

Memorandum

To: Fernando Morales, AIC; Jennifer Morris, ICC Staff; Celia Johnson, SAG Facilitator
From: Hannah Howard and Zach Ross, Opinion Dynamics
Date: June 2020
Re: Q1 2020 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q1 of 2020 as stipulated in our evaluation contract. The team conducted these activities in support of the evaluation of AIC's Plan 3 Portfolio of Electric and Gas Energy Efficiency Programs as well as in support of AIC's 2018-2021 Portfolio of Electric and Gas Energy Efficiency Programs.

Overview of Evaluation Activities

Key Activities for Q1 2020

In the first quarter of 2020, the evaluation team finalized all 2019 impact analyses and developed draft and final 2019 impact evaluation reports. In addition, the evaluation team finalized 2020 evaluation plans. Additional items of note included:

- Processing and reviewing 2019 year-end tracking data
- Fielding HVAC participant survey and conducting commercial site visits for Custom, Retro-Commissioning, and Building Operator Certification offerings
- Developing NEI IQ participant survey instrument and sampling approach
- Participating in SAG and TAC meetings as needed

Upcoming Activities for Q2 2020

In the second quarter of 2020, the evaluation team will review and respond to AIC and stakeholder comments on the 2019 Residential and Business Program impact evaluation reports and issue final versions of both. The evaluation team will also issue the 2019 Summary Evaluation Report and supporting evaluation materials such as the Portfolio CPAS and AAIG workbook. In terms of 2020 evaluation activities, the team will continue communicating with AIC and their implementation team around possible changes to implementation approaches and evaluation scope due to COVID-19.

Additional items of note will include:

- Finalizing 2019 cost-effectiveness inputs and conducting the cost effectiveness analysis

- Providing results of Income Qualified site visits, process and NTG research with 2019 SBDI participants, and NTG research with Retro-Commissioning participants
- Developing memos outlining approach to societal non-energy impacts and presenting options for Utility non-energy impacts assessment
- Fielding surveys with active and non-active HVAC contractors
- Conducting research with AIC residential customers to assess the impact of COVID-19
- Participating in SAG working group and TAC meetings

Summary of Expenditures

The tables below provide a summary of expenditures through Q1 2020 based on team invoices received as of the end of Q1 2020.

Figure 1. Q1 2020 Expenditures for Evaluation of 2018 Program Year

AIC 2018 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2018 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 1,129,208	\$ 1,061,502	\$ 67,706
Process EM&V	\$ 632,525	\$ 636,901	\$ (4,376)
Report Development	\$ 451,683	\$ 424,601	\$ 27,083
<i>Program Specific Evaluation Efforts</i>	\$ 2,213,416	\$ 2,123,004	\$ 90,413
Independent EM&V QA/QC	\$ 30,000	\$ 6,638	\$ 23,363
Stakeholder Advisory Group	\$ 90,000	\$ 95,532	\$ (5,532)
Statewide TRM Review and Participation	\$ 196,400	\$ 192,496	\$ 3,904
Other Non-Program Activities	\$ 729,270	\$ 798,526	\$ (69,256)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,045,670	\$ 1,093,192	\$ (47,522)
2018 Total	\$ 3,259,087	\$ 3,216,196	\$ 42,890

Figure 2. Q1 2020 Expenditures for Evaluation of 2019 Program Year

AIC 2019 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2019 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 993,750	\$ 787,406	\$ 206,344
Process EM&V	\$ 596,250	\$ 286,329	\$ 309,921
Report Development	\$ 397,500	\$ 357,912	\$ 39,588
<i>Program Specific Evaluation Efforts</i>	\$ 1,987,500	\$ 1,431,646.44	\$ 555,854
Independent EM&V QA/QC	\$ 30,000	\$ 8,424	\$ 21,576
Stakeholder Advisory Group	\$ 90,000	\$ 51,713	\$ 38,287
Statewide TRM Review and Participation	\$ 186,000	\$ 81,301	\$ 104,699
Non-Energy Impacts	\$ 250,000	\$ 105,035	\$ 144,965
Other Non-Program Activities	\$ 635,800	\$ 500,280	\$ 135,520
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,191,800	\$ 746,753	\$ 445,047
Contingency	\$ 71,048	\$ -	\$ 71,048
2019 Total	\$ 3,250,348	\$ 2,178,400	\$ 1,000,900

Figure 3. Q1 2020 Expenditures for Evaluation of 2020 Program Year

AIC 2020 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2020 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 841,550	\$ 3,638	\$ 837,912
Process EM&V	\$ 504,930	\$ 1,559	\$ 503,371
Report Development	\$ 336,620	\$ -	\$ 336,620
<i>Program Specific Evaluation Efforts</i>	\$ 1,683,100	\$ 5,196.60	\$ 1,677,903
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Stakeholder Advisory Group	\$ 90,000	\$ -	\$ 90,000
Statewide TRM Review and Participation	\$ 378,200	\$ 20,469	\$ 357,731
Cost-Effectiveness	\$ 70,000	\$ -	\$ 70,000
Non-Energy Impacts	\$ 165,000	\$ 5,876	\$ 159,124
Pilots	\$ 180,000	\$ -	\$ 180,000
Other Non-Program Activities	\$ 551,211	\$ 87,935	\$ 463,275
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,464,411	\$ 114,280	\$ 1,350,131
2020 Total	\$ 3,147,511	\$ 119,477	\$ 3,028,034