

2/7/2020 CTEEB EVALUATION PROJECT DATA REQUEST & PRESENTATION TIMELINES- DRAFT

Notes

Working to track 4 dates (Request/due; Call; utility commitment/agreement; delivery); working to get all contractors on all steps

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| | C1634 Energy Conscious Blueprint Impact Evaluation | |
| | 5/17/2018 | Data questions to Eversource and UI emailed. Deadline of 5/24 requested on follow-up emails on 5/21. |
| | 5/23/2018 | Eversource data question responses received via email. |
| | 6/13/2018 | Data Call #2 with Eversource & UI. Deadline request extended to 7/6 (request #2, project files & monthly consumption) and 7/20 (request #3, AMI consumption). |
| | 6/14/2018 | Eversource commits via email for fulfilling data request #2 by 7/6, data request #3 by 7/20. |
| | 6/26/2018 | UI commits via email for fulfilling data request #2 by 7/9, data request #3 by 7/20. |
| | 7/6/2018 | Eversource delivers project data files, later found to be corrupted. |
| | 7/13/2018 | Eversource delivers interval data |
| | 7/20/2018 | Eversource delivers new project data files, to replace corrupted files. |
| | 7/24/2018 | UI delivers project data files. |
| | 8/16/2018 | UI & Eversource confirmations received for initial site visit contacts. |
| | 9/19/2018 | Data request #2 & #3 follow-up emails to Eversource & UI sent. Request tracking workbook returned by 9/26 and fulfillment by 10/10. |
| | 9/21/2018 | Eversource confirmation on 10/10 requested fulfillment date. |
| | 10/2/2018 | Follow-up emails to Eversource (requesting tracking workbook) and UI (requesting tracking workbook and confirmation of fulfillment date). |
| Slight data delays; project remains on schedule | 10/10/2018 | Eversource shared data tracking workbook with updates, as well as a monthly consumption data file (shared previously but not received by Evaluation team). |
| Slight data delays; project remains on schedule | 10/17/2018 | Follow-up data meetings with UI regarding data gaps from requests #2 and #3. Most of the monthly consumption data provided will not be suitable since it was provided for improper date ranges. Additionally, no AMI data has been provided, and two set of project files have not been transmitted. |
| | 10/29/2018 | Data requests #4 and #5 transmitted, with requested fulfillment by 11/9 and 11/16, respectively. |
| | 10/31/2018 | Data meetings with UI and Eversource. All Eversource data committed to be delivered by 11/19. UI commitment not defined. |
| | 11/13/2018 | Data received from Eversource. |
| | 11/16/2018 | Data received from UI. |
| Problem - October 2018 | 11/17/2018 | Data received from UI. |
| | 11/28/2018 | Transmitted UI data tracker to EA. Still awaiting consumption data for many projects from first request (#2,3) and most projects from second request (#4,5). |
| | 12/4/2018 | Transmitted UI data tracker to UI. Still awaiting consumption data for many projects from first request (#2,3) and most projects from second request (#4,5). |
| Problem November 2018 | 12/4/2018 | Transmitted Eversource data tracker to EA and Eversource. Still awaiting project documents for a few projects and consumption data for many projects. |
| | 12/5/2018 | Data received from UI - currently being assessed for completeness. |
| | 12/18/2018 | Data received from Eversource - currently being assessed for completeness. |
| | 12/19/2018 | Transmitted data issue impacts memo to EA. |
| Outstanding data Dec | 1/30/2019 | Data call with UI and Eversource (?) to discuss format of provided data. Consultant currently evaluating existing data for completeness. |
| Outstanding data Dec | 1/30/2019 | Data Request for PY18 tracking data |
| Outstanding data Dec | 2/21/2019 | PY18 tracking data received from UI and Eversource |
| Dec-Site level data still an issue - gaps, etc. and delays a problem for schedule | 2/27/2019 | Data call with UI and Eversource to discuss utility billing meter account numbers |
| | 1/0/1900 | 1/0/1900 |
| | 1/0/1900 | 1/0/1900 |
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| | C1635 Energy Opportunities (EO) Impact Evaluation | |
| | 4/6/2018 | Miles Ingram fulfilled request (#2) for three Eversource project files. Tracking system estimates for all three projects verified to be gross savings without any net or gross realization rate adjustments |
| | 4/11/2018-4/12/2018 | Dick Oswald fulfilled request (#2) for three UI project files. Tracking system estimates for two projects verified to be gross savings without any net or gross realization rate adjustments. The files provided for the UI site accounted for 2.6 million kWh out of the 4.9 million kWh in the tracking system |
| | 4/12/2018 | Requested additional files from UI (request #3) that account for the ~2.3 million kWh difference. Dick Oswald responded saying he would check on them on 4/12 or 4/13 |
| | 4/16/2018 | EA rep emailed Dick Oswald at UI regarding the additional file request (#3). Dick responded saying that the project was complex but that he would straighten it out by 4/18; due 4/18/2018 |
| | 4/23/2018 | EA rep provided tracking data summary to PAs to check against annual reports as a sanity check and asked Dick Oswald for an update on the additional files requested (#3). Dick responded saying that he had additional files that got the difference down to ~600,000 kWh and hoped to have the rest in "the next several days" |
| | 5/10/2018 | EO electric and EO gas samples finalized and preliminary Upstream lighting sample presented during project kick-off meeting to DEEP, EAs, and PAs. Upstream lighting results in MA indicate that installation rate is the largest driver of program savings. The group decided that it would be best to understand how similar the Upstream programs are in MA & CT before finalizing this sample to see if our sample should focus more on installation rates and less on hours of use. |

