

8/6/2021

**CTEEB EVALUATION PROJECT DATA REQUEST TIMELINES****Notes***Working to track 4 dates (Request/due; Call; utility commitment/agreement; delivery); working to get all contractors on all steps*

	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
Started Data requests	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 Gowans 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; missing UI data	3/26/2020	UI provided initial data. Request not complete; needs follow-up.
	3/31/2020	Eversource provided request #2.
	4/1/2020	Posed additional questions to UI about most recent data submission.
	4/2/2020	Posed additional questions to UI about most recent data submission.
	4/6/2020	Conducted phone call with Eversource about data
	4/8/2020	Received email from UI saying they are working on questions
	4/9/2020	Provided Eversource files with problem cases
	4/10/2020	Clarified with Eversource the location of the files provided on the 10th.
	4/20/2020	Eversource provided quartile data
	4/20/2020	UI provided a sample population file for us to review
	4/22/2020	Posed additional questions to UI about most recent data submission.
	4/24/2020	Received upstream lighting data from Eversource
	4/27/2020	Posed question to Eversource about upstream lighting data
	4/30/2020	Received distributor contact info from Eversource
	5/5/2020	Received updated Customer Popn file from UI.
	5/6/2020	Received responses to some questions from UI
	5/8/2020	Received email from Eversource providing responses to some key questions.
	5/18/2020	Received new participant data from UI.
	5/19/2020	Posted some new questions for UI
	5/19/2020	Received email from Eversource providing data field definitions
	5/20/2020	Message from UI with partial responses to questions; issues still pending
	5/20/2020	Received email from Eversource providing additional clarification on rate codes and verification of program coding.
	5/20/2020	Sent email to Eversource asking for clarification on how they distinguish different ECB pathways.
	5/22/2020	Received additional responses to pending questions from UI. Notes that we are awaiting several files (UL, contractor info, near parts)
	5/27/2020	Received email from Eversource clarifying ECB project pathways.
	6/8/2020	Received email from UI responding to some pending questions
	6/10/2020	Eversource responded to question about UL data
	6/11/2020	Received UL data from UI
	6/12/2020	Received partial participant data from UI
	6/14/2020	Received some data definition info from Eversource
	6/17/2020	Received updated UI C&I Popn file
	6/17/2020	Received additional data clarifications from Eversource
	6/22/2020	Received vendor data file from UI
	6/23/2020	Received some data clarification questions from UI
	7/6/2020	Asked UI question about "qualifiers" field
	7/13/2020	UI submitted additional BES data
	7/15/2020	Submitted question to UI re upstream lighting classification
	7/28/2020	Re-inquired about upstream lighting question and posed question about email addresses
UI - Possibly resolved	7/31/2020	UI responded saying they have no more email addresses.
	8/11/2020	UI reached out to acknowledge they owed us some answers, but have been too busy with storm duties to respond.

