



MEMORANDUM

To: Nick Warnecke, AIC; Elizabeth Horne, ICC Staff; and Celia Johnson, SAG Facilitator
From: Zach Ross and Rose Williamson, Opinion Dynamics
Date: December 16, 2024
Re: Q2 2024 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q2 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 Q2 2024

In the second quarter of 2024, the evaluation team focused on wrapping up the 2023 annual impact evaluation reports and other outstanding 2023 research projects, including the Standard Free-Ridership Survey, Midstream Lighting study, and Small Business Gen Pop Survey, and launching 2024 research. Additionally, the evaluation team began staff interviews for the Residential Program and continued research for Retail Products, MR Home Efficiency, Midstream HVAC, and Multifamily Initiatives Channels. 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 Q2.

UPCOMING ACTIVITIES FOR Q3 2024

In the third quarter of 2024, the evaluation team will continue ongoing research projects for Residential, Business, and Pilots/Emerging Programs. Additionally, the team will provide interim reports for the following Residential Program Channels: Kits, Midstream MHVAC, IQSF, IQ Multifamily, Smart Savers, and MHAS. Meanwhile, Net-to-Gross research will continue in the Business Program.

SUMMARY OF EXPENDITURES

The tables below summarize expenditures through Q2 2024 based on team invoices received as of the end of Q2 2024.

Figure 1. Q2 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	\$ 1,291,019	\$ (57,919)
Process EM&V	\$ 739,860	\$ 774,611	\$ (34,751)
Report Development	\$ 493,240	\$ 516,408	\$ (23,168)
<i>Program Specific Evaluation Efforts</i>	\$ 2,466,200	\$ 2,582,038	\$ (115,838)
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	\$ 89,154	\$ 55,846
Cost-Effectiveness	\$ 50,000	\$ 53,674	\$ (3,674)
Non-Energy Impacts	\$ 80,000	\$ 48,550	\$ 31,451
Pilots	\$ 160,000	\$ 150,182	\$ 9,818
<i>Other Non-Program Activities</i>	\$ 495,000	\$ 657,466	\$ (162,466)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,120,000	\$ 1,100,644	\$ 19,356
Contingency	\$ 96,527	\$ -	\$ 96,527
2023 Total	\$ 3,682,727	\$ 3,682,682	\$ 45

Figure 2. Q2 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	\$ 117,840	\$ 1,055,110
Process EM&V	\$ 703,770	\$ 70,704	\$ 633,066
Report Development	\$ 469,180	\$ 47,136	\$ 422,044
<i>Program Specific Evaluation Efforts</i>	\$ 2,345,900	\$ 235,680	\$ 2,110,221
Compliance and Stakeholder Engagement Activities	\$ 410,000	\$ 90,840	\$ 319,160
Cross-Cutting Evaluation Research	\$ 416,500	\$ 54,360	\$ 362,140
Quality Assurance and Control	\$ 30,000	\$ 7,604	\$ 22,397
Portfolio Evaluation Reporting	\$ 50,000	\$ -	\$ 50,000
Other Non-Program Activities (Project Management, Evaluation Planning, Program Design Support, etc.)	\$ 429,500	\$ 169,181	\$ 260,320
Total Non-Program Specific Evaluation Efforts	\$ 1,336,000	\$ 352,128	\$ 1,014,016
Contingency	\$ 6,573	\$ -	\$ 6,573
2024 Total	\$ 3,688,473	\$ 587,808	\$ 3,130,810