

# Memorandum

**To:** Fernando Morales, AIC; Jennifer Morris, ICC Staff; Celia Johnson, SAG Facilitator  
**From:** Hannah Howard and Zach Ross, Opinion Dynamics  
**Date:** June 27, 2019  
**Re:** Q1 2019 Evaluation Expenditures

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This memorandum provides a summary of evaluation team activities and expenditures in Q1 of 2019 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 2019

In the first quarter of 2019, the evaluation team primarily focused on completing 2018 impact evaluation activities and delivered draft impact evaluation reports on deadline. The evaluation team also continued some process and other research activities, including net-to-gross research for the Appliance Recycling and Multifamily initiatives.

Additional items of note included:

- Participating in SAG and TAC meetings as needed
- Coordination with VEIC on review of Tier 2 Advanced Power Strip research
- Coordination with Illinois stakeholders on advanced thermostat research

### Upcoming Activities for Q2 2019

In the second quarter of 2019, the evaluation team will finalize impact evaluation reports for the 2018 portfolio and continue ongoing portfolio process research.

Additional items of note will include:

- Kicking off 2019 program evaluation research
- Participating in SAG and TAC meetings as needed
- TRM V8.0 workpaper development

## Summary of Expenditures

The tables below provide a summary of expenditures through Q1 2019 based on team invoices received as of the end of Q1 2019.

Figure 1. 2018 Program Year Q1 2019 Evaluation Expenditures

AIC 2018 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2018 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 1,129,208	\$ 735,357	\$ 393,851
Process EM&V	\$ 677,525	\$ 441,214	\$ 236,311
Report Development	\$ 451,683	\$ 294,143	\$ 157,541
<i>Program Specific Evaluation Efforts</i>	\$ 2,258,416	\$ 1,470,714	\$ 787,703
Independent EM&V QA/QC	\$ 30,000	\$ 3,938	\$ 26,063
Stakeholder Advisory Group	\$ 90,000	\$ 76,883	\$ 13,117
Statewide TRM Review and Participation	\$ 196,400	\$ 124,598	\$ 71,802
Other Non-Program Activities	\$ 684,270	\$ 588,970	\$ 95,300
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,000,670	\$ 794,389	\$ 206,282
<b>2018 Total</b>	<b>\$ 3,259,087</b>	<b>\$ 2,265,102</b>	<b>\$ 993,984</b>

Figure 2. 2019 Program Year Q1 2019 Evaluation Expenditures

AIC 2019 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2019 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 993,750	\$ 4,308	\$ 989,443
Process EM&V	\$ 596,250	\$ 2,585	\$ 593,666
Report Development	\$ 397,500	\$ 1,723	\$ 395,777
<i>Program Specific Evaluation Efforts</i>	\$ 1,987,500	\$ 8,615	\$ 1,978,885
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Stakeholder Advisory Group	\$ 90,000	\$ 3,488	\$ 86,512
Statewide TRM Review and Participation	\$ 186,000	\$ 3,373	\$ 182,627
Non-Energy Impacts	\$ 250,000	\$ 14,694	\$ 235,306
Other Non-Program Activities	\$ 635,800	\$ 113,539	\$ 522,261
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,191,800	\$ 135,094	\$ 1,056,706
Contingency	\$ 71,048	\$ -	\$ 71,048
<b>2019 Total</b>	<b>\$ 3,250,348</b>	<b>\$ 143,709</b>	<b>\$ 3,035,591</b>