



# MEMORANDUM

**To:** Nick Warnecke, AIC; Elizabeth Horne, ICC Staff; Celia Johnson, SAG Facilitator  
**From:** Zach Ross and Rose Williamson, Opinion Dynamics  
**Date:** December 16, 2024  
**Re:** Q1 2024 Evaluation Expenditures

---

This memorandum provides a summary of evaluation team activities and expenditures in Q1 of 2024 as stipulated in our evaluation contract. The team conducted these activities in support of AIC's 2022-2025 Portfolio of Electric and Gas Energy Efficiency Programs.

## OVERVIEW OF EVALUATION ACTIVITIES

### KEY ACTIVITIES FOR Q1 2024

In the first quarter of 2024, the evaluation team conducted research for the 2023 program year, delivering memos for the Smart Savers Channel, Single Family Whole Building Channel, and the Multifamily Initiatives Channel in the Residential Program and Net-to-Gross research for the Business Program. We also delivered the draft annual impact evaluation reports for the Residential, Business, and Voltage Optimization programs, as well as the draft 2023 Portfolio Integrated Impact Evaluation Report. In conjunction with these activities, the evaluation team actively participated in SAG, the Illinois NTG Working Group, and Illinois TAC meetings over the course of Q1.

### UPCOMING ACTIVITIES FOR Q2 2024

In the second quarter of 2024, the evaluation team will continue ongoing research projects for Residential, Business, and Pilots/Emerging Programs. Additionally, the team will finalize the 2023 Annual Impact Evaluation reports, wrapping up 2023 work and launching into the 2024 scope of work.

## SUMMARY OF EXPENDITURES

The tables below summarize expenditures through Q1 2024 based on team invoices received as of the end of Q1 2024.

Figure 1. Q1 2024 Expenditures for Evaluation of Program Year 2023

AIC 2023 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2023 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 1,233,100	\$ 1,214,228	\$ 18,872
Process EM&V	\$ 739,860	\$ 728,537	\$ 11,323
Report Development	\$ 493,240	\$ 485,691	\$ 7,549
<i>Program Specific Evaluation Efforts</i>	\$ 2,466,200	\$ 2,428,455	\$ 37,745
Independent EM&V QA/QC	\$ 30,000	\$ 4,731	\$ 25,269
Stakeholder Advisory Group	\$ 160,000	\$ 96,888	\$ 63,112
Statewide TRM Review and Participation	\$ 145,000	\$ 86,451	\$ 58,549
Cost-Effectiveness	\$ 50,000	\$ 28,533	\$ 21,467
Non-Energy Impacts	\$ 80,000	\$ 45,585	\$ 34,415
Pilots	\$ 160,000	\$ 150,182	\$ 9,818
<i>Other Non-Program Activities</i>	\$ 495,000	\$ 625,157	\$ (130,157)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,120,000	\$ 1,037,527	\$ 82,473
Contingency	\$ 96,527	\$ -	\$ 96,527
<b>2023 Total</b>	<b>\$ 3,682,727</b>	<b>\$ 3,465,982</b>	<b>\$ 216,745</b>

Figure 2. Q1 2024 Expenditures for Evaluation of Program Year 2024

AIC 2024 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2024 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 1,172,950	\$ 34	\$ 1,172,916
Process EM&V	\$ 703,770	\$ 21	\$ 703,749
Report Development	\$ 469,180	\$ 14	\$ 469,166
<i>Program Specific Evaluation Efforts</i>	\$ 2,345,900	\$ 69	\$ 2,345,832
Compliance and Stakeholder Engagement Activities	\$ 410,000	\$ 18,060	\$ 391,941
Cross-Cutting Evaluation Research	\$ 416,500	\$ -	\$ 416,500
Quality Assurance and Control	\$ 30,000	\$ -	\$ 30,000
Portfolio Evaluation Reporting	\$ 50,000	\$ -	\$ 50,000
Other Non-Program Activities (Project Management, Evaluation Planning, Program Design Support, etc.)	\$ 429,500	\$ 10,152	\$ 419,348
<b>Total Non-Program Specific Evaluation Efforts</b>	<b>\$ 1,336,000</b>	<b>\$ 28,212</b>	<b>\$ 1,307,789</b>
Contingency	\$ 6,573	\$ -	\$ 6,573
<b>2024 Total</b>	<b>\$ 3,688,473</b>	<b>\$ 28,280</b>	<b>\$ 3,660,193</b>