

Triannual reporting	Metric	Units	Details
Recommended reporting requirements - consistent with PEIEC's proposed portfolio	Narratives		
	Portfolio description		Overview of portfolio accomplishments.
	Program descriptions		By program. Include description, participant definition.
	Program successes		By program.
	Variations in cost-effectiveness over 25%		By program.
	Variations in savings over 25%		By program.
	Variations in budget over 25%		By program.
	Program challenges		By program.
	Lessons learned		By program.
	Cost-effectiveness		
	Planned cost-effectiveness	Ratio	PAC test. By program, sector, portfolio, year.
	Actual cost-effectiveness	Ratio	PAC test. By program, sector, portfolio, year.
	Savings		
	Planned savings	kW, MWh	Gross and net annual capacity for summer and winter (kW), gross and net annual energy for annual and lifetime (MWh). By program, sector, portfolio, utility, year.
	Actual savings	kW, MWh	Gross and net annual capacity for summer and winter (kW), gross and net annual energy for annual and lifetime (MWh). By program, sector, portfolio, utility, year.
	Actual as a percent of planned savings	%	Gross and net annual capacity for summer and winter (kW), gross and net annual energy for annual and lifetime (MWh). By program, sector, portfolio, utility, year.
	Savings as a percent of sales	%	Annual electric energy savings (MWh) as a percent of annual electric sales (MWh). By portfolio, year.
	Benefits		
	Planned benefits	\$	NPV benefits (energy, capacity, transmission, distribution). By program, sector, portfolio, year.
	Actual benefits	\$	NPV benefits (energy, capacity, transmission, distribution). By program, sector, portfolio, year.
	Actual as a percent of planned benefits	%	NPV benefits (energy, capacity, transmission, distribution). By program, sector, portfolio, year.
	Net benefits	\$	NPV net benefits by program, sector, portfolio.
	Budget		
Planned budget	\$	NPV costs by cost categories (inc. administration, marketing, evaluation, sales technical assistance & training, participant incentive, participant costs, performance incentives, other). By program, sector, and portfolio, year.	
Actual budget	\$	NPV costs by cost categories (inc. administration, marketing, evaluation, sales technical assistance & training, participant incentive, participant costs, performance incentives, other). By program, sector, and portfolio, year.	
Actual as a percent of planned budget	%	By cost categories (inc. administration, marketing, evaluation, sales technical assistance & training, participant incentive, participant costs, performance incentives, other). By program, sector, and portfolio, year.	

	Participants		
	Planned participants	Number	By program, sector, portfolio, year.
	Planned participants as a percent of eligible customers	%	By program, sector, portfolio, year.
	Actual participants	Number	By program, sector, portfolio, year.
	Actual participants as a percent of eligible customers	%	By program, sector, portfolio, year.
	Actual participants as a percent of planned participants	%	By program, sector, portfolio, year.
	Funding Sources		
	Funding	\$	By source (MECL, Summerside, Federal, Provincial). By year.
	Key assumptions		
	Discount rate	%	Include source, real or nominal, number of years over which it's evaluated.
	Avoided costs	\$/MWh, \$/kW	Energy, capacity, transmission, distribution, carbon prices, and other key benefits.
	Pollutants	Metric tons	NOx, SOx, CO2. By Sector, year.
	Annual average marginal line losses	%	Transmission and distribution, applied to energy benefits.
	On-peak marginal line losses	%	Transmission and distribution, applied to capacity and transmission and distribution benefits.
	Variables included in cost-effectiveness test		List costs and benefits for each test used.
	Weighted average measure life	Years	Portfolio, program.
	Evaluation study results		Provide all evaluation study results that occurred within the 3-year term. Organized by sector.
Recommended reporting requirements - consistent with Synapse's recommendations	Savings (Other fuels)		
	Planned savings	Therms, MMBTU, Gallons	Annual and lifetime natural gas savings (therms), deliverable fuel savings i.e. oil and propane (annual MMBTU), water savings (annual gallons). By program, sector, portfolio, year.
	Actual savings	Therms, MMBTU, Gallons	Annual and lifetime natural gas savings (therms), deliverable fuel savings i.e. oil and propane (annual MMBTU), water savings (annual gallons). By program, sector, portfolio, year.
	Actual as a percent of planned savings	Therms, MMBTU, Gallons	Annual and lifetime natural gas savings (therms), deliverable fuel savings i.e. oil and propane (annual MMBTU), water savings (annual gallons). By program, sector, portfolio, year.
	Benefits (Other fuels)		
	Planned benefits	\$	By benefit (natural gas, deliverable fuels, water). By program, sector, portfolio, year.
	Actual benefits	\$	By benefit (natural gas, deliverable fuels, water). By program, sector, portfolio, year.
	Actual as a percent of planned benefits	%	By benefit (natural gas, deliverable fuels, water). By program, sector, portfolio, year.
Good practice	Non-energy benefits		
	Value of non-energy benefits	\$/MWh or % of benefits	By benefit type. By program, sector, portfolio, year.

