A. Income Eligible Programs target the underserved income eligible market,
307 providing services designed to make it easy for single-family and multi-family
308 income eligible customers to take advantage of cost-effective energy saving
309 retrofits. Within the Income Eligible Programs, there are paths for single-family
310 and multi-family customers. Within Single Family, North Shore Gas offers Home
311 Energy Assessment, Home Energy Savings Retrofits, and the Illinois Home
312 Weatherization Assistance Program (IHWAP). IHWAP Weatherization services
313 are provided to low-income residents through local community action agencies or
314 not for profit agencies. IHWAP leverages state and federal funds to supplement
315 incentives from the utility programs. Home Energy Assessment offers energy-
316 saving products installed in homes at no-cost to the customer. The Home Energy
317 Assessment program is a joint program offering provided in partnership with
318 ComEd. Homeowners can reduce their energy and water use with the installation
319 of products available to owners of single-family homes, two-flats, and individually

320 metered condos and townhomes. Renters are also eligible with permission from
321 their landlords. Home Energy Retrofits offers direct install products and no-cost
322 weatherization services for Income-Eligible Single-Family home customers. It is
323 delivered jointly with ComEd through approved agencies or partners. Within
324 Multi-Family programs, North Shore Gas offers Income Eligible Multi-family
325 Savings Program, Public Housing Energy Savings, Multi-family Income Eligible
326 Partner Trade Ally, and Income Eligible Kits programs. The Income Eligible Multi-
327 family Savings program provides building owners with free technical assistance
328 to identify energy efficiency opportunities and install measures. Expenses are
329 fully covered by the program, from the direct installation of energy efficiency
330 products into tenants' units (light bulbs, aerators, showerheads, etc.), to common
331 area measures, and more extensive measures requiring building owner co-pay.
332 This program is a joint offering in partnership with ComEd. The Public Housing
333 Energy Savings program offers prescriptive and custom rebates for gas
334 measures in housing owned by Public Housing Authorities. This program is a
335 joint program offering provided in partnership with ComEd. The Multi-family
336 Income Eligible Partner Trade Ally program is a program delivered by vetted
337 Partner Trade Allies. These Trade Allies are given higher rebate amounts to
338 serve geographically income-eligible customers with retrofit measures. Income
339 Eligible Kits provides income-qualified customers with a kit of energy efficiency
340 measures to self-install. The Income Eligible Kits are distributed by ground mail
341 to qualified customers vetted by the Low-Income Home Energy Assistance
342 Program (LIHEAP) and is provided in partnership with ComEd.

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

345 A. North Shore Gas incurred \$930,742 in costs for the Income Qualified
346 Programs during the reconciliation period. NSG-PGL Exhibit 2.1, page 1.

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

349 A. Preliminary net natural gas savings from the Income Qualified Programs
350 were 167,119 therms (NSG-PGL Exhibit 2.1, page 1).

351

352 **III. THE PEOPLES GAS LIGHT AND COKE COMPANY**
353 **A. ENERGY EFFICIENCY OVERVIEW**

354
355 Q. Please provide an overview of the Plan as described in the compliance
356 filing of Peoples Gas filed in Docket No. 21-0159.

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

367 Research and Development and Market Transformation; Market Development
368 Initiative; and the OBF program.

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

370 A. Yes. Once the Plan is approved, Peoples Gas is allowed to make
371 appropriate changes in response to changing market conditions and other
372 factors. Those changes are discussed in quarterly reports filed in Docket No. 13-
373 0309 and, in certain cases, are brought to SAG for review.

374 Q. Did changes to the TRM have any impact on measures offered in 2024?

375 A. There were a total of 155 changes which included: 16 Errata changes, 124
376 measure revisions, 14 new additional measures, and four measure retirements.
377 This is summarized on Table 1.2, of section 1.2, of Volume 1 of the Version 12
378 IL-TRM (approved by the Commission in Docket No. 23-0709). Some of these
379 changes impacted measure savings in the Peoples Gas and North Shore Gas
380 business, multi-family and single family residential programs.

381 Q. Does Peoples Gas participate in SAG?

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

384 Q. You listed one Residential program Peoples Gas offered in 2024. Did
385 Peoples Gas incur any costs for Residential programs that were not implemented
386 in the reconciliation period?

387 A. No.

388 Q. You listed one Business program Peoples Gas offered in 2024. Did
389 Peoples Gas incur any costs for Business programs that were not implemented
390 in the reconciliation period?

391 A. No.

392 Q. You listed one Income Qualified program Peoples Gas offered in 2024.
393 Did Peoples Gas incur any costs for Income Qualified programs that were not
394 implemented in the reconciliation period?

395 A. No.

396 Q. What costs did Peoples Gas incur during the 2024 reconciliation period for
397 these programs?

398 A. A detailed breakdown of the costs, by category, is shown on NSG-PGL
399 Exhibit 2.2 - Peoples Gas 2024 Quarter 4 ICC Report. Costs are categorized in
400 the sections that follow and include the total Peoples Gas EEP costs. The costs
401 are allocated into the following categories:

402 (1) Administrative costs include time and expense associated with portfolio
403 oversight, management, and planning. These are costs required for overall
404 portfolio management that are not specifically tied to one program. Administrative
405 costs also include time and expense associated with SAG meetings and TRM
406 activities. 2024 total administrative costs were \$2,460,306 or 8% of Peoples Gas
407 total Utility EEP costs (NSG-PGL Exhibit 2.2, page 2).

408 (2) Non-incentive costs include program management, program reporting,
409 customer assistance and quality control checks performed by energy experts,
410 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 research project, as defined in the Peoples Gas stipulated agreement for Plan Four. 2024 total non-incentive costs were \$9,835,311, or 33% 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. 2024 total marketing costs were \$729,390, or 2% 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). 2024 total incentive costs were \$14,943,723, or 50% 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. 2024 total EM&V costs were

433 \$1,138,342, or 4% of Peoples Gas total Utility EEP costs (NSG-PGL Exhibit 2.2,
434 page 2).

435 Q. What are the total costs for the 2024 reconciliation period?

436 A. The total Peoples Gas EEP costs that I address in my testimony for the
437 reconciliation period were \$29,968,679 NSG-PGL Exhibit 2.2, page 2.

438 Q. What are the total therm savings associated with the Peoples Gas
439 program in 2024?

440 A. Total net therm savings for Peoples Gas' Utility EEP Programs in 2024
441 were 8,979,021 pending final third party evaluation results (NSG-PGL Exhibit
442 2.2., page 1).

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

445 A. TRM Version 12 dated September 22, 2023 with an effective date of
446 January 1, 2024, as approved by the Commission in its final order in Docket No.
447 23-0709, was used in 2023.

448 Q. What is the basis for the therm savings?

449 A. Savings are based on third party evaluator's 2024 deemed net-to-gross
450 values and evaluated realization rates for each program offered. This is
451 consistent with the prior requirements of the Commission's Orders in Docket
452 Nos. 12-0528 and 13-0077, the most recent Commission final order on the TRM
453 applicable to 2023 in Docket No. 23-0603 and consensus in the SAG process.
454 NSG-PGL Exhibit 2.3, which lists these values by program and describes their
455 application for 2023.

456 Q. Will these savings numbers be adjusted in the future for 2024?

457 A. Yes. The savings values for 2024 will be retroactively adjusted to
458 correspond with finalized 2024 evaluation reports in accordance with the Utilities'
459 interpretation of the Commission's Order and input from SAG; specifically, the
460 realization rates by program.

461 **B. RESIDENTIAL PROGRAMS**

462 Q. What are the Residential Programs?

463 A. The Residential Programs contain two offerings: Single Family and Multi-
464 Family. Within the Single Family offering, residential customers are provided
465 access to energy efficiency via two paths – Home Energy Rebates and Home
466 Energy Assessments. Home Energy Rebates offers rebates on energy-efficient
467 heating, ventilation, air conditioning and water heating equipment and qualifying
468 weatherization projects. Home Energy Assessments offers energy-saving
469 products installed in homes at no-cost to the customer. The Home Energy
470 Assessment program is a joint program offering provided in partnership with
471 ComEd. Homeowners can reduce their energy and water use with the installation
472 of products available to owners of single-family homes, two-flats, and individually
473 metered condos and townhomes. Renters are also eligible with permission from
474 their landlords. Offerings within the Multi-Family path include Multi-Family Energy
475 Savings, Prescriptive and Custom Rebates, and Partner Trade Ally programs.
476 The Multi-Family Energy Savings program is a joint program offering provided in
477 partnership with ComEd. The program offers free direct installation of energy-
478 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 2024 were \$2,946,730 (NSG-PGL Exhibit 2.2, page 1).

Q. Were the costs reasonable?

A. Yes. The Residential Programs achieved 102% of the annual savings goal while using 94% 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 1,361,563 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.

