

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.

	6/22/2020	Received vendor data file from UI
Ongoing UI	6/23/2020	Received some data clarification questions form UI
	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 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
Data quality problems UI	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 held with UI; attendees: Lisa S. (EA Team), Sharon and Joel (UI), Nicole and Lisa W. (NMR), Rob Carmichael (Cadeo), Seth (SCS)
	3/11/2020	As promised, Joel shares revised program data immediately after data call
	3/25/2020	NMR sends UI clarifying questions
	3/26/2020	Joel confirms receipt of clarifying questions
	4/1/2020	Sharon (UI) indicates that she will try to respond to the questions on 4/2
ES data ok; Problematic UI data still	4/3/2020	Joel shares partial data
	4/7/2020	NMR requests remaining data and asks about an unclear field
	4/8/2020	Sharon (UI) shares a mini data dictionary
	4/9/2020	Joel provides remaining data
	Summary	All data requests are complete
		1/0/1900
	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.
	3/11/2020	2nd round of data provided by UI
	3/25/2020	NMR/SCS/Cadeo provided comments/issues to UI regarding data limitations for the 2nd round data.

DATATIMELINE

	4/17/2020	Joel sends data (request 1b) -- indicates they will provide request 1c if this meets NMR/Evergreen's needs	
	4/21/2020	NMR sends reminder to Miles about request 1c discrepancy	
	4/29/2020	Evergreen emails UI highlight the gaps in request 1b data and asks that request 1c be fulfilled	
	4/30/2020	Joel indicates that they will examine Evergreen's request and "will be back in touch soon"	
	5/12/2020	Miles responds about request 1c discrepancy	
	5/13/2020	Joel sends data (request 1c)	
	5/13/2020	Evergreen asks about remainder of UI data (request 1b)	
	5/26/2020	NMR emails Miles with questions on request 1b and 1c; scheduling call for 6/4	
	6/3/2020	Evergreen asks about remainder of UI data (request 1b)	
	6/4/2020	Held data call with Eversource (Attendees: Miles and Rick, Eversource; Nicole, Jared, Sam, NMR; Lisa, Bob, EA Team)	
	6/4/2020	Miles provided data files (request 1b) which were the same data they previously provided	
	6/8/2020	Joel indicates that UI hope to send data in a "couple days"	
	6/14/2020	Miles provides additional data (request 1b)	
	6/23/2020	Joel provides additional data (request 1b)	
	6/25/2020	NMR emails UI outlining data gaps; scheduling data call	
UI have provided data but it	Summary	UI have provided data but it is inadequate	
	1/0/1900		1/0/1900
	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)	
	4/24/2020	Eversource reported no Q1 2020 shelf assortment data due to not being able to conduct the data collection during the COVID-19 pandemic	
	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)	
	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	3/6/2020	Informed NMR that Eversource HPWH data had no contact information	
	3/10/2020	Eversource confirmed that contact data was available	
	3/10/2020	Evergreen downloaded Eversource data for HPWHs	
	3/24/2020	Contacted NMR for status update on Eversource HVAC data and UI data	
ES ok; UI Data hold-up delayed on-site recruitment but subsequently stopped by COVID. Still need data for recruitment / surveys & metering. Lost season.	3/24/2020	NMR updated Evergreen; Evergreen downloaded new Eversource HVAC Data; still waiting on UI	
	4/17/2020	UI sent DHP data to NMR	
	4/28/2020	Evergreen notified UI that the data were good, but only for DHPs (not HPWH and ducted heat pumps)	
	4/30/2020	UI notified Evergreen and NMR that they are looking into the request for HPWH and ducted heat pump data	
	5/13/2020	UI provided HPWH data	
	5/13/2020	Evergreen asked UI about ducted heat pump data	
	6/3/2020	Evergreen asked UI about ducted heat pump data	
	6/23/2020	UI sent ducted heat pump and other data	
	6/23/2020	NMR reviewed the data and informed Evergreen that it contained different measure counts and no contact information; Evergreen verified.	
Need contact info; 7/1 mtg	6/30/2020	NMR scheduled a meeting for 7/1 to discuss the new data and remaining needs (i.e., contact information)	
			1/0/1900
	X1931 In-Depth PSD Review		
	2/14/2020	Data for this project included in x1939 request. Data request #1 submitted to EA team - request for program tracking data	
	3/5/2020	Data for this project included in x1939 request. Data request #1 sent to Utilities	
	3/13/2020	Data for this project included in x1939 request. Data request #1 call with Utilities	

ES provided data; UI not mentioned	3/31/2020	Data for this project included in x1939 request. Eversource provided data for Data Request #1
	4/10/2020	Data for this project included in x1939 request. UI provided commercial data.
	4/29/2020	Data for this project included in x1939 request. Phone call w/UI requesting residential data.
	1/0/1900	1/0/1900
	1/0/1900	1/0/1900
	X1939 Early Retirement	
	2/14/2020	Data request #1 submitted to EA team - request for program tracking data
	3/5/2020	Data request #1 sent to Utilities
	3/13/2020	Data request #1 call with Utilities
ES provided data; UI not mentioned	3/31/2020	Eversource provided data for Data Request #1
	4/10/2020	UI provided commercial data
	4/29/2020	Phone call w/UI about residential data
Data not yet from UI	6/17/2020	Phone call w/UI about upstream and SBEA data, also briefly discussed residential data
	1/0/1900	1/0/1900
	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	1/0/1900	Data request X1941-1-TRC (request for program databases) was fulfilled one month later than originally requested. UI originally provided the data with two critical data fields missing. UI provided the requested data on 2/26/20. Eversource provided the requested data on 2/20/20.
	3/11/2020	Data request X1941-2-TRC (request for project files for small sample of projects) submitted to Eversource
	3/16/2020	X1941-2-TRC mandatory utility data meeting held with Eversource
	3/16/2020	Eversource sent email stating that they will project X1941-2-TRC data by 3/27/20
	3/17/2020	TRC gave Eversource the option to provide project files for a small sample of projects or for the full sample. Eversource chose the full sample. TRC will resubmit data request X1941-2-TRC after the EA team has reviewed the sample.
	3/23/2020	Data request X1941-2b-TRC (request for project files for small sample of projects) submitted to UI
In consultant court.	3/23/2020	X1941-2b-TRC mandatory utility data meeting held with UI. TRC will resubmit data request X1941-2b-TRC after the EA team has reviewed the sample.
	4/2/2020	TRC submitted Data Request X1941-2-TRC to Eversource and UI
	4/6/2020	Eversource confirmed that the deadline of 4/24/20 is acceptable
	4/23/2020	UI confirmed that the deadline of 4/24/20 is acceptable
	4/24/2020	UI provided project documentation for 18 out of 26 projects
	4/27/2020	Eversource requested an extension until 5/1/20 for X1941-2-TRC
Awaiting 8 projects from UI	5/4/2020	Eversource provided requested data for X1941-2-TRC
		1/0/1900
		1/0/1900