**IQ Multifamily Reporting Principles**

**Effective Date:** The policy will go into effect, in full, no later than for the 2024 program year. However, Program Administrators will apply best efforts to address as many of the objectives as possible in reporting for both program year 2022 and program year 2023.

**Policy:**

Each Program Administrator will report on the effectiveness of its efforts to deliver efficiency improvements to the Income Qualified Multi-Family housing sector. In addition to standard program reporting on spending and savings, the PAs will report on a statewide set of metrics designed to provide insight into a variety of other program and policy objectives including:

* **The mix of buildings being treated**. This could include breakdowns between public housing, subsidized housing and unsubsidized housing; the type/size of buildings.
* **Levels of joint delivery and/or coordinated delivery between gas and electric utilities**.
* **The comprehensiveness of efficiency upgrade opportunities being addressed in participating buildings**. This would include a particular emphasis on understanding the level of uptake of building envelope, HVAC equipment, water heating equipment and other major measures (vs. just lower cost measures through direct installation and/or other delivery mechanisms) and barriers encountered in increasing uptake of such major measures.
* **Uptake of new technologies**. This would include, but not be limited to cold climate heat pumps and heat pump water heaters.
* **Leveraging of other funding sources to support IQ MF retrofits**
* **Geographic distribution.** This would include where buildings are served, which could be provided by zip code and/or census tract.

The specific reporting metrics used to inform understanding of these issues will be developed collaboratively with interested stakeholders and may evolve over time. The list of metrics will be posted on the SAG website. The metrics will be referenced in – and lessons learned from reported metric data will be incorporated into – each Program Administrator’s subsequent four-year plan filings.