**SAG Reporting Working Group**

**Open Items for Final Meeting**

**IQ Multi-Family Reporting Metrics**

* [IQ Multi-Family Metrics - Final Draft Clean Version, with Stakeholder Comments for Final Meeting](https://www.ilsag.info/wp-content/uploads/IQ-Multi-Family-Reporting-Metrics-Stakeholder-Comments-for-Final-Meeting.docx)
* [Income Qualified Multi-Family Reporting Tables (Excel)](https://www.ilsag.info/wp-content/uploads/MF-Metrics-DRAFT-11-16-2023.xlsx)

**Open Items Currently Not in Agreement:**

1. For Metrics (i), the mix of buildings being treated, confirm agreement on annual (vs. quarterly) reporting.
2. The IQ MF Spreadsheet Tables are not yet in agreement, and require additional review by utilities and evaluators: [Income Qualified Multi-Family Reporting Tables (Excel)](https://www.ilsag.info/wp-content/uploads/MF-Metrics-DRAFT-11-16-2023.xlsx)
3. For Metric (i), the mix of buildings being treated, confirm agreement on project breakdown by size.
4. For Metric (v), reporting on leveraging funding sources.
5. Whether it’s possible from a database perspective for utilities to report the reasons why a project was qualified, but the measures were not installed.

**Stakeholder follow-up items:**

Gathering data on subsidized vs. unsubsidized properties:

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

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

**Utility follow-up items:**

1. Utilities will review the project breakdown edited during 12/19 meeting and share feedback.
2. Stakeholders are interested in the reasons why participating buildings are not receiving comprehensive upgrades / how often. Utilities to check on what modifications do the database would be needed to gather this information, and the timing for those modifications.
3. Each of the utilities to check with evaluation teams on using the Excel tables proposed by stakeholders in annual evaluation reports
   1. Does the Excel table need to be edited to reflect buildings and units?
   2. Do the evaluators think any other edits are needed to Excel tables?
   3. Discuss the possibility of evaluation research on buildings not getting treated by IQ MF programs

**Diverse Contracting Reporting Metrics**

[Diverse Contracting Metrics - Final Draft Clean Version, with Stakeholder Comments for Final Meeting](https://www.ilsag.info/wp-content/uploads/Diverse-Contracting-Reporting-Policy-Metrics-Stakeholder-Comments-for-Final-Meeting.docx)

**Open Items Currently Not in Agreement:**

1. Confirm with utilities that bi-annual reporting is acceptable.
2. Confirm the stakeholder request for utilities to summarize diverse contracting in 2023.
3. This sentence in Metric #1: *For each category of diverse business (woman-owned, minority-owned, veteran-owned, etc.) report how many are headquartered in Illinois.*
4. Reporting on Community-Based Organizations, Community Action Agencies, and non-profits
5. Once per portfolio cycle reporting

**Utility follow-up items:**

1. Confirm bi-annual reporting is acceptable.
2. Consider the stakeholder request to summarize diverse contracting in 2023.
3. Ameren Illinois, ComEd, and Nicor Gas to check whether referencing “primary” Trade Ally specialties is acceptable.