

SAG Reporting Working Group Open Items for Final Meeting on January 23, 2024

IQ Health and Safety Reporting Metrics

See: [IQ Health and Safety Metrics - Final Draft Clean Version](#)

Open Items Currently Not in Agreement:

1. Metric #9: *Report IQ health and safety spending by program channel, as a percentage (%) of total program spending*
2. Metric #10: *Report IQ health and safety spending in a geographic map, using the same mapping mechanism that will be developed for other reporting.*

Stakeholder follow-up items:

1. Metric #9 is currently non-consensus. Stakeholders will consider utility feedback on metric #9 and follow-up in 1/23 meeting.
2. Metric #10 is currently non-consensus. Stakeholders will consider utility feedback on metric #10 and follow-up in 1/23 meeting.

Utility follow-up items:

1. Confirm utilities will present a health & safety update to SAG at Feb. meetings.
2. Stakeholders accept PG/NSG not reporting on “why” a building could not be remediated, if already included in ComEd’s reporting for joint IQ programs. PG/NSG to confirm.
3. For categorization of health & safety issues, stakeholders are comfortable with the categories that Ameren provides in Q4 reports and would like other utilities to use the same categories, if possible. Ameren IL to share categories with other utilities for review.

Equity and Affordability Reporting Metrics

See: [Equity and Affordability Metrics - Final Draft Clean Version](#)

Open Items Currently Not in Agreement:

1. For Metrics #1-2, confirm agreement on annual (vs. quarterly) reporting.
2. Geographic Reporting:
 - a. Confirm agreement on geographic reporting metric language.
 - b. Confirm agreement on annual (vs. quarterly) geographic reporting.
 - c. Confirm utilities able to report quarterly on IQ SF participants by zip code or census tract, starting April 1, 2024.
3. One-Time Study Report:
 - a. *Utilities will complete a one-time study no later than the end of 2026 (utilities are encouraged to collaborate on a single study that quantifies results by utility). This study will assess the level and consistency of cross referrals made by credit and collections departments to IQ EE programs, and what portion of customers receiving referrals subsequently participate in an IQ whole building program.*
4. Annual Reporting Metric (we did not have time to discuss in 1/16 meeting):
 - a. *Percentage of participants in the IQ single family whole building programs that that were in arrears at some point during the year, or that were participating in payment assistance at some point during the year.*

Stakeholder follow-up items:

1. For Metrics #1-2, stakeholders to confirm annual reporting is acceptable.
2. Geographic Reporting:
 - a. Confirm metric language is acceptable.
 - b. Confirm annual (vs. quarterly) reporting is acceptable.

Utility follow-up items:

1. Stakeholders could accept the utilities agreeing to a one-time study, the specifics of which can be worked out outside of the Reporting Working Group. The utilities will consider this and follow-up.
2. Geographic Reporting:
 - a. Confirm metric language is acceptable.
 - b. Whether ComEd, Nicor Gas, and PG/ NSG can report 2(b) in a similar matter to Ameren:
 - i. *Stakeholders are interested in, at a minimum, receiving the list of building participants by zip code or census tract, starting April 1, 2024 (which is the reporting policy effective date). Stakeholders are interested in receiving this information quarterly.*
3. Utilities to share the Annual Evaluation Report metrics request with evaluation teams.

Diverse Contracting Reporting Metrics

See: [Diverse Contracting Metrics - Final Draft Clean Version](#)

Open Items Currently Not in Agreement:

1. Confirm with utilities that bi-annual reporting is acceptable.
2. Confirm the stakeholder request for utilities to summarize diverse contracting in 2023.
3. This sentence in Metric #1: *For each category of diverse business (woman-owned, minority-owned, veteran-owned, etc.) report how many are headquartered in Illinois.*
4. Reporting on Community-Based Organizations, Community Action Agencies, and non-profits
5. Once per portfolio cycle reporting

Stakeholder follow-up items:

1. Consider the 1/16 discussion regarding “once per portfolio cycle reporting.”

Utility follow-up items:

1. Confirm bi-annual reporting is acceptable.
2. Consider the stakeholder request to summarize diverse contracting in 2023.
3. Ameren Illinois, ComEd, and Nicor Gas to check whether referencing “primary” Trade Ally specialties is acceptable.

IQ Multi-Family Reporting Metrics

See: [IQ Multi-Family Metrics - Final Draft Clean Version](#)

Open Items Currently Not in Agreement:

1. For Metrics (i), the mix of buildings being treated, confirm agreement on annual (vs. quarterly) reporting.
2. The IQ MF Spreadsheet Tables are not yet in agreement, and require additional review by utilities and evaluators: [Income Qualified Multi-Family Reporting Tables \(Excel\)](#)

3. For Metric (i), the mix of buildings being treated, confirm agreement on project breakdown by size.
4. For Metric (v), reporting on leveraging funding sources.
5. Whether it's possible from a database perspective for utilities to report the reasons why a project was qualified, but the measures were not installed.
6. Geographic Reporting:
 - a. Confirm agreement on geographic reporting metric language.
 - b. Confirm agreement on annual (vs. quarterly) geographic reporting.
 - c. Confirm utilities able to report quarterly on building participants by zip code or census tract, starting April 1, 2024.

Stakeholder follow-up items:

1. Gathering data on subsidized vs. unsubsidized properties:
 - a. Is there another way this data could be gathered? Stakeholders want to see how this is changing or not, over time.
 - b. Stakeholders will consider whether they would be comfortable with an annual metric, instead of quarterly.
2. Geographic Reporting:
 - a. Confirm metric language is acceptable.
 - b. Confirm annual (vs. quarterly) reporting is acceptable.

Utility follow-up items:

1. Utilities will review the project breakdown edited during 12/19 meeting and share feedback.
2. Utilities will consider a compromise proposal for leveraging reporting.
3. Stakeholders are interested in the reasons why participating buildings are not receiving comprehensive upgrades / how often. Utilities to check on what modifications do the database would be needed to gather this information, and the timing for those modifications.
4. Each of the utilities to check with evaluation teams on using the Excel tables proposed by stakeholders in annual evaluation reports
 - a. Does the Excel table need to be edited to reflect buildings and units?
 - b. Do the evaluators think any other edits are needed to Excel tables?
 - c. Discuss the possibility of evaluation research on buildings not getting treated by IQ MF programs
5. Geographic Reporting:
 - a. Confirm metric language is acceptable.
 - b. Whether ComEd, Nicor Gas, and PG/ NSG can report 2(b) in a similar matter to Ameren:
 - i. *Stakeholders are interested in, at a minimum, receiving the list of building participants by zip code or census tract, starting April 1, 2024 (which is the reporting policy effective date). Stakeholders are interested in receiving this information quarterly.*