

# Memorandum

**To:** Jonathon Jackson, AIC; Jennifer Morris, ICC Staff;  
Annette Beitel, SAG Facilitator  
**From:** Hannah Arnold, Opinion Dynamics  
**Date:** October 21, 2015  
**Re:** Q2 2015 Evaluation Expenditures

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This memorandum provides a summary of evaluation team activities and expenditures in Q2 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 Q2 2015

During the second quarter of 2015, the evaluation team completed the planning process and began implementing the PY7 evaluation plan. In particular, we completed the following activities:

- Submitted the detailed PY7 evaluation plans for 8-103/8-104 and IPA programs
- Finalized the Multiyear evaluation plan for 8-103/8-104 and IPA programs based on feedback from AIC and ICC staff
- Began responding to comments on the PY7 evaluation plans for 8-103/8-104 and IPA programs, which were received in June
- Completed the majority of annual in-depth interviews with program staff involved in PY7 implementation
- Conducted data collection activities such as interviews with small business program allies and site visits with Custom program participants
- Continued to develop data collection instruments for both residential and C&I programs, including participant and non-participant surveys
- Reviewed the PY7 program-tracking data for the SBDI program, and began impact analysis work
- Participated in SAG meetings, and the TRM process including the NTG Methodology Working Group meetings

### 1.2 Upcoming Activities for Q3 2015

- Finalize the PY7 evaluation plans for 8-103/8-104 and IPA programs based on feedback from AIC and ICC staff.

- Conduct all data collection activities in support of the PY7 evaluation. This includes participant and non-participant survey efforts, as well as interviews with distributors and program allies.
- Conduct all Custom site visits, which inform gross impact estimation for the program.
- Perform modeling to support the Behavioral Modification evaluation.
- Review and analyze PY7 tracking data as soon as it becomes available for each program.
- Finalize and submit updates for the TRM V5.0 update process.
- Participate in TRM and SAG meetings as needed, including ongoing participation in the NTG Working Group.
- Begin to develop draft PY7 evaluation reports and prepare to submit the first reports in September.

## 2. Summary of Expenditures

Each of the tables below provide a summary of expenditures through Q2 2015 based on team invoices received as of the end of Q2 2015.

Table 1. Q2 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	\$ 1,130,103	\$ 1,130,716	\$ (613)
Process EM&V	\$ 678,062	\$ 678,429	\$ (368)
Report Development	\$ 452,041	\$ 452,286	\$ (245)
<i>Program Specific Evaluation Efforts</i>	\$ 2,260,206	\$ 2,261,431	\$ (1,225)
Collaborate with IL utilities on methodologies	\$ 7,000	\$ 29,304	\$ (22,304)
Independent EM&V QA/QC	\$ 20,000	\$ 15,155	\$ 4,845
Commission Staff	\$ 20,000	\$ 7,196	\$ 12,804
Stakeholder Advisory Group	\$ 20,000	\$ 15,798	\$ 4,202
Ameren Coord/ Program Design	\$ 10,000	\$ 1,947	\$ 8,053
Statewide TRM Review and Participation	\$ 35,000	\$ 34,320	\$ 680
<i>Non-Program Specific Evaluation Efforts</i>	\$ 112,000	\$ 103,719	\$ 8,281
<b>TOTAL Evaluation Budget for PY6</b>	<b>\$ 2,372,206</b>	<b>\$ 2,365,151</b>	<b>\$ 7,055</b>

Table 2. Q2 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	\$ 827,150	\$ 137,817	\$ 689,333
Process EM&V	\$ 496,290	\$ 137,817	\$ 358,473
Report Development	\$ 330,860	\$ 30,626	\$ 300,234
<i>Program Specific Evaluation Efforts</i>	\$ 1,654,300	\$ 306,259	\$ 1,348,041
Collaborate with IL Utilities	\$ 10,000	\$ -	\$ 10,000
Independent EM&V QA/QC	\$ 35,000	\$ -	\$ 35,000
Commission Staff	\$ 10,000	\$ 1,066	\$ 8,934
Stakeholder Advisory Group	\$ 20,000	\$ 17,114	\$ 2,886
Ameren Coordination/ Program Design	\$ 40,000	\$ 17,774	\$ 22,226
Statewide TRM Review and Participation	\$ 120,000	\$ 103,492	\$ 16,508
<i>Non-Program Specific Evaluation Efforts</i>	\$ 235,000	\$ 139,446	\$ 95,554
<i>Contingency Funds</i>	\$ 69,476	\$ -	\$ 69,476
<b>TOTAL Evaluation Budget for PY7</b>	<b>\$ 1,958,776</b>	<b>\$ 445,705</b>	<b>\$1,513,070</b>