**Income Qualified Multi-Family Reporting Principles Policy and Metrics**

**From December 19, 2023 SAG Reporting Working Group Meeting**

**CLEAN**

With Stakeholder Comments and Proposed Edits for 1/23 Meeting

**Final “Income Qualified Multi-Family Reporting Principles Policy” from Policy Manual Version 3.0:**

*Each Program Administrator will report on the effectiveness of its efforts to deliver efficiency improvements to the income qualified multi-family housing sector. In addition to standard Program reporting on spending and savings, Program Administrators will report on a statewide set of metrics designed to provide insight into a variety of other Program and policy objectives including:*

1. *The mix of buildings being treated. This could include breakdowns between public housing, subsidized housing and unsubsidized housing; the type/size of buildings.*
2. *Levels of joint delivery and/or coordinated delivery between gas and electric utilities.*
3. *The comprehensiveness of efficiency upgrade opportunities being addressed in participating buildings. This would include a particular emphasis on understanding the level of uptake of building envelope, HVAC equipment, water heating equipment and other major Measures (vs. just lower cost measures through direct installation and/or other delivery mechanisms) and barriers encountered in increasing uptake of such major Measures.*
4. *Uptake of new technologies. This would include, but not be limited to, cold climate heat pumps and heat pump water heaters.*
5. *Leveraging of other funding sources to support income qualified multifamily retrofits.*
6. *Geographic distribution. This would include where buildings are served, which could be provided by zip code and/or census tract.*

*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.*

**Annual Reporting Metrics for (i):**

**Excerpt from policy:** *The mix of buildings being treated. This could include breakdowns between public housing, subsidized housing and unsubsidized housing; the type/size of buildings.*

See the spreadsheet prepared by stakeholders for the Nov. 28, 2023 Reporting Working Group meeting: [Income Qualified Multi-Family Reporting Tables (Excel)](https://www.ilsag.info/wp-content/uploads/MF-Metrics-DRAFT-11-16-2023.xlsx)

Reporting in the spreadsheet includes the number of projects, buildings and units participating in IQ multi-family EE programs in the following building categories:

* Public housing (meaning housing where the government owns or rents an apartment)
* Subsidized housing (meaning state or federal assisted housing, such as the low income housing tax credit properties, project based vouchers, etc.)
* Unsubsidized housing (meaning IQ multifamily housing that is neither public nor has project-based subsidies, this category may include properties with tenants that have tenant-based housing vouchers)

For each type of housing above, projects will be further broken out by size:

* Projects 3-9 units
* Projects 10-19 units
* Projects 20-49 units
* Projects >50 units

**Reporting Location:** Annually, in the Q4 report, including the spreadsheet populated with data. Within a given program year the data will reflect cumulative year-to-date data.

**Quarterly Reporting Metrics for (ii):**

**Excerpt from policy:** *Levels of joint delivery and/or coordinated delivery between gas and electric utilities.*

In the Program Descriptions section of the quarterly report, briefly describe whether the IQ MF program is jointly delivered, or coordinated. If joint or coordinated, include additional explanation on how the utilities work together including addressing the following questions:

* Is there a single vendor?
* Is it a joint program?
* Is there a single point of contact?
* Is there a single application form?

In addition to the quarterly reporting metrics, for the 2023 evaluations that will be conducted in 2024, the evaluators will investigate the level and effectiveness, in both reducing barriers to participation and comprehensively addressing efficiency opportunities, of offering one-stop-shopping services and jointly or in a coordinated fashion delivering the IQ MF programs.

**Reporting Location:** Add to the narrative section of the quarterly reports. Update the narrative description if / when the program design changes.

**Annual Reporting Metrics for (v):**

**Excerpt from policy:** *Leveraging of other funding sources to support income qualified multifamily retrofits.*

Report on any funding sources leveraged or combined for the IQ MF EE program where a utility leverages over $500,000 or more per year, including:

1. Funding source;
2. Amount of funding;
3. Brief description of what the funding is being used for
4. Brief description of any joint or coordinated implementation with the leveraged funding entity and/or any constraints or program modifications resulting from leveraging; and
5. Any required owner co-pays or financing, including detail on what measures require copays and the amounts required

**Annual Reporting Metrics:**

Independent evaluators for Illinois utilities will report data in Annual Evaluation Reports on the number of projects, buildings, and apartments receiving various measures. In addition, for shell and heat pump measures, reporting includes separate reporting on whether the measures are applicable (qualified project), and if a project is qualified but the measures were not installed, the reasons why.

See the spreadsheet prepared by stakeholders for the Nov. 28, 2023 Reporting Working Group meeting: [Income Qualified Multi-Family Reporting Tables (Excel)](https://www.ilsag.info/wp-content/uploads/MF-Metrics-DRAFT-11-16-2023.xlsx)

**Reporting Location:** Annual Evaluation Reports will include the spreadsheet populated with data. Within a given program year the data will reflect cumulative year-to-date data in each quarterly report.

**Annual Reporting Metrics for (vi):**

**Excerpt from policy:** *Geographic distribution. This would include where buildings are served, which could be provided by zip code and/or census tract.*

1. Report IQ MF participation by zip code, including 1) projects, 2) buildings, and 3) units, provided in an Excel format added to the Statewide Quarterly Report Template. Within a given program year the data will reflect cumulative year-to-date data.
2. Geographic reporting for Income Qualified Multi-Family EE program participants, consistent with the process summarized for Income Qualified Single Family EE program participants in the Equity and Affordability Reporting Metrics:
   1. Nicor Gas will work to develop a beta mapping mechanism. A draft mapping mechanism will be reviewed with the Reporting Working Group for feedback no later than end of Q2 2024. Utilities will create a map using the disadvantaged areas definition, and overlay IQ MF program participants (incentives provided) across each utility service territory to show distribution of participation in disadvantaged areas; and
   2. Utilities will report the quantity of IQ MF residential unit participants in each disadvantaged community area of each utility’s service territory, starting April 1, 2024 (which is the reporting policy effective date). Stakeholders are interested in receiving this information quarterly.

**Reporting Location:** Annually, in Q4 reports