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| | 5/14/2018-5/15/2018 | Data Request #3 - Detailed EO electric project files were requested from the PAs. Detailed EO gas and Upstream lighting data will be requested at a later date. Call held with the EA and PAs on 5/15 to discuss project data request. On 5/16 both PAs agreed via email that they could provide the data requested. UI agreed to do so by 5/30 and Eversource by 6/8. After some problems using the consultant's secure file transfer system, UI began providing files on 6/1. |
| | 5/15/2018 | Call held with the EA and PAs to discuss the EO electric project data request. |
| | 5/16/2018 | Both PAs agreed via email that they could provide the data requested. Dick Oswald from UI agreed to do so by 5/30 and Miles Ingram from Eversource by 6/8. |
| | 5/31/2018 | Through the EA, the consultant requested permission from the PAs to speak with their upstream program managers and program vendor. |
| | 5/31/2018 | UI gave permission to speak with their program manager but not the vendor. |
| | 6/1/2018 | Eversource gave permission to speak with their program manager and their vendor. |
| | 6/4/2018 | After some problems using the consultant's secure file transfer system, UI provided the requested detailed EO electric project files. |
| | 6/8/2018 | Eversource provided the requested detailed EO electric project files. |
| | 8/19/2018 | Data Request #4 - Detailed EO gas project files were requested from the PAs. |
| | 8/22/2018 | Call held with the EA and PAs to discuss the EO gas project data request. |
| | 8/22/2018 | Miles Ingram from Eversource agreed (via email) to fulfill the EO gas project data request by 9/12/2018. |
| | 8/27/2018 | Dick Oswald from UI agreed (via email) to fulfill the EO gas project data request by 9/12/2018. |
| | 9/12/2018 | Miles Ingram from Eversource and Dick Oswald from UI provided the EO gas project data that was requested. |
| | 9/28/2018 | Miles Ingram from Eversource was provided with a list of Eversource primary EO electric and gas sample sites for which working calculations that match the tracking savings were not initially provided. |
| | 10/1/2018 | Call held with the EA and Miles Ingram from Eversource to discuss the list provided on 9/28/2018. Miles agreed (via email) to provide any existing working calculations for sites in this list by 10/12/2018. |
| | 10/1/2018-10/9/2018 | Miles Ingram provided additional information for primary EO electric and gas sample sites for which working calculations that match the tracking savings were not initially provided. |
| | 11/5/2018 | For the 117 EO electric sites in the primary sample, we have received working calculations that match the tracking savings for 104, have ten for which such calculations are not available, and three with outstanding requests. |
| | 11/5/2018 | For the 32 EO gas sites in the primary sample, we have received working calculations that match the tracking savings for 24, have two for which such calculations are not available, and six with outstanding requests. |
| | 11/30/2018 | For the 117 EO electric sites in the primary sample, we have received working calculations that match the tracking savings for 104, have 11 for which such calculations are not available, and one with an outstanding request. |
| | 11/30/2018 | For the 32 EO gas sites in the primary sample, we have received working calculations that match the tracking savings for 25 and have seven for which such calculations are not available. |
| Resolved | 2/5/2019 | For the 117 EO electric sites in the primary sample, we have received working calculations that match the tracking savings for 106, have ten for which such calculations are not available, and one outstanding request that was made for a replacement site on 1/31/2019. |
| | 2/5/2019 | For the 32 EO gas sites in the primary sample, we have received working calculations that match the tracking savings for 26 and have six for which such calculations are not available. |
| | 2/5/2019 | Received Eversource's 2018 Upstream lighting program data; which included end user name and address as requested on 1/31/2018 and approved by Miles Ingram from Eversource and Dick Oswald from UI on 2/5/2018. |
| | 2/15/2019 | Dick Oswald from UI expressed concerns about performing on-site visits to evaluate the Upstream Program and requested that the consultant and the EA research the standard practice for evaluating C&I upstream programs. |
| outstanding data Dec/ most provided | 2/22/2019 | After researching previous evaluations of similar programs, the consultant and the EA reported to UI that C&I upstream programs are typically evaluated through the performance of site visits whenever end user name and address are available. |
| No additional data? Dec | 2/24/2019 | Jane Lano from UI agreed that on-site visits should be performed to evaluate the 2018 Upstream Program. |
| | 2/25/2019 | The consultant requested UI's 2018 Upstream Program data; including end user name and address from Dick Oswald at UI and asked when he thought he would be able to provide it. There was a several week delay as UI originally opposed sending the upstream participant name and address data for 2018 participants. After lengthy discussions UI agreed to provide the the requested data. |
| | 3/1/2019 | Received UI's 2018 Upstream lighting program data; which included end user name and address as requested on 1/31/2018 and approved by Miles Ingram from Eversource and Dick Oswald from UI on 2/5/2018. |
| | 3/1/2019 | For the 117 EO electric sites in the primary sample, we have received working calculations that match the tracking savings for 107 and have ten for which such calculations are not available. |
| | 3/22/2019 | Since the PSD calculations for upstream lighting do not provide much detail, the EA rep requested the exact factors and assumptions used to calculate the 2018 PY savings in the data that was provided from Miles Ingram of Eversource and Dick Oswald of UI. |
| | 3/28/2019 | Dick Oswald provided the factors and assumptions used by UI to calculate their 2018 Upstream lighting program savings. |
| | 4/5/2019 | Miles Ingram provided the factors and assumptions used by Eversource to calculate their 2018 Upstream lighting program savings. |
| | 8/5/2019 | Requested gas billing data for 16 Eversource sites from Miles Ingram and for five UI sites from Dick Oswald. |
| | 9/13/2019 | Received gas billing data for 16 Eversource sites from Miles Ingram. |
| | 9/24/2019 | Received gas billing data for three UI sites from Dick Oswald; data for other two sites that it was requested for could not be provided due to "unusual circumstances". |
| | 1/0/1900 | 1/0/1900 |
| C1901 - C&I Sector-Wide Process Evaluation (non-SBEA) | | |
| Working with thi team to improve this tracking; should be up to snuff next month | 11/8/2019 | Program materials |
| | 11/8/2019 | Program tracking data |

