

	A	B	C	D
4			9/4/2019 CTEEB EVALUATION PROJECT DATA REQUEST & PRESENTATION TIMELINES- DRAFT	
5	Notes		<i>Working to track 4 dates (Request/due; Call; utility commitment/agreement; delivery); working to get all contractors on all steps</i>	
20		C1634 ECB Impact Eval		
21		4/5/2018	Data Request #1 transmitted to Eversource & UI. Deadline of 4/20 requested. Emails from EA confirmed timing on 4/5.	
22		4/10/2018	Data Call #1 with Eversource & UI. Deadline request extended to 4/27 at request of utilities. Emails from Eversource (4/17) & UI (4/20) confirmed 4/27 deadline.	
24		4/18/2018	Eversource data 1 of 2 uploaded.	
25		4/27/2018	Eversource data 2 of 2 uploaded.	
26		5/14/2018	UI data 1 if 1 uploaded.	
27		5/17/2018	Data questions to Eversource and UI emailed. Deadline of 5/24 requested on follow-up emails on 5/21.	
28		5/23/2018	Eversource data question responses received via email.	
29		5/24/2018	UI data question response received via email.	
30		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).	
31		6/14/2018	Eversource commits via email for fulfilling data request #2 by 7/6, data request #3 by 7/20.	
32		6/26/2018	UI commits via email for fulfilling data request #2 by 7/9, data request #3 by 7/20.	
33		7/6/2018	Eversource delivers project data files, later found to be corrupted.	
34		7/13/2018	Eversource delivers interval data	
35	Slight data delays; project remains on schedule	7/20/2018	Eversource delivers new project data files, to replace corrupted files.	
36	Slight data delays; project remains on schedule	7/24/2018	UI delivers project data files.	
37		8/16/2018	UI & Eversource confirmations received for initial site visit contacts.	
38		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.	
39		9/21/2018	Eversource confirmation on 10/10 requested fulfillment date.	
40		10/2/2018	Follow-up emails to Eversource (requesting tracking workbook) and UI (requesting tracking workbook and confirmation of fulfillment date).	
41	Problem - October 2018	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).	
42		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.	
43		10/29/2018	Data requests #4 and #5 transmitted, with requested fulfillment by 11/9 and 11/16, respectively.	
44	Problem November 2018	10/31/2018	Data meetings with UI and Eversource. All Eversource data committed to be delivered by 11/19. UI commitment not defined.	
45		11/13/2018	Data received from Eversource.	
46		11/16/2018	Data received from UI.	
47		11/17/2018	Data received from UI.	
48	Outstanding data Dec	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).	
49	Outstanding data Dec	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).	
50	Outstanding data Dec	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.	
51		12/5/2018	Data received from UI - currently being assessed for completeness.	
52		12/18/2018	Data received from Eversource - currently being assessed for completeness.	
53	Dec-Site level data still an issue - gaps, etc. and delays a problem for schedule	12/19/2018	Transmitted data issue impacts memo to EA.	
54		1/30/2019	Data call with UI and Eversource (?) to discuss format of provided data. Cadmus currently evaluating existing data for completeness.	
55		1/30/2019	Data Request for PY18 tracking data	
56		2/21/2019	PY18 tracking data received from UI and Eversource	
57		2/27/2019	Data call with UI and Eversource to discuss utility billing meter account numbers	
58			Date New data meetings (March) here	
59		3/19/2019	PY2018 tracking data review meeting with utilities. Utilities commit to providing updated data by 3/22/19	
60		3/22/2019	PY2018 tracking data received from Eversource	
61		3/26/2019	PY2018 tracking data review meeting cancelled due to missing PY2018 tracking data from UI	
62		3/29/2019	PY2018 tracking data received from UI	
63		4/8/2019	Cadmus provided PY2018 sample memo to EA.	
64		4/15/2019	Cadmus and EA reviewed Sample design and memo. Sample approved.	
65		4/22/2019	Cadmus provided updates sample memo to EA with requested modifications.	
66		4/23/2019	PY2018 sample data request meeting held by Cadmus, EA, and Utilities. Utilities agreed to provide data by 5/17/19.	
