

## Joint Stakeholders' Updated Policy Proposal November 8, 2022

This document includes:

- IQ Multifamily Reporting
- IQ Health and Safety Reporting
- Income Qualified Multifamily (IQ MF) One-Stop Shop Principles

### IQ Multifamily Reporting

Each Program Administrator (PA) 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, the PAs will report on a statewide set of metrics designed to provide insight into a variety of other program and policy objectives including:

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

The specific reporting metrics used to inform understanding of these issues will be developed collaboratively with interested stakeholders and may evolve over time.

### IQ Health and Safety Reporting

Each Program Administrator (PA) will report on the effectiveness of its efforts to address health and safety improvements necessary to enable 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:

- How often health and safety concerns are found.
- The types of health and safety concerns that are found and addressed.

- How often the programs are able to address (vs. “walk away” from) any health and safety concerns that are found.
- Spending to address health and safety concerns.
- Geographic and building type distribution of both health and safety issues and the ability of the PA’s programs to address them.

The specific reporting metrics used to inform understanding of these issues will be developed collaboratively with interested stakeholders and may evolve over time.

### **Income Qualified Multifamily (IQ MF) One-Stop Shop Principles**

When Program Administrators commit to One-Stop Shop approaches to delivering IQ MF efficiency programs, and other programs as applicable, in order to help participants navigate a complex program landscape, the approaches are defined as including the following:

- **Program navigation support** – making the process of participating in the IQ MF EE program easier through integrated program services. This can include a single point or reduced points of contact, application and enrollment support, coordinating access to other programs, assisting with coordination of rebates, incentives, and financing options, monitoring progress, and more.
- **Application ease** – reducing application burdens, which can include a single or universal intake application.
- **Comprehensive technical assistance** – supporting participants with technical assistance, which can include navigating audits and auditors, reviewing scopes of work proposed, discussing available rebates, incentives, and financing options, providing a list of potential contractors, supporting post-project quality inspections and annual benchmarking services, and more.
- **Integrated offers of all potentially applicable efficiency measures** – clearly articulating to building owners and/or tenants the full range of efficiency measures that may be applicable to their building and which the utility supports.