

CTEEB EVALUATION PROJECT DATA REQUEST TIMELINES

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

DATATIMELINE

	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.
	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.
Resolved	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.
outstanding data Dec/ most provided	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.
No additional data? Dec	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.
	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.
	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.
	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.
Incomplete data	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".
	C1901 - C&I Sector-Wide Process Evaluation (non-SBEA)	
	1/31/2020	Met with UI to clarify program material request
	10/17/2019	Met with UI to confirm understanding of UI's C&I programs and understand what data are available
	11/7/2019	ODC sends Data Request #1 to UI and Eversource. Requested available data/materials by 12/6/19
	11/15/2019	Discussed data request #1 with UI and Eversource. Utilities agree to provide program materials and 2017-18 data by 12/13 and 2019 data in early 2020
	11/22/2019	ODC sends final data request #1 with some changes to original based on discussions with utilities on 11/15. Email also includes request to confirm dates requested data can be provided.
	11/22/2019	ODC sends UI invitation to file sharing site
	12/2/2019	UI responds saying that they are required to use their own file sharing site and asks for ODC contacts
	12/2/2019	ODC sends lists of contacts for UI file sharing site
	12/4/2019	Requested list of 2017-2019 SBEA participants via email
	12/12/2019	ODC sends reminder about Data Request #1 to UI and Eversource, asking for status on program materials and 2017-18 data
	12/17/2019	UI responds saying that they are close to getting contract signed
	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
	1/23/2020	ODC holds project kickoff call. UI asks during call if there have been any data requests.
	1/23/2020	Dakers Gowens forwards UI final data request #1 from 11/22/19
	1/23/2020	UI emails asking for list of ODC contacts for UI file sharing system
	1/31/2020	UI and ODC have conference call to discuss data request #1. UI agrees to provide program materials and data by 2/14
	2/4/2020	UI sends ODC contract for evaluation
	2/7/2020	ODC sends follow up email restating UI's delivery of program materials and data by 2/14
	2/13/2020	UI sends ODC program materials. ODC asks when to expect program/customer data, UI says "sometime in the next few days, I hope."
	2/19/2020	ODC follows up with UI asking about status on program/customer data. No response.
	3/3/2020	ODC sent email to UI checking on data status. No response.
ES data ok; no UI data		We currently have all Eversource data. We have no UI data. Availability of UI data will soon begin to delay project progress.
		1/0/1900
	C1906 SEM Design and Evaluation	
None to date	1/0/1900	1/0/1900
	R1959 Single-Family Renovations & Additions Potential Analysis	
	11/8/2019	Submitted data request 1a and 1b (due Nov 27)
	11/14/2019	Miles emails that this due date (11/27/19) 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 but provides no commitment about timeline
	1/31/2020	Dick indicated that UI does not have information to share
OK	Summary	All data requests are fulfilled
		1/0/1900
	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	
	2/7/2020	During a program staff IDI with Eversource, they commit to sharing a retailer list	
	2/10/2020	NMR reminded UI of lateness in data	
	2/11/2020	Dick emails that they are working on the data	
	2/13/2020	Dick shares program data	
	2/14/2020	Sharon Guarino shares a retailer list	
	2/18/2020	SCS reminds Eversource about retailer lists	
	2/19/2020	Miles emails that he forwarded the request for the retailer list to program staff	
	2/20/2020	Miles shares retailer list	
	2/21/2020	Miles shares full 2019 retail lighting data	
Data quality problems UI	2/24/2020	NMR emails UI a memo with data issues	
	2/24/2020	Dick confirms receipt of memo	
	2/27/2020	Dick indicates that they hope to share a dataset the week of 3/2 and answers data dictionary questions but confirms they do not have a data dictionary	
	3/11/2020	Data call scheduled for this date	
R1963B: Short Term Residential Analysis			
	mid-2019	NMR requested program sales data from both Eversource and UI.	
	10/25/2019	2015-19 data provided by Eversource	
	2/13/2020	data provided by UI	
	2/24/2020	NMR/SCS provided comments/issues to UI regarding data limitations.	
	3/11/2020	Call scheduled with UI/NMR/SCS/Sera to discuss data issues.	
	1/0/1900		1/0/1900
	2/7/2020	SCS requests retailer list from Eversource.	
	2/14/2020	Follow-up with Eversource via email.	
	2/20/2020	Eversource provides retailer list.	
	2/14/2020	SCS requests retailer list from UI.	
OK	2/14/2020	UI provides retailer list.	
	1/0/1900		1/0/1900
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 via email that Eversource can meet due date	
	9/25/2019	UI says they cannot provide data until contracting is complete	
	9/27/2019	Lisa S. 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 via email that UI will provide data sometime around 1/24 or so	
	2/5/2020	NMR shared previous UI correspondence with Joel Kopylec	
	2/7/2020	During a program staff IDI with Eversource, they verbally committed to sharing a retailer list	
