

Memorandum

To: Jonathon Jackson, AIC; Jennifer Morris, ICC Staff;
Annette Beitel, SAG Facilitator

From: Hannah Howard, Opinion Dynamics

Date: June 21, 2018

Re: Q1 2018 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q1 of 2018 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.

1. Overview of Evaluation Activities

1.1 Key Activities for Q1 2018

In the first quarter of 2018, the evaluation team wrapped up all reporting related to the PY9 AIC and IPA programs. The team also completed all of the impact evaluation activities for the Transition Period and provided a draft impact evaluation report on March 15th. Additional items of note include:

- Conducting qualitative research with AIC's top 500 C&I customers, as well as public sector customers
- Conducting data collection for a low income need assessment with AIC's income qualified customers to understand barriers to participation, as well as energy burden
- Responding to comments on and finalizing the 2018-2021 Multiyear Evaluation Plan, as well as the 2018 Annual Evaluation Plan
- Participating in SAG and TAC meetings

1.2 Upcoming Activities for Q2 2018

In the second quarter of 2018, the evaluation team will wrap up all integrated reporting related to PY9 and Transition Period programs (e.g., PY9 Integrated Report and Plan 3 Summary Report). Additional items of note include:

- Submitting results from qualitative research with AIC's top 500 C&I customers, as well as public sector customers
- Finalizing and submitting the low income need assessment for AIC and ICC staff review
- Finalizing and submitting a Strategic Energy Management literature review and evaluability assessment
- Participating in SAG and TAC meetings as needed
- Beginning in-depth interviews and material review for AIC's 2018 programs

2. Summary of Expenditures

The table below provides a summary of expenditures through Q1 2018 based on team invoices received as of the end of Q1 2018.

Table 1. PY9 Q1 2018 AIC Portfolio Evaluation Expenditures

AIC PY9 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	PY9 Budget	Expensed to Date	Remaining
Impact EM&V*	\$ 867,500	\$ 873,821	\$ (6,321)
Process EM&V*	\$ 516,500	\$ 524,292	\$ (7,792)
Report Development*	\$ 346,000	\$ 349,528	\$ (3,528)
<i>Program Specific Evaluation Efforts</i>	\$ 1,730,000	\$ 1,747,641	\$ (17,641)
Collaborate with IL Utilities	\$ 10,000	\$ 8,182	\$ 1,818
Independent EM&V QA/QC	\$ 15,000	\$ 6,244	\$ 8,756
Commission Staff	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 30,000	\$ 32,505	\$ (2,505)
Ameren Coordination/Program Design	\$ 5,000	\$ 4,088	\$ 912
Statewide TRM Review and Participation	\$ 70,000	\$ 57,986	\$ 12,014
Other Non-Program Activities*	\$ 623,070	\$ 629,702	\$ (6,632)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 763,070	\$ 738,706	\$ 24,364
<i>Contingency Funds</i>	\$ 0	\$ -	\$ 0
PY9 Total	\$ 2,493,070	\$ 2,486,348	\$ 6,723

* During Q1 2018, budget was re-allocated to these tasks from others where spend was lower than expected.

Table 2. Transition Period Q1 2018 Evaluation Expenditures

AIC TP Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	TP Budget	Expensed to Date	Remaining
Impact EM&V	\$ 383,250	\$ 359,162	\$ 24,088
Process EM&V	\$ 229,950	\$ 102,618	\$ 127,332
Report Development	\$ 153,300	\$ 51,309	\$ 101,991
<i>Program Specific Evaluation Efforts</i>	\$ 766,500	\$ 513,088	\$ 253,412
Independent EM&V QA/QC	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 20,000	\$ 1,173	\$ 18,827
Statewide TRM Review and Participation	\$ 10,000	\$ 3,237	\$ 6,764
Other Non-Program Activities	\$ 223,175	\$ 106,970	\$ 116,205
<i>Non-Program Specific Evaluation Efforts</i>	\$ 263,175	\$ 111,380	\$ 151,795
Transition Period Total	\$ 1,029,675	\$ 624,468	\$ 405,207