

## **Income Qualified Multi-Family Reporting Metrics Final – 6/20/2024**

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 Multi-Family Reporting Principles Policy” from the Policy Manual, and metrics finalized in June 2024.

### **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.

### **Final “Income Qualified Multi-Family Reporting Principles Policy” from Policy Manual Version 3.0, Section 6.8:**

*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:*

- i. The mix of buildings being treated. This could include breakdowns between public housing, subsidized housing and unsubsidized housing; the type/size of buildings.*
- ii. Levels of joint delivery and/or coordinated delivery between gas and electric utilities.*
- iii. 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.*
- iv. Uptake of new technologies. This would include, but not be limited to, cold climate heat pumps and heat pump water heaters.*
- v. Leveraging of other funding sources to support income qualified multifamily retrofits.*
- vi. 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.*

Utilizing a spreadsheet – [IQ Multi-Family Reporting Metrics Spreadsheet \(Final 6/5/2024\)](#) – Program Administrators<sup>1</sup> will report the number of 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 buildings for which government subsidies are provided to property owners or developers, i.e., not to individual tenants).
- 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 <20 units
- Projects 20-49 units
- Projects with 50+ units

**Reporting Location:** Annually, in Q2 utility reports for the previous program year, 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, 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

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<sup>1</sup> As referenced in footnote 4 of the IQ Multi-Family Metrics Spreadsheet, this information will be reported by Ameren Illinois, ComEd and Nicor Gas. Peoples Gas and North Shore Gas may provide a more limited report, potential excluding distinctions between central and individual heating systems and between subsidized and unsubsidized housing. However, to the extent that its IQ MF program is delivered jointly with ComEd, those details from Peoples Gas and North Shore Gas participants should be included in ComEd totals.

fashion delivering the IQ MF programs. Utilities and interested stakeholders will work together with independent evaluators through the annual SAG evaluation plan process to determine the scope and timeframe for this evaluation.

**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 Program Administrator 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

**Reporting Location:** Annually, in Q2 utility reports for the previous program year.

**Annual Reporting Metrics:**

Independent evaluators for Illinois Program Administrators will report data in Annual Evaluation Reports on the number of 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 [IQ Multi-Family Reporting Metrics Spreadsheet \(Final 6/5/2024\)](#).

**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.

**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.*

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 multi-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 utility reports for the previous program year.