

INSTRUCTIONS TO FILL OUT A CIP WORKSHEET:

GENERAL REPORTING INFORMATION

- Row 2 Enter utility name
- Row 3 Enter program name
- Row 4 Enter New, Continuing, or Modification

Conservation Improvement Program Report	
Utility:	
Program Name:	
New, Continuing, Modification:	

PROGRAM TYPE

Does the program have **indirect benefits** such as an audit, education, R&D, renewable, or other, and no energy or demand savings, or does it have **direct benefits**, which includes energy and/or demand savings. Programs will either be indirect or direct.

Rows 9-14 Enter "X" on the line that best applies for all years.

Program Type (Enter "X" where applicable)	2001 Actual	2002 Budget	2003 Budget	Historical Info
Indirect (No kWh or KW Savings) check below				
Audit/Info				
Education				
R&D				
Renewable				
Other				
Direct (kWh or kW Savings)				

COST COMPONENTS

The first step is to determine the dollars spent per program in the various cost categories listed in Rows 16-21. One possible suggestion might be to:

- Determine your lump sum total DSM and conservation expenditures for the year.
- Divide this total by some determinant that gives you total expenditure by program.
- Then determine program expenditures by cost components.
- Do the same for your budgeted dollars for the forecast period – years 2002 and 2003 in the categories listed on Rows 16-20.
- For Participant Incentives, use rebate loan or grant dollars offered by the utility.

Rows 16-21 Enter the dollars that you spent on the program in 2001, and the budgeted dollars for the forecast reporting period – years 2002 and 2003 in the cost components listed on Rows 16-21.

	2001 Actual	2002 Budget	2003 Budget	Historical Info
Cost Components (Dollars)				
Project Delivery				
Utility Administration				
Advertising & Promotion				
Evaluation Labor & Expenses				
Participant Incentives				
Other				
Total Budget				

PROGRAM PARTICIPANTS

Row 24 Enter the number of program participants for 2001, and the anticipated participants for the forecast reporting period – years 2002 and 2003. For some of the indirect programs you may not have number of program participants, enter N/A for Not Applicable.

	2001 Actual	2002 Budget	2003 Budget	Historical Info
Program Participants				
Total Number of New Participants				

PERCENT OF SPENDING BY CUSTOMER SEGMENT

What percentage of the expenditures identified on Row 22 will be spent on the following customer segments: *Residential, Commercial, Industrial, C&I Combined, or Other*. Please include Agricultural in the *Other* segment. Row 31 must equal 100%.

Rows 26-30 Enter expenditures as a percentage of the Total budget listed on Row 22 for each of the customer segments where this program applies. If the program has only one applicable customer segment, enter 100% in that customer segment. Do the same for the forecast reporting period – years 2002 and 2003. Row 31 must equal 100%.

	2001 Actual	2002 Budget	2003 Budget	Historical Info
% of Spending by Customer Segment				
Residential				
Commercial				
Industrial				
C&I Combined				
Other				
Total % of Spending (must equal 100%)				

LOW INCOME PARTICIPATION

What percent of the customers identified on Row 24 are low income participants? What percent of the Total budget identified on Row 22 is for low income participants?

Row 33 Enter the percentage of low income participants.

Row 34 Enter the percentage of the Total Budget identified on Row 22 that will be used for low income participants.

	2001 Actual	2002 Budget	2003 Budget	Historical Info
Low Income Participation				
Participants % (% of Row 24)				
Budget % (% of Row 22)				

RENTER PARTICIPATION

What percent of the customers identified on Row 24 are renter participants? What percent of the Total Budget identified on Row 22 is for renter participants?

Row 36 Enter the percentage of renter participants.

Row 37 Enter the percentage of the Total Budget identified on Row 22 that will be used for renter participants.

	2001 Actual	2002 Budget	2003 Budget	Historical Info
Renter Participation				
Participants % (% of Row 24)				
Budget % (% of Row 22)				

TYPE OF INCENTIVE

What type of incentive do you offer the participant: loan, rebate, direct installation or grant? If possible, limit your selection to one type of incentive.

Rows 39-42 Enter "X" in the lines that best apply for all years.

	2001 Actual	2002 Budget	2003 Budget	Historical Info
Type of Incentive (Enter "X" where applicable)				
Loan				
Rebate				
Direct Installation				
Grant				

END-USE TARGET

What is end-use target of the program? Enter "X" for all that apply. For air source and ground source heat pumps, select Space Heating and Cooling Combination.

Rows 44-53 Enter "X" in the Row that best applies for all years.

	2001 Actual	2002 Budget	2003 Budget	Historical Info
End-Use Target (Enter "X" where applicable)				
Lighting				
Motor				
Process				
Refrigeration				
Space Cooling (only)				
Space Heating (only)				
Space Heating & Cooling Combination				
Water Heating				
Weatherization				
General/Other				

ENERGY SAVINGS

- Every Direct Benefit Program (identified in Row 14) must have kWh and/or kW Savings per Participant, or Total Program kWh and/or kW Savings. For some of the programs, standard per participant kWh and kW savings are included on Rows 55 and/or 58 – these standards will be used by all the cooperatives to provide a consistent energy savings measurement.
- For programs where standard per participant savings are not calculable, the utility must enter *Total Program kWh Savings and/or Total Program kW Savings* in Rows 56 and/or 59.
- Rows 57 and 60 calculate *Cost per kWh Saved and Cost per kW Saved*.
- Enter data for all years.

