

# Progress Report for Workgroup #5: Reporting and Verification of Savings

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## *Issues:*

### #10: BPA Role in Verifying Utility Self-funded Savings (utility generated)

- Summary: BPA has the same requirements for reporting of self-funded savings as for BPA-funded savings. Can requirements for reporting of self-funded savings be streamlined?
- Options:
  - Status quo
  - Reduced requirements for reporting self-funded savings

### #12: Timing of Utility Reporting to BPA (BPA generated)

### #13: Reporting and Consistency of Utility Self-Funded Savings (BPA generated)

- Summary (12 and 13): BPA would like to receive regular reporting of BPA-funded and self-funded savings to allow tracking of progress toward its targets. BPA would like to continue to receive regular forecasts of savings to also help with this tracking. In addition, BPA would like to receive periodic forecasts of expenditures to satisfy BPA Finance needs and ensure EEI funds are fully utilized.
- Options (12 and 13):
  - Status quo – utilities have flexibility to report when they want
  - More regular reporting of savings; regular forecasting of savings, expenditures

## *Summary of Progress to Date:*

- Kickoff meeting held March 4
- Combined Issues 12 and 13 and addressed them first – initial draft recommendations:
  - Reporting savings
    - What's included: Actual EEI-funded (invoiced) savings and self-funded savings
    - Frequency: Best practice is monthly reporting, minimum is every six months
    - Utilities affected: All
    - How implemented: Via IS 2.0/NED
  - Forecasting savings
    - What's included: EEI-funded and self-funded savings
    - Frequency: Quarterly projections (or most quarters)
    - Utilities affected: Top-20 utilities currently but could be expanded
    - How implemented: Through EERs currently
  - Forecasting expenditures
    - What's included: EEI expenditures
    - Frequency: 2<sup>nd</sup> quarter of each fiscal year covering the last 2 quarters of the fiscal year
    - Utilities affected: TBD

- How implemented: Through EERs initially
- Had some discussion under Issue 10 on non-reportable measures and the desire to reduce what is considered non-reportable

### *Next Steps:*

- EE needs to review draft recommendations for Issues 12 and 13, flesh them out, and bring them back to workgroup for further discussion
- Analytical work needed:
  - Is 'hockey stick' driven by completion dates and/or decision on when to report?  
Deemed measures and/or custom projects?
  - Other?
- Take up Issue 10 in Workgroup
- Two-hour meetings scheduled for April 1 and 22

### *Request for Feedback*

- Any reactions to initial draft recommendations?
- Would like utility feedback on whether 'hockey stick' pattern of reporting is driven by completion dates and/or decision on when to report

### **Please contact co-chairs directly for follow-up or your Energy Efficiency Representative**

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