

Memorandum

To: Jonathon Jackson, AIC; Jennifer Morris, ICC Staff;
Annette Beitel, SAG Facilitator

From: Mary Sutter and Hannah Arnold, Opinion Dynamics

Date: June 23, 2015

Re: Q1 2015 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q1 of 2015 as stipulated in our evaluation contract. The team conducted these activities in support of the evaluation of AIC's Plan 2 and Plan 3 Portfolio of C&I and Residential Electric and Gas Efficiency Programs.

1. Overview of Evaluation Activities

1.1 Key Activities for Q1 2015

During the first quarter of 2015, the evaluation team wrapped up PY6 activities and began the planning process for the Plan 3 cycle.

- Responded to final comments on select PY6 evaluation reports from ICC staff
- Finalized the majority of PY6 evaluation reports based on ICC staff and AIC feedback
- Provided NTG recommendations to the SAG for PY8 programs
- Conducted an in-person planning meeting with AIC and implementation team staff
- Developed and submitted Multi-Year Evaluation plans for 8-103/8-104 and IPA programs for review
- Began conducting in-depth interviews with program staff involved in PY7 implementation
- Participated in SAG meetings, as well as the TRM NTG Methodology Working Group process

1.2 Upcoming Activities for Q2 2015

- Finalize the last outstanding PY6 evaluation reports for Residential Lighting and EE Kits
- Submit the detailed PY7 evaluation plan for 8-103/8-104 and IPA programs
- Finalize the Multiyear and PY7 evaluation plans for 8-103/8-104 and IPA programs based on feedback from AIC and ICC staff
- Continue to conduct annual in-depth interviews with program staff involved in PY7 implementation
- Begin data collection activities such as interviews with small business program allies and site visits with Custom program participants

- Develop draft data collection instruments for both residential and C&I programs
- Begin to review PY7 program-tracking data as it becomes available
- Participate in SAG meetings as needed
- Continue to participate in TRM activities as needed, including the NTG Methodology Working Group

2. Summary of Expenditures

Each of the tables below provide a summary of expenditures through Q1 2015 based on team invoices received as of the end of Q1 2015.

Table 1. Q1 2015 AIC Portfolio Evaluation Expenditures for PY6

AIC PY6 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	PY6 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 1,125,103	\$ 1,119,923	\$ 5,180
Process EM&V	\$ 675,062	\$ 671,954	\$ 3,108
Report Development	\$ 450,041	\$ 447,969	\$ 2,072
<i>Program Specific Evaluation Efforts</i>	\$ 2,250,206	\$ 2,239,846	\$ 10,360
Collaborate with IL utilities on methodologies	\$ 7,000	\$ 29,567	\$ (22,567)
Independent EM&V QA/QC	\$ 20,000	\$ 9,855	\$ 10,145
Commission Staff	\$ 20,000	\$ 8,632	\$ 11,369
Stakeholder Advisory Group	\$ 20,000	\$ 20,924	\$ (924)
Ameren Coord/ Program Design	\$ 10,000	\$ 1,801	\$ 8,199
Statewide TRM Review and Participation	\$ 35,000	\$ 33,089	\$ 1,911
<i>Non-Program Specific Evaluation Efforts</i>	\$ 112,000	\$ 103,868	\$ 8,132
TOTAL Evaluation Budget for PY6	\$ 2,362,206	\$ 2,343,714	\$ 18,492

Table 2. Q1 2015 AIC Portfolio Evaluation Expenditures for PY7

AIC PY7 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	PY7 Budget*	Expensed to Date	Remaining
Impact EM&V	\$ 863,000	\$ 61,910	\$ 801,090
Process EM&V	\$ 517,800	\$ 61,910	\$ 455,890
Report Development	\$ 345,200	\$ -	\$ 345,200
<i>Program Specific Evaluation Efforts</i>	<i>\$ 1,791,125</i>	<i>\$ 123,821</i>	<i>\$ 1,602,179</i>
Collaborate with IL Utilities	\$ 10,000	\$ -	\$ 10,000
Independent EM&V QA/QC	\$ 35,000	\$ -	\$ 35,000
Commission Staff	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 20,000	\$ 16,237	\$ 3,763
Ameren Coordination/ Program Design	\$ 15,000	\$ 17,774	\$ (2,774)
Statewide TRM Review and Participation	\$ 80,000	\$ 75,649	\$ 4,351
<i>Non-Program Specific Evaluation Efforts</i>	<i>\$ 170,000</i>	<i>\$ 109,660</i>	<i>\$ 60,341</i>
TOTAL Evaluation Budget for PY7	\$ 1,961,125	\$ 233,480	\$1,662,520

* Note that the team is currently finalizing the detailed PY7 evaluation plans. As such, the budgets presented here are draft and subject to change.