

Equity and Affordability Reporting Metrics FINAL (updated 9/8/2025)

Illinois Energy Efficiency Policy Manual Version 3.0 was developed by the SAG Policy Manual Subcommittee from June 2022 to August 2023. Policy Manual Version 3.0 was approved by the Illinois Commerce Commission in December 2023. A follow-up item agreed to in the Policy Manual was for the SAG Reporting Working Group to develop metrics for Equity and Affordability Reporting. This document includes the excerpted “Equity and Affordability Reporting Principles Policy” from the Policy Manual, and metrics finalized in June 2024. Metrics were updated by the SAG Reporting Working Group in September 2025.

Effective Date Interpretation:

- For information the utilities have been collecting, utilities will use best efforts to start tracking new reporting metrics on June 1, 2024, and report this information in the Q3 2024 report.
- For information the utilities were not previously collecting, finalized by July 1, 2024, utilities will use best efforts to start tracking by October 1, 2024, and include in the Q4 2024 report.
- The new annual reporting metrics will be included in Q2 2025 utility reports.
- The SAG Reporting Group agreed upon changes to the frequency and reporting location for certain metrics affected by 2026-2029 Energy Efficiency Plan Stipulations between Program Administrators and stakeholders. Changes are effective January 1, 2026.

Final “Equity and Affordability Reporting Principles Policy” from Policy Manual Version 3.0, Section 6.10:

Each Program Administrator 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, Program Administrators will report on a statewide set of metrics designed to provide insight into a variety of other Program and policy objectives, which shall include:

- i. How participation in Program Administrator whole building retrofit Programs overlaps with geographic areas with economic need;*
- ii. How participation in Program Administrator whole building retrofit Programs overlaps with the Low Income Home Energy Assistance Program (LIHEAP) and Percentage of Income Payment Plan (PIPP) participation; and*
- iii. How participation in Program Administrator whole building retrofit Programs overlaps with disadvantaged communities or other indicators of equity.*

Annual Reporting Metrics for (i – iii):

1. Report the total number of Income Qualified (IQ) Single Family (SF) EE program participants and spend by zip code.
2. Geographic Reporting:
 - a. Program Administrators will report via spreadsheet each zip code they serve, whether the zip code is defined as an economically disadvantaged area, and income qualified single family EE program spending for each zip code.
 - b. Nicor Gas will work to develop a beta interactive mapping mechanism. A draft mapping mechanism will be reviewed with the SAG Reporting Working Group for feedback by the end of Q2 2024.

Reporting Location: Annually, in Q2 Semi-Annual Narrative Report for the previous program year. Within a given program year, the data will reflect cumulative year-to-date data.

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

- i. The effectiveness of whole building retrofit Programs and other Program Administrator-sponsored assistance and efficiency programs in reducing Low Income Customer energy burdens.*
- ii. The number of and effectiveness of cross referrals between Energy Efficiency and credit/collections departments in enrolling Low Income Customers.*
- iii. The number or proportion of Energy Efficiency Program Participants that are payment troubled (e.g., Customers at risk of being disconnected; with high arrears; participating in bill assistance programs).*

Program Administrators shall work with interested stakeholders to reach consensus in developing the specific metrics to address these reporting needs. The metrics may evolve over time.

The list of metrics will be posted on the SAG and LIEEAC website(s). The metrics will be referenced in, and lessons learned from reported metric data will be referenced in, the Program Administrators' reports and discussed in SAG and LIEEAC with the goal of improving Program delivery and outcomes.

Annual Reporting Metrics for (i):

Independent evaluators for Illinois Program Administrators will include the following reporting metrics in Annual Evaluation Reports, separately for each EE program:

1. Total number of IQ single family whole building program participants.
2. Total number of IQ single family whole building program participants adopting air sealing.
3. Total number of IQ single family whole building program participants adopting insulation.
4. Total number of IQ single family whole building program participants with electric resistance heating adopting heat pumps.
5. Total number of IQ single family whole building program participants with fossil fuel heating adopting heat pumps.
6. Total number of IQ single family whole building program participants adopting heat pump water heaters.
7. Total number of IQ single family whole building program participants with fossil fuel heating or hot water systems replaced with another fossil fuel system.

Reporting Location: In a spreadsheet format in Annual Evaluation Reports.

One-Time Study Report for (ii):

Program Administrators will consider completing a one-time study no later than the end of 2026 (Program Administrators may collaborate on a single study that quantifies results by Program Administrator). This study will assess the level and consistency of cross referrals made by credit and collections departments to IQ EE programs, and what portion of customers receiving referrals subsequently participate in an IQ whole building program. Program Administrators will make best efforts to coordinate to pursue consistent methodologies. This one-time study will meet the commitment in (ii) above, from the Equity and Affordability Reporting Principles Policy finalized in Policy Manual Version 3.0.

Reporting Location: One time study report.