502 Customers with Peoples Gas rate Service Class 2 accounts, that use less than
503 400,000 therms per year, are eligible to participate in this program.

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

506 A. Peoples Gas incurred \$1,445,279 for this program during the
507 reconciliation period (NSG-PGL Exhibit 2.2, page 1).

508 Q. Were the costs reasonable?

509 A. Yes. The Small and Midsize Business Program achieved 128% of its
510 annual therm savings goal, utilizing 89% of the annual program budget (NSG-
511 PGL Exhibit 2.2, page 1).

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

514 A. Preliminary therm savings from the Small and Midsize Business Program
515 were 1,155,008 net therms (NSG-PGL Exhibit 2.2, page 1).

516 Q. What is the C&I Program?

517 A. The Commercial & Industrial (C&I) Program offers several paths for C&I
518 customers within Peoples Gas Service Class 2 or larger accounts. These paths
519 include Prescriptive and Custom Rebates, New Construction Rebates, Gas
520 Optimization Studies, Retro-commissioning, Engineering Studies, Smart Check
521 Studies, Staffing Grants, and Strategic Energy Management. Each path is
522 described briefly below.

523 Prescriptive rebates are provided for common types of energy efficiency
524 measures in C&I buildings, including demand control ventilation, steam trap

525 testing and repairs, boiler tune-ups, and pipe insulation. Custom rebates are
526 provided to customers with energy saving projects outside the prescriptive
527 rebates and with variables that can affect the savings of those projects such as
528 boiler and burner retrofits and replacements, heat exchangers, heat recovery
529 (blow down and economizers), as well as pipe insulation. Gas Optimization
530 Studies provide customers with an analysis of energy-using systems to help
531 identify no- and low-cost improvements to achieve natural gas savings in C&I
532 buildings. New Construction Rebates provide incentives for new construction
533 projects that surpass the region's building codes to improve energy efficiency.
534 Retro-commissioning offers a full-building tune-up through a systematic
535 evaluation of mechanical and electrical systems to help facilities to perform
536 optimally. Low-cost energy-saving operational improvements that can pay for
537 themselves in 18 months or less are identified. Engineering Studies provide an
538 analysis of a single system within a facility's operations to support
539 implementation of natural gas saving project. Staffing Grants offer up to \$50,000
540 per customer per year to fund a project manager to guide projects to completion
541 for customers who have energy efficiency projects that cannot be completed due
542 to lack of staff time or availability. Lastly, Strategic Energy Management engages
543 customers to deliver a continuous improvement approach to energy efficiency by
544 engaging site management, leveraging data, and by promoting best practices at
545 the site. New Construction and Retro-commissioning are offered in partnership
546 with ComEd.

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

549 A. Peoples Gas incurred \$2,945,661 for the C&I Program during the
550 reconciliation period (NSG-PGL Exhibit 2.2, page 1).

551 Q. Were the costs reasonable?

552 A. Yes. The program reached 113% of its annual therm savings goal using
553 71% of its annual budget.

554 Q. What were the therm savings from the C&I Program during the 2024
555 reconciliation period?

556 A. Preliminary net natural gas savings from the C&I Program were 2,407,828
557 therms (NSG-PGL Exhibit 2.2, page 1).

558 Q. What is the Public Sector Program?

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

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

566 A. Peoples Gas incurred \$2,870,245 for the Public Sector Program during
567 the reconciliation period (NSG-PGL Exhibit 2.1, page 1).

568 Q. Were the costs reasonable?

569 A. Yes. The program reached 92% of its 2024 therm savings goal using
570 109% of the annual budget. NSG-PGL Exhibit 2.2, page 2.

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

573 A. Preliminary net natural gas savings from the Public Sector Program were
574 1,085,095 therms (NSG-PGL Exhibit 2.1, page 1).

575 **D. INCOME QUALIFIED PROGRAMS**

576 Q. What are the Income Qualified Programs?

577 A. Income Eligible Programs target the underserved income eligible market,
578 providing services designed to make it easy for single-family and multi-family
579 income eligible customers to take advantage of cost-effective energy saving
580 retrofits. Within the Income Eligible Programs, there are paths for single-family
581 and multi-family customers. Within Single Family, Peoples Gas offers Home
582 Energy Assessment, Home Energy Savings Retrofits, and the Illinois Home
583 Weatherization Assistance Program (IHWAP). IHWAP Weatherization services
584 are provided to low-income residents through local community action agencies or
585 not for profit agencies. IHWAP leverages state and federal funds to supplement
586 incentives from the utility programs. Home Energy Assessment offers energy-
587 saving products installed in homes at no-cost to the customer. The Home Energy
588 Assessment program is a joint program offering provided in partnership with
589 ComEd. Homeowners can reduce their energy and water use with the installation
590 of products available to owners of single-family homes, two-flats, and individually
591 metered condos and townhomes. Renters are also eligible with permission from

592 their landlords. Home Energy Retrofits offers direct install products and no-cost
593 weatherization services for Income-Eligible Single-Family home customers. It is
594 delivered jointly with ComEd through approved agencies or partners. Within
595 Multi-Family programs, Peoples Gas offers Income Eligible Multi-family Savings
596 Program, Public Housing Energy Savings, Multi-family Income Eligible Partner
597 Trade Ally, and Income Eligible Kits programs. The Income Eligible Multi-family
598 Savings program provides building owners with free technical assistance to
599 identify energy efficiency opportunities and install measures. Expenses are fully
600 covered by the program, from the direct installation of energy efficiency products
601 into tenants' units (light bulbs, aerators, showerheads, etc.), to common area
602 measures, and more extensive measures requiring building owner co-pay. This
603 program is a joint offering in partnership with ComEd. The Public Housing Energy
604 Savings program offers prescriptive and custom rebates for gas measures in
605 housing owned by Public Housing Authorities. This program is a joint program
606 offering provided in partnership with ComEd. The Multi-family Income Eligible
607 Partner Trade Ally program is a program delivered by vetted Partner Trade Allies.
608 These Trade Allies are given higher rebate amounts to serve geographically
609 income-eligible customers with retrofit measures. Income Eligible Kits provides
610 income-qualified customers with a kit of energy efficiency measures to self-
611 install. The Income Eligible Kits are distributed by ground mail to qualified
612 customers vetted by the Low-Income Home Energy Assistance Program
613 (LIHEAP) and is provided in partnership with ComEd.

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

616 A. Peoples Gas incurred \$13,580,388 for the Income Qualified Programs
617 during the reconciliation period (NSG-PGL Exhibit 2.2, page 1).

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

620 A. Preliminary net natural gas savings from the Income Eligible Programs
621 were 2,969,526 therms (NSG-PGL Exhibit 2.2, page 1).

622

623 **IV. OTHER PROGRAM IMPLEMENTATION MATTERS**

624 Q. How did NSG-PGL participate in SAG?

625 A. At least one NSG-PGL representative attended every SAG meeting during
626 2024. In addition to attending and participating in SAG meetings, the Utilities had
627 a representative fully participate in the development of the Illinois TRM. This
628 representative was also a participant in the SAG Technical Advisory Committee.
629 Additionally, NSG-PGL participated in the SAG Planning process for the 2026-
630 2029 Energy Efficiency Plan in 2024. As noted above, the costs of these activities
631 are classified as administrative costs.

632 Q. Did the Utilities present to the SAG regarding the programs and overall
633 portfolio progress, successes, and challenges during 2024?

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

636 **V. ON BILL FINANCING**

637 Q. Please describe the Utilities' OBF programs.

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

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

649 A. A measure screening tool is used.

650 Q. Why were some customers declined from participating?

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

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

654 A. There were no bankruptcies filed in 2024 for PGL and NSG.

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

657 A. North Shore Gas incurred \$68,524.32 and Peoples Gas incurred
658 \$82,173.73 for the OBF program during the reconciliation period. NSG-PGL
659 Exhibit 1.3N and NSG-PGL 1.3P respectively.

