

# Memorandum

**To:** Fernando Morales, AIC; Jennifer Morris, ICC Staff  
**From:** Hannah Howard and Zach Ross, Opinion Dynamics  
**Date:** October 15, 2019  
**Re:** Q3 2019 Evaluation Expenditures

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This memorandum provides a summary of evaluation team activities and expenditures in Q3 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 Q3 2019

In the third quarter of 2019, the evaluation team conducted several 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 included:

- Submitting process and NTG results for the Retail Products, Multifamily, Standard, and SBDI initiatives, as well as findings of the 2018 residential general population advanced thermostat survey
- Finalizing 2018 cost-effectiveness inputs
- Participating in SAG and TAC meetings

### Upcoming Activities for Q4 2019

In the fourth quarter of 2019, the evaluation team will continue execute 2019 evaluation activities, including site visits, participant surveys, and the review of tracking data and program materials. The evaluation team will also develop draft 2020 evaluation plans. Additionally, the evaluation team plans to submit findings from the Behavioral Modification persistence study, supplemental results from the Retail Products participant survey, and memos detailing outcomes of several non-energy impact research efforts. Consistent with prior quarters, we also anticipate participating in SAG and TAC meetings as needed.

## Summary of Expenditures

The tables below provide a summary of expenditures through Q3 2019 based on team invoices received as of the end of Q3 2019.

Table 1. 2018 Program Year Q3 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	\$ 1,216,584	\$ (87,376)
Process EM&V	\$ 632,525	\$ 552,993	\$ 79,532
Report Development	\$ 451,683	\$ 442,394	\$ 9,289
<i>Program Specific Evaluation Efforts</i>	\$ 2,213,416	\$ 2,211,971	\$ 1,445
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
<b>2018 Total</b>	<b>\$ 3,259,087</b>	<b>\$ 3,194,961</b>	<b>\$ 64,125</b>

Table 2. 2019 Program Year Q3 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	\$ 155,014	\$ 838,736
Process EM&V	\$ 596,250	\$ 98,645	\$ 497,605
Report Development	\$ 397,500	\$ 28,184	\$ 369,316
<i>Program Specific Evaluation Efforts</i>	\$ 1,987,500	\$ 281,843	\$ 1,705,657
Independent EM&V QA/QC	\$ 30,000	\$ 8,424	\$ 21,576
Stakeholder Advisory Group	\$ 90,000	\$ 28,984	\$ 61,016
Statewide TRM Review and Participation	\$ 186,000	\$ 40,129	\$ 145,871
Non-Energy Impacts	\$ 250,000	\$ 67,532	\$ 182,468
Other Non-Program Activities	\$ 635,800	\$ 228,748	\$ 407,052
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,191,800	\$ 373,817	\$ 817,983
Contingency	\$ 71,048	\$ -	\$ 71,048
<b>2019 Total</b>	<b>\$ 3,250,348</b>	<b>\$ 655,661</b>	<b>\$ 2,523,639</b>