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| | 11/8/2019 | Customer data | |
| | 11/15/2019 | Scheduled data call with utilities | |
| | 11/22/2019 | Final data request memo (includes modifications from call with utilities) | |
| | 12/4/2019 | Requested list of 2017-2019 SBEA participants via email | |
| | 12/20/2019 | Received program materials from Eversource | |
| | 1/13/2020 | Received 2017-2018 program data from Eversource | |
| | 1/24/2020 | Received 2019 program data from Eversource | |
| | 1/31/2020 | Met with UI to clarify program material request | |
| | 1/0/1900 | | 1/0/1900 |
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| | | C1906 SEM Design and Evaluation | |
| None to date | 1/0/1900 | | 1/0/1900 |
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| | | R1959 Single-Family Renovations & Additions Potential Analysis | |
| | 11/8/2019 | Submitted data request 1a and 1b (due Nov 27) | |
| | 11/14/2019 | Miles confirms that this due date works and that a data call is unnecessary | |
| | 11/27/2019 | Miles provides program data | |
| | 12/3/2019 | NMR reminded UI about the data request (to confirm availability, not deliver) | |
| | 12/3/2019 | NMR informally requested program tracking data request to Eversource | |
| | 12/4/2019 | Miles shared tracking data | |
| | 12/12/2019 | Eversource immediately responded to a clarifying question | |
| | 1/7/2020 | NMR reminded UI about the data request (to confirm availability, not deliver) | |
| | 1/20/2020 | NMR reminded UI about the data request (to confirm availability, not deliver) | |
| | 1/20/2020 | Dick questioned the data request format | |
| | 1/30/2020 | Dick confirmed he received the data request | |
| | 1/31/2020 | Dick indicated that UI does not have information to share | |
| | 1/0/1900 | | 1/0/1900 |
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| | | R1963a Short-Term Residential Lighting Analysis | |
| | 9/11/2019 | Data request call held; attendees: Miles (Eversource); Dick, Will (UI); Nicole, David (NMR); Rob C. (Cadeo); Lisa, Bob (EA Team) | |
| | 9/16/2019 | Data request 1 issued (due date 10/28/19) | |
| | 9/17/2019 | Miles confirms Eversource can meet the timeline | |
| | 9/25/2019 | UI says they cannot provide data until contracting is complete | |
| | 9/27/2019 | Lisa reminds UI they need to commit to a timeline and indicate if they can/cannot provide data | |
| | 10/25/2019 | Miles delivered Eversource data | |
| | 1/7/2020 | NMR requested update from UI | |
| | 1/20/2020 | NMR requested update from UI | |
| | 1/20/2020 | Will indicated UI will provide data sometime around 1/24 or so | |
| | 2/5/2020 | NMR shared previous UI correspondence with Joel Kopylec | |
| | 1/0/1900 | | 1/0/1900 |
| | 1/0/1900 | | 1/0/1900 |
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| | | R1963B: Short Term Residential Analysis | |
| | 9/11/2019 | Data request call held; attendees: Miles (Eversource); Dick, Will (UI); Nicole, David (NMR); Rob C. (Cadeo); Lisa, Bob (EA Team) | |
| | 9/16/2019 | Data request 1 issued (due date 10/28/19) | |
| | 9/17/2019 | Miles confirms Eversource can meet the timeline | |
| | 9/25/2019 | UI says they cannot provide data until contracting is complete | |
| | 9/27/2019 | Lisa reminds UI they need to commit to a timeline and indicate if they can/cannot provide data | |
| | 10/25/2019 | Miles delivered Eversource data | |
| | 1/7/2020 | NMR requested update from UI | |
| | 1/20/2020 | NMR requested update from UI | |
| | 1/20/2020 | Will indicated UI will provide data sometime around 1/24 or so | |
| | 2/5/2020 | NMR shared previous UI correspondence with Joel Kopylec | |
| | 1/0/1900 | | 1/0/1900 |
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| | | R1965 HP/HPWH Baseline and Potential Assessment | |
| | 1/13/2020 | Submitted data request 1 (due dates vary by component: 1/24, 2/21, and 2/28) | |
| | 1/16/2020 | Held data call with Eversource (Attendees: Miles, Eversource; Nicole, Jared, Rohit, NMR; Lisa, Bob, EA Team) | |
| | 1/16/2020 | Miles verbally confirmed due dates are attainable | |
| | 1/16/2020 | NMR requested times to meet with UI | |
| | 1/20/2020 | NMR requested times to meet with UI | |
| | 1/27/2020 | NMR requested times to meet with UI | |
| | 1/24/2020 | Miles provided program materials (request 1a) | |
| | 1/28/2020 | Miles provided program materials (request 1a) | |
| | 2/3/2020 | NMR requested times to meet with UI | |
| | 2/5/2020 | Held data call with UI (Attendees: Dick, Joel, UI; Nicole, Jared, Rohit, NMR; Lisa, Bob, EA Team) | |
| | 2/5/2020 | UI verbally confirmed due dates are attainable, but one due date passed -- they will provide data for that request by 2/7 | |
| | 1/0/1900 | | 1/0/1900 |
| | 1/0/1900 | | 1/0/1900 |
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| | | R1973 Retail Non-lighting | |
| | 11/21/2019 | Data Request sent to Lisa - requesting access to sales data portal | |
| | 11/21/2019 | Data Request sent to Lisa (in same email as above) - requesting shelf assortment survey data from utilities | |
| | 12/11/2019 | Data Request sent to UI and Eversource - requesting access to sales data portal | |