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

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

663 Q. Were these costs reasonable?

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

668 **VI. CONCLUSION**

669 Q. Does this complete your direct testimony?

670 A. Yes.

Statewide Quarterly Report Template
Tab 1: Ex Ante Results
Q4 2024

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 2024

Section 8-103B/8-104 (EEPS) Program	Net Energy Savings Achieved (therms)	2024 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	2024 Original Plan Budget*	2024 Approved Budget**	% of Costs YTD Compared to Approved Budget
Business Programs											
Commercial & Industrial Program (Includes Commercial Food Service)	818,410	637,568	697,178	711,000	115%	\$ 486,164	\$ 221,608	\$ 264,556	\$ 833,733	\$ 932,729	52%
Small Business	232,558	169,135	176,797	170,000	137%	\$ 271,673	\$ 106,568	\$ 165,105	\$ 328,946	\$ 324,526	84%
Public Sector	271,254	48,311	42,234	80,000	339%	\$ 606,606	\$ 373,444	\$ 233,162	\$ 344,690	\$ 316,021	192%
Business Programs Subtotal	1,322,222	855,015	916,209	961,000	138%	\$ 1,364,444	\$ 701,619	\$ 662,824	\$ 1,507,369	\$ 1,573,277	87%
Business Programs - Private Sector Total	1,050,968	806,703	873,975	881,000	119%	\$ 757,838	\$ 328,176	\$ 429,662	\$ 1,162,679	\$ 1,257,256	60%
Business Programs - Public Sector Total	271,254	48,311	42,234	80,000	339%	\$ 606,606	\$ 373,444	\$ 233,162	\$ 344,690	\$ 316,021	192%
Residential Programs											
Single Family	293,848	460,544	487,208	270,487	109%	\$ 521,051	\$ 346,263	\$ 174,788	\$ 895,920	\$ 460,032	113%
Multi-Family	3,277	82,118	84,096	14,950	22%	\$ 49,843	\$ 2,538	\$ 47,305	\$ 172,795	\$ 70,318	71%
Residential Programs Subtotal	297,125	542,664	571,304	285,437	104%	\$ 570,894	\$ 348,801	\$ 222,093	\$ 1,068,715	\$ 530,350	108%
Income Qualified Programs											
IHWAP-braided - Single Family	-	-	-	-	N/A	\$ 27,328	\$ -	\$ 27,328	N/A	\$ 27,150	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	83,358	-	-	96,724	N/A	\$ 380,548	\$ 230,947	\$ 149,601	N/A	\$ 412,939	N/A
Single Family Subtotal	83,358	68,426	72,915	96,724	86%	\$ 407,876	\$ 230,947	\$ 176,930	\$ 399,313	\$ 440,089	93%
IHWAP-braided - Multi-Family	-	-	-	-	N/A	\$ 489	\$ -	\$ 489	N/A	\$ 496	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	83,761	-	-	94,972	N/A	\$ 522,377	\$ 235,893	\$ 286,484	N/A	\$ 484,609	N/A
Gas-only-TA - Multi-Family	-	-	-	-	N/A	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Multi Family Subtotal	83,761	35,872	36,950	94,972	88%	\$ 522,865	\$ 235,893	\$ 286,972	\$ 374,526	\$ 485,105	108%
Income Qualified Programs Subtotal	167,119	104,298	109,865	191,696	87%	\$ 930,742	\$ 466,840	\$ 463,902	\$ 773,839	\$ 925,195	101%
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	-	2,613	2,633	-	N/A	-	N/A	N/A	N/A	N/A	N/A
Demonstration of Breakthrough Equipment and Devices Subtotal	-	2,613	2,633	-		\$ -	\$ -	\$ -	\$ -	\$ -	N/A
Market Development Initiative											
Market Development Initiative Subtotal	N/A	N/A	N/A	N/A	N/A	\$ 174,305	\$ -	\$ 174,305	\$ 100,000	\$ 180,868	96%
Overall Total North Shore Gas Section 8-103B/8-104 (EEPS) Programs	1,786,467	1,504,589	1,600,012	1,438,133	124%	\$ 3,040,384	\$ 1,517,260	\$ 1,523,124	\$ 3,449,922	\$ 3,209,689	95%

*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 2024

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 2024

Section 8-103B/8-104 (EEPS) Cost Category	2024 Actual Costs YTD
Program Expenditures by Sector	
C&I Programs (private sector)	\$ 757,838
Public Sector Programs	\$ 606,606
Residential Programs	\$ 570,894
Income Qualified Programs	\$ 930,742
Market Development Initiative	\$ 174,305
Third Party Programs (Beginning in 2019)	
Total North Shore Gas Program Costs	\$ 3,040,384
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)	
Research and Development - Demonstration of Breakthrough Equipment and Devices Costs	\$ 25,218
Market Transformation Programs	\$ 75,531
Evaluation Costs	\$ 162,872
Marketing Costs (including education and outreach)	\$ 142,577
Portfolio Administrative Costs	\$ 566,876
Total North Shore Gas Portfolio-Level Costs	\$ 973,073
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 4,013,457

Section 8-103B/8-104 (EEPS) Costs - Q4 2024

Overall Total Costs	2024 Actual Costs YTD	2024 Approved Budget	% of Costs YTD Compared to Approved Budget
Total North Shore Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 4,013,457	\$ 4,268,517	94%

Statewide Quarterly Report Template
Tab 3: Historical Energy Saved
Q4 2024

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 2024

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	1,600,012	112%
2025	Ex Ante		1,466,712	1,560,836	0%
2022-2025 Plan Total		5,438,072	6,248,466	6,605,398	82%

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)									
Evaluation Status (Ex Ante, Verified**, or ICC Approved)	--	--	--	116,426 ICC	271,864 ICC	288,363 ICC	173,093 ICC	10,992 ICC	285,181 ICC
Source	--	--	--	Approved Docket 15- 0298	Approved Docket 15- 0298	Approved Docket 15- 0298	IS&ES Summary	EPY7/GPY4 DCEO Cost Effectiveness	EPY8/GPY5 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 2024

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 2024

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	
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	
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	
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	
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	
Direct Portfolio Jobs *****											9	12	11	10	12	11	
Income qualified homes served***									25	108	138	2,087	1,577	3,504	2,528	2,502	

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 2024

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 2024

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	\$ -	\$ 4,098,601	0%		
2022-2025 Plan Total	\$ 11,469,749	\$ 16,394,404	70%		

*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 2024

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 2024

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

IQ Trade-Ally-Driven Multi-Family Participation for the North Shore Gas Service Territory as of Q4 2024

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

Statewide Quarterly Report Template
Tab 8: Historical Other - IQ Participation and Measures
2024

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 2024

Zip Code	Economically Disadvantaged Area (Y/N)	2022*					2023*					2024					SF ONLY*		MF ONLY	
		IQ - Quantity of Program Participants (Buildings)	IQ - Quantity of Whole Building Assessments	IQ - Quantity of In-Unit Service 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 In-Unit Service Installations	IQ - Quantity of In-Unit Service Installations	IQ - Quantity of Major Measure Installations	IQ - Quantity of Program Participants	IQ - Quantity of Whole Building Assessments	IQ - Quantity of In-Unit Service Installations	IQ - Quantity of Major Measure Installations	IQ - Quantity of Program Participants	IQ SF - Quantity of Participants	IQ SF - Incentive Spend	IQ MF - Incentive Spend	
	60002	Y	8	0	4	4	0	3	0	3	0	0	2	2	0	0	2	\$0	\$0	
	60015	Y	46	0	77	77	0	97	1	96	0	2	21	21	0	0	21	\$5,046	\$0	
	60022	N	4	0	26	26	0	18	0	18	0	0	4	4	0	0	0	\$0	\$0	
	60030	Y	74	0	40	40	0	42	2	40	0	4	24	24	1	70	23	\$18,901	\$1,206	
	60031	Y	653	0	57	57	0	46	1	45	0	0	44	40	0	0	40	\$1,444	\$6,925	
	60033	Y	53	1	89	89	1	48	4	222	209	16	65	65	1	66	0	44	\$9,054	\$2,455
	60037	N	209	0	179	179	0	0	0	0	0	0	0	0	0	0	0	\$0	\$0	
	60040	N	10	0	0	0	0	1	0	0	0	0	5	5	0	0	0	\$13,642	\$0	
	60044	Y	19	0	21	21	0	2	12	0	5	10	10	0	0	0	10	\$7,459	\$0	
	60045	Y	14	1	38	38	1	32	4	28	0	7	11	11	0	0	0	\$1,340	\$0	
	60046	Y	36	0	22	22	0	20	0	20	0	0	21	21	0	0	21	\$5,931	\$0	
	60047	Y	0	0	0	0	0	4	0	4	0	0	3	3	0	0	3	\$0	\$0	
	60048	Y	27	0	42	42	0	30	0	30	0	0	21	21	0	0	21	\$240	\$0	
	60060	Y	105	0	33	33	0	28	1	27	0	0	22	22	0	0	22	\$15,334	\$0	
	60061	Y	55	0	39	39	0	18	0	18	0	0	24	24	0	0	24	\$12,930	\$0	
	60062	Y	0	0	0	0	0	18	1	17	0	0	0	0	0	0	0	\$0	\$0	
	60064	Y	208	12	52	52	3	17	3	48	31	3	17	16	1	2	0	\$1,137	\$92	
	60069	N	12	0	15	15	0	0	0	0	0	0	7	7	0	0	7	\$7	\$0	
	60075	N	0	0	0	0	0	0	0	0	0	1	1	0	0	0	1	\$4,493	\$0	
	60079	N	0	0	0	0	0	15	0	15	0	2	0	0	0	0	0	\$0	\$0	
	60083	N	31	0	18	18	0	73	3	67	0	8	7	7	0	0	7	\$124	\$0	
	60085	Y	1,388	16	179	182	14	24	3	14	0	5	39	40	1	249	12	\$43,903	\$91,712	
	60087	Y	217	3	125	125	4	34	1	37	0	11	31	31	0	374	12	\$16,899	\$4,935	
	60088	Y	0	0	0	0	0	5	0	823	819	4	1	0	0	4	0	\$0	\$118,612	
	60089	Y	26	0	36	36	0	5	0	5	0	4	12	12	0	0	0	\$43	\$0	
	60093	Y	0	0	0	0	0	30	3	49	0	0	2	2	0	0	2	\$7	\$0	
	60096	Y	32	0	5	5	0	0	0	0	0	0	4	4	0	0	4	\$254	\$0	
	60099	Y	375	10	85	84	2	4	1	139	139	0	33	31	0	0	2	\$9,739	\$8,008	

