

Memorandum

To: Fernando Morales, AIC; Jennifer Morris, ICC Staff; Celia Johnson, SAG Facilitator
From: Hannah Howard and Zach Ross, Opinion Dynamics
Date: January 15, 2021
Re: Q4 2020 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q4 of 2020 as stipulated in our evaluation contract. The team conducted these activities in support of AIC's 2018-2021 Portfolio of Electric and Gas Energy Efficiency Programs.

Overview of Evaluation Activities

Key Activities for Q4 2020

In the fourth quarter of 2020, the evaluation team focused on continuing 2020 evaluation activities, including continuing analysis and reporting for a number of NTG research efforts, and finalizing early impact reviews for the majority of AIC's prescriptive energy efficiency programs. The evaluation team also developed draft 2021 evaluation plans, discussed them with AIC, presented them to SAG, and submitted draft written plans for AIC and SAG feedback. Additional items of note included:

- Beginning research for pilot evaluations of Efficient Choice (Enervee) and Virtual Commissioning (Power TakeOff)
- Continuing Building Operator Certification Research
- Reviewing AIC's 2021 gas savings goals as part of the adjustable savings goal process
- Finalizing societal NEI analysis and continuing to move forward with utility and participant NEI activities
- Participating in SAG and TAC meetings as needed

Upcoming Activities for Q1 2021

In the first quarter of 2021, the evaluation team will focus on development of draft 2020 impact evaluation reports. The evaluation team will also finalize 2021 evaluation plans.

Additional items of note will include:

- Fielding Instant Incentives participant survey with a focus on NTG updates
- Finalizing review of AIC 2021 gas savings goals
- Preparing 2020 cost-effectiveness inputs
- Participating in SAG and TAC meetings as needed

Summary of Expenditures

The tables below provide a summary of expenditures through Q4 2020 based on team invoices received as of the end of Q4 2020.

Table 1. Q4 2020 Expenditures for Evaluation of 2019 Program Year

AIC 2019 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2019 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 993,750	\$ 993,750	\$ -
Process EM&V	\$ 596,250	\$ 596,250	\$ -
Report Development	\$ 397,500	\$ 397,500	\$ -
<i>Program Specific Evaluation Efforts</i>	\$ 1,987,500	\$ 1,987,500.00	\$ -
Independent EM&V QA/QC	\$ 14,000	\$ 14,040	\$ (40)
Stakeholder Advisory Group	\$ 65,000	\$ 64,820	\$ 180
Statewide TRM Review and Participation	\$ 186,000	\$ 199,485	\$ (13,485)
Non-Energy Impacts	\$ 250,000	\$ 143,916	\$ 106,084
Other Non-Program Activities	\$ 747,848	\$ 749,237	\$ (1,389)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,262,848	\$ 1,171,497	\$ 91,351
2019 Total	\$ 3,250,348	\$ 3,158,997	\$ 91,351

Table 2. Q4 2020 Expenditures for Evaluation of 2020 Program Year

AIC 2020 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2020 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 841,550	\$ 661,780	\$ 179,770
Process EM&V	\$ 504,930	\$ 226,637	\$ 278,293
Report Development	\$ 336,620	\$ 18,131	\$ 318,489
<i>Program Specific Evaluation Efforts</i>	\$ 1,683,100	\$ 906,548.46	\$ 776,552
Independent EM&V QA/QC	\$ 30,000	\$ 14,716	\$ 15,284
Stakeholder Advisory Group	\$ 90,000	\$ 125,164	\$ (35,164)
Statewide TRM Review and Participation	\$ 378,200	\$ 101,763	\$ 276,437
Cost-Effectiveness	\$ 70,000	\$ 3,913	\$ 66,087
Non-Energy Impacts	\$ 165,000	\$ 123,979	\$ 41,021
Pilots	\$ 180,000	\$ 155,898	\$ 24,102
Other Non-Program Activities	\$ 551,211	\$ 368,886	\$ 182,325
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,464,411	\$ 894,319	\$ 570,092
2020 Total	\$ 3,147,511	\$ 1,800,867	\$ 1,346,644