

Memorandum

To: Fernando Morales, AIC; Jennifer Morris, ICC Staff
From: Hannah Howard and Zach Ross, Opinion Dynamics
Date: July 15, 2019
Re: Q2 2019 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q2 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 Q2 2019

In the second quarter of 2019, the evaluation team received and addressed comments on the draft 2018 impact evaluation reports and provided finalized versions in advance of regulatory deadlines. The evaluation team also continued work on several research activities, including survey efforts with Income Qualified participants, Retail Products participants, and multifamily tenants and property managers.

Additional items of note included:

- Participating in SAG and TAC meetings
- Submitting draft 2018 cost-effectiveness inputs
- Conducting program staff interviews and reviewing materials for several initiatives for the 2019 evaluation
- Holding in-person meetings with AIC staff to review 2018 evaluation findings and revisit the scope of select 2019 evaluation activities

Upcoming Activities for Q3 2019

In the third quarter of 2019, the evaluation team will kick off 2019 evaluation activities, including a mid-year review of program tracking data, interviews with program staff, and C&I Custom desk reviews and on-site verification. Additional items of note will include:

- Submitting NTG memos for the Retail Products, Multifamily, Standard, and SBDI initiatives
- Finalizing 2018 cost-effectiveness inputs

- Presenting findings of advanced thermostat research with Retail Products participants and the general population of AIC residential customers
- Participating in SAG and TAC meetings as needed

Summary of Expenditures

The tables below provide a summary of expenditures through Q2 2019 based on team invoices received as of the end of Q2 2019.

Table 1. 2018 Program Year Q2 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	\$ 1,073,581	\$ 55,627
Process EM&V	\$ 632,525	\$ 487,991	\$ 144,534
Report Development	\$ 451,683	\$ 390,393	\$ 61,290
<i>Program Specific Evaluation Efforts</i>	\$ 2,213,416	\$ 1,951,965	\$ 261,451
Independent EM&V QA/QC	\$ 30,000	\$ 3,938	\$ 26,063
Stakeholder Advisory Group	\$ 90,000	\$ 93,236	\$ (3,236)
Statewide TRM Review and Participation	\$ 196,400	\$ 157,163	\$ 39,237
Other Non-Program Activities	\$ 729,270	\$ 728,654	\$ 617
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,045,670	\$ 982,991	\$ 62,680
2018 Total	\$ 3,259,087	\$ 2,934,955	\$ 324,131

Table 2. 2019 Program Year Q2 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	\$ 25,433	\$ 968,317
Process EM&V	\$ 596,250	\$ 15,260	\$ 580,990
Report Development	\$ 397,500	\$ 10,173	\$ 387,327
<i>Program Specific Evaluation Efforts</i>	\$ 1,987,500	\$ 50,866	\$ 1,936,634
Independent EM&V QA/QC	\$ 30,000	\$ 4,446	\$ 25,554
Stakeholder Advisory Group	\$ 90,000	\$ 13,988	\$ 76,012
Statewide TRM Review and Participation	\$ 186,000	\$ 18,818	\$ 167,183
Non-Energy Impacts	\$ 250,000	\$ 28,086	\$ 221,914
Other Non-Program Activities	\$ 635,800	\$ 154,346	\$ 481,454
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,191,800	\$ 219,683	\$ 972,117
Contingency	\$ 71,048	\$ -	\$ 71,048
2019 Total	\$ 3,250,348	\$ 270,549	\$ 2,908,751