67		5/20/2019	Received Batch 1 of 3 of Eversource sample project documents	
68		5/24/2019	Received Batch 2 of 3 of Eversource sample project documents	
69		5/27/2019	Received Batch 1 of 1 of UI sample project documents	
70		5/31/2019	Received Batch 3 of 3 (one project) of Eversource sample project documents	
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73		C1635 EO Impact Eval		
74		1/31/2018	Tracking system data request (#1) sent to PAs by EA rep; due 2/20/2018	

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4		9/4/2019	CTEEB EVALUATION PROJECT DATA REQUEST & PRESENTATION TIMELINES- DRAFT	
75		2/5/2018	Tracking system data request (#1) follow-up call with EA rep, Miles Ingram and Rick Mascoli from Eversource, and Dick Oswald from UI	
76		2/20/2018	Date that Miles Ingram and Rick Mascoli from Eversource, and Dick Oswald from UI committed to providing tracking system data (request #1) on 2/5/2018 call	
77		2/16/2018	Received Eversource tracking system data (request #1) from Miles Ingram	
78		3/8/2018	Received UI tracking system data (request #1) from Dick Oswald (UI cannot provide customer contact info for upstream)	
79		4/3/2018	Data Request #2 - Requested small sample of three project files from each PA to check if tracking savings provided include net or gross realization rate adjustments; due 4/18/2018	
80		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	
81		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	
82		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	
83		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	
84		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"	
85		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.	
86		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 DNV GL's secure file transfer system, UI began providing files on 6/1.	
87		5/15/2018	Call held with the EA and PAs to discuss the EO electric project data request.	
88		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.	
89		5/31/2018	Through the EA, DNV GL requested permission from the PAs to speak with their upstream program managers and program vendor.	
90		5/31/2018	UI gave permission to speak with their program manager but not the vendor.	
91		6/1/2018	Eversource gave permission to speak with their program manager and their vendor.	
92		6/4/2018	After some problems using DNV GL's secure file transfer system, UI provided the requested detailed EO electric project files.	
93		6/8/2018	Eversource provided the requested detailed EO electric project files.	
94		8/19/2018	Data Request #4 - Detailed EO gas project files were requested from the PAs.	
95		8/22/2018	Call held with the EA and PAs to discuss the EO gas project data request.	
96		8/22/2018	Miles Ingram from Eversource agreed (via email) to fulfill the EO gas project data request by 9/12/2018.	
97		8/27/2018	Dick Oswald from UI agreed (via email) to fulfill the EO gas project data request by 9/12/2018.	
98		9/12/2018	Miles Ingram from Eversource and Dick Oswald from UI provided the EO gas project data that was requested.	
99		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.	
100	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.	
101		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.	
102		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.	
103		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.	
104	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.	
105	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.	
106		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.	
107		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.	
108		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.	
109		2/15/2019	Dick Oswald from UI expressed concerns about performing on-site visits to evaluate the Upstream Program and requested that DNV GL and the EA research the standard practice for evaluating C&I upstream programs.	
110		2/22/2019	After researching previous evaluations of similar programs, DNV GL 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.	
111		2/24/2019	Jane Lano from UI agreed that on-site visits should be performed to evaluate the 2018 Upstream Program.	

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4			9/4/2019 CTEEB EVALUATION PROJECT DATA REQUEST & PRESENTATION TIMELINES- DRAFT	
112		2/25/2019	DNV GL 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.	
113		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.	
114		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.	
115		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.	
116		3/28/2019	Dick Oswald provided the factors and assumptions used by UI to calculate their 2018 Upstream lighting program savings.	
117		4/5/2019	Miles Ingram provided the factors and assumptions used by Eversource to calculate their 2018 Upstream lighting program savings.	
118		8/5/2019	Requested gas billing data for 16 Eversource sites from Miles Ingram and for five UI sites from Dick Oswald.	
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121			C1644 EO Baseline & NTG	
122			Narrative: We have had a number of data issues which have resulted in delays in data collection launch. The data from Eversource was particularly challenging, as there were 6 separate contact fields for name, email, and phone number (owner-home, owner-business, applicant-home, applicant-business, contractor, and other). Stakeholder interviews and working with the data revealed that there was not a system for completing the applications and standardizing data entry. As such, we found that contact names could refer to the decision-maker, or whomever filled out the application. Phone numbers were found duplicated across fields and were entered in different positions across projects and contacts. Some projects had 4 contact fields completed, others 1, with duplicate names and phone numbers showing up both within single contact fields and across them. De-duplicating the data and determining the correct individual to contact has proved very challenging. Recruiting has also proved difficult: many contacts have retired or do not have accurate contact information. We are currently working with the PAs to determine better contact information. We initially requested updated contact information December 5th and the PAs requested additional time given end-of-the-year reporting requirements for program teams. We have re-initiated our request in 2019 with reminder emails on January 2, 2019.	
