

Memorandum

To: Fernando Morales, AIC; Jennifer Morris, ICC Staff; Celia Johnson, SAG Facilitator
From: Hannah Howard and Zach Ross, Opinion Dynamics
Date: June 27, 2019
Re: Q4 2018 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q4 of 2018 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 2018

In the fourth quarter of 2018, the evaluation team finalized Plan 3 evaluation activities, developed draft 2019 evaluation plans, and continued ongoing 2018 evaluation activities.

Additional items of note will include:

- Participating in SAG and TAC meetings as needed

Upcoming Activities for Q1 2019

In the first quarter of 2019, the evaluation team will primarily focus on completing draft impact evaluation reports for the 2018 portfolio and continue ongoing portfolio process research. The evaluation team will also issue final 2019 evaluation plans.

Additional items of note will include:

- Continuing 2018 program evaluation research, including:
 - Participant surveys and interviews
 - On-site research for the Custom and Retro-Commissioning initiatives
- Participating in SAG and TAC meetings as needed

Summary of Expenditures

The tables below provide a summary of expenditures through Q4 2018 based on team invoices received as of the end of Q4 2018.

Figure 1. PY9 Q4 2018 AIC Portfolio Evaluation Expenditures

AIC PY9 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	PY9 Budget*	Expensed to Date	Remaining
Impact EM&V*	\$ 858,750	\$ 873,821	\$ (15,071)
Process EM&V*	\$ 511,250	\$ 524,292	\$ (13,042)
Report Development*	\$ 342,500	\$ 349,528	\$ (7,028)
<i>Program Specific Evaluation Efforts</i>	\$ 1,712,500	\$ 1,747,641	\$ (35,141)
Collaborate with IL Utilities	\$ 10,000	\$ 8,182	\$ 1,818
Independent EM&V QA/QC	\$ 15,000	\$ 6,244	\$ 8,756
Commission Staff	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 30,000	\$ 32,505	\$ (2,505)
Ameren Coordination/Program Design	\$ 5,000	\$ 4,088	\$ 912
Statewide TRM Review and Participation	\$ 70,000	\$ 59,176	\$ 10,824
Other Non-Program Activities*	\$ 622,070	\$ 635,216	\$ (13,146)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 762,070	\$ 745,410	\$ 16,660
<i>Contingency Funds</i>	\$ 18,500	\$ -	\$ 18,500
PY9 Total	\$ 2,493,070	\$ 2,493,052	\$ 19

* As needed, budget is re-allocated between tasks from others where spend was lower than expected.

Figure 2. Transition Period Q4 2018 Evaluation Expenditures

AIC TP Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	TP Budget*	Expensed to Date	Remaining
Impact EM&V	\$ 293,250	\$ 279,114	\$ 14,136
Process EM&V	\$ 169,950	\$ 167,469	\$ 2,481
Report Development	\$ 113,300	\$ 111,646	\$ 1,654
<i>Program Specific Evaluation Efforts</i>	\$ 576,500	\$ 558,229	\$ 18,271
Independent EM&V QA/QC	\$ 10,000	\$ 5,550	\$ 4,450
Stakeholder Advisory Group	\$ 5,000	\$ 4,474	\$ 526
Statewide TRM Review and Participation	\$ 15,000	\$ 18,559	\$ (3,559)
Other Non-Program Activities	\$ 423,175	\$ 442,864	\$ (19,689)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 453,175	\$ 471,447	\$ (18,272)
Transition Period Total	\$ 1,029,675	\$ 1,029,675	\$ (0)

* As needed, budget is re-allocated between tasks from others where spend was lower than expected.

Figure 3. 2018 Program Year Q4 2018 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	\$ 450,430	\$ 678,778
Process EM&V	\$ 677,525	\$ 270,258	\$ 407,267
Report Development	\$ 451,683	\$ 180,172	\$ 271,511
<i>Program Specific Evaluation Efforts</i>	\$ 2,258,416	\$ 900,860	\$ 1,357,557
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Stakeholder Advisory Group	\$ 90,000	\$ 69,113	\$ 20,887
Statewide TRM Review and Participation	\$ 196,400	\$ 108,128	\$ 88,273
Other Non-Program Activities	\$ 684,270	\$ 451,799	\$ 232,471
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,000,670	\$ 629,040	\$ 371,631
2018 Total	\$ 3,259,087	\$ 1,529,899	\$ 1,729,187

Figure 4. 2019 Program Year Q4 2018 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	\$ 1,095	\$ 992,655
Process EM&V	\$ 596,250	\$ 657	\$ 595,593
Report Development	\$ 397,500	\$ 438	\$ 397,062
<i>Program Specific Evaluation Efforts</i>	\$ 1,987,500	\$ 2,191	\$ 1,985,309
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Stakeholder Advisory Group	\$ 90,000	\$ -	\$ 90,000
Statewide TRM Review and Participation	\$ 186,000	\$ -	\$ 186,000
Non-Energy Impacts	\$ 250,000	\$ -	\$ 250,000
Other Non-Program Activities	\$ 635,800	\$ 108,457	\$ 527,343
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,191,800	\$ 108,457	\$ 1,083,343
Contingency	\$ 71,048	\$ -	\$ 71,048
2018 Total	\$ 3,250,348	\$ 110,648	\$ 3,068,652