

Memorandum

To: Fernando Morales, AIC; Jennifer Morris, ICC Staff
From: Hannah Howard and Zach Ross, Opinion Dynamics
Date: January 15, 2020
Re: Q4 2019 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q4 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 Q4 2019

In the fourth quarter of 2019, the evaluation team continued preparations for 2019 impact analysis and reporting and developed draft 2020 evaluation plans. In addition, the evaluation team:

- Submitted a memo outlining key information and considerations surrounding AMI data transfers, detailed findings from the Behavioral Modification persistence study, non-energy impact research efforts, and the Retail Products participant survey
- Participated in multiple in SAG and TAC meetings

Upcoming Activities for Q1 2020

In the first quarter of 2020, the evaluation team will focus on development of draft 2019 impact evaluation reports. The evaluation team will also finalize 2020 evaluation plans.

Additional items of note will include:

- Fielding HVAC participant survey and conducting Retro-Commissioning site visits
- Finalizing memo detailing findings from interviews with Income Qualified CAAs
- Preparing 2019 cost-effectiveness inputs
- Participating in SAG and TAC meetings as needed

Summary of Expenditures

The tables below provide a summary of expenditures through Q4 2019 based on team invoices received as of the end of Q4 2019.

Figure 1. 2018 Program Year Q4 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	\$ 1,159,614	\$ (30,406)
Process EM&V	\$ 632,525	\$ 624,408	\$ 8,117
Report Development	\$ 451,683	\$ 446,006	\$ 5,678
<i>Program Specific Evaluation Efforts</i>	\$ 2,213,416	\$ 2,230,028	\$ (16,611)
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	\$ 3,213,018	\$ 46,068

Figure 2. 2019 Program Year Q4 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	\$ 606,798	\$ 386,952
Process EM&V	\$ 596,250	\$ 386,144	\$ 210,106
Report Development	\$ 397,500	\$ 110,327	\$ 287,173
<i>Program Specific Evaluation Efforts</i>	\$ 1,987,500	\$ 1,103,269	\$ 884,231
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
2019 Total	\$ 3,250,348	\$ 1,477,086	\$ 1,702,214