**SAG Reporting Working Group**

**Tuesday, December 19, 2023 Meeting**

**Summary of Follow-up Items – Compiled by SAG Facilitator**

**IQ Multi-Family Reporting Metrics**

***Stakeholder Follow-up Items (Community Investment Corp., ICC Staff, IL Attorney General’s Office, National Consumer Law Center, NRDC)***

Gathering data on subsidized vs. unsubsidized properties (see page 1 of metrics document):

Is there another way this data could be gathered? Stakeholders want to see how this is changing or not, over time.

* 1. Stakeholders will consider whether they would be comfortable with an annual metric, instead of quarterly.

1. Narrative Description (see page 2 of metrics document): It sounded like the group is in consensus on the utilities including a narrative description in the quarterly report, and updating it if/when the program design changes. I added *“Update the narrative description if / when the program design changes.”* Confirmation needed on this edit.
2. Geographic Distribution Reporting (see pages 4-5 of metrics document):
   1. Stakeholders to discuss whether you are comfortable with annual reporting instead of quarterly.
   2. Potential consensus by the group to remove #3 in redline (see page 5), pending agreement on the geographic distribution language edits the utilities are working on.

***Utility Follow-up Items (Ameren Illinois, ComEd, Nicor Gas, Peoples Gas and North Shore Gas)***

1. Project breakdown by housing type: Utilities will review and share feedback on the updated project breakdown, see page 2 of metrics document:

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

* + *Projects 3-9 units*
  + *Projects 10-19 units*
  + *Projects 20-49 units*
  + *Projects >50 units*

1. Comprehensiveness metrics (per Excel tables proposed by stakeholders), see page 3 of metrics document: Each of the utilities to check with evaluation teams on using the Excel tables proposed by stakeholders in annual evaluation reports

Does the Excel table need to be edited to reflect buildings and units?

Do the evaluators think any other edits are needed to Excel tables?

Discuss the possibility of evaluation research on buildings not getting treated by IQ MF programs

[Income Qualified Multi-Family Reporting Tables (Excel)](https://www.ilsag.info/wp-content/uploads/MF-Metrics-DRAFT-11-16-2023.xlsx)

1. Comprehensiveness metrics (per Excel tables proposed by stakeholders), see pages 3 of metrics document:
   1. Stakeholders are interested in the reasons why participating buildings are not receiving comprehensive upgrades / how often.
   2. Utilities to check on what modifications do the database would be needed to gather this information, and the timing for those modifications

[Income Qualified Multi-Family Reporting Tables (Excel)](https://www.ilsag.info/wp-content/uploads/MF-Metrics-DRAFT-11-16-2023.xlsx)

1. Leveraging Funding, see page 4 of metrics document: Utilities shared concerns about reporting on other funding sources. Utilities to consider a compromise proposal.
2. Geographic Distribution, see pages 4-5 of metrics document: Utilities will propose redline edits to these metrics given the discussion:

* *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.*
* *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.*

1. Geographic Distribution, see pages 4-5 of metrics document: In addition to the mapping mechanisms Nicor Gas will work on for future discussion, stakeholders are interested in, at a minimum, receiving the list of building participants by zip code or census tract (in Excel), starting April 1, 2024 (which is the reporting policy effective date). Stakeholders are interested in receiving this information quarterly.
   1. Ameren already reports this information in PDF.
   2. ComEd, Nicor Gas, Peoples Gas and North Shore Gas will review Ameren’s report and share feedback on whether they are able to report in a similar manner.

**IQ Health and Safety Reporting Metrics**

***Stakeholder Follow-up Items (Community Investment Corp., ICC Staff, IL Attorney General’s Office, National Consumer Law Center, NRDC)***

1. Confirm that stakeholders are ok with annual, vs. quarterly reporting on $ spent on health and safety. As discussed in the meeting, this may depend on whether the utilities are using all of their current health and safety budgets.

***Utility Follow-up Items (Ameren Illinois, ComEd, Nicor Gas, Peoples Gas and North Shore Gas)***

1. Follow-up question for ComEd: Is ComEd expecting to have health and safety funding leftover in 2023?
2. In response to PG/NSG’s feedback on page 2, stakeholders are ok with PG/NSG not reporting on “why” a building could not be remediated, if this information is already included in ComEd’s reporting for joint IQ programs. PG/NSG to follow-up.