### **Joint Stakeholder Proposal: Equity and Affordability Metrics**

**Utility Redline Edits for Discussion April 19, 2023**

Each Program Administrator (PA) will report on the delivery of its energy efficiency programs to disadvantaged communities. In addition to standard reporting of disconnection and other credit and collections data by zip code already required by Section 8.201.10 of the Public Utilities Act, the PAs will report on a statewide set of metrics designed to provide insight into a variety of other program and policy objectives, which may include:

* The distribution of low income participation in whole building weatherization, by program and by zip code;
* How participation in utility whole building weatherization programs overlaps with communities with economic need;
* How participation in utility whole building weatherization programs overlaps with disadvantaged communities or other indicators of equity;

Each Program Administrator (PA) will also perform periodic analyses to provide insight into additional program and policy objectives, which may include:

* The effectiveness of whole building weatherization and other utility-sponsored assistance and efficiency programs in reducing low income energy burdens;
* The effectiveness of cross referrals between energy efficiency and credit/collections departments in enrolling low income customers.
* ~~The degree to which low income program participants are also customers who receive bill payment assistance and/or participate in other utility-sponsored initiatives, energy efficiency-related or otherwise;~~
* ~~The number of low income EE program participants that (A) got referrals to bill payment assistance programs and (B) that ultimately enrolled in such programs; and~~
* ~~The number of referrals utility credit and collections departments made to low income EE programs.~~

The utilities and stakeholders shall work to reach consensus in developing the specific metrics to address these reporting needs. The metrics may evolve and be amended over time.