



Guideline for Annual Reporting of CDM Initiatives

Background:

Further to the Ontario Energy Board's (the "Board") orders approving electricity distributor conservation and demand management ("CDM") plans, the Board requires that each distributor file an annual report including a cost benefit analysis. This document consists of the Board's instructions on the content and format of the annual report.

Instructions:

Distributors should file five (5) hard copies and two (2) electronic copies of their annual report with the Board Secretary by March 31 of the following year. Hard copies should be filed with the Board Secretary at Ontario Energy Board, P.O. Box 2319, 2300 Yonge Street, Suite 2700, Toronto, ON, M4P 1E4. One electronic copy must be in PDF format consisting of the entire report. The second electronic copy must be in Excel format and consist only of the appendices. These electronic copies must be included on a disk with the hard copies. All filings should have the title: "***(Insert Name of Distributor) - RP-2004-0203(Insert Distributor EB #) - Conservation and Demand Annual Report***".

These filing Guidelines and the Excel templates of Appendix A and Appendix B are available at: http://www.oeb.gov.on.ca/html/en/industryrelations/ongoingprojects_distconservation.htm

Format:

The annual report should consist of the following sections;

1. Introduction
2. Evaluation of the CDM Plan
3. Discussion of Programs
4. Lessons Learned
5. Conclusion

1. Introduction

In the introduction section of the annual report, distributors should provide a general overview of their CDM initiative including any relevant local context.

2. Evaluation of the CDM Plan

The Evaluation of the CDM Plan will provide an overview of the effectiveness of a distributor's CDM plan. The distributor's CDM plan consists of all initiatives begun or completed within the previous year.¹ To complete this section, please complete Appendix A. Distributors should complete the information for each metric (rows) and broken down by category (columns). Where a category is not available, distributors should use one of the "other" columns.

3. Discussion of the Programs

The Discussion of Programs section will provide details on each of the distributor's programs. To complete this section, please complete Appendix B for **each** program in the plan. If the type of program or the benefits of a program do not fit in the cells provided, create the appropriate headings and measures under the "Other programs (specify)" section. Appendix B must be completed for each of the distributor's programs. In section C of Appendix B, one or more category may apply.

Note:

Stand alone education or marketing programs that do not have quantifiable benefits should report all relevant information (some relevant assessment criteria are identified in Table 3.1 of the TRC Guide). Marketing or support programs (i.e. programs designed to enhance market acceptance of other programs) should not be reported individually as they are components of other programs. Similarly, the costs of marketing or support programs should be allocated to the programs they support.

Distributors who have pilot programs or other programs for which cost effectiveness data was not provided by the Board (in the TRC Guide) should provide their own values, if available, and report all relevant information (attach a separate table if required).

If the TRC test inputs used by the distributor vary from those provided in the TRC Guide, the distributor must identify the variations and file additional information supporting the variation in an appendix to this report. If the specific technology promoted by a distributor was not included by the Board (in the TRC Guide), distributors may select a similar technology from the TRC Guide as a proxy for annual reporting purposes. Distributors that select a proxy technology for reporting must identify the actual technology in their annual report and the similarities between the proxy technology and the actual technology.

¹ For the first reporting year only (2005), distributors should include initiatives begun in 2004.

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. Distributors should indicate if a program is considered a success or not and whether the LDC should continue its delivery.

5. Conclusion

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

Note:

For the purpose of reporting programs initiated under the "third tranche" initiative, distributors are reminded that these reporting requirements will not be used to determine prudence of expenditures. All third tranche approvals are subject to final orders.