

3/4/2021

**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*

	<b>C1634 Energy Conscious Blueprint Impact Evaluation</b>	
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
	<b>C1635 Energy Opportunities (EO) Impact Evaluation</b>	
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		
	<b>C1901 - C&amp;I Sector-Wide Process Evaluation (non-SBEA)</b>	
	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.
	8/13/2020	UI reached out with responses to some pending questions.
	10/14/2020	Notified both utilities that we are beginning fielding of all primary data collection efforts.
	10/22/2020	Emails with Eversource inquiring about custom/prescriptive and gas/electric accounts.
	10/22/2020	Submitted Data Request #3 to both utilities
	10/22/2020	Emails with UI asking about gas/electric accounts and prescriptive/custom measures.
	10/27-10/29	Emails w/ Eversource regarding confusion over Data Request #3.
	10/27/2020	Met with UI to agree upon Data Request #3; they agree to a 11/20 delivery date.
	10/29/2020	Met with Eversource to agree upon Data Request #3; they agree to a 11/6 delivery date.
	11/9/2020	Received consumption data from Eversource.
	11/10/2020	Email with Eversource posing questions about consumption data.
	11/10/2020	Received response from Eversource on consumption data questions.
	11/19/2020	Received consumption data from UI; still need SBEA data
	11/19/2020	Submitted data clarification questions to UI
outstanding UI	11/30/2020	Submitted data clarification questions to UI
	12/7/2020	Call with UI to discuss consumption data and SBEA data request
	12/9/2020	Received clarification email from Eversource about some of our questions
	12/17/2021	Received SBEA data from UI
	12/21/2020	Received email from Eversource regarding questionable account numbers
	12/24/2020	Received email from Eversource stating the resolution of questionable account numbers would be a sizable undertaking for them.
	1/4/2021	C1901. Reached out to UI about missing account number.
	1/27/2021	C1901. No response from UI so reached out again.
	1/27/2021	C1901. Sent email to UI about missing account numbers of upstream lighting data
	1/11/2021	C1901. ODC submitted formal Data Request #4 to Eversource covering missing/erroneous emails
	1/14/2021	C1901. Held meeting with Eversource re Data Request #4
	1/14/2021	C1901. Sent email summarizing results of DR#4. Eversource committed to getting us requested data by Feb 4. Also mentioned outstanding issue regarding some missing consumption data; Alex agreed to look into it.
	1/26/2021	C1901. Alex responded regarding missing/erroneous email addresses. Stated some appear to be UI gas accounts, others unlikely to be matched.
	1/26/2021	C1901. Email to Eversource re the fact that our program file savings do not match savings achieved in CT online Dashboard.
	2/1/2021	C1901. Eversource responded that discrepancies between program data and savings achieved in database are likely due to incremental bids. Alex said she will try and get us a file that will help us sort this out.
2/6/2021-data issues - data mismatch not yet resolved.	2/2/2021	C1901. Email with UI re missing upstream lighting data
	2/3/2021	C1901. UI provided new OMM and RCx data to correct missing account numbers.
	2/4/2021	C1901. Email to UI clarifying we still had a pending SBEA data request
	2/15/2021	C1901. Notified UI of some consumption data that is still missing.
	2/5/2021	C1901. Eversource provided file with incremental bid info.
	2/8/2021	C1901. Communications with Eversource about development of a data request covering all remaining issues.
	2/9/2021	C1901. ODC provided a formal data request to Eversource containing several pending data issues.
	2/16/2021	C1901. Eversource provided responses to data issue noted in formal data request.
A little missing data	3/2/2021	C1901. Only remain data issues are a missing file from UI and some missing consumption data from Eversource.
		C1906 SEM Design and Evaluation
None to date	1/0/1900	1/0/1900
		R1959 Single-Family Renovations & Additions Potential Analysis
Started data requests	11/8/2019	Submitted data request 1a and 1b (due Nov 27)
	1/31/2020	Dick indicated that UI does not have information to share
Done	Summary	All data requests are fulfilled
		R1963a Short-Term Residential Lighting Analysis
Started data requests	9/11/2019	Data request call held; attendees: Miles (Eversource); Dick, Will (UI); Nicole, David (NMR); Rob C. (Cadeo); Lisa, Bob (EA Team)
	4/9/2020	Joel provides remaining data
done	Summary	All data requests are complete
		1/0/1900

