



# Three-Year Term Report

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

Presentation to EEAC

March 31, 2015





# Introduction

- Background for straw included Order in D.P.U. 11-120-A, Phase II, Plan-Year Report template, D.P.U. 08-50-C, 2011-2012 Annual Report Orders, Green Communities Act
- 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

- 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 Model & Technical Reference Manual

- 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





# D.P.U. 11-120 Technical Session – March 16, 2015

- 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