	2/10/2020	NMR reminded UI of lateness in data	
	2/11/2020	Dick emails that he is attempting to share data	
	2/13/2020	Dick shares program data	
	2/14/2020	Sharon Guarino (UI) shares a retailer list	
	2/18/2020	SCS reminds Eversource about retailer lists	
	2/19/2020	Miles emails that he forwarded the request for the retailer list to program staff and will send whatever he receives ASAP (no firm date)	
	2/20/2020	Miles shares retailer list	
	2/21/2020	Miles shares full 2019 retail lighting data	
	2/24/2020	NMR emails UI a memo with data issues	
	2/24/2020	Dick confirms receipt of memo but indicates he cannot answer questions	
	2/27/2020	Dick indicates that they hope to share a dataset the week of 3/2 and answers data dictionary questions but confirms they do not have a data dictionary	
	3/11/2020	Data call with UI scheduled for this date	
ES OK; UI Data incomplete and late	Summary	Eversource has met all due dates in a timely manner. UI provided incomplete data very late even considering the contracting delays which were cleared up ~1/1/2020; they provided problematic data and we have scheduled a call to address the issues.	
	1/0/1900		1/0/1900
R1965 HP / HPWH Baseline and Potential Assessment			
	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 via email that Eversource can meet due date	
	9/25/2019	UI says they cannot provide data until contracting is complete	
	9/27/2019	Lisa S. 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 via email that UI will provide data sometime around 1/24 or so
	2/5/2020	NMR shared previous UI correspondence with Joel Kopylec
	2/7/2020	During a program staff IDI with Eversource, they verbally committed to sharing a retailer list
	2/10/2020	NMR reminded UI of lateness in data
	2/11/2020	Dick emails that he is attempting to share data
	2/13/2020	Dick shares program data
	2/14/2020	Sharon Guarino (UI) shares a retailer list
	2/18/2020	SCS reminds Eversource about retailer lists
	2/19/2020	Miles emails that he forwarded the request for the retailer list to program staff and will send whatever he receives ASAP (no firm date)
	2/20/2020	Miles shares retailer list
	2/21/2020	Miles shares full 2019 retail lighting data
	2/24/2020	NMR emails UI a memo with data issues
	2/24/2020	Dick confirms receipt of memo but indicates he cannot answer questions
	2/27/2020	Dick indicates that they hope to share a dataset the week of 3/2 and answers data dictionary questions but confirms they do not have a data dictionary
	3/11/2020	Data call with UI scheduled for this date
ES OK; UI Data incomplete and late	Summary	Eversource has met all due dates in a timely manner. UI provided incomplete data very late even considering the contracting delays which were cleared up ~1/1/2020; they provided problematic data and we have scheduled a call to address the issues.
		1/0/1900
		1/0/1900
	R1973 Retail Non-lighting	
	10/1/2019	Initial data request call with Utilities
	11/21/2019	Data Request sent to Lisa
	12/11/2019	Data Request sent to UI and Eversource
	12/17/2019	Utilities confirmed they would fulfill access to ICF portal by January 2020
	12/17/2019	Utilities confirmed they would provide shelf assortment data by April 2020
	1/6/2020	Consultants received access to the ICF portal from Eversource
	1/30/2020	Consultants received access to the ICF portal from UI
	1/6/2020	Consultants received shelf assortment data (Q1-Q4 2019) from both Eversource and UI
OK	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
	1/0/1900	1/0/1900
	1982. 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)
	2/24/2020	Data sent by UI; incorrect data
	2/27/2020	Eversource emailed NMR to confirm that they are working on the request.
	3/3/2020	Data meeting with UI.
	3/4/2020	Data in review (Eversource and UI)
ES ok; UI Data hold-up jeopardizing project on-sites / schedule may suffer 6 month delay	1/0/1900	Data holdup is jeopardizing recruitment and could delay metering by a full season if not met. This Friday is a vital delivery date.
	1/0/1900	1/0/1900
	X1931 In-Depth PSD Review	
	1/0/1900	This project will leverage data from x1939 - no separate request being made. This data is needed to help prioritize measures for review.
	X1939 Early Retirement	
	2/14/2020	Data request #1 submitted to EA team - request for program tracking data. Edits to data request
	3/5/2020	Data request submitted to utilities with dates proposed for data meeting.
	X1941 Multifamily Impact Evaluation	
	12/23/2019	Data request X1941-1-TRC (request for program databases) submitted to utilities. Main points of contact: Miles Ingram from Eversource and Dick Oswald from UI
	1/8/2020	X1941-1-TRC mandatory utility data meeting held
	1/27/2020	X1941-1-TRC original utility submittal deadline
	2/5/2020	X1941-1-TRC utility submittal deadline that utilities agreed to during data meeting
	1/29/2020	UI provided data for X1941-1-TRC - incomplete (missing street address and premise ID)
	2/20/2020	Eversource provided all requested data for X1941-1-TRC
	2/25/2020	Consultant submitted X1941-1a-TRC to UI requesting missing data
	2/26/2020	UI provided all requested data for X1941-1-TRC
	2/28/2020	meeting with Eversource and consultants to discuss data provided for X1941-1-TRC

Delayed one month; now OK	Data request X1941-1-TRC (request for program databases) was fulfilled one month later than originally requested.