1/0/1900

DATATIMELINE

	R2029 SF Weatherization Assessment and Update	
	N/A	See R1983 for all data request communications.
	3/2/2021	Awaiting WAP data
Awaiting data	to present -	Awaiting WAP data
	X1942 NEIs	
	12/18/2020	Arrearage-related Historical details as part of the R1983 data request
	1/12/2021	Arrearage-related Historical details as part of the updated R1983 data request to Companies
	4/13/2021	Sent UI specific email about X1942 arrearage data
	4/21/2021	Followed up with Eversource about arrearage data
	4/22/2021	UI sent X1942 arrearage data
	5/4/2021	Followed up with Eversource about arrearage data
Awaiting Arrearage data	5/11/2021	Followed up with Eversource about arrearage data
	5/18/2021	Followed up with Eversource about arrearage data
	5/25/2021	Followed up with Eversource about arrearage data
Awaiting Arrearage data	5/27/2021	Followed up with Eversource about arrearage data
	6/4/2021	Followed up with both utilities about remaining items
	6/10/2021	Emailed UI to arrange a meeting to discuss arrearage data request
	6/11/2021	Followed up with Eversource about arrearage data
	6/11/2021	Meeting with UI about arrearage data
	6/11/2021	UI sent last piece of arrearage data; X1942 UI Data Request complete
	6/11/2021	Met with UI to discuss arrearage data request
	6/11/2021	UI sent some updated arrearage data
	6/15/2021	Eversource responded with some answers about arrearage data
	6/24/2021	Eversource emailed with follow up questions about arrearage data and we responded
	6/28/2021	Followed up with UI asking for ID#s in the arrearage data to match to program data
	6/29/2021	UI responded saying they'll check
	7/2/2021	Followed up with Eversource about arrearage data missing some vital variables
	7/6/2021	Followed up with UI about arrearage data request
	7/7/2021	Followed up with Eversource again
Awaiting Arrearage data	7/13/2021	Followed up with Eversource again
	7/27/2021	Followed up with Eversource again
	8/2/2021	Followed up with Eversource again
Awaiting Arrearage data	Summary	See R1983 for more details; Awaiting arrearage-related data from Utilities. Cannot begin analysis until the data are provided
	X1931-1 ISP Comm Boiler & Furnace Study	
	1/0/1900	1/0/1900
	X1931-2 Coincidence Factor and Loadshape Study	
	1/0/1900	1/0/1900
	X1931-3 New Measure Compressed Air Systems	
	1/0/1900	1/0/1900
	X1931-4 New Measure Advanced Lighting Controls	
	1/0/1900	1/0/1900
	X1931-5 Comm Refrigeration Efficiency Update Study	
	1/0/1900	1/0/1900
	X1931-6 Hours of Use Documentation	
	1/0/1900	1/0/1900
	X1931-7 Degree Days Update Study	
	1/0/1900	1/0/1900
	1/0/1900	
	1/0/1900	1/0/1900
	C2014 C&I Lighting Saturation and Remaining Potential	
	10/1/2020	made the request to ODC to get the dataset of record they prepared for C1901
	1/4/2021	ODC gathered additional data from utilities and is working on consolidating the consumption and tracking data into a master da

	3/1/2021	processed dataset for both Eversource and UI
	4/5/2021	received upstream distributor contact info from ODC
		1/0/1900
	CT X2022 - Education and Engagement Evaluation	
	1/5/2021	Data Request - 1 sent to Eversource and UI
	1/19/2021	Data request -1 Part 1 -- deadline
	1/19/2021	Data Request - 1 Part 1 - data received
	1/26/2021	Data discussion with Eversource and UI
	2/1/2021	Additional Data received - UI
	2/4/2021	Additional Data received - UI
	2/26/2021	Data Request 2 - sent to utilities
	3/19/2021	Deadline for data request 2
	3/19/2021	Data received from utilities
	5/4/2021	Data request 3 - sent to utilities
	5/13/2021	Data received from utilities
	5/26/2021	Data request 4 sent to utilities - Educate the public and eversource customer Engagement
	6/7/2021	Data received from utilities in response to Data request 4
	6/11/2021	Data Request 5 sent to Eversource
	6/22/2021	Data received from Eversource
	1/0/1900	1/0/1900
	X2001 - EUL	
	12/24/2020	Submitted Data Request #1.
	1/8/2021	Met with utilities to discuss data availability
	1/21/2021	Discussed delay of data processing with Eversource. New due date set for week of 2/2
	1/22/2021	Received data from UI
	2/11/2021	Received initial set of data files from Eversource
	2/11/2021	Communicated with Eversource about missing residential data
	2/17/2021	Received full set of data from Eversource
		1/0/1900
	R1983 - HES & HES-IE Process / Impact Evaluation	
	7/13/2020	Preliminary data call
	8/14/2020	Awaiting data - deadline extended (Data request for HES/HES-IE Program Materials, QA/QC Vendor Inspection Reports/Tracking
	12/11/2020	Data request Meeting
	12/11/2020	Data request meeting with both utilities
	12/16/2020	Doug sent out notes from meeting
	12/18/2020	Doug sent revised data request + program design doc to EA Team
	1/7/2021	Received comments from EA team on data request
	1/11/2021	Sent updated data request to utilities
	1/21/2021	Asked utilities for Recurve reports
	1/22/2021	Received Recurve report from Eversource
	1/28/2021	UI asked for a week long extension
	2/3/2021	UI sent over files but they were empty
	2/4/2021	Eversource sent over files for Item A
	2/4/2021	UI sent over data
	2/8/2021	Eversource sent over files
	2/9/2021	UI sent over data
	2/10/2021	UI sent over data
	2/11/2021	Eversource sent over files for Item D
	2/11/2021	Sent UI notes on what is missing and questions
	2/12/2021	UI answered some questions
	2/17/2021	UI sent over data but I could not extra data from them
	2/18/2021	Eversource sent over files for Item C
	2/18/2021	Eversource gives permission for NMR to contact Recurve
	2/19/2021	UI posted data to NMR's SharePoint
	2/19/2021	Eversource sent over more files for Item A
	2/25/2021	UI attempted to send over more data
	3/3/2021	Eversource sent over files for Item D
	3/3/2021	Doug reached out to Recurve for UI data
	3/5/2021	Asked Eversource to prioritize vendor + customer data
	3/8/2021	Eversource says they can get that to us in 4 weeks
	3/9/2021	UI gives permission for NMR to contact Recurve
	3/11/2021	Meeting with Recurve
	3/16/2021	Recurve uploaded UI data
	3/17/2021	Meeting with Recurve to discuss Eversource
	3/22/2021	Sent email identifying missing data and questions for UI
	3/23/2021	Sent email identifying missing data and questions for Eversource
	3/23/2021	Eversource responded with delivery dates
	3/24/2021	Followed up with Recurve - UI questions
	3/25/2021	Followed up with UI to see if they received 3/22 email
	3/27/2021	Recurve uploaded more UI data

