Three-Year Term Report

Prepared for D.P.U. 11-120 Technical Session 3-16-15

Presentation to EEAC
March 31, 2015
Introduction

- Report to include data tables, narrative explanations, EM&V updates
- Report to incorporate by reference the Plan-Year Reports from Year 1 and Year 2
Data Tables

- **Pivot table format to allow for user manipulation**
  - PAs considered other formats, but, on balance, felt that pivot tables reduce likelihood of inaccuracies

- **Includes data for all core initiatives, including variances**
  - Variances between three year planned values and three year actuals

- **Evaluated results from each Plan-Year Report for Year 1 and Year 2 will be input**
  - Evaluated values, once reported, will not be amended by new factors
Significant Core Initiative Variances and Cost-Effectiveness

- Significant variances at core initiative level
- Percent variance set at 20% to match MTM
- Variance explanations isolate significant changes in budget, savings, and benefits
- PAs must demonstrate cost-effectiveness and explain if a core initiative is not cost-effective
Statutory Requirements

- Data tables will include information for each of the following, with explanation in narrative as noted
  - Low-Income Cost Allocation
  - Minimization of Administrative Costs
  - Competitive Procurement
• BCR screening tools will be provided as working Excel models
  • PAs have worked to harmonize among PAs and use common assumptions and naming conventions where possible

• Technical Reference Manual will be provided in digitized format, with option for paper
  • PAs working with vendor to create “Technical Reference Library”
  • TRL with Term Report will be for Year 3 only – Year 1 and Year 2 will be submitted with the appropriate Plan-Year report and incorporated by reference
Evaluation Studies

• Incorporate Year 1 and Year 2 studies and summaries by reference
• Study summaries designed to provide useful information, including:
  • Objectives
  • Applicable programs/core initiatives
  • Summary
  • Results and Significance
  • Study Method
  • Manner of Use
• Full Year 3 studies appended
Costs and Incentives

- **Costs/spending**
  - Invoice summary table, per 2011 & 2012 Annual Report Order
  - PAs to include information on C&I Direct Install in 2013-2015 Report (2011 & 2012 AR Order)

- **Performance Incentives**
  - Statewide three-year performance incentive model showing actual incentives earned by PAs
PAs presented straw template at Technical Session on March 16, 2015

PAs will consider comments of Department and other stakeholders in any future drafts prepared by PAs