



# MEMORANDUM

**To:** Nick Warnecke, AIC; Elizabeth Horne, ICC Staff; and Celia Johnson, SAG Facilitator  
**From:** Zach Ross and Rose Williamson, Opinion Dynamics  
**Date:** February 17, 2025  
**Re:** Q4 2024 Evaluation Expenditures

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This memorandum provides a summary of evaluation team activities and expenditures in Q4 of 2024 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 2024

In the fourth quarter of 2024, the evaluation team continued ongoing research projects and provided interim impact memos on Residential, Business, and Pilots/Emerging Programs. Specifically, ongoing research for the Residential program included the CAA Staffing Pilot Study, the Healthier Homes/Accessibility Pilot, and process research for Multifamily Initiatives. Deliverables for the Business program included memos for the following initiatives: Standard Core, SBDI, MFS, MSL, and Small Business. The second Voltage Optimization interim impact analysis was also finalized. The evaluation team began drafting the 2025 evaluation plan and continued participating in SAG meetings as they occurred.

### UPCOMING ACTIVITIES FOR Q1 2025

In the first quarter of 2025, the evaluation team will continue ongoing research projects for the Residential, Business, and Pilots/Emerging Programs. Expected deliverables for the Residential program include the CAA Staffing Pilot Study, the Multifamily Initiatives memo, and the Smart Savers memo. The evaluation team will also present preliminary findings for the LLLC MTI program. The evaluation team will continue to engage with SAG committees, working groups, and TAC meetings as needed.

## SUMMARY OF EXPENDITURES

The tables below summarize expenditures through Q4 2024 based on team invoices received as of the end of Q4 2024.

Figure 1. Q4 2024 Expenditures for Evaluation of Program Year 2024

<b>AIC 2024 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs</b>			
	<b>2024 Budget</b>	<b>Expensed to Date</b>	<b>Remaining</b>
Impact EM&V	\$ 1,172,950	\$ 1,001,032	\$ 171,918
Process EM&V	\$ 703,770	\$ 600,619	\$ 103,151
Report Development	\$ 469,180	\$ 400,413	\$ 68,767
<i>Program Specific Evaluation Efforts</i>	\$ 2,345,900	\$ 2,002,064	\$ 343,836
Compliance and Stakeholder Engagement Activities	\$ 410,000	\$ 158,228	\$ 251,773
Cross-Cutting Evaluation Research	\$ 416,500	\$ 328,013	\$ 88,487
Quality Assurance and Control	\$ 30,000	\$ 7,604	\$ 22,397
Portfolio Evaluation Reporting	\$ 50,000	\$ 6,383	\$ 43,618
Other Non-Program Activities (Project Management, Evaluation Planning, Program Design Support, etc.)	\$ 429,500	\$ 462,122	\$ (32,622)
<b>Total Non-Program Specific Evaluation Efforts</b>	\$ 1,336,000	\$ 634,336	\$ 373,651
<i>Contingency</i>	\$ 6,573	\$ -	\$ 6,573
<b>2024 Total</b>	<b>\$ 3,688,473</b>	<b>\$ 2,636,400</b>	<b>\$ 724,060</b>