

## Minimum Reporting Requirements

### 1. Introduction

This document outlines details related to the Minimum Reporting Requirements of purchased and self-generated utility data maintained and submitted by campuses and medical centers.

### 2. Purpose

In order to collect, maintain, and provide readily accessible utility data to University stakeholders and satisfy system reporting and planning needs (budgetary, legislative, regulatory, Presidential initiatives, etc.), these expected Minimum Reporting Requirements are established.

Benefits:

- Allows a comprehensive view of utility cost and use at the campus level and systemwide level.
- Provides a centralized repository of utility data that is easily accessible.
- Provides a metric for achieving campus specific and systemwide policy goals.
- Provides guidance on the characteristics of utility data to be recorded.

### 3. Submission Methodology

Campuses and medical centers may use EnergyCAP<sup>1</sup> to meet Minimum Reporting Requirements and/or may determine their own methodology in order to achieve the Minimum Reporting Requirements. Data could be integrated from sources external to EnergyCAP. For locations not currently using EnergyCAP, meeting the Minimum Reporting Requirements does not preclude the ability to advance to full implementation at a later date.

Those locations not electing to use EnergyCAP at all may opt to submit equivalent data in a provided Excel template to the specified UCOP contact referenced in this document.

### 4. In Scope/Out of Scope

Expected Minimum Reporting Requirements shall include monthly campus and medical center purchased utility data and self-generation energy production data under University operational control for the commodities listed in Appendix 1 and in accordance with the schedule appearing in Appendix 2. This excludes purchased utility data for which the University is not under obligation to pay.

---

<sup>1</sup> EnergyCAP is a registered trademark of EnergyCAP, Inc.

## 5. Responsibility

The responsibility for complying with Minimum Reporting Requirements shall be the party(ies) designated as the lead (i.e. Energy Data Administrator) for each specific campus. The responsibility may be shared so there may be more than one lead designated per campus depending on administrative structure so each co-lead would be responsible for their assigned portion. Costs incurred in order to comply with Minimum Reporting Requirements shall be the responsibility of each specific campus. As updates and revisions occur to this working document the party responsible will be so informed.

## 6. Data Attributes and Data Quality

Purchased utility data and self-generation data shall be reported by campus and medical centers at a summary level on a semi-annual basis by month and by supplier per commodity, as indicated in Appendix 1. Data fields shall consist of the month, commodity, supplier, units, unit type, amount in dollars and comments, except for self-generation data where amount in dollars is not reported. An Excel reporting template shall be provided.

For campuses choosing to report through the EnergyCAP purchased utility database, being recorded at a summary level means at the campus or medical center Topmost Place as configured in EnergyCAP. This will require at least one summary building, meter and account per commodity per supplier. With this summary level requirement, detailed building, meter and account level data does not need to be maintained. Individual utility bill processing and recharging processes do not have to occur within EnergyCAP.

For data which is billed at a frequency less than once a month or spans across months or includes multiple months, the campus can choose to record the data for the month(s) in which the data occurred or the month in which the billed period ends. The standard for recording at usage period or billing period is at the discretion of the campus.

In order to eliminate double counting of electric or natural gas purchases, adjustments would need to be made to accommodate any cross campus utility purchases such as the direct access Wholesale Power Program (WPP) or recharging campuses/medical centers for shared facilities. For these commodities the comments field should be used to indicate whether it is full service, distribution only or supply only.

## 7. Due Dates

Semi-annual data submissions will have monthly data recorded/reported at most four months in arrears from the final reported month in the semi-annual period. The four month time delay allows for billed utilities to be processed, corrected and finalized for a given month before being reported. For example,

it is expected that June utility data shall be recorded/reported by October 31 and December utility data shall be recorded/reported by April 30. One-time corrections to summary data beyond the four month time frame should be performed as soon as possible after being discovered with a note to the contact person at the end of this document of the change made. Corrections of a recurring nature and as part of a correction/true-up process should have that process documented and communicated to the UCOP contact referenced in this document. Campuses are discouraged from making corrections beyond a three year time frame.

## **8. Implementation**

The application of Minimum Reporting Requirements to specific commodities will commence over a period of time in accordance with the schedule in Appendix 2. Initially the commodities expected to be reported are electricity, natural gas, and water (including combined water & sewer) with future expansion in scope to include other commodities.

## **9. Miscellaneous**

The amount in dollars shall include all billed costs including transmission cost, distribution cost, commodity cost, demand cost, service fees, and late fees and penalties.

### **Report Submissions and Document Tracking**

Data submissions in addition to questions or comments related to the Minimum Reporting Requirements should be provided to:

Robert Stanton at robert.stanton@ucop.edu, telephone (510) 987-0655

| <b>Version</b> | <b>Date of edit/change</b> | <b>Who made the edit/change</b> | <b>Description of edit/change</b>                       |
|----------------|----------------------------|---------------------------------|---|
| 1.0            | 5/06/16                    | R.Stanton                       | Issuance of Version 1.0                                 |
| 1.1            | 8/24/16                    | R.Stanton                       | Modified Appendix 1 and Appendix 2 reported commodities |

## Appendix 1

Purchased Commodities with suggested Unit Types – Reported semi-annually on a monthly basis by vendor for amounts paid and the volume of units purchased. Include the Unit Type.

1. Natural Gas (Therm)\*
2. Electric (kWh)\*
3. Steam (Therm)\*
4. Solar PV (kWh)\*
5. Hot Water (Therm)\*
6. Biogas (Therm)\*
7. Chilled Water (Ton Hr)
8. Diesel Fuel (red dyed #2)(Gal)
9. Water (Kgal)
10. Water & Sewer (Kgal)

Self-generated Commodities with suggested Unit Types – Reported semi-annually on a monthly basis for only the volume of units generated. Include the Unit Type. Do not report costs incurred.

1. Electric(kWh)
2. Solar PV (kWh)
3. Well Water (Kgal)

Note transportation fuels are not included.

\*Energy consumption item reported to The Climate Registry as kWh or MMBtu.

## Appendix 2

### Commodities subject to Minimum Reporting Requirements and first reporting period

Date: October 31, 2016, with data for January 1 thru June 30, 2016

Natural Gas, Electricity, Water, Water & Sewer

Date: December 31, 2016, with data for January 1 thru June 30, 2016

Steam, Solar PV, Hot Water, Biogas

Date: April 30, 2017, with data for July 1 thru December 31, 2016

Chilled Water, Diesel Fuel (red dyed #2), Well Water