

Draft Guideline for Annual Reporting of CDM Initiatives

Background:

Further to the Board's orders approving distributor conservation and demand management (CDM) plans, the Board requires that each distributor file an annual report including a cost benefit analysis.

The Board's *Total Resource Cost Guide* provides distributors with direction on the techniques and data requirements to perform a total resource cost (TRC) analysis. This document consists of the Board's instructions on the content and format of the annual report.

Instructions:

The annual report should consist of the following sections;

1. Introduction
2. Evaluation of Overall Plan
3. Discussion of Programs and Cost Benefit Analysis
4. Lessons Learned
5. Conclusion

1. Introduction

In the introduction section distributors will provide a background to the annual report and the local context of its CDM initiative.

2. Evaluation of Overall Plan

The Evaluation of Overall Plan will provide a high level overview of the effectiveness of a distributor's CDM plan. This section will discuss the aggregated investment amounts as well as savings associated with the plan. This section should present the following statistics:

- a) Annual kWh, peak kW and peak kVa saved for the plan (total and by major customer segments i.e. residential, commercial/institutional, industrial);
- b) Annual kWh, peak kW and Peak kVa saved as a percentage of the distributor's total kWh delivered, peak kW and peak kVa respectively, broken out according to major customer segments (i.e. residential, commercial/institutional, industrial);
- c) Conservation expenditures;
- d) Gross participant expenditures by customer class
- e) Conservation expenditures per kWh delivered, peak kW and Peak kVa, broken out by major customer segments;
- f) Net present value of TRC benefits, broken out by major customer segment;
- g) First year and cumulative rate impacts of their plan of conservation programs, broken out by major customer segments.

3. Discussion of the Programs

The Discussion of Programs section will consist of the following information:

- a) A detailed discussion of each program within each rate class;
- b) Number of participants;
- c) Expenditures of the program (including and identifying utility direct and indirect capital and operating expenditures and participant costs, including and identifying incentives);
- d) Dollars spent per program participant;
- e) Incentive amount per program participant;
- f) Measure lifetime electricity savings (kWh, kW and kVa) and other resources saved (total and per participant) for each program, (custom project savings assessments should be filed at this stage);
- g) All TRC test inputs and the source of the inputs;
- h) TRC results;

Note: If the TRC test inputs vary from those provided in the Assumptions and Measures List, the distributor must identify the variations and file additional information supporting the variation in an appendix to this report.

4. Lessons Learned

In this section the distributor will indicate what has been learned over the course of the year. The goal of this section is to evaluate and benchmark programs for greater efficiency in delivery and cost effectiveness and to provide information to other distributors with respect to CDM programs.

5. Conclusion

The conclusion section will consist of the distributor's summary of its CDM Plan over the previous year.