	3/29/2021	Eversource sent over files for Item G
	3/29/2021	UI experiencing IT issues
	3/30/2021	Data request meeting with Eversource
	3/31/2021	Many failed transfer attempts from UI 3/30 + 31
	4/1/2021	UI sent over more files - but for the wrong project
	4/2/2021	Eversource sent over some more files for Item E
	4/2/2021	UI sent over more files
	4/2/2021	UI responded to email from 3/22
	4/6/2021	Data request meeting with UI
	4/8/2021	Doug sent updated/simplified data request to UI
	4/12/2021	Followed up with UI to see if they received 4/8 email
	4/12/2021	Followed up with Eversource about missing data
	4/13/2021	Sent UI specific email about X1942 arrearage data
	4/14/2021	UI sent over more files - one duplicate and one corrupt
	4/15/2021	Followed up with UI about 4/14 data
	4/16/2021	UI sent over more files
	4/16/2021	Eversource sent over more files for Item C
	4/19/2021	UI sent over more files
	4/21/2021	UI sent over more files - one corrupt
	4/21/2021	Followed up with Eversource about arrearage data
	4/21/2021	Followed up with UI about arrearage data
	4/21/2021	Doug sent questions to utilities
	4/22/2021	Eversource sent over more files for Item C
	4/22/2021	UI sent over more files (via Glen Eigo to NMR SharePoint)
	4/22/2021	UI sent X1942 arrearage data
	4/23/2021	Eversource sent over more files for Items C, E, and G
	4/28/2021	Sent follow up questions to Eversource and UI
	4/29/2021	UI sent more data
	5/4/2021	Sent follow up questions to Eversource and UI
	5/5/2021	UI sent more data and answered questions
Multiple delays; but need better tracking of DR#s.	5/6/2021	UI sent more data
	5/6/2021	Responded to questions
	5/7/2021	Sent follow up questions to Eversource and UI
	5/7/2021	UI sent some answers
	5/10/2021	Sent questions to UI about data discrepancies + additional data
	5/11/2021	Followed up with Eversource about remaining items and questions
	5/11/2021	Eversource responded with updates on items
	5/12/2021	Followed up with Eversource with more questions
	5/14/2021	Eversource sent over some more files for Items D and F
	5/18/2021	Followed up on questions to UI about data discrepancies
	5/18/2021	Followed up with UI about arrearage data
	5/19/2021	UI sent additional data but didn't answer questions
	5/19/2021	UI sent some of the arrearage information requested
	5/19/2021	Followed up with Eversource about remaining items and questions
	5/19/2021	Eversource sent over more files
	5/19/2021	Followed up with Eversource with a new list of remaining items
	5/20/2021	UI sent more data - ends up being duplicate data
	5/20/2021	Set up meeting to discuss questions and missing items with UI
	5/24/2021	Meeting with UI - Attended by Dick Oswald, Joel Kopylec (UI); Lisa Skumatz, Bob Wirtshafter (EA Team); Glenn Gavi (DNV), Eric D
	5/25/2021	Followed up with Eversource about remaining items and questions
	5/26/2021	UI sent one of the remaining files
	5/27/2021	Eversource sent over more files
	5/27/2021	Followed up with Eversource about arrearage data
	6/2/2021	Followed up with both utilities about remaining items
Problematic - in progress	6/4/2021	Followed up with both utilities about remaining items
	6/4/2021	Followed up with UI about remaining items
	6/10/2021	Eversource sent some of the remaining items
	6/10/2021	Emailed UI to arrange a meeting to discuss arrearage data request
	6/11/2021	Followed up with Eversource about arrearage data
	6/11/2021	Meeting with UI about arrearage data
	6/11/2021	UI sent last piece of arrearage data; X1942 UI Data Request complete
	6/11/2021	Met with UI to discuss arrearage data request
	6/11/2021	UI sent some updated arrearage data
	6/15/2021	Eversource responded with some answers about arrearage data
	6/15/2021	Followed up with both utilities asking for monthly consumption data
	6/15/2021	UI responded with questions about consumption data request and we responded
	6/16/2021	Eversource responded with 3 week turnaround time for monthly consumption data
	6/17/2021	UI responded with questions about consumption data request and we responded
	6/22/2021	Sent Eversource request for replacements of two files that were missing data
	6/22/2021	Followed up with UI about consumption data request
	6/24/2021	Eversource emailed with follow up questions about arrearage data and we responded
	6/28/2021	Checked in with Eversource about remaining items

