



# 2020 Energy Efficiency Forecast Data Collection

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*Energy Efficiency Forecast Working Group*

Tim Costa

SYSTEM PLANNING



# Outline

- Program Data Collection Form Review
- State Budget Data Collection Form Review
- Distributed Generation Survey Form Review



# PROGRAM DATA

*Submitted by Program Administrators*



# Program Data Form Instructions

- **Form due to ISO on November 1, 2019**
  - **Submit to: [eeforecast@iso-ne.com](mailto:eeforecast@iso-ne.com)**
- Program Administrators (PAs) will be provided with the Forecast Data Form for the 2020 Energy Efficiency Forecast
  - Forms will be pre-populated with data submitted in previous years
- Where missing, PAs should add adjusted gross values to prior programs that have been submitted
- Add new programs only if they have been implemented
- Corrections are encouraged, as well as filling in missing values
- Send questions to [eeforecast@iso-ne.com](mailto:eeforecast@iso-ne.com)

# Program Data Form: Contact Tab

ISO New England Energy Efficiency Data Reporting Form	
Date:	
Utility Name:	
Contact Name:	
Phone Number:	
Email Address:	
<b>Form Instructions:</b>	
<input type="checkbox"/> Data from this form will be used by ISO-NE to develop a long range energy efficiency forecast.	
<input type="checkbox"/> Complete all open fields on this Form 1 - contact tab and on Form 2 - Data tab with required information.	
<input type="checkbox"/> Refer to definitions provided on the Data Definitions tab of this document for the basis of information to be completed on this Energy Efficiency Data Reporting Form. Also refer to Form 2 - Sample tab for example data input.	
<input type="checkbox"/> Data entered in this form should cover the requested period performance and spending data. The reporting period is typically for the past 12 months (Jan - Dec, or Jun - May) or entire program year, as specified.	
<input type="checkbox"/> Enter all information for each program in a different column on the "Form" tab.	
<input type="checkbox"/> Save and rename this file, use a naming convention that uniquely identifies the Utility Company and creation date of the file. (UtilityName_mm_dd_yyyy.xls)	
<input type="checkbox"/> This form may be reused to complete subsequent submissions to maintain consistency of the Energy Efficiency programs reported on.	
<input type="checkbox"/> Return form by the specified date via email attachment to <a href="mailto:eeforecast@iso-ne.com">eeforecast@iso-ne.com</a>	

