



MEMORANDUM

To: Nick Warnecke, AIC; Elizabeth Horne, ICC Staff; Celia Johnson, SAG Facilitator
From: Zach Ross and Rose Williamson, Opinion Dynamics
Date: January 8, 2025
Re: Q4 2023 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q4 of 2023 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 Q4 2023

In the fourth quarter of 2023, the evaluation team presented results for the Income-Qualified Participant Non-Energy Impacts survey, along with the LLLC MT energy savings framework and evaluation plan to SAG. The team also delivered the Virtual Commissioning memo, Midstream HVAC process memo, and 2024 Net-to-Gross (NTG) research recommendations. The remaining Residential Program interim impact memos were delivered and all interim impact reports for the Business Program were finalized.

UPCOMING ACTIVITIES FOR Q1 2024

In the first quarter of 2024, the evaluation team plans on delivering memos for the Smart Savers Channel, Single Family Whole Building Channel, and the Multifamily Initiatives Channel in the Residential Program and NTG research for the Business Program. We also plan on delivering the draft annual impact evaluation reports for the Residential, Business, and Voltage Optimization programs, as well as the draft 2023 Portfolio Integrated Impact Evaluation Report.

SUMMARY OF EXPENDITURES

The tables below summarize expenditures through Q4 2023 based on team invoices received as of the end of Q4 2023.

Figure 1. Q4 2023 Expenditures for Evaluation of Program Year 2022

AIC 2022 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2022 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 1,094,300	\$ 1,181,473	\$ (87,173)
Process EM&V	\$ 656,580	\$ 708,884	\$ (52,304)
Report Development	\$ 437,720	\$ 472,589	\$ (34,869)
<i>Program Specific Evaluation Efforts</i>	\$ 2,188,600	\$ 2,362,946.45	\$ (174,346)
Independent EM&V QA/QC	\$ 30,000	\$ 12,426	\$ 17,574
Stakeholder Advisory Group	\$ 160,000	\$ 100,794	\$ 59,206
Statewide TRM Review and Participation	\$ 145,000	\$ 121,905	\$ 23,095
Cost-Effectiveness	\$ 50,000	\$ 47,245	\$ 2,755
Non-Energy Impacts	\$ 80,000	\$ 95,454	\$ (15,454)
Pilots	\$ 247,000	\$ 165,545	\$ 81,455
Other Non-Program Activities	\$ 580,000	\$ 665,595	\$ (85,595)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,292,000	\$ 1,208,964	\$ 83,036
Contingency	\$ 98,963	\$ -	\$ 98,963
2022 Total	\$ 3,579,563	\$ 3,571,910	\$ 7,652

Figure 2. Q4 2023 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	\$ 671,440	\$ 561,660
Process EM&V	\$ 739,860	\$ 402,864	\$ 336,996
Report Development	\$ 493,240	\$ 268,576	\$ 224,664
<i>Program Specific Evaluation Efforts</i>	\$ 2,466,200	\$ 1,342,879	\$ 1,123,321
Independent EM&V QA/QC	\$ 30,000	\$ 754	\$ 29,246
Stakeholder Advisory Group	\$ 160,000	\$ 96,888	\$ 63,112
Statewide TRM Review and Participation	\$ 145,000	\$ 80,833	\$ 64,167
Cost-Effectiveness	\$ 50,000	\$ 14,415	\$ 35,586
Non-Energy Impacts	\$ 80,000	\$ 45,585	\$ 34,415
Pilots	\$ 160,000	\$ 147,139	\$ 12,861
Other Non-Program Activities	\$ 495,000	\$ 466,835	\$ 28,165
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,120,000	\$ 852,449	\$ 267,551
Contingency	\$ 96,527	\$ -	\$ 96,527
2023 Total	\$ 3,682,727	\$ 2,195,328	\$ 1,487,399