	6/28/2021	Followed up with UI about consumption data request
	6/28/2021	Followed up with UI asking for ID#s in the arrearage data to match to program data
	6/29/2021	UI responded saying they'll check
	7/1/2021	Eversource sent some of the remaining items
	7/2/2021	Followed up with Eversource about arrearage data missing some vital variables
	7/6/2021	Followed up with UI about arrearage data request
	7/7/2021	Followed up with Eversource again
	7/7/2021	UI sent some updated arrearage data
	7/7/2021	UI responded saying no updated turnaround date for consumption data
Problematic - in progress - dates, partial data, awaiting data, "they'll check" ...	7/7/2021	UI sent sample of consumption data to make sure it was what we were looking for
	7/7/2021	R1983 team check data and responded to UI
	7/8/2021	UI responded saying they would try but gave no date
	7/13/2021	Followed up with Eversource about remaining items and added another missing item
	7/13/2021	Followed up with UI about remaining items; they responded saying it's in progress
	7/14/2021	Eversource responded; key data person out on vacation
	7/15/2021	Eversource sent monthly consumption data
	7/19/2021	UI posted monthly consumption data to NMR's SharePoint
	7/19/2021	UI and NMR exchanged emails about the data
	7/21/2021	Eversource followed up to check in on request
	7/27/2021	Followed up with Eversource about arrearage data; they responded saying it was in progress
	7/27/2021	Posted list of UI IDs that were missing a crosswalk
	8/2/2021	Followed up with Eversource about arrearage data
	8/2/2021	Followed up with UI about IDs
	8/3/2021	UI posted crosswalk data
Reviewing data	Summary:	Reviewing data from Utilities; Data request in progress.