Attachment E:
Sample Metrics Reporting Guides

Metrics Reporting Guide

Information Dissemination

On an annual basis, the Contractor shall submit, to NYSERDA's Project Manager, a prepared analysis and summary of metrics addressing the anticipated energy, environmental and economic benefits that are realized by the project. All estimates shall reference credible sources and estimating procedures, and all assumptions shall be documented.

Reporting shall commence the first calendar year after the contract was executed. Reports shall be submitted by January 31st for the previous calendar years activities (i.e. reporting period). Reports shall continue to be submitted for **two** consecutive calendar years after the project is completed. The Contractor shall make every effort to quantify and document benefits and incorporate them into the Final Report and technology transfer activities as required in this agreement.

A form will be provided to you to submit the following metrics:

Information Dissemination

Name of Presentation or Event	*Names of the presentation or event where information was communicated about the product, company or research*
Organization that hosted the event	*Name of the organization that hosted the event*
Type of event	*The type of event where information was communicated about your company, product or research (e.g. conference, workshop, media event, etc.)*

Publications

Publication Date	*Date information is published (month & year)*
Publication Title	*Name of publication written as a result of research performed under contract with NYSERDA*
Publication Type	*Examples: Citation, Final/Technical Report, Newsletter, Trade Publication etc.*
Periodical Name	*Name of periodical the publication appeared in (if applicable)*
Policy Development	*State if this publication been cited in government policy development*
Names of Authors	*Author First & Last Names*

Metrics Reporting Guide

Product Demonstration

On an annual basis, the Contractor shall submit, to NYSERDA's Project Manager, a prepared analysis and summary of metrics addressing the anticipated energy, environmental and economic benefits that are realized by the project. All estimates shall reference credible sources and estimating procedures, and all assumptions shall be documented.

Reporting shall commence the first calendar year after the contract was executed. Reports shall be submitted by January 31st for the previous calendar years activities (i.e. reporting period). Reports shall continue to be submitted for **five** consecutive calendar years after commissioning or acceptance of equipment. The Contractor shall make every effort to quantify and document benefits and incorporate them into the Final Report and technology transfer activities as required in this agreement.

A form will be provided to you to submit the following metrics:

Site Metrics

Installation Status	*Current status of system installation (e.g. Design, Installed & Commissioning, Operational, etc.)*
Expected Duration	*Number of years equipment is expected to be installed*
Replication of System	*Additional installations of a similar system as a result of the NYSERDA project*
Jobs	*Jobs created/retained as a result of a NYSERDA project*

Information Dissemination

Name of Presentation or Event	*Names of the presentation or event where information was communicated about the product, company or research*
Organization that hosted the event	*Name of the organization that hosted the event*
Type of event	*The type of event where information was communicated about your company, product or research (e.g. conference, workshop, media event, etc.)*

Publications

Publication Date	*Date information is published (month & year)*
Publication Title	*Name of publication written as a result of research performed under contract with NYSERDA*
Publication Type	*Examples: Citation, Final/Technical Report, Newsletter, Trade Publication etc.*
Periodical Name	*Name of periodical the publication appeared in (if applicable)*
Policy Development	*State if this publication been cited in government policy development*
Names of Authors	*Author First & Last Names*

Resources Saved

+	*Add Metric*		
	General Resource Type	Specific Resource Type	Unit of Measurement
X			

Resources Used

+	*Add Metric*		
	General Resource Type	Specific Resource Type	Unit of Measurement
X			

hide

Metrics Reporting Guide

Product Development

On an annual basis, the Contractor shall submit, to NYSERDA's Project Manager, a prepared analysis and summary of metrics addressing the anticipated energy, environmental and economic benefits that are realized by the project. All estimates shall reference credible sources and estimating procedures, and all assumptions shall be documented.

Reporting shall commence the first calendar year after the contract was executed. Reports shall be submitted by January 31st for the previous calendar years activities (i.e. reporting period). Sales reporting shall continue under the terms of the agreement in section 8.03 if recoupment terms apply to this contract. Reports shall continue to be submitted for **ten** consecutive calendar years after the project is completed. The Contractor shall make every effort to quantify and document benefits and incorporate them into the Final Report and technology transfer activities as required in this agreement.

A form will be provided to you to submit the following metrics:

Product Metrics

Development Stage	*Development stage of the product (e.g. Initial Prototype, Refined Prototype, Commercial Product, etc.)*
Outcomes of Product Development Efforts	*Outcomes as a result of product development activities (e.g. Copyrights, License Agreements, Certifications, UL Listing, etc.)*
Units Sold	*Total number of units sold*
Units Sold in NYS	*Number of units sold in New York State*
Product Sales	*Total annual sales of the product associated with the contract(s)*
Recoupment Payment	*Payment amount owed to NYSERDA under the terms of the agreement (if applicable).*
Investments	*Investment dollars as a result of NYSERDA project from a source other than NYSERDA.*

Patent Information

Patent Number	*Patent number or patent application number for patents as a result of work funded by NYSERDA*
Issue Date	*Date patent was issued or application submitted*
Patent Description	*Abstract or brief description of the patent*

Information Dissemination

Name of Presentation or Event	*Names of the presentation or event where information was communicated about the product, company or research*
Organization that hosted the event	*Name of the organization that hosted the event*
Type of event	*The type of event where information was communicated about your company, product or research (e.g. conference, workshop, media event, etc.)*

Publications

Publication Date	*Date information is published (month & year)*
Publication Title	*Name of publication written as a result of research performed under contract with NYSERDA*
Publication Type	*Examples: Citation, Final/Technical Report, Newsletter, Trade Publication etc.*
Periodical Name	*Name of periodical the publication appeared in (if applicable)*
Policy Development	*State if this publication been cited in government policy development*
Names of Authors	*Author First & Last Names*

Resources Saved per Product Unit (e.g. Energy, Emissions, Fuel etc.)

+	*Add Metric*		
	General Resource Type	Specific Resource Type	Unit of Measurement
x			