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

IQ Building Retrofit Materials Used for the North Shore Gas Service Territory in 2024

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

Statewide Quarterly Report Template
Tab 9: Historical Other - Health & Safety
2024

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

Instructions:
Other to be completed by SAG

IQ Whole Building Retrofit Health & Safety Spend for the North Shore Gas Service Territory				
Health & Safety Spend	2022	2023	2024	2025
Single Family			\$8,650	
Multi-Family			\$9,311	

IQ Whole Building Retrofit Health & Safety Metrics for the North Shore Gas Service Territory in 2024					
Health & Safety Metrics	2022	2023	2024	2025	
Number of Properties Assessed - Single Family	7	32	21		
Number of Properties Assessed - Multi-Family	39	2	15		
Number of Properties with Identified Health & Safety Issues	11	32	17		
Number of Properties Deferred due to Health & Safety Issues	0	13	1		
Quantity of Properties with the Following Health and Safety Issues Identified					
Electrical Safety	0	1	0		
Natural Gas Safety	0	13	0		
Fire Safety	7	6	2		
Indoor Air Quality	7	20	0		
Other	4	6	17		

IQ Whole Building Retrofit Health & Safety Narrative for the North Shore Gas Service Territory	
Qualitative Narrative	
Q1 2024	<p>Single Family</p> <p>-in Q1, 2 SF properties were assessed.</p> <p>-A total of 2 H&S issues were identified, both were fire safety issues.</p>
Q2 2024	<p>Single Family</p> <p>- in Q2, 8 single family properties were assessed.</p> <p>- A total of 6 H&S issues were identified.</p> <p>- The main issue was mice infestation.</p> <p>Multi-Family</p> <p>-in Q2, 6 multi-family properties were assessed.</p> <p>- No H&S issues were identified.</p>
Q3 2024	<p>Single Family</p> <p>- in Q3, 6 single family properties were assessed.</p> <p>Multi-Family</p> <p>-in Q3, 2 multi-family properties were assessed.</p> <p>-No H&S projects were completed.</p> <p>-A Q4 project was identified with \$2,241 in H&S improvements to support a \$20,786 weatherization project.</p>
Q4 2024	<p>Single Family</p> <p>In Q4, 5 properties were assessed.</p> <p>Four H&S issues were identified, 2 being mice infestation, 1 dealing with mold, and 1 exhaust fan.</p> <p>Multi-Family</p> <p>In Q4, 1 H&S project included addressing mold and exhaust fans not properly terminated to support weatherization.</p>



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 Health & Safety Spend by Zip Code		
Zip Code	Economically Disadvantaged Area (Y/N)	Health & Safety Spend
60002	Y	\$0
60013	Y	\$500
60022	N	\$0
60030	Y	\$500
60031	Y	\$0
60033	Y	\$500
60037	N	\$0
60440	N	\$500
60444	Y	\$500
60445	Y	\$0
60446	Y	\$488
60447	Y	\$0
60448	Y	\$0
60460	Y	\$500
60611	Y	\$1,000
60642	Y	\$0
60644	Y	\$0
60649	N	\$0
60075	N	\$500
60079	N	\$0
60083	N	\$0
60085	Y	\$6,636
60087	Y	\$1,000
60088	Y	\$4,800
60089	Y	\$0
60093	Y	\$0
60094	Y	\$0
60099	Y	\$488

Statewide Quarterly Report Template
Tab 10: Diverse Contracting
2024

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			2
Veteran-owned businesses	0	0	0
Woman and minority-owned business			4
Woman and veteran-owned business	0	0	0
	Total		14

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	19.97%	0.00%	12.41%	1.37%	2.79%	1.91%	21.34%	2.79%	14.32%
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							1.83%	6.39%	3.55%
Woman and veteran-owned business	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Total						24.61%	9.18%	18.77%

Statewide Quarterly Report Template
Tab 1: Ex Ante Results
Q4 2024

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 2024

Section 8-103B/8-104 (EEPS) Program	Net Energy Savings Achieved (therms)	2024 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	2024 Original Plan Budget*	2024 Approved Budget**	% of Costs YTD Compared to Approved Budget
Business Programs											
Commercial & Industrial Program (Includes Commercial Food Service)	2,407,828	1,625,180	1,726,445	2,124,367	113%	\$ 2,945,661	\$ 1,486,048	\$ 1,459,613	\$ 2,578,984	\$ 4,124,710	71%
Small Business	1,155,008	1,257,584	1,419,890	900,000	128%	\$ 1,445,279	\$ 529,608	\$ 915,670	\$ 2,013,450	\$ 1,625,650	89%
Public Sector	1,085,095	534,270	589,816	1,180,233	92%	\$ 2,870,245	\$ 1,389,079	\$ 1,481,166	\$ 2,430,247	\$ 2,626,904	109%
Business Programs Subtotal	4,647,932	3,417,034	3,736,151	4,204,600	111%	\$ 7,261,184	\$ 3,404,736	\$ 3,856,449	\$ 7,022,681	\$ 8,377,264	87%
Business Programs - Private Sector Total	3,562,836	2,882,764	3,146,335	3,024,367	118%	\$ 4,390,940	\$ 2,015,657	\$ 2,375,283	\$ 4,592,434	\$ 5,750,360	76%
Business Programs - Public Sector Total	1,085,095	534,270	589,816	1,180,233	92%	\$ 2,870,245	\$ 1,389,079	\$ 1,481,166	\$ 2,430,247	\$ 2,626,904	109%
Residential Programs											
Single Family	622,386	948,450	1,011,075	603,847	103%	\$ 1,391,652	\$ 499,210	\$ 892,442	\$ 1,778,128	\$ 1,466,990	95%
Multi-Family	739,177	1,648,777	1,610,465	729,818	101%	\$ 1,555,078	\$ 957,390	\$ 597,688	\$ 2,451,859	\$ 1,670,962	93%
Residential Programs Subtotal	1,361,563	2,597,227	2,621,540	1,333,665	102%	\$ 2,946,730	\$ 1,456,600	\$ 1,490,130	\$ 4,229,987	\$ 3,137,952	94%
Income Qualified Programs											
IHWAP-braided - Single Family	40,587			48,348	N/A	\$ 560,107	\$ 487,622	\$ 72,484	N/A	\$ 521,815	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	1,079,117			1,167,034	N/A	\$ 4,534,071	\$ 3,395,954	\$ 1,138,117	N/A	\$ 4,367,199	N/A
Single Family Subtotal	1,119,704	842,064	883,315	1,215,382	92%	\$ 5,094,177	\$ 3,883,576	\$ 1,210,601	\$ 5,275,305	\$ 4,889,014	104%
IHWAP-braided - Multi-Family	5,804			6,061	N/A	\$ 404,148	\$ 196,026	\$ 208,123	N/A	\$ 408,212	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	1,844,019			1,353,103	N/A	\$ 8,082,062	\$ 6,002,786	\$ 2,079,276	N/A	\$ 7,722,731	N/A
Gas-only-TA - Multi-Family	-			-	N/A	\$ -	\$ -	\$ -	N/A	\$ -	N/A
Multi Family Subtotal	1,849,822	962,304	962,520	1,359,164	136%	\$ 8,486,210	\$ 6,198,811	\$ 2,287,399	\$ 7,142,526	\$ 8,130,943	104%
Income Qualified Programs Subtotal	2,969,526	1,804,368	1,845,835	2,574,546	115%	\$ 13,580,388	\$ 10,082,388	\$ 3,498,000	\$ 12,417,831	\$ 13,019,957	104%
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	-	6,899	6,967	-	N/A	-	N/A	N/A	N/A	N/A	N/A
Demonstration of Breakthrough Equipment and Devices Subtotal	-	6,899	6,967	-		\$ -	\$ -	\$ -	\$ -	\$ -	N/A
Market Development Initiative	N/A	N/A	N/A	N/A	N/A	\$ 990,732	\$ -	\$ 990,732	\$ 700,000	\$ 1,024,916	
Market Development Initiative Subtotal	N/A	N/A	N/A	N/A	N/A	\$ 990,732	\$ -	\$ 990,732	\$ 700,000	\$ 1,024,916	97%
Overall Total Peoples Gas Section 8-103B/8-104 (EEPS) Programs	8,979,021	7,825,528	8,210,493	8,112,811	111%	\$ 24,779,033	\$ 14,943,723	\$ 9,835,311	\$ 24,370,499	\$ 25,560,089	97%

