

IQ Policy Proposals

Policy Proposals from IQ-N Facilitator

- Form: Create single section in EE Policy Manual for IQ Policies
 - **Income Qualified Program-Specific Policies**
 - Overview
 - Vision: the vision for serving Income Qualified Customers is [Placeholder]
 - Mission: the mission for serving Income Qualified Customers through Energy Efficiency and related efforts is . . . [Placeholder]
 - Values: the values for serving Income Qualified Customers through Energy Efficiency and related efforts is below . . . [Placeholder]
 - All policies that are either uniquely applicable or likely applicable to income qualified programs are either listed below or cross-referenced in the section below.
- Form: Policy that all IQ items discuss through SAG and/or SAG subcommittees should be grouped so that interested IQ participants can participate in targeted way in SAG meetings.
 - All IQ items discuss through SAG and/or SAG subcommittees should be grouped so that interested IQ participants can participate in targeted way in SAG meetings, where reasonably possible.

Policy Proposal from 2022 IQ-N LT

- **Local CBOs/CAAs Considered “Non-financially interested parties”:**

Policy indicating that, by definition, local CBOs/CAAs are included in definition of “non-financially interested parties” except in the narrow case that a contract with that organization is being considered by SAG or a SAG subcommittee.

 - Local CBOs, as defined in the Climate and Equitable Jobs Act, are included in definition of “non-financially interested parties” except in the narrow case that a contract with that organization is being considered by SAG or a SAG subcommittee.
 - Items to consider:

- Should there be cap on level of funding that CBO can receive to still be excluded from “non-financially interested party” definition? What about \$50,000 per annum?
 - For example, should all MDI recipients be excluded because they’ve received a small amount of money from a utility?
 - Don’t we want entities who “touch customers” and have some knowledge of IQ EE to participate in “behind door discussions”
- If a CBO/CAA is providing “full service implementation” – marketing and installation, should they be considered a CBO or a “implementer?” for purposes of non-financially interested party.