

SAG Reporting Working Group Meeting #3

Celia Johnson, SAG Facilitator

Tuesday, December 19, 2023

Purpose of SAG Reporting Working Group

For Illinois utilities and interested stakeholders to reach consensus on specific reporting metrics to address the new reporting principle policies finalized in Policy Manual Version 3.0, including:

- ▶ Income Qualified Multi-Family Reporting Principles
- ▶ Income Qualified Health and Safety Reporting Principles
- ▶ Equity and Affordability Reporting Principles
- ▶ Diverse Contracting Reporting Principles

Collaborative and Inclusive Participation

1. Listen to suggestions and share feedback with an open mind
2. Consider compromise options throughout this process
3. Be patient when listening to others; avoid interrupting
4. Provide space for all participants to speak up
5. Avoid using acronyms or phrases that may be misunderstood
6. Focus comments / questions on today's agenda topics - anything raised outside of the meeting topics will be tabled

New Reporting Policies in Policy Manual

- ▶ The new reporting policies mention reaching consensus on metrics:
 - ❖ *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 new reporting policies mention where metrics will be available:
 - ❖ *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.*

New Reporting Policies in Policy Manual

- ▶ Effective Date for New Reporting Policies:
 - ❖ *This policy is effective ninety (90) days after conclusion of the SAG Reporting / Metrics Working Group, but no later than April 1, 2024, unless consensus is reached for a later date within the SAG Working Group. Program Administrators remain bound by provisions of settlement agreements regarding reporting metrics - including for 2022 and 2023. Any new metrics approved through the SAG Working Group will be supplemental to specific metrics that were agreed-upon and referenced in a Program Administrator's stipulation.*
- ▶ In order to meet this policy effective date, the SAG Reporting Working Group metrics process needs to wrap up by end of January

November 28 Meeting Recap

- ▶ A small group of stakeholders put together metrics proposals for all four reporting policies, presented to the Reporting Working Group on November 28
- ▶ Written feedback on proposed metrics was requested following the November meeting
 - ❖ Feedback received Dec. 12 from the utilities as a group (Ameren Illinois, ComEd, Nicor Gas, Peoples Gas and North Shore Gas)
 - ❖ Feedback received Dec. 15 from representatives of the IQ North EE Committee

December 19th Meeting

- ▶ Several stakeholders (Community Investment Corp., IL Attorney General's Office, ICC Staff, National Consumer Law Center, NRDC) prepared responses to comments received:
 - ❖ Income Qualified Multi-Family Reporting Metrics
 - ❖ Income Qualified Health and Safety Reporting Metrics
- ▶ Goal for today's meeting is to determine which metric(s) are in consensus; identify follow-up; discuss next steps

Next Steps

- ▶ The deadline for written comments on the following stakeholder proposed metrics is **Monday, January 8:**
 - ❖ Equity and Affordability Reporting Metrics
 - ❖ Diverse Contracting Reporting Metrics
- ▶ Feedback received on Equity/Affordability and Diverse Contracting metrics will be discussed at the **Tuesday, January 16** Reporting Working Group meeting
- ▶ If needed, a final Reporting Working Group meeting is scheduled on **Tuesday, January 23**

Questions?

- ▶ SAG Facilitator Contact Information:
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