

REPORTING STRUCTURE FOR COMED, DCEO AND AIU EM&V REPORTS 2008-2010 PROGRAMS

DRAFT – 06/16/09

Items We Kept in Mind

- There will be different audiences for the reports – legislature, utility management, program managers, and other evaluators. Each needs differing levels of detail in the reports.
- The number of programs being fielded by ComEd (13), DCEO (9) and AIU (10) means that there will be a great deal of reporting, much of it program specific. The question becomes whether the report is broken down into 1) sections where each program is discussed (i.e., methods section with each program discussed within that section) or 2) into sections that encompass each program. The evaluators are strongly in favor of option 2. Given the number of programs and that each is mostly being evaluated independently with its own methods and timeline, it will be simplest and most logical to produce program-level evaluation reports that are free standing.
- While content is important, the structure of the reports is critical as it must be easy to find information that is relevant to each of the users.

Evaluator Suggestions

- There will be two types of annual documentation. The first has a higher level discussion of methods across all programs and then portfolio and program specific results. This document would be created for each program year. The second would have much more detailed information that is more relevant to program managers and other evaluators. The second annual report is really more than a single document; it is a set of stand-alone documents that are program specific. These documents would be written first and then information from them pulled into the first document. Submitted at the same time?
- Use appendices for areas of high technical reporting such as detailed outputs and results of statistical methods.
- Use page numbering that is sequential through each document (i.e., 1 to 200 not by section).
- Use Tables and Figures that are sequential through the document (i.e., Figure 1, Figure 10, not Figure 1.1, Figure 2.4, etc).
- Use numbered headings through the first 3 headings to allow for more easily discussing sections.

Outline for Program Level Detailed Report

This level report would be created for ComEd, DCEO, AIU-Residential, and AIU-Commercial. There would be several of these reports covering each of the evaluated programs or groups of programs (as the four DCEO Low Income programs are being evaluated within two work plans). The audience for these reports would be the utility managers, program managers, some SAG members, and other evaluators.

- 1) Executive Summary – 2 page max
- 2) Introduction to Program
 - a) Program Description
 - b) Evaluation Questions
- 3) Evaluation Methods
 - a) Analytical Methods
 - b) Data Sources
 - c) Sampling Plan
- 4) Program Level Results
 - a) Impact
 - b) Process
- 5) Conclusions and Recommendations
- 6) Appendices
 - a) Data Collection Instruments
 - b) Other appendices as needed

Outline for Portfolio Level Report

Each program year there would be three of this level report created; one for ComEd (DCEO within ComEd embedded in results), AIU-Residential, and AIU-Commercial (DCEO within Ameren Illinois embedded in results). The audience for this report would be the legislature, SAG members, and utility managers. The impact results would show past and current program year results and sum the results to show the total across all program years within the report. This report would be relatively small (probably around 20 pages or so) as it is a compilation of the detailed reports and pulls from them directly.

- 1) Executive Summary – 2 page max
- 2) Introduction to Portfolio and Programs
 - a) Relatively brief discussion of the programs that make up the portfolio
 - b) Evaluation questions (brief)

- 3) Evaluation Methods (overview of those used by which programs)
- 4) Portfolio Level Results and Recommendations
 - a) Portfolio Level Impact Results
 - b) Cross-cutting Process Results
- 5) Program Level Results and Recommendations
 - a) Program 1 results
 - b) Program 2 results
 - c) Program 3 results
 - d) Etc.

DVD of All Reports

At the end of the evaluation contract, each prime contractor would create PDF files of each of the reports generated across the three years, create a table as shown below that is a READ ME file, and put all reports onto a single DVD for ComEd, AIU, DCEO, and the ICC. Each report would have the unique ID at the beginning of the file name for ease of reference and be filed by folders representing entities and program years.

N	Unique ID	Entity	Report Name	Date of Final Report	Comments
1	CE01	ComEd	XXX	11/15/09	Detailed Report for XX Program
2	DC01	DCEO	XXX	XX/XX/XX	Detailed Report for XX Program
3	AC01	AIU-Commercial	XXX	XX/XX/XX	
4	AR01	AIU-Residential			
5	CEPY1	ComEd/DCEO			PY1 Portfolio Level Report
6		Etc.			