**Equity and Affordability Reporting Principles Policy and Proposed Metrics**

**From January 16, 2024 Reporting Working Group Meeting**

**CLEAN VERSION**

**Final “Equity and Affordability Reporting Principles Policy” from Policy Manual Version 3.0:**

*Each Program Administrator will report on the delivery of its Energy Efficiency Programs to disadvantaged communities. In addition to standard reporting of disconnection and other credit and collections data by zip code already required by Section 8.201.10 of the Public Utilities Act, Program Administrators will report on a statewide set of metrics designed to provide insight into a variety of other Program and policy objectives, which shall include:*

1. *How participation in Program Administrator whole building retrofit Programs overlaps with geographic areas with economic need;*
2. *How participation in Program Administrator whole building retrofit Programs overlaps with the Low Income Home Energy Assistance Program (LIHEAP) and Percentage of Income Payment Plan (PIPP) participation; and*
3. *How participation in Program Administrator whole building retrofit Programs overlaps with disadvantaged communities or other indicators of equity.*

**Annual Reporting Metrics for (i – iii):**

1. Report the total number of Income Qualified (IQ) Single Family (SF) EE program participants and spend by zip code.
2. Geographic reporting for Income Qualified Single Family EE program participants, consistent with the process summarized for Income Qualified Multi-Family Reporting Metrics:
	1. Nicor Gas will work to develop a beta mapping mechanism. A draft mapping mechanism will be reviewed with the Reporting Working Group for feedback in 2024. Utilities will create a map using the disadvantaged areas definition, and overlay IQ SF program participants (incentives provided) across each utility service territory to show distribution of participation in disadvantaged areas.
	2. Stakeholders are interested in, at a minimum, receiving the list of IQ SF 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.

**Reporting Location:** Annually, in Q4 utility reports. Within a given program year the data will reflect cumulative year-to-date data in each quarterly report.

*Each Program Administrator will also perform periodic analyses to provide insight into additional Program and policy objectives, which may include:*

1. *The effectiveness of whole building retrofit Programs and other Program Administrator-sponsored assistance and efficiency programs in reducing Low Income Customer energy burdens.*
2. *The number of and effectiveness of cross referrals between Energy Efficiency and credit/collections departments in enrolling Low Income Customers.*
3. *The number or proportion of Energy Efficiency Program Participants that are payment troubled (e.g., Customers at risk of being disconnected; with high arrears; participating in bill assistance programs).*

*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 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.*

**Annual Reporting Metrics for (i):**

Independent evaluators for Illinois utilities will include the following reporting metrics in Annual Evaluation Reports, separately for each EE program:

1. Total number of IQ single family whole building program participants.
2. Total number of IQ single family whole building program participants adopting air sealing.
3. Total number of IQ single family whole building program participants adopting insulation.
4. Total number of IQ single family whole building program participants with electric resistance heating adopting heat pumps.
5. Total number of IQ single family whole building program participants with fossil fuel heating adopting heat pumps.
6. Total number of IQ single family whole building program participants adopting heat pump water heaters.
7. Total number of fossil fuel heating or how water systems replaced with another fossil fuel system.

**Reporting Location:** In a spreadsheet format in Annual Evaluation Reports.

**One-Time Study Report for (ii):**

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.

**Reporting Location:** One time study report.

**Annual Reporting Metric for (iii):**

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.

**Reporting Location:** Either in Q4 Quarterly reports, or as a separate annual report.