# Program Data Form: Data Tab

1	ID	Energy Efficiency Data Reporting Form	Input Format	Program 1	Program 2
2	<b>1</b>	<b>Reporting Period Information</b>			
3	<b>1.1</b>	Reporting Period Start Date	Month/Year (DD/MM/YYYY)	1/1/2009	1/1/2009
4	<b>1.2</b>	Reporting Period End Date	Month/Year (DD/MM/YYYY)	12/1/2009	12/1/2009
5	<b>1.3</b>	Energy Efficiency Program Administrator	XYZ Company	XYZ Company	XYZ Company
6	<b>1.4</b>	Program Name	Program Name	Home Energy Solutions	New Homes
7	<b>1.5</b>	Program Type	Program Type	Lighting/Appliances	New Construction
8	<b>1.6</b>	Program Sector	Sector Name	Residential	Residential
9	<b>1.7.1</b>	Program Measures/End Uses 1	Measures/End Uses	Lighting	Lighting
10	<b>1.7.1.1</b>	Program Percentage of Measure/End Use 1 based on kWh	%	60%	50%
11	<b>1.7.1.2</b>	Program Percentage of Measure/End Use 1 based on kW	%	60%	50%
12	<b>1.7.1.3</b>	Program Percentage of Measure/End Use 1 based on \$	%	60%	50%
13	<b>1.7.2</b>	Program Measures/End Uses 2	Measures/End Uses	HVAC	HVAC
14	<b>1.7.2.1</b>	Program Percentage of Measure/End Use 2 based on kWh	%	20%	20%
15	<b>1.7.2.2</b>	Program Percentage of Measure/End Use 2 based on kW	%	20%	20%
16	<b>1.7.2.3</b>	Program Percentage of Measure/End Use 2 based on \$	%	20%	20%
17	<b>1.7.3</b>	Program Measures/End Uses 3	Measures/End Uses	Appliances	Appliances
18	<b>1.7.3.1</b>	Program Percentage of Measure/End Use 3 based on kWh	%	10%	10%
19	<b>1.7.3.2</b>	Program Percentage of Measure/End Use 3 based on kW	%	10%	10%
20	<b>1.7.3.3</b>	Program Percentage of Measure/End Use 3 based on \$	%	10%	10%
21	<b>1.7.4</b>	Program Measures/End Uses 4	Measures/End Uses	Hot Water	Hot Water
22	<b>1.7.4.1</b>	Program Percentage of Measure/End Use 4 based on kWh	%	10%	10%
23	<b>1.7.4.2</b>	Program Percentage of Measure/End Use 4 based on kW	%	10%	10%
24	<b>1.7.4.3</b>	Program Percentage of Measure/End Use 4 based on \$	%	10%	10%
25	<b>1.7.5</b>	Program Measures/End Uses 5	Measures/End Uses		Building Envelope
26	<b>1.7.5.1</b>	Program Percentage of Measure/End Use 5 based on kWh	%		8%
27	<b>1.7.5.2</b>	Program Percentage of Measure/End Use 5 based on kW	%		8%
28	<b>1.7.5.3</b>	Program Percentage of Measure/End Use 5 based on \$	%		8%
29	<b>1.7.6</b>	Program Measures/End Uses 6	Measures/End Uses		
30	<b>1.7.6.1</b>	Program Percentage of Measure/End Use 6 based on kWh	%		
31	<b>1.7.6.2</b>	Program Percentage of Measure/End Use 6 based on kW	%		
32	<b>1.7.6.3</b>	Program Percentage of Measure/End Use 6 based on \$	%		
:					
49	<b>1.7.11</b>	<b>Program Measure/End Use Summation - Calculated</b>			
50	<b>1.7.11.1</b>	Program Measure/End Uses Total kWh (calculated for reference only)	Calculated %	100%	98%
51	<b>1.7.11.2</b>	Program Measure/End Uses Total kW (calculated for reference only)	Calculated %	100%	98%
52	<b>1.7.11.3</b>	Program Measure/End Uses Total \$ (calculated for reference only)	Calculated %	100%	98%

# Program Data Form: Data Tab

1	ID	Energy Efficiency Data Reporting Form	Input Format	Program 1	Program 2
			⋮		
54	<b>2</b>	<b>Savings Goals for Report Period</b>			
55	2.1	Net Annualized kWh Program Goal	kWh	7,500,000	
56	2.2	Net Lifetime kWh Program Goal	kWh	90,000,000	
57	2.3	Net Summer Peak kW Program Goal	kW	2,000	
58	2.4	Net Winter Peak kW Program Goal	kW	2,000	
59	<b>3</b>	<b>Achieved Savings for Reporting Period</b>			
60	3.1	Net Annualized kWh Achieved	kWh	5,850,000	
61	3.2	Net Lifetime kWh Achieved	kWh	70,200,000	
62	3.3	Net Summer Peak kW Achieved	kW	1,560	
63	3.4	Net Winter Peak kW Achieved	kW	1,560	
64	<b>4</b>	<b>Committed Savings Not Yet Achieved for Reporting Period</b>			
65	4.1	Net Annualized kWh Committed	kWh	750,000	
66	4.2	Net Lifetime kWh Committed	kWh	9,000,000	
67	4.3	Net Summer Peak kW Committed	kW	200	
68	4.4	Net Winter Peak kW Committed	kW	200	
69	<b>5</b>	<b>Costs for Reporting Period</b>			
70	5.1	Administrative costs	\$	195,000	
71	5.2	Marketing costs	\$	117,000	
72	5.3	Payments to participants or contractors (Incentives, Rebates, Grants, Direct Install)	\$	3,025,000	
73	5.4	Performance Incentive	\$	468,000	
74	5.5	Research and Evaluation	\$	97,500	
75	5.6	Other	\$	-	
76	5.7	Total Costs	\$	3,902,500	
77	5.8	Program Year to Date Budget	\$	5,000,000	
78	<b>6</b>	<b>Program Participation for Reporting Period</b>			
79	6.1	Total number of applications received	#	12,250	
80	6.2	Number of program applications committed	#	875	
81	6.3	Number of program applications fulfilled (paid)	#	11,300	
82	6.4	Number of program applications rejected	#	75	
83	<b>7</b>	<b>Total Savings Program Year to Date (Achieved &amp; Committed) Calculated</b>			
84	7.1	Net First-year annual kWh (achieved + committed)	Calculated kWh	6,600,000	-
85	7.2	Net Lifetime kWh (achieved + committed)	Calculated kWh	79,200,000	-
86	7.3	Net Summer Peak kW (achieved + committed)	Calculated kW	1,760	-
87	7.4	Net Winter Peak kW (achieved + committed)	Calculated kW	1,760	-