Annual reporting	Metric	Units	Details
Recommended reporting requirements - consistent with PEIEC's proposed portfolio	Narrative		
	Program successes		By program.
	Variations in cost-effectiveness over 25%		By program.
	Variations in savings over 25%		By program.
	Variations in budget over 25%		By program.
	Program challenges		By program.
	Lessons learned		By program.
	Cost-effectiveness		
	Planned cost-effectiveness	Ratio	PAC test. By program, sector, portfolio.
	Actual cost-effectiveness*	Ratio	PAC test. By program, sector, portfolio.
	Savings		
	Planned savings	kW, MWh	Gross and net annual capacity for summer and winter (kW), gross and net annual energy for annual and lifetime (MWh). By program, sector, portfolio, utility.
	Actual savings*	kW, MWh	Gross and net annual capacity for summer and winter (kW), gross and net annual energy for annual and lifetime (MWh). By program, sector, portfolio, utility.
	Actual as a percent of planned savings	%	Gross and net annual capacity for summer and winter (kW), gross and net annual energy for annual and lifetime (MWh). By program, sector, portfolio, utility.
	Benefits		
	Planned benefits	\$	NPV benefits (energy, capacity, transmission, distribution). By program, sector, portfolio, year.
	Actual benefits*	\$	NPV benefits (energy, capacity, transmission, distribution). By program, sector, portfolio, year.
	Actual as a percent of planned benefits	%	NPV benefits (energy, capacity, transmission, distribution). By program, sector, portfolio, year.
	Net benefits	\$	NPV net benefits by program, sector, portfolio.
	Budget		
	Planned budget	\$	Cost categories (administration, marketing, incentive, evaluation and participant costs). By program, sector, and portfolio.
	Actual budget	\$	Cost categories (administration, marketing, incentive, evaluation and participant costs). By program, sector, and portfolio.
	Actual as a percent of planned budget	%	Cost categories (administration, marketing, incentive, evaluation and participant costs). By program, sector, and portfolio.
	Participants		
	Planned participants	Number	By program, sector, portfolio.
	Actual participants	Number	By program, sector, portfolio.
	Actual as a percent of planned participants	Number	By program, sector, portfolio.

	Funding Sources		
	Funding	\$	By source (MECL, Summerside, Federal, Provincial). By year.
	Key assumptions		
	Discount rate	%	Include source, real or nominal, number of years over which it's evaluated.
	Avoided costs	\$/MWh, \$/kW	Energy, capacity, transmission, distribution, carbon prices, and other key benefits.
	Pollutants	Metric tons	NOx, SOx, CO2. By Sector, year.
	Annual average marginal line losses	%	Transmission and distribution, applied to energy benefits.
	On-peak marginal line losses	%	Transmission and distribution, applied to capacity and transmission and distribution benefits.
	Variables included in cost-effectiveness test		List costs and benefits for each test used.
	Weighted average measure life	Years	Portfolio, program.
Recommended reporting requirements - consistent with Synapse's recommendations	Savings (Other fuels)		
	Planned savings	Therms, MMBTU, Gallons	Annual and lifetime natural gas savings (therms), deliverable fuel savings i.e. oil and propane (annual MMBTU), water savings (annual gallons)
	Actual savings*	Therms, MMBTU, Gallons	Annual and lifetime natural gas savings (therms), deliverable fuel savings i.e. oil and propane (annual MMBTU), water savings (annual gallons)
	Actual as a percent of planned savings	Therms, MMBTU, Gallons	Annual and lifetime natural gas savings (therms), deliverable fuel savings i.e. oil and propane (annual MMBTU), water savings (annual gallons)
	Benefits (Other fuels)		
	Planned benefits	\$	By benefit (natural gas, deliverable fuels, water). By program, sector, portfolio.
	Actual benefits*	\$	By benefit (natural gas, deliverable fuels, water). By program, sector, portfolio.
	Actual as a percent of planned benefits	%	By benefit (natural gas, deliverable fuels, water). By program, sector, portfolio.

* For annual reporting, report evaluated values where available. If the relevant evaluation studies have not been completed within the annual term, report deemed or preliminary values. Indicate in reporting table whether the values are evaluated or otherwise.

Quarterly reporting – Required for the first year			
Recommended reporting requirements - consistent with PEIEC's proposed portfolio	Program launch qualitative updates		By program.
	Customers		
	Planned first year customer count	Number	By program.
	Customer count YTD	Number	By program.
	YTD customers as a percent of planned first year customers	%	By program.