123		4/12/2018	4/12/2018 - EMI Consulting submitted data request	
124		4/19/2018	4/19/2018 - UI provided data	
125		4/16/2018	4/16/2018 - Eversource provided data	
126		12/5/2018	12/5/2018 - EMI Consulting requested updated contact information (n=56 - Eversource, n=17 - UI)	
127		12/6/2018	12/6/2018 - Eversource requests delay due to EOY efforts	
128		1/4/2019	1/4/2019 - EMI Consulting provides reminder, prioritizes list	
129		1/14/2019	1/14/2019 - EMI Consulting provides reminder, prioritizes list	
130		1/17/2019	1/17/2019 - Eversource provides contact data (n=12)	
131		1/17/2019	1/17/2019 - UI provides contact data (n=1)	
132		2/21/2019	2/21/2019 - EMI Consulting provides updated prioritization lists for PA support	
133		2/28/2019	2/24/2019 - Eversource reached out to customers (18 customers for 25 projects).	
134	Asking for help to get custom	2/28/2019	3/12/2019 - UI sent out an updated priority list was sent to customer account managers (8 customers for 9 projects).	
135		3/1/2019	No outstanding data requests.	
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139			R1616/R1708 Residential Lighting Impact Saturation Study	
140		9/10/2018	Eversource sends expenditures data	
141		9/20/2018	Eversource sends bulb data - NMR notes some gaps	
142		9/21/2018	NMR notes some gaps in Eversource bulb data	
143		9/21/2018	UI indicates they will send #s early next week	
144		9/21/2018	Eversource provides revised bulb data	
145	Weighting data rec'd Dec	10/17/2018	UI provides data	
146				
147			MEETINGS	
148		3/21/2018	Held kickoff	
149		8/29/2018	Held data meeting. Attendees: Miles, Rick (Eversource); Dick, Tyfannie (UI); Nicole, David (NMR); Lisa (EA Team)	
150		6/28/2019	Released draft report	
151				
152			R1617 Residential Ductless Heat Pumps / Cold Climate Heat Pump Measure Cost-effectiveness and Effects	
153		8/14/18	Requested avoided costs (no due date)	
154		8/15/18	Companies submitted avoided costs materials	
155		11/21/18	Requested program costs (no due date)	
156		11/26/18	Eversource indicates they will provide data by early week of 12/2	
157		11/27/18	UI provides data	
158	Resolved	12/6/18	Eversource provides data	
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160				
161				
169			R1706 Residential Appliance Saturation Survey	
170		11/17/2017	Sent reminder to UI about request 2	
171		11/29/2017	UI leaves voicemail with questions; NMR reaches him through email to re-describe request 2	

	A	B	C	D
4		9/4/2019 CTEEB EVALUATION PROJECT DATA REQUEST & PRESENTATION TIMELINES- DRAFT		
172		12/5/2017	Sent reminder to UI about request 2	
173		12/15/2017	UI provides data	
174		2/9/2018	Submitted data request 3 (due 2/23/18) -- no call needed because request was clear	
175		2/12/2018	Eversource indicates they can provide data by 3/2	
176		3/3/2018	NMR reminds Companies about data request 3	
177		3/5/2018	Submitted data request 4 (due 4/16/18) -- no call needed because request was clear	
178	Late by about 2 mo	3/7/2018	UI provides partial data for request 3	
179		3/9/2018	UI provides complete data for request 3	
180		3/12/2018	Eversource provides data for request 3	
181		3/19/2018	Eversource provides data for request 4	
182		3/22/2018	UI provides data for request 4	
183		8/23/2018	Submitted data request 5 (due 9/20/18)	
184		8/29/2018	Agreed to move due date for request 5 to 10/4/18	
185		9/6/2018	NMR emails Companies asking if customer database with participation data is possible and to hold off on request 5	
186		9/7/2018	Eversource confirms availability	
187		9/14/2018	UI indicates they cannot supply data	
188	Data Problem October 2018	9/21/2018	NMR asks why UI cannot supply - UI explains that it isn't necessary (9/25)	
189		10/10/2018	NMR emails Eversource: rescinds data request 5 and submits request 6	
190		10/12/2018	NMR makes slight adjustment to Eversource request 6 -- officially rescind request 5 / Eversource agrees to 11/7 due date	
191		10/17/2018	NMR revises requests to UI: re-issue request 5 and officially submit request 6 / Ask to confirm 11/7 due date	
192	Awaiting Data	10/31/2018	UI confirms they can meet 11/7 due date	
193		11/8/2018	Eversource provides (incomplete) request 6 data	
194		11/8/2018	UI provides request 5 data	
195		11/15/2018	UI provides (incorrect) request 6 data	
196		11/15/2018	NMR notifies UI data request 6 data are incorrect	
197		11/16/2018	NMR discovers that Eversource request 6 data are incomplete and shares the missing cases with Eversource	
198		11/28/2018	Eversource provides additional request 6 data	