Rows 55 or 56 Enter kWh Savings per Participant or Total Program kWh Savings.

Rows 58 or 59 Enter kW Savings per Participant or Total Program kW Savings.

Rows 57 & 60 No data entry is required – calculated from the data submitted above. But please verify that cells do contain results.

	2001 Actual	2002 Budget	2003 Budget	Historical Info
Energy Savings				
KWh Savings per Participant				
Total Program kWh Savings (E24 times E55)				
Cost per kWh Saved (E22 divided by E56)				
kW Savings per Participant				
Total Program kW Savings (E58 times E24)				
Cost per kW Saved (E22 divided by E59)				

1	CONSERVATION IMPROVEMENT PROGRAM REPORT SAMPLE				
2	Utility: XYZ Utility				
3	Program Name: High-Efficiency Air Conditioning Rebate				
4	New, Continuing, Modification: Continuing				
5	SAMPLE				
6		2001 Actual	2002 Budget	2003 Budget	Historical Info
7	Program Type				
8	Indirect (No kWh or kW Savings) check below				
9	Audit/Info				
10	Education				
11	R&D				
12	Renewable				
13	Other				
14	Direct (kWh or kW Savings)	X	X	X	
15	Cost Components (Dollars)				
16	Project Delivery	\$12,234	\$13,000	\$13,000	
17	Utility Administration	3,676	3,600	3,600	
18	Advertising & Promotion	6,235	6,000	6,000	
19	Evaluation Labor & Expenses	5,678	6,000	6,000	
20	Participant Incentives	96,000	96,000	96,000	
21	Other	12,233	13,000	13,000	
22	Total Budget	\$136,056	\$137,600	\$137,600	
23	Program Participants				
24	Total Number of New Participants	480	480	480	
25	% of Spending by Customer Segment				
26	Residential	100%	100%	100%	
27	Commercial	0%	0%	0%	
28	Industrial	0%	0%	0%	
29	C&I Combined	0%	0%	0%	
30	Other	0%	0%	0%	
31	Total % of Spending (must equal 100%)	100%	100%	100%	
32	Low-Income Participation				
33	Participants % (% of Row 24)	2%	2%	2%	
34	Budget % (% of Row 22)	5%	5%	5%	
35	Renter Participation				
36	Participants % (% of Row 24)	0%	0%	0%	
37	Budget % (% of Row 22)	0%	0%	0%	
38	Type of Incentive				
39	Loan				
40	Rebate	X	X	X	
41	Direct Installation				
42	Grant				
43	End-Use Target				
44	Lighting				
45	Motor				
46	Process				
47	Refrigeration				
48	Space Cooling (only)	X	X	X	
49	Space Heating (only)				
50	Space Heating & Cooling Combination				
51	Water Heating				
52	Weatherization				
53	General/Other				
54	Energy Savings				
55	kWh Savings perSParticipant	400	400	400	
56	Total Program kWh Savings (E24 times E55)	192,000	192,000	192,000	
57	Cost per kWh Saved (E22 divided by E56)	0.7086	0.7167	0.7167	
58	kW Savings per Participant	1	1	1	
59	Total Program kW Savings (E58 times E24)	480	480	480	
60	Cost per kW Saved (E22 divided by E59)	\$283	\$287	\$287	

1 CONSERVATION IMPROVEMENT PROGRAM REPORT TEMPLATE				
2	Utility:	Aggregating: Yes ___ No ___		
3	Program Name:	If yes, with what other utilities?		
4	New, Continuing, Modification:	Who will file report?		
5	Use this sheet to print a paper copy for calculations	2001	2002	2003
6		Actual	Budget	Budget
7	Program Type (Enter "X" where applicable)	*Report once		Historical Info
8	Indirect (No kWh or kW Savings) check below			
9	Audit/Info			
10	Education			
11	R&D			
12	Renewable			
13	Other			
14	Direct (kWh or kW Savings)			
15	Cost Components (Dollars)			
16	Project Delivery			
17	Utility Administration			
18	Advertising & Promotion			
19	Evaluation Labor & Expenses			
20	Participant Incentives			
21	Other			
22	Total Budget	*		
23	Program Participants			
24	Total Number of New Participants			
25	% of Spending by Customer Segment			
26	Residential			
27	Commercial			
28	Industrial			
29	C&I Combined			
30	Other			
31	Total % of Spending (must equal 100%)			
32	Low-Income Participation			
33	Participants % (% of Row 24)			
34	Budget % (% of Row 22)			
35	Renter Participation			
36	Participants % (% of Row 24)			
37	Budget % (% of Row 22)			
38	Type of Incentive (Enter "X" where applicable)			
39	Loan			
40	Rebate			
41	Direct Installation			
42	Grant			
43	End-Use Target (Enter "X" where applicable)			
44	Lighting			
45	Motor			
46	Process			
47	Refrigeration			
48	Space Cooling (only)			
49	Space Heating (only)			
50	Space Heating & Cooling Combination			
51	Water Heating			
52	Weatherization			
53	General/Other			
54	Energy Savings			
55	kWh Savings perSParticipant			
56	Total Program kWh Savings (E24 times E55)			
57	Cost per kWh Saved (E22 divided by E56)			
58	kW Savings per Participant			
59	Total Program kW Savings (E58 times E24)			
60	Cost per kW Saved (E22 divided by E59)			