*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 2024

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 2024

Section 8-103B/8-104 (EEPS) Cost Category	2024 Actual Costs YTD
Program Expenditures by Sector	
C&I Programs (private sector)	\$ 4,390,940
Public Sector Programs	\$ 2,870,245
Residential Programs	\$ 2,946,730
Income Qualified Programs	\$ 13,580,388
Market Development Initiative	\$ 990,732
Third Party Programs (Beginning in 2019)	
Total Peoples Gas Program Costs	\$ 24,779,033
Portfolio-Level Costs by Portfolio Cost Category (Section 8-103B/8-104 EEPS)	
Research and Development - Demonstration of Breakthrough Equipment and Devices Costs	\$ 302,902
Market Transformation Programs	\$ 558,707
Evaluation Costs	\$ 1,138,342
Marketing Costs (including education and outreach)	\$ 729,390
Portfolio Administrative Costs	\$ 2,460,306
Total Peoples Gas Portfolio-Level Costs	\$ 5,189,646
Total Peoples Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 29,968,679

Section 8-103B/8-104 (EEPS) Costs - Q4 2024

Overall Total Costs	2024 Actual Costs YTD	2024 Approved Budget	% of Costs YTD Compared to Approved Budget
Total Peoples Gas Program and Portfolio-Level Section 8-103B/8-104 (EEPS) Costs	\$ 29,968,679	\$ 31,653,461	95%

Statewide Quarterly Report Template
Tab 3: Historical Energy Saved
Q4 2024

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 2024

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	8,210,493	109%
2025	Ex Ante		7,092,622	7,451,019	0%
2022-2025 Plan Total		28,518,440	32,293,240	33,786,033	84%

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
				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
Source	—	—	—						

Footnotes:
*Electric Program Year 9 (EPY9) and Gas Program Year 6 (GPY6) covers energy efficiency programs offered from June 1, 2016 to May 31, 2017.
**Verified savings refer to evaluator estimated savings that are intended to count toward compliance with a Program Administrator's energy savings goal. Verified savings generally utilize deemed net-to-gross ratios and IL-TRM algorithms, where applicable. See also the definition of 'savings verification' in the IL-TRM Policy Document.

Statewide Quarterly Report Template
Tab 4: Historical Other - Environmental and Economic Impacts
Q4 2024

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 2024																	
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	
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	
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	
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	
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	
Direct Portfolio Jobs *****											59	83	79	67	71	59	
Income qualified homes served***									668	1,327	4,724	22,395	19,223	59,602	39,989	32,902	

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 2024

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 2024

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		\$ 29,049,031	0%		
2022-2025 Plan Total	\$ 83,205,770	\$ 116,196,124	72%		

*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 2024

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

Multi-Family Participation for the Peoples Gas Service Territory as of Q4 2024								
Zip Code	2022	2023		2024		2025		
	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	
60601	0	0	0	0	0	0	0	
60602	0	0	0	0	0	0	0	
60604	0	0	0	0	0	0	0	
60605	0	0	0	0	0	0	0	
60606	0	0	0	0	0	0	0	
60607	2	6	1	3	1	20		
60608	36	405	3	243	44	3,821		
60609	1	3	1	5	3	29		
60610	0	0	2	444	448			
60611	0	0	0	0	15	363		
60612	4	33	7	998	24	672		
60613	7	94	3	134	7	615		
60614	1	40	2	172	36	1,023		
60615	32	1,239	34	1,342	61	4,154		
60616	14	713	11	1,853	15	2,279		
60617	19	677	8	348	74	678		
60618	9	109	6	67	23	251		
60619	72	949	55	984	104	1,412		
60620	60	1,147	43	752	34	243		
60621	15	257	15	335	11	88		
60622	1	18	4	503	5	20		
60623	19	131	14	314	13	109		
60624	22	321	11	435	8	234		
60625	29	501	16	301	13	413		
60626	77	2,341	37	997	51	1,042		
60628	127	1,110	9	349	39	535		
60629	23	330	37	554	15	179		
60630	1	25	3	59	0			
60631	0	0	0	0	3	23		
60632	2	7	6	32	6	53		
60633	0	0	0	0	1	4		
60634	1	44	0	0	2	7		
60636	3	18	2	7	17	379		
60637	42	1,104	37	804	18	364		
60638	1	3	0	0	0	123		
60639	13	227	5	51	11	310		
60640	21	938	17	1,134	20	978		
60641	10	252	3	69	14	242		
60642	1	324	0	0	0			
60643	5	123	5	114	10	265		
60644	44	964	21	724	21	793		
60645	22	394	10	258	10	181		
60646	0	0	0	0	3	103		
60647	11	183	3	79	32	1,001		
60649	80	1,657	93	2,423	64	1,480		
60651	15	528	6	100	9	94		
60652	1	11	0	0	10	409		
60653	20	670	16	851	7	244		
60654	0	0	0	0	0			
60655	0	0	3	40	0	0		
60656	0	0	0	0	0	0		
60657	0	0	0	0	5	282		
60659	21	427	13	258	14	750		
60660	29	1,703	18	984	21	1,059		
60661	0	0	0	0	0	0		
60707	0	0	0	0	2	1,547		
60827	0	0	0	0	0	0		

IQ Trade-Ally-Driven Multi-Family Participation for the Peoples Gas Service Territory as of Q4 2024				
Participation Metrics	2022	2023	2024	2025
Quantity of Buildings Served	11	0	0	
Quantity of (Apartment/Condo) Units Served	0	0	0	
Quantity of Buildings Assessed	11	0	0	
Quantity of Units Assessed	0	0	0	
Quantity of Buildings with Direct Installations Only	0	0	0	
Quantity of Units with Direct Installations Only	0	0	0	
Quantity of Buildings with Direct Installs and Major Meas	11	0	0	
Quantity of Units with Direct Installs and Major Measure	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					
Size	Housing Type	Number of Buildings		Number of Apartments	
		Central Heating System	Individual Heating System	Central Heating System	Individual Heating System
Buildings <20 Units	Public Housing	1	0	1	0
	Subsidized Housing	8	3	74	40
	Unsubsidized Housing	365	84	2,978	583
Buildings 20-49 Units	Public Housing	0	0	0	0
	Subsidized Housing	1	0	45	0
	Unsubsidized Housing	126	15	3,907	449
Buildings w/50+ Units	Public Housing	68	16	3,586	121
	Subsidized Housing	67	4	1,952	1,474
	Unsubsidized Housing	80	9	9,327	2,638

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	N/A
Funding Source	N/A
Amount of Funding	N/A
What was the funding used for?	N/A
Was there any joint or coordinated implementation with the leveraged funding entity and/or any constraints or program modifications resulting from leveraging?	N/A
Was there any required owner co-pays or financing? If yes, include detail on what measures require copays and the amounts required.	N/A

Statewide Quarterly Report Template
Tab 8: Historical Other - IQ Participation and Measures
2024