199		11/29/2018	NMR confirms that Eversource request 6 data are still missing cases	
200		12/3/2018	NMR provides Eversource with the missing case data again	
201		12/7/2018	Eversource issues additional questions following 12/5 data call	
202		12/11/2018	Lisa/Nicole/Eversource agree on a compromise to minimize data pull burden; Eversource confirms they can provide missing (request 6) data by 12/19	
203		12/13/2018	Eversource provides data; additional correspondence - incomplete	
204		12/13/2018	UI provides update	
205		12/19/2018	Eversource provides corrected data (request 6)	
206		12/20/2018	Eversource answers clarifying questions	
207		12/21/2018	UI provides partial data (request 6)	
208		12/26/2018	NMR sends follow up questions and request for due date for remaining to UI (request 6) data	
209		1/6/2019	NMR sends follow up question on HER data to Eversource	
210	Weighting Data rec'd Dec	1/8/2019	Dick leaves voicemail expressing challenges with HER data pull (request 6)	
211	Note compromise	1/9/2019	NMR/EA Team agree to move forward without HER data	
212	Resolved	1/9/2019	Dick emails HER participation numbers (request 6)	
213				
214				
215			MEETINGS	
216		9/5/2017	Held data call. Attendees: Joe, Miles, Rick (Eversource); Dick, Tyfannie (UI); NMR; ERS; Bob, Lisa (EA Team)	
217		9/22/2017	Held kickoff	
218		8/29/2018	Held data call. Attendees: Miles, Rick (Eversource); Dick, Tyfannie (UI); Nicole, David (NMR); Lisa (EA Team)	
219		10/12/2018	Held data call with Eversource. Attendees: Miles, Rick (Eversource); Nicole, David (NMR); Lisa (EA Team)	
220		10/17/2018	Held data call with UI. Attendees: Dick, Tyfannie (UI); Nicole, David (NMR); Lisa, Bob (EA Team); Taren	
221		12/5/2018	Held data call. Attendees: Miles, Rick (Eversource); Dick, Tyfannie (UI); Nicole, Melissa (NMR); Lisa (EA Team)	
222		6/28/2019	Released draft report	
223				
224				
244			R1603 HES Impact Eval	
245		11/16/2017	WHEC submits data requests 1-A through 1-E to utilities, due date is 12/15/2017	
246		12/1/2017	Call with UI & Eversource to clarify the data request	
247		Dec, 2017	Work stopped	
248		12/4/2017	Eversource provides partial response to data request 1-A, 1-B and 1-C	
249		1/6/2018	Eversource provides remaining response to data request 1-A	
250		1/18/2018	Project re-started	
251	About 6 weeks late/partial	1/24/2018	UI provides response to data request 1-A	
252		3/20/2018	WHEC gives project kick-off presentation	
253		3/21/2018	Miles Ingram (Eversource) requests via email that third component of study focus on updating PSD demand savings for select measures	
254		4/19/2018	WHEC sent written questions to SERA re: data provided by utilities in response to data requests 1-A through 1-E	
255		4/23/2018	WHEC, SERA and utilities conference to review data issues outlined in 4/19/2018 question document	
256		4/25/2018	WHEC submits data requests 2-A through 2-F to utilities with due date ASAP	
257		4/26/2018	Miles Ingram (Eversource) commits via email to providing data requests 2-A through 2-F by no later than 5/19/2018	
258		4/27/2018	Richard Oswald (UI) gives partial response to data request 2-F via email	
259		5/3/2018	WHEC sent updated questions reflecting e-mail responses from UI & Eversource, requested UI to provide an estimated delivery date	

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4		9/4/2019	CTEEB EVALUATION PROJECT DATA REQUEST & PRESENTATION TIMELINES- DRAFT	
261		5/14/2018	Miles Ingram (Eversource) communicates inability to provide data request 2D (measure descriptions)	
262		5/21/2018	Richard Oswald (UI) provided response to data request 2D (measure descriptions)	
264		5/25/2018	Call with UI to discuss their response to data request 2E (UI gas projects in EV electric territory)	
265		5/31/2018	Rick Mascoli (Eversource) provided response to data requests 2A through 2C (program overlap info)	
266		6/11/2018	Richard Oswald (United Illumination) inquires about outstanding data request items	
267		6/12/2018	Data Request 3: WHEC submits data requests 3-A and 3-B with due date ASAP	
268		6/19/2018	Data Request 3-A: Miles Ingram (Eversource) requests additional detail from WHEC regarding data request 3-A (Desk Review Sample)	
269		6/19/2018	Eversource provides partial response to data request 3-B (Redundant Savings for Projects in Overlapping Territories)	
270		6/22/2018	Data Request 2-A & 2-C: WHEC replies to United Illumination regarding outstanding data request items, informs that items 2-A through 2-C still need attention	
