

# Introduction to Utility EE Reporting

- ▶ Illinois utilities prepare quarterly and annual reports on EE portfolio progress
  - ❖ Current Policy Manual describes the purpose of reporting: *Reporting provides information about Energy Efficiency Program savings, expenditures, and portfolio successes and challenges such that others can learn from successes, and stakeholders can provide recommendations on addressing challenges.*
    - See Section 6.4, Reporting Purpose
  - ❖ Quarterly reports are [posted on the SAG website](#), and circulated to SAG following each quarter
  - ❖ Utilities present a report-out to SAG on EE portfolio progress twice per year
  - ❖ Quarterly and annual reports are filed with the ICC
  - ❖ Policy Manual includes a list of quarterly report requirements
    - See Section 6.5, Program Administrator Quarterly Reports
  - ❖ Policy Manual includes a list of annual report requirements
    - See Section 6.6, Program Administrator Annual Summary of Activities (Annual Report)
- ▶ In previous years, reporting has also been discussed through the SAG EE Portfolio Planning Process, in preparation for utilities filing 4-year EE Plans with the ICC for approval - additional reporting is described in stipulated agreements

# Introduction to Utility EE Reporting (cont.)

- ▶ Several stakeholders proposed additional reporting in the Policy Manual - stakeholders will introduce the new reporting policies, including:
  - ❖ IQ Multi-family Reporting Principles Policy
  - ❖ IQ Health & Safety Reporting Principles Policy
  - ❖ Equity and Affordability Reporting Principles Policy
  - ❖ Diverse Contracting Reporting Principles Policy
- ▶ After the Policy Manual is finalized, the SAG Reporting Working Group will meet to discuss metrics related to these reporting policies
  - ❖ Start in September, and finalize by December
  - ❖ Interested IQ North and IQ South Committee participants welcome to participate
- ▶ The Policy Manual Subcommittee is interested in feedback on where metrics for the reporting policies above should be posted - on the SAG website, or also on the IQ Committee websites?