

Proposed Policy for Version 3.0: Income Qualified Multifamily Statewide Reporting Metrics

Submitted By: The following Illinois Energy Efficiency for All (IL EEFA) Coalition Members and EE Settlement Groups: ACES 4 Youth, City of Chicago, Community Investment Corporation (CIC), Citizens Utility Board (CUB), Natural Resources Defense Council (NRDC), People for Community Recovery (PCR), National Consumer Law Center (NCLC) / Community Organizing on Family Issues (COFI)

Question 1: Proposed Policy and Rationale

Proposed Policy: The adoption of statewide, consistent Income Qualified (IQ) Multifamily reporting metrics.

The following metrics/reporting should include consistency in all reporting language used, and shared definitions of terms such as participants, projects, buildings, units.

Proposed metrics:

All utilities to provide the following in ICC-filed Quarterly Reports:

Overarching Program Data (Actuals YTD)

- Participation – buildings by zip code and apartment units (including type of affordable housing as able - public, subsidized, unsubsidized/naturally occurring affordable housing)
- Spending – incentives, non-incentives, total
- Savings (1st year) – MWh, therms

Measure Data/Comprehensiveness of Treatment reported bi-annually through relevant reports, in SAG/IQ Committee meetings, and included in ICC-filed Annual Reports:

- % of buildings that received different types of EE services:
 - Whole building assessments
 - Only DI measures
 - In-unit
 - 1 or more major measures listed by type (e.g., building envelope measures – air sealing and insulation, HVAC equipment, and water heating equipment)
- List of measures installed, and the following totals provided for each measure:
 - Number of measures installed (e.g., 535 of measure X, 1498 of measure Y, etc.) (unit vs. common area)
 - Program savings – MWh and Therms (1st year)
 - Incentive \$ spent

Why/Rationale: In the 2022-2025 utility plans and stipulations agreements, IQ MF budgets expanded, program design elements were added, and there were some IQ MF reporting metrics added to assess performance. But these reporting metrics vary by utility and are inconsistent. This proposal is to ensure there's clear, consistent reporting on IQ MF programs across all

utilities. This reporting is important for transparency and a shared understanding of progress in serving IQ MF buildings and underserved communities, and the comprehensiveness of treatment. These proposed metrics will also assist the utility, regulators and the public in better understanding IQ MF program performance, benefits, gaps, and will add consistency in IQ MF data reporting across utilities.

Question 2: Utility Impact

Describe whether the proposed policy impacts Illinois gas utilities, electric utilities, or both.

Both - would apply to all utilities, gas and electric

Question 3: Background Research

N/A - as this proposal is about consistent reporting on IQ MF, related to some metrics utilities have already agreed to.