# Program Data Form: Data Tab

1	ID	Energy Efficiency Data Reporting Form	Input Format	Program 1	Program 2
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88	<b>8</b>	<b>Adjusted Gross Data for Regional Energy Efficiency Database (REED)</b>		<b>(These data are for REED only and not part of EE Forecast)</b>	
89	<b>8.1</b>	<b>Savings Goal for Reporting Period</b>			
90	<b>8.1.1</b>	Adjusted Gross Annualized kWh Program Goal	kWh		
91	<b>8.1.2</b>	Adjusted Gross Lifetime kWh Program Goal	kWh		
92	<b>8.1.3</b>	Adjusted Gross Summer Peak kW Program Goal	kW		
93	<b>8.1.4</b>	Adjusted Gross Winter Peak kW Program Goal	kW		
94	<b>8.2</b>	<b>Achieved Savings for Reporting Period</b>			
95	<b>8.2.1</b>	Adjusted Gross Annualized kWh Achieved	kWh		
96	<b>8.2.2</b>	Adjusted Gross Lifetime kWh Achieved	kWh		
97	<b>8.2.3</b>	Adjusted Gross Summer Peak kW Achieved	kW		
98	<b>8.2.4</b>	Adjusted Gross Winter Peak kW Achieved	kW		
99	<b>8.3</b>	<b>Committed Savings Not Yet Achieved for Reporting Period</b>			
100	<b>8.3.1</b>	Adjusted Gross Annualized kWh Committed	kWh		
101	<b>8.3.2</b>	Adjusted Gross Lifetime kWh Committed	kWh		
102	<b>8.3.3</b>	Adjusted Gross Summer Peak kW Committed	kW		
103	<b>8.3.4</b>	Adjusted Gross Winter Peak kW Committed	kW		

- Blank program data form can be found on the EEFWG web page: [https://www.iso-ne.com/static-assets/documents/2019/09/eef2020\\_pa\\_data\\_form.xlsx](https://www.iso-ne.com/static-assets/documents/2019/09/eef2020_pa_data_form.xlsx)





# BUDGET DATA

*Submitted by States*

# Budget Data Form Instructions

- **Form due to ISO on November 1, 2019**
  - **Submit to:** [eeforecast@iso-ne.com](mailto:eeforecast@iso-ne.com)
- NEW: Funds allocated to Active Demand Reduction (ADR)
- System Benefit Charges (SBC)
- Forward Capacity Market (FCM) dollars allocated to EE
- RGGI dollars allocated to EE
- Dollars budgeted beyond SBC/FCM/RGGI
- Approved EE budgets where available
- May use the form submitted last year by adding an additional year
- Blank budget data form can be found on the EEFWG webpage:  
[https://www.iso-ne.com/static-assets/documents/2019/09/eef2020\\_state\\_budget\\_form.xlsx](https://www.iso-ne.com/static-assets/documents/2019/09/eef2020_state_budget_form.xlsx)
- Send questions to [eeforecast@iso-ne.com](mailto:eeforecast@iso-ne.com)

