

# NY Clean Energy Dashboard Portfolio Progress and Plans: Beginning 2016

## Data Dictionary

### Commonly used terms:

- **Encumbered Funds:** The current amount of funds that are tied to executed contracts, completed applications which have been determined to meet basic eligibility criteria but for which the program administrator does not have in hand an executed contract, and contracts awarded through competitive solicitations which are not yet executed.
- **Expended Funds:** Funds that have been paid or remitted.

Data Label	Data Type	Data Description
Program Administrator	Text	An entity (NYSERDA or an investor-owned utility) which administers the program
Fuel-Type Funding Source	Text	Program funding source, either electric or gas
Portfolio	Text	Collection of programs or initiatives
NYS Clean Heat	Text	“Yes” or “No” to indicate whether program is part of New York State Clean Heat
New Efficiency: New York	Text	“Yes” or “No” to indicate whether program is part of New Efficiency: New York
LMI/Market Rate	Text	Indicates whether a program addresses the LMI or “Low-to-Moderate Income” customers or “Market Rate” customers
Reporting Period	Text	Year and quarter through which data is being reported
Year	Date	Calendar year of reporting period
Annual Portfolio Administration (Dollars) Expenditures Budget	Currency	Funds that are planned to be spent in the current year on portfolio administration costs which includes all portfolio-level (non-program specific) costs other than Portfolio EM&V costs or labor costs of utility employees that are recovered through a utility’s base rates.
Portfolio Administration (Dollars) Expenditures Budget to Date	Currency	Funds that are planned to be spent through the current quarter on portfolio administration costs which includes all portfolio-level (non-program specific) costs other than Portfolio EM&V costs or labor costs of utility employees that are recovered through a utility’s base rates.
Portfolio Administration (Dollars) Expenditures this Quarter	Currency	Funds spent in the current quarter on portfolio administration costs which includes all portfolio-level (non-program specific) costs other than Portfolio EM&V costs or labor costs of utility employees that are recovered through a utility’s base rates.
Portfolio Administration (Dollars) Expenditures to Date	Currency	Funds spent through the current quarter on portfolio administration costs which includes all portfolio-level (non-program specific) costs other than Portfolio EM&V costs or labor costs of utility employees that are recovered through a utility’s base rates.
Portfolio Administration (Dollars) Currently Encumbered	Currency	Funds encumbered (but not expended) in the current quarter on portfolio administration costs which includes all portfolio-level (non-program specific) costs other than Portfolio EM&V costs or labor costs of utility employees that are recovered through a utility’s base rates.
Annual EM&V (Dollars) Expenditures Budget	Currency	Funds that are planned to be spent in the current year on activities associated with the evaluation, measurement and verification of the program, including: evaluation planning, program logic models, process

		evaluation, impact evaluation, evaluation – related market research, measurement and verification activities, and evaluation reporting.
EM&V (Dollars) Expenditures Budget to Date	Currency	Funds that are planned to be spent through the current quarter on activities associated with the evaluation, measurement and verification of the program, including: evaluation planning, program logic models, process evaluation, impact evaluation, evaluation – related market research, measurement and verification activities, and evaluation reporting.
EM&V (Dollars) Expenditures this Quarter	Currency	Funds spent in the current quarter on activities associated with the evaluation, measurement and verification of the program, including: evaluation planning, program logic models, process evaluation, impact evaluation, evaluation – related market research, measurement and verification activities, and evaluation reporting.
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