271		6/29/2018	Data Request 3: WHEC submits additional detail requested by Eversource re: data request 3-A	
272		7/11/2018	Data Request 2: Richard Oswald (UIL) provides response to WHEC 6/29/2018 query re: outstanding data request items, 2-A data already provided, 2-B says outstanding data is forthcoming, 2-C data not available	
273		7/12/2018	Data Request 2-A: WHEC replies to UIL 7/11/2018 response, reiterating question of whether UIL provided extraneous project data for non-HES participants	
274		7/13/2018	Data Request 2-A: Richard Oswald (UIL) provides response to WHEC 7/12/2018 e-mail referencing data already provided	
275		7/13/2018	Data Request 2-A: WHEC e-mail to frame question to UI as whether they provided all non-HES program records or only those associated with HES projects	
276		7/20/2018	Data Request 3: WHEC provides language to SERA for requesting conference call with utilities to discuss data request 3, and UIL-specific issues	
277		7/26/2018	WHEC conferences with SERA to establish workplan priorities for current calendar year	
278		7/26/2018	Data Request 2-A: WHEC conferences with UIL to understand which UIL project records are not HES participants; WHEC documents call & WHEC to verify participant matching between programs	
279		7/30/2018	Data Request 2-A: UI responds with clarification about program implementation	
280		7/30/2018	Data Request 2-B: Richard Oswald (UIL) provides response to data request 2-B	
281		7/31/2018	Data Request 3-A (Desk Review Sample): Miles Ingram (Eversource) provides partial response to data request 3-A	
282		7/31/2018	Data Request 3-A: Richard Oswald (UIL) requests additional detail from WHEC regarding data request 3-A (Desk Review Sample)	
283		8/1/2018	Data Request 3-A: WHEC submits additional detail requested by UIL re: data request 3-A	
284		8/15/2018	WHEC proposes use for unspecified third budget component to SERA: intensive analysis of project modeling files to identify inputs contributing to high/low realization rates	
285		8/15/2018	Data Request 4 (Future Participant Billing): WHEC submits data request 4 (billing data and project dates for future participants); deadline is 9/21	
286		8/17/2018	Data Request 3-A: Miles Ingram (Eversource) provides partial response to data request 3-A	
287		8/22/2018	Data Request 3-A: Miles Ingram (Eversource) provides aggregate files; LI aggregate file found to be empty of measure-level data; HES aggregate file has some measures, but not all	
288		8/24/2018	Data Requests 3-A, 4: WHEC and Eversource (Miles Ingram) conference re: missing information in project modeling file "extracts" (electronic data sheets); Miles does not need additional information on DR-4	
289		8/28/2018	Data Request 3-A: Miles Ingram (Eversource) provides example electronic data sheet input files for WHEC's review	
290		8/31/2018	Data Request 2-A, 3-A, 4: WHEC and UIL (Richard Oswald, Tyfannie Mack) conference to address outstanding data clarity issues on DR2-A, format of response for DR3-A and responds to UI questions on DR-4; WHEC requests example modeling files for DR3-A	
291		8/31/2018	Data Request 3-A: Richard Oswald (UIL) provides response but it was missing critical information	
292		9/11/2018	Data Request 3-A: West Hill requests a conference with Eversource to discuss issues raised after reviewing the example electronic data sheet input files proved on 8/28/2018	
293		9/12/2018	Data Request 3-A: West Hill conferences with Eversource (Miles Ingram & Rick Mascoli) to resolve remaining ambiguities about where to find savings calculation inputs in the files provided for data requests 1-A and 3-A. Eversource explains this information is spread across four different sets of files, some of which had not yet been provided	
294		9/13/2018	Data Request 3-A: West Hill submits supplemental data request 3-A to Eversource asking for "Incentive Qualification Tool" files associated with all single family low-income projects in the desk review sample with a due date of 9/28/2018. These files contain the savings calculation input values for add-on measures in this program segment	
295		9/17/2018	At request of Bob Wirtshafter, West Hill provides synopsis United Illumination's outstanding data request items	
296		9/27/2018	Data Request 4-A: Miles Ingram (Eversource) provides partial response to Data Request 4 (billing data for "future participants"); data only provided for electric customers. Miles acknowledges the oversight but does not commit to a date certain for providing the missing gas data.	