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 2024

Zip Code	Economically Disadvantaged Area (Y/N)	2022*					2023*					2024					SF ONLY*		MF ONLY	
		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	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	
40601	N	4	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	\$0	\$0	
40602	N	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	\$0	\$0	
40604	N	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	\$0	\$0	
40605	N	7	0	0	0	0	0	0	0	0	0	3	3	0	0	0	3	\$7	\$0	
40606	N	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	\$0	\$0	
40607	N	116	5	28	30	3	24	1	23	3	1	8	8	8	95	0	7	\$196	\$2,206	
40608	N	1,760	16	83	88	15	383	4	99	34	2	70	41	9	34	31	27	\$21,424	\$191,784	
40609	N	2,302	22	66	83	19	511	6	59	48	2	46	13	13	0	0	39	\$19,450	\$656	
40610	N	94	1	21	21	0	20	1	23	14	2	16	6	10	694	1	5	\$7	\$15,748	
40611	N	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	\$7	\$0	
40612	N	1,395	3	46	48	6	497	0	63	8	0	39	24	17	278	18	0	\$1,395	\$15,397	
40613	N	61	4	273	273	6	34	0	26	0	0	16	9	0	0	0	13	\$243	\$193,404	
40614	N	50	0	105	105	0	33	0	30	0	0	19	18	1	53	0	16	\$294	\$203,722	
40615	N	790	15	307	304	23	331	30	203	158	26	19	22	29	1,389	56	23	\$1,174	\$981,652	
40616	N	1,513	10	154	154	31	467	0	61	26	10	30	25	3	1,480	24	16	\$304	\$436,008	
40617	N	3,536	148	229	362	152	1,187	7	42	308	9	78	256	7	89	25	244	\$208,525	\$287,993	
40618	N	725	13	115	121	13	156	8	79	13	4	56	53	4	107	8	45	\$1,144	\$34,847	
40619	N	2,459	182	352	502	207	935	65	325	39	153	378	299	89	350	282	\$273,327	\$267,334		
40620	N	3,156	253	583	808	285	1,094	66	419	83	183	577	243	16	74	59	324	\$449,433	\$274,271	
40621	N	1,511	38	258	263	32	425	15	45	166	18	88	8	8	73	0	73	\$11,306	\$83,938	
40622	N	372	3	67	68	1	95	0	35	0	2	15	13	1	0	12	0	\$430	\$8,520	
40623	N	3,188	29	80	91	25	710	13	79	9	28	55	48	9	56	7	39	\$27,730	\$81,903	
40624	N	1,778	22	273	284	25	568	2	9	0	19	63	2	122	5	61	\$47,455	\$47,225		
40625	N	818	19	104	114	46	148	9	155	9	13	18	9	3	15	9	32	\$26,051	\$18,414	
40626	N	282	22	174	177	94	161	7	114	67	24	51	16	1	65	44	11	\$290	\$483,702	
40628	N	3,287	146	721	853	147	1,021	41	585	216	92	402	393	14	209	377	\$303,227	\$99,403		
40629	N	2,177	201	353	384	11	818	91	495	368	103	222	200	11	50	33	187	\$279,362	\$61,183	
40630	N	394	10	50	60	11	97	0	45	0	7	43	0	0	0	0	0	\$30,706	\$0	
40631	N	82	14	35	48	17	40	2	32	0	8	0	0	0	0	0	0	\$8,691	\$17	
40632	N	3,627	48	98	102	46	685	4	22	86	26	54	59	3	15	8	52	\$66,698	\$34,425	
40633	N	367	0	367	367	1	111	0	367	0	0	23	23	1	4	0	22	\$19,444	\$1,297	
40634	N	1,033	28	73	94	24	148	10	41	0	48	69	81	80	2	3	0	\$39,699	\$170	
40636	N	1,387	40	73	108	37	354	24	104	4	48	91	86	2	5	8	85	\$103,070	\$37,817	
40637	N	1,490	68	692	694	49	370	18	194	18	85	75	8	68	23	56	54	\$36,409	\$234,290	
40638	N	974	59	119	141	23	254	0	53	0	105	107	100	0	0	0	5	\$74,030	\$700	
40639	N	2,450	46	87	124	63	384	19	118	34	87	82	87	5	112	88	77	\$69,160	\$53,263	
40640	N	533	7	117	114	27	182	8	262	0	0	33	25	1	106	19	18	\$427	\$246,459	
40641	N	1,156	30	80	108	38	231	2	12	25	72	25	26	6	58	26	57	\$57,619	\$262,323	
40642	N	244	1	251	251	0	29	0	13	0	0	5	4	0	0	0	0	\$198	\$0	
40643	N	1,207	104	288	320	106	401	38	155	85	259	258	5	10	7	255	\$270,380	\$7,891		
40644	N	1,805	45	312	343	67	557	19	121	33	38	85	98	4	114	24	74	\$128,502	\$203,652	
40645	N	981	17	124	130	32	408	8	87	27	10	39	24	0	12	22	24	\$6,450	\$128,035	
40646	N	118	1	37	38	12	42	0	3	0	3	26	0	0	0	0	0	\$5,762	\$0	
40647	N	1,648	12	156	159	13	373	4	44	0	4	57	52	7	225	9	43	\$11,516	\$52,122	
40649	N	1,202	96	573	603	103	448	43	421	317	89	136	76	14	269	74	58	\$106,894	\$511,671	
40651	N	2,545	64	163	220	68	732	26	73	6	37	85	87	6	95	7	76	\$85,343	\$72,454	
40652	N	803	89	92	169	82	262	28	79	0	68	157	157	2	164	3	156	\$293,140	\$1,323	
40653	N	1,227	18	527	527	12	283	9	349	257	14	49	48	10	212	11	33	\$13,444	\$130,569	
40654	N	1	0	0	0	0	8	0	8	0	0	0	0	0	0	0	0	\$0	\$0	
40655	N	120	20	33	38	25	55	7	34	0	13	44	2	0	0	0	0	\$103,064	\$0	
40656	N	311	5	20	24	5	21	1	8	0	2	28	0	0	0	0	0	\$14,231	\$0	
40657	N	61	0	52	52	0	41	1	35	0	4	9	8	3	11	0	0	\$60	\$30,507	
40659	N	567	11	68	74	19	135	3	50	3	15	37	30	0	0	0	0	\$24,058	\$41,253	
40660	N	497	3	60	60	37	252	11	22	0	15	42	14	1	16	10	0	\$204	\$250,014	
40661	N	1	0	0	0	0	4	0	4	0	0	0	0	0	0	0	0	\$0	\$0	
40707	N	209	14	32	46	14	46	2	22	0	4	24	24	0	0	1	23	\$1,306	\$6,448	
40827	N	189	4	4	7	3	19	1	5	0	0	8	8	7	0	0	7	\$815	\$252,020	

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

IQ Building Retrofit Materials Used for the Peoples Gas Service Territory in 2024

IQ Retrofit Materials Metrics	2022	2023	2024	2025
Quantity of Projects with the following predominant Insulation Materials:				
Insulation - Fiberglass	374	0	127	
Insulation - Cellulose	900	142	224	
Insulation - Spray Foam	404	0	0	
Insulation - Rigid Foam	685	0	0	
Pipe Insulation - Foam	0	0	0	
Pipe Insulation - Wood (Glass, Mineral)	0	0	0	
Pipe Insulation - Tape	0	0	0	
Insulation - Other	279	0	12	
Quantity of Projects with the following predominant Sealants/Caulks in general:				
General Sealant Material - Tape	0	216	0	
General Sealant Material - Mastic	10	0	0	
General Sealant Material - Latex	0	0	4	
General Sealant Material - Silicone	1	0	0	
General Sealant Material - Polyurethane	0	139	220	
General Sealant Material - Other	0	0	14	
Quantity of Projects with the following predominant Sealants/Caulks in HVAC Ductwork:				
HVAC Ductwork Sealant Material - Tape	0	0	0	
HVAC Ductwork Sealant Material - Mastic	0	0	0	
HVAC Ductwork Sealant Material - Latex	0	0	0	
HVAC Ductwork Sealant Material - Silicone	0	0	0	
HVAC Ductwork Sealant Material - Polyurethane	0	0	0	
HVAC Ductwork Sealant Material - Other	0	0	0	

Statewide Quarterly Report Template
Tab 7: Historical Other - Health & Safety
2024

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

Instructions:
Other to be completed by SAG

IQ Whole Building Retrofit Health & Safety Spend for the Peoples Gas Service Territory				
Health & Safety Spend	2022	2023	2024	2025
Single Family			\$88,144	
Multi-Family			\$44,029	

IQ Whole Building Retrofit Health & Safety Metrics for the Peoples Gas Service Territory in 2024				
Health & Safety Metrics	2022	2023	2024	2025
Number of Properties Assessed - Single Family	1,392	1,264	363	
Number of Properties Assessed - Multi-Family	494	285	264	
Number of Properties with Identified Health & Safety Issues	787	919	391	
Number of Properties deferred due to Health & Safety Issues	109	165	14	
Quantity of Properties with the following Health and Safety Issues identified:				
Electrical Safety	7		8	
Natural Gas Safety	1	241	8	
Fire Safety	403	300	194	
Indoor Air Quality	392	449	18	
Other	384	451	87	

IQ Whole Building Retrofit Health & Safety Narrative for the Peoples Gas Service Territory	
Executive Narrative:	
Q1 2024	Single Family -In Q1, 254 3F properties were assessed. Multi-Family -For H&S, total of 225 H&S issues were identified, with 153 fire safety, 5 electrical safety, and 3 Natural Gas safety issues. Multi-family saw instances of H&S issues including improper flue venting, foundation/roof leak/bulk water, and suspected asbestos.
	Single Family -In Q2, 46 single family properties were assessed. -A total of 43 H&S issues were identified: 35 fire safety, 3 electrical safety, and 1 natural safety. Multi-Family -Issues addressed included exhaust fans not properly terminated to exterior, exhaust fans, improper flue venting, inadequate/missing CO/smoke detectors, wrapping non-insulated kitchen and both fan flues to a minimum of R-7. -4 of 8 H&S projects were identified by Energy Advisors during an assessment.
Q3 2024	Single Family -In Q3, there were no properties assessed. Multi-Family -91 properties were assessed and H&S issues were identified at 10 properties. Those 10 H&S issues were barriers to weatherization. Projects are scheduled for both Q4 2024 and Q1 2025. -Q3 was the largest quarter for H&S projects for Retrofits, totaling \$20,421. 70% of H&S funds supported weatherization projects and the remaining supported gas mechanicals through addressing suspected asbestos-containing materials. -The H&S funding allowed five projects to be completed in Q3 that otherwise could not have been completed. Additionally, H&S projects support projects that will complete in Q4.
Q4 2024	Single Family -In Q4, 14 H&S issues were identified, 6 being smoke detector batteries, 2 dealing with dryer vents, 3 dealing with improper flue venting and 1 with vermiculite testing. Multi-Family -In Q4, 3 projects were funded. Two projects addressed inadequate or missing smoke detectors, and the final addressed improper flue venting.

