

## **Income Qualified Health and Safety Reporting Metrics FINAL (1/23/2024)**

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 Income Qualified Health and Safety Reporting. This document includes the excerpted “Income Qualified Health and Safety Reporting Principles Policy” from the Policy Manual, and the metrics finalized by the SAG Reporting Working Group in January 2024.

### **Final “Income Qualified Health and Safety Reporting Principles Policy” from Policy Manual Version 3.0, Section 6.9:**

*Health and safety issues can sometimes be impediments to weatherizing homes. When that is the case, income qualified households not only lose the potential for realizing energy bill reductions, but also are left with underlying structural and/or other problems in their home that they typically do not have the financial or technical resources to remedy. This policy is intended to provide transparency on how Program Administrators are addressing health and safety issues encountered through their income qualified weatherization Programs, to enable understanding of similarities and differences in opportunities and challenges experienced by each Program Administrator, as well as to make available data that can shed light on both successes and future opportunities for improvement in addressing such issues. Specifically, it requires that each Program Administrator report on the effectiveness of its efforts to address health and safety improvements necessary to enable Energy Efficiency retrofits – particularly building envelop upgrades, HVAC equipment upgrades and other major Measures – in income qualified single family and multi-family buildings. The reporting will be on a statewide set of metrics designed to provide insight into the following issues for both single family and multi-family buildings:*

- i. How often health and safety concerns are found.*
- ii. The types of health and safety concerns that are found and the Measures used to address those concerns.*
- iii. How often the Programs are able to address (vs. unable to address) any health and safety concerns that are found and why.*
- iv. Levels of spending to address health and safety concerns.*
- v. Geographic and building type distribution of health and safety data.*
- vi. The types of materials used for air sealing and insulation.*

*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' quarterly and/or annual reports and discussed in SAG and LIEEAC with the goal of improving Program delivery and outcomes.*

**Quarterly Reporting Metrics:**

1. Report Program Administrator health and safety spending broken down between SF, MF, and mobile homes (if the Program Administrator has a mobile homes offering, or if the Program Administrator is able to track whether a mobile home participated); and
2. Report a qualitative narrative describing health and safety trends, successes and challenges, including differences by building type, where notable.

**Reporting Location:** Add to the narrative section of quarterly reports (data should be cumulative year to date for each quarter)

**Annual Reporting Metrics:**

Report the following information for all IQ whole building programs (broken out by program):

1. Total number of housing units, separately by income qualified EE program type (for example: Community Action Agency Single Family; Income Qualified Single Family, IQ Multifamily; etc.)
  - a. Include the number of housing units where frequently observed health and safety issues, broken down in the following manner, were:
    - i. Observed
    - ii. Remediated
    - iii. Not remediated
  - b. For housing units that could not be remediated, include why the remediation was not possible (for example: cost; not possible without another update to the building; customer did not want to remediate; etc.)
2. Number of EE program housing units that were weatherized and received a health and safety update
3. Number of EE program housing units that were weatherized and did not need a health and safety update
4. Number of housing units that did not receive weatherization due to a health and safety issue
5. Through a pie chart, report the types of health and safety issues frequently observed in housing units that did not receive weatherization due to a health and safety issue
6. Through a pie chart, report the types of health and safety issues frequently observed in housing units that were weatherized and received a health and safety update
7. Report the total amount of health and safety spending by program channel
8. Report the percentage (%) of the total program spend for each health and safety issue
9. 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 health and safety 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:** Add to the narrative section of the Q4 report.