297		9/27/2018	Data Request 3-A: West Hill sends UI (Richard Oswald, Tyfannie Mack, Brian Singer) email following up on previous requests to be sent example project modeling files.	
298		9/28/2018	Data Request 3-A: Miles Ingram (Eversource) requests two additional weeks to fulfill supplemental 3-A data request ("Incentive Qualification Tools"). Original due date was 9/28	
299	Problem - October 2018		UI has provided no response to Data request 4; Eversource has provided electric and working on Gas. See Oct Summary Report	
300		10/2/2018	Data Request 3-A: Richard Oswald (UIL) provides response to 8/31 request for example project modeling files (jpegs of a user interface dialog showing project info), and communicates that more info re: savings calculation was forthcoming	
301		10/2/2018	Data Request 4-A: Richard Oswald (UIL) provides billing data for future participants	
302		10/2/2018	West Hill requests call with utilities to discuss program changes since previous evaluation	
303		10/9/2018	Data Request 4-A: Miles Ingram (Eversource) clarifies that Eversource's 9/27 response contains both gas and electric billing data that can be distinguished by codes in a certain field	
304		10/15/2018	West Hill, SERA and utilities conference re: program changes since previous evaluation	
305		10/16/2018	Data Request 3-A: Miles Ingram (Eversource) provides Incentive Qualification Tools requested on 9/13, explains that several projects in sample did not have add-on measures, thus no IQTs	

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4		9/4/2019	CTEEB EVALUATION PROJECT DATA REQUEST & PRESENTATION TIMELINES- DRAFT	
306		10/18/2018	Data Request 3-A: West Hill informs Miles Ingram (Eversource) that the savings totals in the multi-family project modeling files for the desk review sample do not match those in the program data originally provided for Data Request 1-A	
307		10/22/2018	Data Request 3-A: Miles Ingram (Eversource) responds to West Hill's 10/18 message, explaining that there was a change in how multi-family project savings were totaled in 2016	
308	Data Issues - Nov 2018	10/31/2018	High savings: West Hill sends memo to utilities calling attention to prevalence of disproportionately high program-reported savings totals that could be inappropriately influencing billing analysis results	
309		11/8/2018	Retrofit/LO: West Hill emails Eversource with question re: how to determine when savings were reported on lost opportunity vs retrofit basis.	
310		11/9/2018	High Savings/Retrofit: West Hill conferences with both utilities re: 1) homes with atypically high program-reported savings and 2) how to determine when savings were reported on lost opportunity vs. retrofit basis. Conversation leads West Hill to exclude MF units from billing analysis.	
311		11/14/2018	West Hill sends utilities list of action items from 11/9 call. Eversource commits to providing. United Illumination does not reply.	
312		11/15/2018	Eversource provides responses to some of the outstanding questions remaining after 11/9 conference: 1) how to identify SF energy star projects found in the MF data, 2) how were the savings in the program data adjusted from gross values?	
313	?Issue? Dec	11/19/2018	West Hill requests conference with Richard Oswald (United Illumination) to review content of 11/9/2018 call in more detail. UI does not respond.	
314		11/21/2018	Data Request 3-A: West Hill conferences with Eversource re: 1) discrepancies between project modeling files (LOA) and program data originally provided for Data Request 1-A. This is a continuation of the 11/9 call.	
