

SAG Reporting Working Group Summary of Next Steps from February 7, 2024 Meeting

Final Draft Diverse Contracting Metrics:

- [Diverse Contracting Reporting Metrics \(Final Draft Clean 2/7/2024\)](#)

Final Draft IQ Multi-Family Reporting Metrics:

- [IQ Multi-Family Reporting Metrics \(Final Draft Clean 2/7/2024\)](#)

Effective Date:

The Working Group discussed how to interpret the policy effective date. It was suggested to add “best efforts” to the interpretation.

- **Effective date excerpted from Policy Manual Version 3.0:** *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.*
- **Edited interpretation language:** Utilities will start tracking new reporting metrics on the policy effective date (April 1, 2024). For quarterly metrics, utilities will use best efforts to include this reporting in the Q2 2024 report.
- **SAG Facilitator to confirm PG/NSG is comfortable with the edited interpretation language.**

Diverse Contracting Reporting Metrics:

There are several reporting metrics requested by stakeholders that are non-consensus and will not be included in the final reporting metrics.

- **Next Steps:** *After the remaining open items are resolved, the SAG Facilitator will prepare a “Comparison Exhibit” summarizing positions on non-consensus metrics.*
 - Any party who wishes to share comments or a position will have an opportunity to do so. The Non-Consensus Comparison Exhibit will be posted on the SAG website.
 - If needed, the SAG Reporting Working Group can follow-up on non-consensus metrics at a later time. If discussion is needed in the future, it would need to wait until the conclusion of the SAG Planning Process.

Diverse Trade Ally Metrics:

- The Working Group discussed several options for reporting metrics addressing (ii) and (iii) in the Diverse Contracting Reporting policy:
 - *(ii) How diverse Trade Allies are distributed geographically by Program.*
 - *(iii) Location of diverse Trade Allies relative to historically disadvantaged communities and Environmental Justice communities, whichever is more inclusive of low and moderate income communities.*
- Three options have been discussed by the Working Group to address metrics (ii) and (iii) above:
 - **1/10 Utility Proposal:** *Utilities can commit to conducting research as it pertains to trade ally geographic distributions and their relation to Environmental Justice communities and historically disadvantaged communities.*

- **1/11 Stakeholder Proposed Compromise:** *Utilities will provide, on an annual basis, the percentage of Trade Allies whose primary business location is in an Environmental Justice community defined in the same manner as agreed to for IQ multi-family program participation mapping.*
- **2/7 Stakeholder Proposal (drafted during the meeting):** *Utilities will provide a list of participating Trade Allies for program year 2024 in a spreadsheet format accompanying the utility's Q2 2024 report. This spreadsheet will include the zip code or primary business location of each Trade Ally, whether that Trade Ally is a diverse business, and identify whether or not the Trade Ally's primary business location is an economically disadvantaged area. Utilities commit to conducting research in 2025, as it pertains to Trade Ally geographic distributions and their relation to economically disadvantaged areas. This research will provide recommendations for future reporting that would be helpful in understanding this issue. Utilities will make best efforts to report on this Trade Ally research by end of Q4 2025. Results of this research will be discussed with SAG and the IQ North and / or IQ South EE Committees.*
- **Next Steps:** Several utilities requested additional time to review the stakeholder proposal drafted during the 2/7 meeting. Utilities will send comments to the SAG Facilitator by Friday, March 1st. The SAG Facilitator will update the Working Group after this comment deadline.

Income Qualified (IQ) Multi-Family Reporting Metrics Spreadsheet:

- At the November 2023 Working Group meeting, stakeholders proposed a set of IQ multi-family tables in a spreadsheet. Following the February 7th meeting, NRDC and Ameren Illinois reached agreement on an edited version of the spreadsheet. Other utilities and interested stakeholders need to review to share feedback or confirm agreement.
- **Next Steps:**
 - Utilities and interested stakeholders to review the updated IQ MF spreadsheet and reach out to Chris Neme (cneme@energyfuturesgroup.com) with any questions or feedback, by Friday, March 1st:
 - Updated IQ Multi-Family Reporting Tables for Review (2/15/2024).
 - Please CC Celia@CeliaJohnsonConsulting.com.
 - There is an open follow-up item from the December Working Group meeting, for utilities to check with their evaluation teams about using the IQ MF spreadsheet for annual evaluation reports, as referenced in the final metrics document.
 - Except from IQ MF Metrics Document: *Independent evaluators for Illinois Program Administrators will report data in Annual Evaluation Reports on the number of projects, buildings, and apartments receiving various measures. In addition, for shell and heat pump measures, reporting includes separate reporting on whether the measures are applicable (qualified project), and if a project is qualified but the measures were not installed, the reasons why.*

Updating the SAG Website:

After the remaining open items are finalized, final reporting metrics will be posted on the [Reports page](#) of the SAG website. The SAG Facilitator will also share final metrics with the IQ North and IQ South EE Committees to post on their website(s).