**Income Qualified Health and Safety Reporting Principles and Proposed Metrics**

**For Discussion January 16, 2024 Reporting Working Group Meeting**

The text ***in italics*** below is the final Policy Manual Version 3.0 language. The text **in red** below represents draft proposed reporting metrics prepared by several stakeholders. The comments **in blue** below is from utilities (Ameren Illinois, ComEd, Nicor Gas, Peoples Gas and North Shore Gas)

*Health and safety issues can sometimes be impediments to weatherizing homes. When that is the case, income qualified households not only lose the potential for realizing energy bill reductions, but also are left with underlying structural and/or other problems in their home that they typically do not have the financial or technical resources to remedy. This policy is intended to provide transparency on how Program Administrators are addressing health and safety issues encountered through their income qualified weatherization Programs, to enable understanding of similarities and differences in opportunities and challenges experienced by each Program Administrator, as well as to make available data that can shed light on both successes and future opportunities for improvement in addressing such issues. Specifically, it requires that each Program Administrator report on the effectiveness of its efforts to address health and safety improvements necessary to enable Energy Efficiency retrofits – particularly building envelop upgrades, HVAC equipment upgrades and other major Measures – in income qualified single family and multi-family buildings. The reporting will be on a statewide set of metrics designed to provide insight into the following issues for both single family and multi-family buildings:*

1. *How often health and safety concerns are found.*
2. *The types of health and safety concerns that are found and the Measures used to address those concerns.*
3. *How often the Programs are able to address (vs. unable to address) any health and safety concerns that are found and why.*
4. *Levels of spending to address health and safety concerns.*
5. *Geographic and building type distribution of health and safety data.*
6. *The types of materials used for air sealing and insulation.*

*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.*

**Timing:** Quarterly Reporting

**Reporting Location:** Add to the narrative section of each quarterly report (data should be cumulative year to date for each quarter)

**Collective Utility Comments:**

1. All Health and Safety reporting should be annual.
   1. **Stakeholder Response:** Since the law has specific budget requirements, important to see health and safety spending on a quarterly basis, broken down between SF, MF, and mobile homes (if the utility has a mobile homes offering, or if they are able to track whether a mobile home participated). Additional health and safety reporting can be provided annually, in the Q4 report.
   2. **1/11 Stakeholder Compromise Proposal:** Stakeholders are interested in:
      1. Quarterly health and safety spending broken down between SF, MF, and mobile homes (if the utility has a mobile homes offering, or if they are able to track whether a mobile home participated); and
      2. A qualitative narrative describing health and safety trends, successes and challenges.
      3. Stakeholders accept other health and safety reporting annually. However, stakeholders would like to see a report summarizing health and safety efforts in 2023.

**Metrics:** Report the following information for all IQ single family whole building programs (broken out by program):

1. Total number of participants, separately by income qualified EE program type (for example: Community Action Agency Single Family; Income Qualified Single Family, IQ Multifamily; etc.)
   1. Include the number of projects where frequently observed health and safety issues, broken down in the following manner, were:
      1. Observed
      2. Remediated
      3. Not remediated
   2. For buildings that could not be remediated, include why the remediation was not possible (for example: cost; not possible without another update to the building; customer did not want to remediate; etc.)

**Collective Utility Comments:**

* + - 1. Peoples/North Shore systems and processes are structured to collect information on opportunities as well as what was completed. Data centered around why customers don’t complete projects/measures would require a large lift to incorporate into the current process and would require additional time to determine what is needed to make that happen.
      2. **Stakeholder Response:** 
         1. Confirm the other utilities are accepting of these metrics.
         2. For (b) above, stakeholders are interested in the utilities using the same list of reasons “why” in reporting.
         3. Stakeholders are ok with PG/NSG not reporting on “why” a building could not be remediated, if already included in ComEd’s reporting for joint IQ programs.
         4. Several stakeholders expressed concern in the 11/28 meeting about dropping the geographic distribution reporting. Stakeholder request the health and safety geographic distribution reporting use the same approach as the IQ multifamily geographic distribution reporting.

**12/19 Meeting:** Did not have time to cover. Discuss in 1/16 meeting.

* + - * 1. Stakeholders request utilities propose health and safety reporting categories; stakeholders are interested in the utilities using the same categories.

**12/19 Meeting:** Did not have time to cover. Discuss in 1/16 meeting.

**1/11 Stakeholder Update:** Ameren already includes categories of health and safety reporting; stakeholders are ok with the other utilities using the same reporting.

1. Number of EE program participants that were weatherized and received a health and safety update
2. Number of EE program participants that were weatherized and did not need a health and safety update
3. Number of customers that did not receive weatherization due to a health and safety issue
4. Through a pie chart, report the types of health and safety issues frequently observed in buildings that did not receive weatherization due to a health and safety issue
5. Through a pie chart, report the types of health and safety issues frequently observed in buildings that were weatherized and received a health and safety update
6. Report the amount of health and safety spending for frequently observed health and safety issues, including:
   1. Dollar amount spend per health and safety issue
      * 1. **Collective Utility Comments:** Will this be a simple average for each health and safety issue?
           1. **Stakeholder Response:** Stakeholders are interested in the total health and safety spending for each “frequently observed” category, not the average.
           2. **12/19 Meeting:** Did not have time to cover. Discuss in 1/16 meeting.
   2. % of the total program spend for each health and safety issue
      * 1. **Collective Utility Comments:** What is the value in capturing the data for this particularly metric especially considering there are budget caps for health and safety issues?
           1. **Stakeholder Response:** Stakeholders are ok removing (b), if (a) is being reported.
           2. **12/19 Meeting:** Did not have time to cover. Discuss in 1/16 meeting.
   3. Year to date total dollar amount spent for all health and safety, along with what percentage of the total IQ single family whole building program spending health and safety expenditures represent.