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

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

**CLEAN VERSION**

With Stakeholder Comments and Proposed Edits for 1/23 Meeting

**Final “Income Qualified Health and Safety Reporting Principles Policy” from Policy Manual Version 3.0:**

*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.*

**Quarterly Reporting Metrics:**

1. Report utility health and safety spending broken down between SF, MF, and mobile homes (if the utility has a mobile homes offering, or if the utility is able to track whether a mobile home participated); and
2. Report a qualitative narrative describing health and safety trends, successes and challenges, including differences by building type, where notable.

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

**Annual Reporting 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.)
2. Number of EE program participants that were weatherized and received a health and safety update
3. Number of EE program participants that were weatherized and did not need a health and safety update
4. Number of customers 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 did not receive weatherization due to a health and safety issue
6. 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
7. Report the total amount of health and safety spending by program channel
8. Report the percentage (%) of the total program spend for each health and safety issue
9. Report IQ health and safety spending in a geographic map, using the same mapping mechanism that will be developed for other reporting.

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