	R1963B: Short Term Residential Analysis	
Started data requests	mid-2019	NMR requested program sales data from both Eversource and UI.
	10/25/2019	2015-19 data provided by Eversource
Requests complete	7/2/2020	Requested select MOUs from Eversource for data cleaning.
	R1965 HP/HPWH Baseline and Potential Assessment	
Started data requests	1/13/2020	Submitted data request 1 (due dates vary by component: 1/24, 2/21, and 2/28)
	1/14/2020	Dick and Miles provided dates they could attend the call
	7/8/2020	Another data call scheduled but canceled by UI
UI - Resolved, but not well	7/15/2020	UI sends new data file (request 1b)
	8/26/2020	Miles provides data clarification on overlap (request 1b)
	Summary	Data requests complete (moving forward regardless of data problems)
	R1973 Retail Non-lighting	
Data requests start	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
		Received next quarter data; integrated into appendix. No additional data requests.
		1/0/1900
	R1982 HVAC/DHW Performance and Potential Evaluation	
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
		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.
Not resolved well	8/4/2020	
	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
	11/23/2020	Emailed the EA Team about adding 2020 program participants to the study sample; Lisa confirmed
Sent data request; utilities requested delay in data discussion meeting	1/27/2021	Emailed data request for 2020 program records to UI and Eversource
	1/28/2021	Scheduled UI data request meeting for 2/1/21
	2/1/2021	UI requested a later date due to weather
	2/1/2021	Sent doodle poll to UI to select meeting time
	2/1/2021	Eversource responded and requested that the meeting be scheduled for mid-February
Data request meetings	3/2/2021	Data request meeting with Eversource
4 wks later than expected	3/2/2021	UI data request meeting postponed until Joel returns
	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
	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
		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
	6/17/2020	Phone call w/UI about upstream and SBEA data, also briefly discussed residential data
	7/13/2020	UI provided residential data
		1/0/1900
	X1941 Multifamily Impact Evaluation	
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	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
	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, project files & air sealing calculations)
	11/13/2020	interview with TRC and Eversource re: air sealing calculations
	11/16/2020	interview with TRC and UI re: air sealing calculations
	11/10/2020	TRC submitted Data Request X1941-6-TRC to Eversource (revised, project files only), deadline of 11/24/20
	11/12/2020	TRC submitted request for additional funding through contingency fund to help cover the cost of completing the study
	12/2/2020	Eversource provided files requested in X1941-6-TRC
		all data requests complete
		1/0/1900
	X1932 - Demand	all data requests complete
	5/22/2020	Draft data request to EA team
	6/9/2020	Data request to UI
	12/2/2020	Data request call with UI and EA Team (Attendees: Joel K., Paul G., Richard O., UI; Lisa S. Bob W., Ralph P., EA Team; Kiersten vT,
	1/6/2021	Data request call with EnergyHub (Attendees: Joel K., Paul G., Richard O., UI; Lisa S., EA Team; Kiersten vT, Yogi P., NMR; Aaron S
	1/12/2021	Google security assessment information submitted by DSA
	1/26/2021	DSA answered additional data security questions for EnergyHub
	1/29/2021	EnergyHub created example runtime reports for DSA's review
	Summary	Data request delivery in progress
	R2029 SF Weatherization Assessment and Update	
	3/2/2021	Awaiting requests for HES data from utilities
Awaiting data	3/2/2021	Awaiting WAP data from DEEP
	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
	Summary	Awaiting data from Utilities
	X1931-1 ISP Comm Boiler & Furnace Study	
	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
	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
	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
	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	1/0/1900
	R1983 - HES & HES-IE Process / Impact Evaluation	
	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
	Summary	Reviewing data from Utilities; Data request in progress.