

# Memorandum

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

From: Hannah Arnold, Opinion Dynamics

Date: May 2, 2016

Re: Q1 2016 Evaluation Expenditures

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This memorandum provides a summary of evaluation team activities and expenditures in Q1 of 2016 as stipulated in our evaluation contract. The team conducted these activities in support of the evaluation of AIC's Plan 3 Portfolio of C&I and Residential Electric and Gas Efficiency Programs.

## 1. Overview of Evaluation Activities

### 1.1 Key Activities for Q1 2016

During the first quarter of 2016, the evaluation team focused on completing all remaining PY7 evaluation reports and planning for PY8. In particular, we completed the following activities:

- Submitted remaining final reports to AIC, ICC staff and the SAG
- Participated in SAG discussions of the PY9 NTG recommendations
- Wrapped up participation in the TRM V5.0 update process
- Began to prepare PY7 Evaluation Binders and TRC inputs
- Began developing the formal PY8 evaluation plan, and conducted meetings with AIC and implementation team staff to inform the planning process
- Began implementing early evaluation activities such as:
  - In-store intercepts for the Lighting Program
  - Fielding of a builder survey for the New Homes Program
  - Heat Pump and AC meter installations, as well as recruitment of non-ECM measure participants for the HVAC Program

### 1.2 Upcoming Activities for Q2 2016

In the second quarter of 2016, the evaluation team will work to finalize PY8 evaluation planning activities and move forward with the plan's implementation. A couple of items of note include:

- Finalize the draft PY8 evaluation plan and submit it to AIC and ICC staff for review
- Participate in SAG NTG recommendation meetings

- Continue to participate in the NTG working group and TRM update process
- Begin preparation of PY7 Integrated Report
- Submit draft PY8 Residential Lighting intercept and shelf survey preliminary results memo
- Begin to conduct PY8 evaluation activities, including program staff interviews and submission of data requests for various programs

## 2. Summary of Expenditures

Each of the tables below provide a summary of expenditures through Q1 2016 based on team invoices received as of the end of Q1 2016.

Table 1. PY7 Q1 2016 AIC Portfolio Evaluation Expenditures

AIC PY7 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	PY7 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 834,650	\$ 830,526	\$ 4,124
Process EM&V	\$ 500,790	\$ 498,315	\$ 2,475
Report Development	\$ 333,860	\$ 332,210	\$ 1,650
<i>Program Specific Evaluation Efforts</i>	<i>\$ 1,669,300</i>	<i>\$ 1,661,051</i>	<i>\$ 8,249</i>
Collaborate with IL Utilities	\$ 10,000	\$ 2,159	\$ 7,841
Independent EM&V QA/QC	\$ 35,000	\$ 25,299	\$ 9,701
Commission Staff	\$ 10,000	\$ 10,416	\$ (416)
Stakeholder Advisory Group	\$ 20,000	\$ 25,766	\$ (5,766)
Ameren Coordination/ Program Design	\$ 5,000	\$ 2,193	\$ 2,807
Statewide TRM Review and Participation	\$ 120,000	\$ 206,764	\$ (86,764)
<i>Non-Program Specific Evaluation Efforts</i>	<i>\$ 200,000</i>	<i>\$ 272,596</i>	<i>\$ (72,596)</i>
<i>Contingency Funds</i>	<i>\$ 89,476</i>	<i>\$ -</i>	<i>\$ 89,476</i>
<b>PY7 Total</b>	<b>\$ 1,958,776</b>	<b>\$ 1,933,647</b>	<b>\$ 25,128</b>

Table 2. PY8 Q1 2016 AIC Portfolio Evaluation Expenditures

AIC PY8 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	PY8 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 1,001,450	\$ 171,197	\$ 830,253
Process EM&V	\$ 600,870	\$ 171,197	\$ 429,673
Report Development	\$ 400,580	\$ -	\$ 400,580
<i>Program Specific Evaluation Efforts</i>	<i>\$ 2,002,900</i>	<i>\$ 342,394</i>	<i>\$ 1,660,506</i>
Collaborate with IL Utilities	\$ 5,000	\$ -	\$ 5,000
Independent EM&V QA/QC	\$ 30,000	\$ 1,480	\$ 28,520
Commission Staff	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 15,000	\$ -	\$ 15,000
Ameren Coordination/Program Design	\$ 10,000	\$ -	\$ 10,000
Statewide TRM Review and Participation	\$ 130,000	\$ 76,280	\$ 53,720
<i>Non-Program Specific Evaluation Efforts</i>	<i>\$ 200,000</i>	<i>\$ 77,760</i>	<i>\$ 122,240</i>
<i>Contingency Funds</i>	<i>\$ 52,106</i>	<i>\$ -</i>	<i>\$ 52,106</i>
<b>PY8 Total</b>	<b>\$ 2,255,006</b>	<b>\$ 420,154</b>	<b>\$1,834,851</b>