

Memorandum

To: Jonathon Jackson, AIC; Jennifer Morris, ICC Staff;
Annette Beitel, SAG Facilitator
From: Hannah Arnold, Opinion Dynamics
Date: August 2, 2017
Re: Q1 2017 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q1 of 2017 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.

1. Overview of Evaluation Activities

1.1 Key Activities for Q1 2017

In the first quarter of 2017, the evaluation team finalized pending PY8 reports and began PY9 evaluation planning activities. Items of note include:

- Submitted remaining final reports to AIC, ICC staff and the SAG
- Participated in SAG discussions of the PY10 NTG recommendations and 2018 Plan Period
- Wrapped up participation in the TRM V6.0 update process
- Prepared PY8 Evaluation Binders and TRC inputs
- Conducted in-home visits to support the residential Lighting Program
- Continued work on the HVAC incremental cost analysis
- Began developing the formal PY9 evaluation plan through in-person meetings with AIC and implementation team staff

1.2 Upcoming Activities for Q2 2017

In the second quarter of 2017, the evaluation team will complete evaluation planning activities and ramp up program-specific evaluation efforts for the AIC and IPA programs. Items of note include:

- Finalize PY9 evaluation plans for AIC and IPA programs
- Conduct in-depth interviews with program staff and submit data requests for all programs
- Begin to conduct impact analyses for those programs with final program tracking data
- Begin to conduct process evaluation activities for all programs

- Participate in IL-TRM related discussions related to research priorities for the 2018 Plan

2. Summary of Expenditures

Each of the tables below provide a summary of expenditures through Q1 2017 based on team invoices received as of the end of Q1 2017.

Table 1. PY8 Q1 2017 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	\$ 986,403	\$ 1,007,145	\$ (20,742)
Process EM&V	\$ 554,852	\$ 566,519	\$ (11,667)
Report Development	\$ 513,751	\$ 524,555	\$ (10,803)
<i>Program Specific Evaluation Efforts</i>	\$ 2,055,006	\$ 2,098,218	\$ (43,212)
Collaborate with IL Utilities	\$ 5,000	\$ -	\$ 5,000
Independent EM&V QA/QC	\$ 30,000	\$ 6,845	\$ 23,155
Commission Staff	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 15,000	\$ 6,612	\$ 8,388
Ameren Coordination/Program Design	\$ 10,000	\$ 5,582	\$ 4,418
Statewide TRM Review and Participation	\$ 130,000	\$ 135,160	\$ (5,160)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 200,000	\$ 154,199	\$ 45,801
<i>Contingency Funds*</i>	\$ -	\$ -	\$ -
PY8 Total	\$ 2,255,006	\$ 2,252,418	\$ 2,588

Table 2. PY9 Q1 2017 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	\$ 824,000	\$ 112,033	\$ 711,967
Process EM&V	\$ 494,400	\$ 112,033	\$ 382,367
Report Development	\$ 329,600	\$ -	\$ 329,600
<i>Program Specific Evaluation Efforts</i>	\$ 1,648,000	\$ 224,066	\$ 1,423,934
Collaborate with IL Utilities	\$ 10,000	\$ -	\$ 10,000
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Commission Staff	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 30,000	\$ 22,399	\$ 7,601
Ameren Coordination/Program Design	\$ 25,000	\$ -	\$ 25,000
Statewide TRM Review and Participation	\$ 100,000	\$ 11,163	\$ 88,837
Other Non-Program Activities	\$ 526,000	\$ 94,074	\$ 431,926
<i>Non-Program Specific Evaluation Efforts</i>	\$ 731,000	\$ 127,636	\$ 603,364
<i>Contingency Funds</i>	\$ 114,070	\$ -	\$ 114,070
PY9 Total	\$ 2,493,070	\$ 351,702	\$2,141,369