

Final Aggregation Project Report Template

This template is provided as a guide and is not required. However, all information here must be included in some form in the final aggregation project report.

Overall Aggregation Project Description *(recommended length: ½ page)*

This section should provide an executive summary of the aggregation project and business model approach that was tested.

Customer Acquisition Outcomes *(recommended length: 1 page)*

This section should describe the customer acquisition process for the project. It should include the following:

- Original proposed approach
- Final successful approach
- The process to achieve the final successful approach
- Hurdles and successes of the proposed and final approaches
- Participant sites solicited and their commonalities
- Final participant sites included in project and their commonalities
- Whether customer acquisition costs were reduced

Aggregated Annual Utility Spend & Baseline Energy Use *(recommended length: 1 page)*

This section should include an overview of the total annual utility spend and baseline energy use of all the participant sites within the aggregation project.

Aggregated Identified Savings Summary *(recommended length: 1 page)*

This section should include an overview of the total savings metrics and measure types from all participant sites, using the Total Aggregated Savings worksheet within the Project Summary Sheet Template. The Total Aggregated Savings table should be pasted into the Final Report.

Business Model Outcomes *(recommended length: 3 pages)*

This section should describe the outcomes of the project, indicating how the business model proved successful and/or unsuccessful. This should include:

- Lessons learned
- Hurdles or impediments encountered and addressed
- Strengths and weaknesses
- Assumptions that proved to be correct or incorrect
- Whether study costs were reduced
- Whether the anticipated savings were achieved
- Whether the business model is scalable, sustainable, and replicable to only a segment of the market or the commercial market as a whole

Recommended Business Model Revisions *(recommended length: 1 page)*

This section should describe how the consultant would improve or modify the business model, based on the project's outcomes, to better achieve scale and produce a more replicable and sustainable model.

Next Steps *(recommended length: ½ page)*

This section should indicate your anticipated next steps for the business model based on the results of the aggregation project. Identify whether you expect to expand upon or adjust the business model (and how) or abandon it. Include the reasoning behind your decision.

Appendix

Each NYSERDA approved quarterly report should be included in the appendix.