**Income Qualified Multi-Family Reporting Principles Policy**

**Proposed Metrics – for November 28, 2023 SAG 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.

*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, Program Administrators will report on a statewide set of metrics designed to provide insight into a variety of other Program and policy objectives including:*

1. *The mix of buildings being treated. This could include breakdowns between public housing, subsidized housing and unsubsidized housing; the type/size of buildings.*

**Timing:** Quarterly

**Reporting Location:** Quarterly reports. The Quarterly reports will include the spreadsheet populated with data. Within a given program year the data will reflect cumulative year-to-date data in each quarterly report.

**Metrics:** See spreadsheet. Reporting includes the number of projects, buildings and units participating in IQ multi-family EE programs in the following building categories:

* Public housing (meaning housing where the government owns or rents an apartment)
* Subsidized housing (meaning state or federal assisted housing, such as the low income housing tax credit properties, project based vouchers, etc.)
* Unsubsidized housing (meaning IQ multifamily housing that is neither public nor has project-based subsidies, this category may include properties with tenants that have tenant-based housing vouchers)

For each type of housing above, projects will be further broken out by size:

* Projects <20 units
* Projects 20-49 units
* Projects >50 units
1. *Levels of joint delivery and/or coordinated delivery between gas and electric utilities.*

**Timing:** Quarterly

**Reporting Location:** Add to the narrative section of the quarterly reports

**Metrics:** In the Program Descriptions section of the quarterly report, briefly describe whether the IQ MF program is jointly delivered, or coordinated. If joint or coordinated, include additional explanation on how the utilities work together including whether:

* There is a single vendor hired?
* There is a single point of contact?
* There is a single application form?

For reference, here are general definitions for “joint” and “coordinated” delivery:

Joint = EE program that is jointly funded by more than one utility,

* Coordinated = EE programs where utilities work together on program delivery, but program is not joint
* In addition, for the 2023 evaluations (conducted in 2024) the evaluators will investigate the level and effectiveness, in both reducing barriers to participation and comprehensively addressing efficiency opportunities, of offering one-stop-shopping services and jointly or in a coordinated fashion delivering the MF programs.
1. *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.*
2. *Uptake of new technologies. This would include, but not be limited to, cold climate heat pumps and heat pump water heaters.*

**Timing:** Quarterly

**Reporting Location:** Quarterly reports. The Quarterly reports will include the spreadsheet populated with data. Within a given program year the data will reflect cumulative year-to-date data in each quarterly report.

**Metrics:** See spreadsheet. Reporting includes data 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.

1. *Leveraging of other funding sources to support income qualified multifamily retrofits.*

**Timing:** Annual Q4 Report

**Reporting Location:** Add to the narrative section of the annual Q4 report

**Metrics:** Report on any funding sources leveraged for the IQ MF EE program, including:

1. Funding source;
2. Amount of funding; and
3. Brief description of what the funding is being used for
4. Brief description of any joint or coordinated implementation with the leveraged funding entity and/or any constraints or program modifications resulting from leveraging;
5. Any required owner co-pays or financing, including detail on what measures require copays and the amounts required
6. *Geographic distribution. This would include where buildings are served, which could be provided by zip code and/or census tract.*

**Timing:** Quarterly Reports

**Reporting Location:** Quarterly reports

**Metrics:**

1. Report IQ MF participation quarterly by zip code, including 1) projects, 2) buildings, and 3) units, provided in an Excel format added to the Statewide Quarterly Report Template. Within a given program year the data will reflect cumulative year-to-date data in each quarterly report.
2. A heat map showing the geographic IQ MF participation (number of units) by zip code, with an overlay of all residential customers that are on a payment plan and/or LIHEAP (also by zip code). The heat maps will provide a general indication of the level of either participation in the MF program or the general magnitude of residential customers on PIPP/LIHEAP.
3. At least once per 4-year EE Plan, evaluators will analyze IQ MF participation at the census tract level, and the general correlation between MF participation and low income census tracts.

*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.*