

# 11/8/2020 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

	C1634 Energy Conscious Blueprint Impact Evaluation	
Started 4/5/18	4/5/2018	Data Request #1 transmitted to Eversource & UI. Deadline of 4/20 requested. Emails from EA confirmed timing on 4/5.
DATA REQ's DONE	2/27/2019	Data call with UI and Eversource to discuss utility billing meter account numbers
	C1635 Energy Opportunities (EO) Impact Evaluation	
Started data requests	1/31/2018	Tracking system data request (#1) sent to PAs by EA rep; due 2/20/2018
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".
DATA REQ's DONE		
	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



	<b>R1982 HVAC/DHW Performance and Potential Evaluation</b>	
Data requests start	2/5/2020	data request call with NMR and UI to confirm that UI can deliver HP program data by 2/21/20.
	7/16/2020	UI sent data to NMR / Evergreen
Not resolved well	8/4/2020	NMR and Evergreen discussed data from UI, and data from Eversource (previously) and are working to line everything up. We do not expect to go back to UI at this point.
	8/4/2020	NMR sent additional details to Evergreen regarding the files received to-date.
	8/6/2020	Evergreen provided recommended edits to NMR survey questions related to soft recruitment of potential R1982 participants
	10/7/2020	Evergreen and NMR coordinating on finalizing recruitment database
		1/0/1900
	<b>X1931 In-Depth PSD Review</b>	
	2/14/2020	Data for this project included in x1939 request. Data request #1 submitted to EA team - request for program tracking data
	10/21/2020	Data request #2 submitted
	10/26/2020	Phone call with UI and Eversource to discuss data request #2
	10/27/2020	Data delivery from UI and Eversource
	<b>X1939 Early Retirement</b>	
	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 wUI about residential data
	6/17/2020	Phone call wUI about upstream and SBEA data, also briefly discussed residential data
	7/13/2020	UI provided residential data
		1/0/1900
	<b>X1941 Multifamily Impact Evaluation</b>	
Data requests start	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. 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.
	1/0/1900	
	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
	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
	5/4/2020	Eversource provided requested data for X1941-2-TRC
	7/16/2020	UI provided project documentation for remaining projects from Data Request X1941-2-TRC
	8/10/2020	TRC submitted Data Request X1941-3-TRC to Eversource and UI
	8/25/2020	UI provided project documentation for X1941-3-TRC (deadline was extended, UI provided data on time)
	8/28/2020	TRC submitted Data Request X1941-4-TRC to Eversource
	8/31/2020	Eversource requested an extension until 9/4/20/20 for X1941-3r-TRC and 9/18/20 for X1941-4-TRC
	9/8/2020	Eversource provided files requested in X1941-3r-TRC
	9/18/2020	TRC submitted Data Request X1941-5-TRC to Eversource
	9/24/2020	Eversource provided files requested in X1941-4-TRC, request deadline of 10/2/20
	9/24/2020	Eversource requested an extension until 10/9/20 for X1941-5-TRC
	10/13/2020	Eversource provided files requested in X1941-5-TRC, request deadline of 10/9/20
	11/6/2020	TRC will submit Data Request X1941-6-TRC to Eversource and UI (expected date)