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| | 12/11/2019 | Data Request sent to UI and Eversource (in same email as above) - requesting shelf assortment survey data from utilities | |
| | 1/6/2020 | EMI received access to the ICF portal - both Eversource and UI | |
| | 1/6/2020 | EMI received shelf survey data (Q1-Q4 2019) from both Eversource and UI | |
| | 1/6/2020 | Eversource/UI will send quarterly shelf survey data for 2020 as it is available (by April 2020) | |
| | 1/0/1900 | | 1/0/1900 |
| | R1982. HVAC/DHW Performance and Potential Evaluation | | |
| | 2/5/2020 | data request call with NMR and UI to confirm that UI can deliver HP program data by 2/21/20. | |
| | 2/3/2020 | email from Nicole Rosenberg (NMR) confirming that Eversource can meet the data request timeline (2/21/20) | |
| | 1/0/1900 | | 1/0/1900 |
| | X1931 In-Depth PSD Review | | |
| None yet | 1/0/1900 | | 1/0/1900 |
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| | X1939 Early Retirement | | |
| None yet | 1/0/1900 | | 1/0/1900 |
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| | X1941: Multifamily Impact Evaluation | | |
| | 12/23/2019 | Data request X1941-1-TRC submitted to utilities | |
| | 1/8/2020 | Data request X1941-1-TRC call with utilities | |
| | 2/5/2020 | Data request X1941-1-TRC utility submittal deadline | |
| | 1/0/1900 | | 1/0/1900 |