315	?Issue? Dec	11/30/2018	Data Request 3-A: West Hill sends Eversource list of action items from 11/21 call. Eversource commits to providing.	
316		12/10/2018	Miles Ingram (Eversource) provides answer to WHEC's question about how to discern when lost opportunity or retrofit basis was used to calculate ex ante savings in the program data	
317		12/10/2019	Billing data: Miles Ingram (eversource) informs WHEC that electric consumption data originally provided for the billing analysis contains many errors and overstates usage in many cases	
318		12/12/2018	Data Request 3-A: Miles Ingram (Eversource) provides response to WHEC's memo asking for explanation of discrepancies between project modeling files and program tracking data.	
319		12/13/2018	High savings/DR 3A: West Hill again requests conference with United Illumination to review issues raised in 10/31/2018 memo (high program reported savings) and outstanding data request 3 items (desk review savings calculation inputs).	
320	Resolved	12/18/2018	Billing data: Miles Ingram (Eversource) provides corrected electric usage data	
321		12/19/2018	High Saving Projects: West Hill conferences with United Illumination re: high program reported savings and outstanding data request 3-A items (desk review savings calculation inputs); UI confirms project savings match the HES program database for the projects with very high savings	
322	Dec-Missing data needed for risk analysis work; Ev provided files	12/21/2018	Data Request 3-A: Richard Oswald (United Illumination) provides data request 3-A (desk review sample savings calculation inputs)	
323		1/7/2019	Data Request 3-A: West Hill informs Richard Oswald (United Illumination) that response is missing most fields requested	
324	Issue for schedule, workload	1/14/2019	Data Request 3-A: Richard Oswald (United Illumination) acknowledges missing fields in response, commits to rectifying	
325		2/6/2019	Data Request 3-A: Richard Oswald (United Illumination) provides missing fields	
326		3/5/2019	WHEC delivers draft billing analysis report to SERA	
327		4/12/2019	SERA finishes review of draft billing analysis report	
328		5/23/2019	WHEC submits final draft of billing analysis report to SERA	
329		6/20/2019	WHEC receives Eversource and Energy Futures Group comments on billing analysis report from SERA	
330		7/2/2019	WHEC receives United Illuminating comments on billing analysis report from SERA	
331		7/3/2019	WHEC provides final responses to Eversource and Energy Futures group comments to SERA	
332		7/26/2019	WHEC provides supplemental analysis memo to SERA	
333		8/5/2019	WHEC presents results of supplemental analysis to utilities	
334		8/8/2019	WHEC provides revised supplemental analysis memo to SERA	
335		8/19/2019	WHEC provides additional evaluation tasks overview memo to SERA	
336		8/24/2019	SERA provides feedback on additional evaluation tasks to WHEC	
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338			R1705 R1609 Multifamily Baseline and Weatherization Study	
339		3/21/2018	Kickoff presentation among CT stakeholders: EEB, utilities, EA Team, CT DEEP	
340		6/7/2018	Draft utility data request #001 memo submitted to Eversource and UI	
341		6/15/2018	Utility data request #001 teleconference. Attendees: Rick Mascoli and Joe Swift (Eversource), Dick Oswald and Tyfannie Mack (UI), Lisa Skumatz (EA), Patrick Hewlett and Kerri-Ann Richard (ERS)	
342		6/22/2018	Revised utility data request #001 memo submitted to Eversource and UI based on suggestions in the teleconference. Requested submittal deadline of July 31	
343		6/26/2018	Eversource written agreement on utility data request #001 received	
344		7/12/2018	Data request #001 clarification call with UI. Attendees: Dick Oswald, Tyfannie Mack, Lisa Skumatz, ERS	
345		7/24/2018	Revised account number spreadsheet re-uploaded to UI via ERS's Sharepoint	
346		8/8/2018	Eversource fulfillment of Data Request #001	
347			Awaiting UI's fulfillment of June 22 data request; received update from Oswald on 8/22 that UI is in progress...	
348	Resolved	10/26/2018	UI fulfillment of Data Request #001	
349		2/20/2019	Approval of weighting scheme that incorporated utility participation data	
350		7/15/2019	Delivery of R1705 report review draft to stakeholders	
351		8/19/2019	Receipt of stakeholder and utility comments on R1705 report review draft	
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4	9/4/2019 CTEEB EVALUATION PROJECT DATA REQUEST & PRESENTATION TIMELINES- DRAFT			
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