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

**Proposed Metrics – for November 28, 2023 SAG Reporting Working Group Meeting**

The text in italics below is the final Policy Manual Version 3.0 language. The text in red below represents draft proposed reporting metrics.

*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.*

**Timing:** Quarterly

**Reporting Location:** Quarterly reports. The Quarterly 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.

**Metrics:** See spreadsheet. Reporting 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)
  + 1. Is there is a public data set that can be universally utilized for subsidized vs unsubsidized?
    2. Furthermore, the delineation between non-PHA subsidized vs unsubsidized may not highlight much.
    3. Ultimately what are we trying to reveal with the building type breakdown?

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

* Projects <20 units
* Projects 20-49 units
* Projects >50 units
  + - 1. Is this proposed unit range appropriate for this metric?
      2. Ultimately what are we trying to reveal with the building type breakdown?

1. *Levels of joint delivery and/or coordinated delivery between gas and electric utilities.*

**Timing:** Quarterly

**Reporting Location:** Add to the narrative section of the quarterly reports

**Metrics:** 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 whether:

* There is a single vendor hired?
* There is a single point of contact?
* There is a single application form?

We are doing all aforementioned items and is it necessary to reaffirm this status quarterly?

For reference, here are general definitions for “joint” and “coordinated” delivery:

Joint = EE program that is jointly funded by more than one utility,

* Coordinated = EE programs where utilities work together on program delivery, but program is not joint
* In addition, for the 2023 evaluations (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 MF programs.

1. We can agree to this particular evaluation project but there is no need to capture this as a quarterly reporting metric.
2. Furthermore, this evaluation should only be conducted in the event the utility offers their MF program in a joint manner.
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.*

**Timing:** Quarterly

**Reporting Location:** Quarterly reports. The Quarterly 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.

**Metrics:** See spreadsheet. Reporting includes data 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.

1. We can agree to the evaluation but the data reporting does not be required to be captured as a quarterly reporting metric.
2. We propose that evaluators extract the data and provide the data within our annual evaluation reports. (Both for Measure Reporting table and Qualified Owners vs Unqualified Owners tables)
3. Furthermore, with respect to the Measure Reporting table on the equipment uptake, why is it necessary to view the data at such a granular level?
   1. We propose to report on DI vs comprehensive.
4. *Leveraging of other funding sources to support income qualified multifamily retrofits.*

**Timing:** Annual Q4 Report

**Reporting Location:** Add to the narrative section of the annual Q4 report

**Metrics:** Report on any funding sources leveraged for the IQ MF EE program, including:

1. Funding source;
2. Amount of funding; and
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;
5. Any required owner co-pays or financing, including detail on what measures require copays and the amounts required
6. It will be necessary to further define “leverage” and how it is applied.
7. *Geographic distribution. This would include where buildings are served, which could be provided by zip code and/or census tract.*

**Timing:** Quarterly Reports

**Reporting Location:** Quarterly reports

**Metrics:**

1. Report IQ MF participation quarterly 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 in each quarterly report.
2. A heat map showing the geographic IQ MF participation (number of units) by zip code, with an overlay of all residential customers that are on a payment plan and/or LIHEAP (also by zip code). The heat maps will provide a general indication of the level of either participation in the MF program or the general magnitude of residential customers on PIPP/LIHEAP.
3. PIPP/LIHEAP is a poor indicator of equitable participation given inconsistency in participation. We propose using the disadvantaged area definition first, then overlaying MF program incentives provided across our territories to show distribution in disadvantaged areas.
4. The mapping mechanisms will require more time to develop and more than likely will not be ready within an 8-month. In the interim, the Nicor Gas team will work to develop a beta product that can be shared with Stakeholders as an attempt to illustrate our current capabilities.
5. At least once per 4-year EE Plan, evaluators will analyze IQ MF participation at the census tract level, and the general correlation between MF participation and low income census tracts.
6. We should allow for a non-evaluator party that is external to the Utility to conduct the research.
7. Ultimately, why should an evaluation be conducted at a four-year interval?

*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.*