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.

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	\$18,871
60609	Y	\$500
60610	Y	\$0
60611	Y	\$0
60612	Y	\$594
60613	Y	\$0
60614	Y	\$7,724
60615	Y	\$200
60616	Y	\$0
60617	Y	\$7,966
60618	Y	\$0
60619	Y	\$6,531
60620	Y	\$18,212
60621	Y	\$0
60622	Y	\$0
60623	Y	\$299
60624	Y	\$1,213
60625	Y	\$330
60626	Y	\$184
60628	Y	\$2,385
60629	Y	\$4,965
60630	Y	\$1,706
60631	Y	\$67
60632	Y	\$2,415
60633	Y	\$402
60634	Y	\$292
60636	Y	\$7,797
60637	Y	\$531
60638	Y	\$2,941
60639	Y	\$1,866
60640	Y	\$0
60641	Y	\$1,255
60642	Y	\$0
60643	Y	\$8,233
60644	Y	\$10,246
60645	Y	\$534
60646	Y	\$111
60647	Y	\$459
60649	Y	\$3,063
60651	Y	\$2,418
60652	Y	\$6,812
60653	Y	\$760
60654	Y	\$0
60655	Y	\$2,806
60656	Y	\$341
60657	Y	\$0
60659	Y	\$1,104
60660	Y	\$0
60661	N	\$0
60707	Y	\$0
60801	Y	\$0

Statewide Quarterly Report Template
 Tab 10: Diverse Contracting
 2024

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	0	3	3
Veteran-owned businesses	0	0	0
Woman and minority-owned business			4
Woman and veteran-owned business	0	0	0
	Total		15

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	18.42%	0.00%	9.23%	1.02%	0.52%	0.77%	19.44%	0.52%	10.00%
Minority-owned businesses	0.00%	0.00%	0.00%	1.58%	0.00%	0.79%	1.58%	0.00%	0.79%
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							2.12%	5.49%	3.80%
Woman and veteran-owned business	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Total						23.13%	6.01%	14.59%

