### **Equity and Affordability Reporting Policy**

**6/16/23 Update – Stakeholder Edits for Final Draft Review (see yellow highlight)**

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, the 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:

* How participation in utility whole building weatherization programs overlaps with geographic areas with economic need
* How participation in utility whole building weatherization programs overlaps with LIHEAP and PIPP participation;
* How participation in utility whole building weatherization programs overlaps with disadvantaged communities or other indicators of equity;

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

* The effectiveness of whole building weatherization and other utility-sponsored assistance and efficiency programs in reducing low income energy burdens;
* The number of and effectiveness of cross referrals between energy efficiency and credit/collections departments in enrolling low income customers.

The utilities and stakeholders shall work to reach consensus in developing the specific metrics to address these reporting needs. The metrics may evolve and be amended over time.

The list of metrics will be posted on the SAG website. To the extent there are lessons learned and recommendations made from reported metric data, each Program Administrator will describe how they have been addressed in its subsequent four-year plan filings. Each Program Administrator’s subsequent four-year plan filings will also state the metrics that will be tracked and reported on in the next plan cycle.

**Proposed Effective Date:** The policy will go into effect, in full, no later than for the 2024 program year. However, the Program Administrators will apply best efforts to address as many of the objectives listed in the bullets above as possible, and in a manner consistent with each utility’s 2022-2025 Plan Stipulation and future Plan Stipulations, in reporting for both program year 2022 and program year 2023.