# Budget Data Form

	<i>Data Type</i>	<b>Fiscal Year 2018</b>			
<b>Sector</b>	<i>Res/Low Income/C&amp;I</i>	<b>Residential</b>	<b>Low Income</b>	<b>C&amp;I</b>	<b>TOTAL</b>
<b>SBC Rate</b>	<i>mil rate (\$/kWh)</i>				
<b>SBC \$</b>	\$				
<b>FCM \$</b>	\$				
<b>FCM %</b>	%				
<b>RGGI \$</b>	\$				
<b>RGGI %</b>	%				
<b>Other \$</b>	\$				
<b>Explanation of Source</b>	<i>Text</i>				
<b>Other \$</b>	\$				
<b>Explanation of Source</b>	<i>Text</i>				
<b>Other \$</b>	\$				
<b>Explanation of Source</b>	<i>Text</i>				
<b>Total</b>	\$				
<b>Does Total Include Active Demand Reduction?</b>	<i>Yes/No</i>				
<b>\$ Allocated to Active Demand Reduction</b>	\$				
<b>Estimated Annual Energy Savings†</b>	<i>kWh</i>				
<b>Estimated Summer Peak Savings†</b>	<i>kW</i>				
<b>Estimated Winter Peak Savings†</b>	<i>kW</i>				

- In the absence of sector details, just include totals
- % of the FCM/RGGI dollars = percent of the total FCM/RGGI dollars available for EE.
- **New this year: Funds allocated to Active Demand Reduction (ADR)**

# DISTRIBUTED GENERATION SURVEY

*Submitted by Program Administrators*

# Distributed Generation Survey Instructions

- **Form due to ISO on November 1, 2019**
  - **Submit to: [eeforecast@iso-ne.com](mailto:eeforecast@iso-ne.com)**
- EE funds used to develop distributed generation going back to 2012
- Dollars spent and savings achieved
- Number of projects by fuel type
- Blank distributed generation survey form can be found on the EEFWG web page: [https://www.iso-ne.com/static-assets/documents/2019/09/eef2020\\_dg\\_survey\\_form.xlsx](https://www.iso-ne.com/static-assets/documents/2019/09/eef2020_dg_survey_form.xlsx)
- Send questions to [eeforecast@iso-ne.com](mailto:eeforecast@iso-ne.com)

# Distributed Generation Survey

8	DG Funded Under EE Conservation Dollars										
9	1	Utility Name									
10	2	Utility Contact									UPDATE
11		Year		2012	2013	2014	2015	2016	2017	2018	2019 to date
12	3	CHP or Other DG Funded with EE Budget	yes/no								
13	4	CHP or Other DG Performance included in EE Program Performance	yes/no								
14		If answer to 3 and 4 are no, do not continue									
15	5	Budget Dollars Spent for CHP or Other DG	\$								
16	6	Net Annual Energy Savings Claimed	kWh								
17	7	Net Lifetime Energy Savings Claimed	kWh								
18	8	Net Summer Peak Capacity Savings Claimed	kW								
19	9	Net Winter Peak Capacity Saving Claimed	kW								
20	10	Net Annual Therm Savings Claimed	Therms								
21	11	Net Lifetime Therm Savings Claimed	Therms								
22	12	Total Number of Projects	#								
23	13	Number of Projects with Fuel Type - Nat Gas	#								
24	14	Number of Projects with Fuel Type - Oil/Diesel	#								
25	15	Number of Projects with Fuel Type - Biofuel	#								
26	16	Number of Projects with Fuel Type - Solar	#								
27	17	Number of Projects with Fuel Type - Wind	#								
28	18	Number of Projects with Fuel Type - Other	#								

# Questions