NSG-PGL Ex. 2.3

Peoples Gas (PGL) and North Shore Gas (NSG)
Final 2024 NTG Values

27-Sep-23

		Final 2024 NTG Values				2024 NTG Value	Gas Source(s)
Sector	Program/Path/Measures	New NTG Research Since Final 2023 Recommendation	Free Ridership (FR)	Participant Splitover (PSO)	Non-Participant Splitover (NPSO)		
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 Re-program	Yes	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 splitover and gross with respect to non-participant splitover. For more detail, see Table 5.3 in Volume 4 of the IL TRM. The Guidelinehouse recommends NTG = 1 + FR2 + NPSO for residential advanced thermostats. Here FR is based on Guidelinehouse research conducted in 2023 with PGL/NSG customers who participated in HEJ between Q2 2022 and Q1 2023. Guidelinehouse memo: PGL NSG Advanced Thermostat FR Memo 2023-08-31. (Note that net savings achieved by advanced thermostats are included when calculating residential non-participant splitover with the multiplier described below.)
	HEJ - Faucet Aerators	Yes	0.00	0.09		1.00	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-Participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
	HEJ - Showerheads	Yes	0.00	0.09		1.00	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-Participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
	HEJ - Programmable Thermostat	Yes	0.10	0.09		0.99	FR and PSO: 2023 Survey of 2021-Participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
	HEJ - Re-Programmable Thermostat	Yes	0.10	0.09		0.99	FR and PSO: 2023 Survey of 2021-Participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
	HEJ - Boiler Pipe Insulation, DRW Pipe Insulation	Yes	0.10	0.09		0.99	FR and PSO: 2023 Survey of 2021-Participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
Residential	HEJ - Loose-Battled Kt Measures are Slower Timer, Cell Foam Weatherstripping, and Door Seals)	Yes	0.10	0.09		0.99	FR and PSO: 2023 Survey of 2021-Participants. Memo: PGL NSG Home Energy Jumpstart Program NTG Memo 2023-08-24 DRAFT
	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 or 0.89	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) ConEd 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 splitover and gross with respect to non-participant splitover. 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 splitover.
	Air Sealing (conducted without adding Attic Insulation)	No	0.24	0.01		0.79	FR, Navigant research of free ridership from a telephone survey administered to ConEd EPV/GPV6 and CY2018 Weatherization Replaces Program participants that purchased a discounted advanced thermostat through the Home Energy Rebate Program. Navigant, 5/26/17
Residential	Insulation measures, excluding ceiling/attic insulation, including Wall, Floor Above Crawlspace, Basement Sides, Rim/Joint	No	0.22	0.01		0.79	FR and PSO: Guidelinehouse 2020 survey of 100 analyzed completes from 2018 participants (any measures) for PSO; 83 analyzed completes from 2019 for FR (HE furnace participants); and 41 analyzed completes of 2019 active participating trade allies. Since HE furnaces comprise 62% of HVAC equipment savings, Guidelinehouse recommends applying FR results to other HVAC equipment (predominantly HE boilers and tankless water heaters)
	Duct Sealing	No	0.14	0.01		0.87	PSO: 2017 Survey of 86 GPV6 Air Sealing, Duct Sealing, and Insulation participants and 60 participating trade allies. Memo: Net-to-Gross Research Results from GPV6 for the Peoples Gas and North Shore Gas Home Energy Rebate Program, Navigant, 5/26/17
Residential	Online Marketplace Advanced (Smart) Thermostats	Yes	0.10			0.90	Guidelinehouse recommends NTG = 1 + FR2 + NPSO for residential advanced thermostat. Here FR is based on Guidelinehouse research conducted in 2023 with PGL/NSG customers who purchased a discounted advanced thermostat through the Online Marketplace between Q2 2022 and Q1 2023. Guidelinehouse memo: PGL NSG Advanced Thermostat FR Memo 2023-08-31. (Note that net savings achieved by advanced thermostats are included when calculating residential non-participant splitover with the multiplier described below.)
Residential	Home Energy Rebate Advanced (Smart) Thermostats	Yes	0.22			0.88	Guidelinehouse recommends NTG = 1 + FR2 + NPSO for residential advanced thermostat. Here FR is based on Guidelinehouse 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. Guidelinehouse memo: PGL NSG Advanced Thermostat FR Memo 2023-08-31. (Note that net savings achieved by advanced thermostats are included when calculating residential non-participant splitover with the multiplier described below.)
Residential	Home Energy Rebate (HVAC and other equipment, excluding Advanced Thermostats, Duct Sealing, Air Sealing, and Insulation Measures)	No				0.87	FR and PSO: Guidelinehouse 2020 survey of 100 analyzed completes from 2018 participants (any measures) for PSO; 83 analyzed completes from 2019 for FR (HE furnace participants); and 41 analyzed completes of 2019 active participating trade allies. Since HE furnaces comprise 62% of HVAC equipment savings, Guidelinehouse recommends applying FR results to other HVAC equipment (predominantly HE boilers and tankless water heaters)
	Direct Install In-Unit Faucet Aerators (when meeting TRM specifications for zero free ridership)	No	0.00	0.01	0.00	1.01	NSO: ATSO: 0.11; 2013 Survey of 59 non-participating trade allies. Residential Prescriptive Rebate Program GPV2 Evaluation Report, Navigant, 2/10/14
Residential	Prescriptive Rebates	No	0.14	0.01		0.87	ATSO: 0.08; The spillover measures reported by participants (PSO: 0.02) and active trade allies (ATSO: 0.06) in the 2020 survey research did not overlap, therefore the spillover results are additive. The inactive trade allies spillover estimate (ATSO: 0.11) does not overlap with either participants or active trade allies.
Residential	Partner Trade Allies	Yes	0.14	0.01	0.01	0.88	NSO: ATSO: 0.08; The spillover measures reported by participants (PSO: 0.02) and active trade allies (ATSO: 0.06) in the 2020 survey research did not overlap, therefore the spillover results are additive. The inactive trade allies spillover estimate (ATSO: 0.11) does not overlap with either participants or active trade allies.
Multi-Family DI In-Unit and Common Areas (starting 2020)	Direct Install In-Unit Faucet Aerators (when meeting TRM specifications for zero free ridership)	No	0.00	0.01	0.00	1.01	NSO: ATSO: 0.08; The spillover measures reported by participants (PSO: 0.02) and active trade allies (ATSO: 0.06) in the 2020 survey research did not overlap, therefore the spillover results are additive. The inactive trade allies spillover estimate (ATSO: 0.11) does not overlap with either participants or active trade allies.
Multi-Family DI In-Unit	Direct Install In-Unit Faucet Aerators (when meeting TRM specifications for zero free ridership)	No	0.00	0.01	0.00	1.01	NSO: ATSO: 0.08; The spillover measures reported by participants (PSO: 0.02) and active trade allies (ATSO: 0.06) in the 2020 survey research did not overlap, therefore the spillover results are additive. The inactive trade allies spillover estimate (ATSO: 0.11) does not overlap with either participants or active trade allies.
Multi-Family DI In-Unit	Direct Install In-Unit Faucet Aerators (when meeting TRM specifications for zero free ridership)	No	0.00	0.01	0.00	1.01	NSO: ATSO: 0.08; The spillover measures reported by participants (PSO: 0.02) and active trade allies (ATSO: 0.06) in the 2020 survey research did not overlap, therefore the spillover results are additive. The inactive trade allies spillover estimate (ATSO: 0.11) does not overlap with either participants or active trade allies.
Multi-Family Comprehensive - Path-Based Estimates	Custom Incentives	No	0.14	0.01		0.87	NSO: ATSO: 0.08; The spillover measures reported by participants (PSO: 0.02) and active trade allies (ATSO: 0.06) in the 2020 survey research did not overlap, therefore the spillover results are additive. The inactive trade allies spillover estimate (ATSO: 0.11) does not overlap with either participants or active trade allies.
Residential	Gas Optimization	No	0.06	0.00	0.00	0.94	Guidelinehouse Research, 2021) Evaluation research consisting of 2019 and 2020 participating customer and trade ally self-reports. Free-ridership of 27% and participant splitover of 11% from 20 participating customer and trade ally interviews completed from a population of 80 (relative precision of 7.5% at the 90% confidence level). Free Ridership of 13% and participant splitover 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 30% trade ally value. The trade ally splitover of 8% was not applicable in preference for the 11% customer participant value (to exclude the potential for double counting). Non-participant splitover of 2% for Business/Private Sector only, from 5 non-participating trade ally interviews conducted in GPV2 as part of evaluation research, non-double counting participant splitover 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.
	Sector-wide, non-income-eligible residential customers	Yes				0.83	Guidelinehouse Research, 2021) Evaluation research consisting of 2019 and 2020 participating customer and trade ally self-reports. Free-ridership of 27% and participant splitover of 11% from 20 participating customer and trade ally interviews completed from a population of 80 (relative precision of 7.5% at the 90% confidence level). Free Ridership of 13% and participant splitover 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 30% trade ally value. The trade ally splitover of 8% was not applicable in preference for the 11% customer participant value (to exclude the potential for double counting). Non-participant splitover of 2% for Business/Private Sector only, from 5 non-participating trade ally interviews conducted in GPV2 as part of evaluation research, non-double counting participant splitover 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.
Business							Guidelinehouse Research, 2021) Evaluation research consisting of 2019 and 2020 participating customer and trade ally self-reports. Free-ridership of 27% and participant splitover of 11% from 20 participating customer and trade ally interviews completed from a population of 80 (relative precision of 7.5% at the 90% confidence level). Free Ridership of 13% and participant splitover 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 30% trade ally value. The trade ally splitover of 8% was not applicable in preference for the 11% customer participant value (to exclude the potential for double counting). Non-participant splitover of 2% for Business/Private Sector only, from 5 non-participating trade ally interviews conducted in GPV2 as part of evaluation research, non-double counting participant splitover 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.
Business	Prescriptive Rebates including Thermostats	No	0.22	0.11	0.02	0.91	Method: Evaluation research consisting of 2019 and 2020 participating customer and trade ally self-reports. Free-ridership of 27% and participant splitover of 11% from 20 participating customer and trade ally interviews completed from a population of 80 (relative precision of 7.5% at the 90% confidence level). Free Ridership of 13% and participant splitover 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 30% trade ally value. The trade ally splitover of 8% was not applicable in preference for the 11% customer participant value (to exclude the potential for double counting). Non-participant splitover of 2% for Business/Private Sector only, from 5 non-participating trade ally interviews conducted in GPV2 as part of evaluation research, non-double counting participant splitover 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	0.16 TA: 0.13 Wgt: 60% / 40%TA: 0.15	Participant: 0.00 TA: 0.07	0.00	0.92	Guidelinehouse 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 splitover 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 splitover 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 splitover of 7% was applicable to Public Sector participants. Non-participant splitover conducted in GPV2 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.
Business	Custom Rebates	No	0.26	0.00		0.74	Consider multi-year samples given the small population. Navigant analysis of participant interviews conducted in 2019 of 2018 Custom Rebate Program participants, including the private and public sectors. Completed 10 interviews from population of 19 (C/P 80%). Sample size not large enough for separate Private/Public NTG estimates.
Public Sector	Custom Rebates	No	0.15	0.07	0.00	0.92	Guidelinehouse 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 splitover 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 splitover 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 splitover of 7% was applicable to Public Sector participants. Non-participant splitover conducted in GPV2 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.
Business and Public Sector	Gas Optimization	No	0.06	0.00	0.00	0.94	Guidelinehouse Research, 2021) Evaluation research consisting of 2019 and 2020 participating customer and trade ally self-reports. Free-ridership of 27% and participant splitover of 11% from 20 participating customer and trade ally interviews completed from a population of 80 (relative precision of 7.5% at the 90% confidence level). Free Ridership of 13% and participant splitover 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 30% trade ally value. The trade ally splitover of 8% was not applicable in preference for the 11% customer participant value (to exclude the potential for double counting). Non-participant splitover of 2% for Business/Private Sector only, from 5 non-participating trade ally interviews conducted in GPV2 as part of evaluation research, non-double counting participant splitover 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.
Business and Public Sector	Retro-Commissioning	No	0.07	0.05	0.00	0.96	FR (Guidelinehouse research conducted in 2021): Participant FR based on responses from year 2020 participants and EESPs. Participant free ridership reported by 10 (C/P 90.10) responses from population of 132 participants. EESP FR reported by 10 EESPs (delivering 10% of program savings) from population of 25 EESPs. FR results weighted 37% participants and 63% EESP. Splitover (Guidelinehouse research conducted in 2021): Spillover population and sample same as free ridership, results verified from two of six participant respondents passing spillover screen. EESP natural gas spillover was negligible from one respondent. No NPSO.
Business and Public Sector	Joint Non-Residential New Construction Program	Yes	2023 FR -0.51	0.00	0.00	0.43	NTG is the average of previous 4 program years of research CY2018 (0.45); CY2020 (0.39); CY2022 (0.36); CY2023 (0.49). The 2023 FR estimate from Dynamic Dynamics Q2022 research, based on 37 completed interviews from a population of 100 (relative precision of 9.5% at the 90% confidence level). NTG is the average of previous 4 program years of research CY2018 (0.45); CY2020 (0.39); CY2022 (0.36); CY2023 (0.49). The 2023 FR estimate from Dynamic Dynamics Q2022 research, based on 37 completed interviews from a population of 100 (relative precision of 9.5% at the 90% confidence level). NTG is the average of previous 4 program years of research CY2018 (0.45); CY2020 (0.39); CY2022 (0.36); CY2023 (0.49). The 2023 FR estimate from Dynamic Dynamics Q2022 research, based on 37 completed interviews from a population of 100 (relative precision of 9.5% at the 90% confidence level). 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STATE OF ILLINOIS

ILLINOIS COMMERCE COMMISSION

Illinois Commerce Commission)	
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v.)	
)	
North Shore Gas Company)	
And)	Docket No. 24-0831
The Peoples Gas Light and Coke Company)	
)	
Reconciliation of Revenues Collected)	
Under Rider EOA with Actual Costs)	
Associated with Energy Efficiency and)	
On-Bill Financing Programs)	

NOTICE OF FILING AND CERTIFICATE OF SERVICE

I hereby certify that North Shore Gas Company and The Peoples Gas Light and Coke Company filed their direct testimony and exhibits on the Illinois Commerce Commission's e-docket system and served by electronic mail upon each person designated in the official service list compiled in these proceedings, Docket Nos. 24-0831 in accordance with requirements of the Commission's Rules of Practice.

Dated at Chicago, Illinois, this 12th day of September 2025.

By: /S/ KOBY BAILEY

Koby Bailey
An Attorney for
North Shore Gas Company
The Peoples Gas Light and
Coke Company