

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.

DATATIMELINE

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	2/11/2020	NMR emailed meeting minutes from the UI call which reflected that Dick agreed to the due dates
	2/11/2020	Miles emailed that Eversource could provide the REM/Rate files "in a couple weeks"
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	2/12/2020	Miles offered further clarification on previous item via email
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	2/18/2020	NMR offered further clarification on previous item via email
	2/20/2020	Miles provided RNC tracking data (request 1b and 1c, partial)
	2/21/2020	Miles clarified via email one field in the program data provided the previous day
	2/21/2020	Dick described via email the data he would provide
	2/24/2020	Dick provided HPWH data (request 1c, partial)
	2/26/2020	NMR reminded Miles about the remainder of requests 1b and 1c
	2/26/2020	Miles indicated that Eversource is pulling the data (could not provide an estimate, though indicated they are fast tracking it)
	2/26/2020	Miles emailed information in response to request 1d
	2/27/2020	NMR reminded Eversource of the urgency of request 1b and 1c
	2/27/2020	Miles shared that Eversource is fast-tracking the remainder of 1b and 1c data
	2/27/2020	Miles shared the 2020-2021 CT screening model (request 1d)
	2/27/2020	NMR identified that UI did not provide necessary data and reminded them of the urgency of supplying it (requests 1b and 1c)
	2/27/2020	Dick left Nicole (NMR) a voicemail expressing confusion about the data request and indicated he did not attend the call on 2/5
	2/27/2020	Nicole forwarded Dick the data call minutes answering his questions and asked to schedule a call
	3/3/2020	Held follow-up data call with UI to address request 1b and 1c (Attendees: Lisa, Bob, EA Team; Nicole, Jared, NMR; Kevin, Evergreen; Dick, Alyson, UI)
	3/3/2020	Alyson (UI) verbally indicated she would send some data by 3/6 but confirmed that she never received the data request which has been reshared multiple times [NMR sent meeting minutes 3/4]
	3/3/2020	Miles sent additional data (request 1b and 1c)
	3/3/2020	Alyson (UI) sent additional data (request 1b)
Data problems	3/5/2020	NMR emails UI describing insufficiency of data and asking for clarification
	3/6/2020	Dick confirms UI received emails and indicates they will provide responses "early next week"
	3/9/2020	Kevin (Evergreen) reaches out to Miles about missing contact information (request 1c)
	3/10/2020	Miles provides contact information (request 1c)
	3/11/2020	NMR emails Miles about inconsistency in numbers (request 1b)
	3/20/2020	Miles shares missing data (request 1b)
	3/25/2020	Joel confirms UI is seeking customer contact information, expecting it "fairly quickly"
ES Delivered data; UI not yet but actively working on it	Summary	NMR confirming, but Eversource appears to have provided all data needed. UI has not provided all data needed, but is actively trying to satisfactorily fulfill requests.
	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
	RHVAC/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

		1/0/1900
		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
	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
		1/0/1900
		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.
	1/0/1900	1/0/1900