

Memorandum

To: Jonathon Jackson, AIC; Jennifer Morris, ICC Staff; Celia Johnson, SAG Facilitator
From: Hannah Howard and Zach Ross, Opinion Dynamics
Date: September 7, 2018
Re: Q2 2018 Evaluation Expenditures

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

Overview of Evaluation Activities

Key Activities for Q2 2018

In the second quarter of 2018, the evaluation team finalized the Transition Period impact evaluation report and submitting updated drafts of the Plan 3 integrated reports. In addition, the team continued work on a number of qualitative/process research tasks, including the Low Income Needs Assessment and SEM literature review and evaluability assessments. Additional items of note include:

- Continuing qualitative research with AIC public sector customers
- Beginning in-depth interviews and material review for AIC's 2018 programs
- Participating in SAG and TAC meetings

Upcoming Activities for Q3 2018

In the third 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 will include:

- Submitting results from the second phase of research with AIC's public sector customers
- Finalizing and submitting the low income need assessment for AIC and ICC staff review
- Submitting a range of data collection instruments and surveys for AIC's 2018 programs
- Participating in SAG and TAC meetings as needed

Summary of Expenditures

The tables below provide a summary of expenditures through Q2 2018 based on team invoices received as of the end of Q2 2018.

Figure 1. PY9 Q2 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	\$ 59,176	\$ 10,824
Other Non-Program Activities*	\$ 623,070	\$ 631,335	\$ (8,265)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 763,070	\$ 741,530	\$ 21,540
<i>Contingency Funds</i>	\$ 0	\$ -	\$ 0
PY9 Total	\$ 2,493,070	\$ 2,489,171	\$ 3,899

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

Figure 2. Transition Period Q2 2018 Evaluation Expenditures

AIC TP Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	TP Budget	Expensed to Date	Remaining
Impact EM&V*	\$ 393,250	\$ 397,338	\$ (4,088)
Process EM&V	\$ 229,950	\$ 238,403	\$ (8,453)
Report Development	\$ 153,300	\$ 158,935	\$ (5,635)
<i>Program Specific Evaluation Efforts</i>	\$ 776,500	\$ 794,675	\$ (18,175)
Independent EM&V QA/QC	\$ 10,000	\$ 5,550	\$ 4,450
Stakeholder Advisory Group	\$ 5,000	\$ 4,474	\$ 526
Statewide TRM Review and Participation*	\$ 15,000	\$ 17,189	\$ (2,189)
Other Non-Program Activities	\$ 223,175	\$ 106,970	\$ 116,205
<i>Non-Program Specific Evaluation Efforts</i>	\$ 253,175	\$ 134,183	\$ 118,992
Transition Period Total	\$ 1,029,675	\$ 928,858	\$ 100,817

* During Q2 2018, budget was re-allocated to these tasks from others where spend was lower than expected.