**Questions for Policy Manual Writing Committee (compiled by SAG Facilitator)**

**Sept. 11, 2023**

1. **Income Qualified Topics (see Section 3.10)**

I suggest this policy be re-worded for clarity:

*All income qualified items discussed through SAG, SAG Working Groups, and/or SAG Subcommittees should be grouped so that ~~interested income qualified~~ participants interested in income qualified topics can participate in targeted way in SAG meetings, where reasonably possible.*

1. **Single Family Income Qualified Eligibility Verification Guidelines Policy (see Section 4.4)**

Should this policy use “income eligible” or “income qualified”? Or does the policy make sense as-written? Both terms are used in this policy. A similar policy already exists in the Policy Manual (see Section 4.3, Income Eligibility Verification Guidelines for Low Income Customers).

Low Income is a defined term in the Manual’s Glossary:

* ***Low Income Customer*** *means a residential Customer of a participating utility with a household income at or below one-hundred and fifty percent (150%) of the poverty level9 or households at or below eighty percent (80%) of the Area Median Income.*

1. **One Stop Shop Program Design Definition for Income Qualified Multifamily Retrofit Policy (see Section 4.5)**

Similar to question 1, is the Writing Committee comfortable with this policy using “income qualified” vs. another term?

1. **Language referencing agreement on metrics**

There are four “reporting principle” policies that are new to the Manual:

* Income Qualified Multi-Family Reporting Principles Policy
  + See Section 6.8
* Income Qualified Health and Safety Reporting Principles Policy
  + See Section 6.9
* Equity and Affordability Reporting Principles Policy
  + See Section 6.10
* Diverse Contracting Reporting Principles Policy
  + See Section 6.11

There is a sentence towards the end of each policy that references developing specific metrics that may evolve over time. This sentence is not the same in each policy.

I suggest this language be the same for each policy. The SAG Reporting Working Group will meet this fall with the goal of reaching consensus on metrics for each of these policies by the end of 2023.

What does the Writing Committee think about using this sentence? *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.*

1. **LIEEAC Facilitator Independence Policy (see Section 4.6)**

CEJA refers to this committee as the “low-income energy efficiency accountability committee”, however in practice it is referred to as the Income Qualified North EE Committee and IQ South EE Committee. Should both be referenced, or leave the statutory name?

1. **Independence Policies**

There are four independence protocols:

SAG Facilitator Independence – see Section 3.5

LIEEAC Facilitator Independence – see Section 4.6

IL-TRM Administrator Independence – see Section 7.1(ii)

Evaluator Independence – see Section 7.6

***Question 1:*** Should the independence protocols be moved into a new, separate section? Or remain where they are in the Manual?

***Question 2:*** The edits to this policy establish a timeframe for Commission review of contracts. This timeframe was also incorporated into the new LIEEAC Facilitator Independence policy. This policy edit was proposed for the TRM Administrator and Evaluator independence policies. The SAG Facilitator contract also requires Commission approval. Is the Writing Committee comfortable with this language being in all independence policies?

1. **Heating Penalties Policy (see Section 7.7)**

The policy references FEJA. Should FEJA still be referenced, or Section 8-103B(b-25) instead?

1. **Negative Savings Policy (see Section 7.8)**

There is a sentence from a previous version of the policy that should be deleted: *This exception is described in response to question 5.*

1. **Interactive Effects Policy (see Section 12.3)**

Zach Ross (Opinion Dynamics) recommends the writing committee consider re-naming this policy to make clear it is specific the statute (b-25).

What does the Writing Committee think about re-naming the policy “Interactive Effects and Savings Conversions”?