

Memorandum

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

From: Hannah Arnold, Opinion Dynamics

Date: August 4, 2017

Re: Q2 2017 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q2 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 Q2 2017

In the second quarter of 2017, the evaluation team finalized all pending PY8 activities, as well as PY9 evaluation planning efforts. Items of note include:

- Finalized PY9 evaluation plans for AIC and IPA programs
- Conducted in-depth interviews with program staff and submitted data requests for PY9 programs
- Began to conduct impact analyses for programs with final program tracking data (e.g., Home Efficiency Standard, Community-Based CFL Distribution, Rural Kits)
- Began to conduct process evaluation activities for all programs, including developing in-depth interview guides and surveys
- Participated in IL-TRM related discussions related to research priorities for the 2018 Plan

1.2 Upcoming Activities for Q3 2017

In the third quarter of 2017, the evaluation team will complete most of the data collection planned to support the PY9 evaluation of AIC and IPA programs. The team will also conduct impact and process analyses for most programs. Items of note include:

- Finalize participant surveys and interview guides for the C&I programs, including Custom, Standard, Retro-Commissioning, and Small Business
- Complete all Wave 1 site visits planned for the Custom Program, and schedule Wave 2 visits
- Conduct in-depth interviews and surveys with select C&I participants
- Develop and finalize the residential general population survey
- Complete the Behavioral Modification impact analysis

- Complete the Home Efficiency Income Qualified participation analysis, assuming all programs provide final tracking data in August
- Submit interim memos for the containing literature review findings, trade ally interview results, and other preliminary analyses
- Collect lighting loggers installed as part of the Statewide Lighting Logger Study from participating customer homes and begin analysis of the data.
- Continue to participate in IL-TRM related discussions related to research priorities for the 2018 Plan
- Submit draft reports for Home Efficiency Standard, Community-Based CFL Distribution, Rural Kits, and Appliance Recycling programs

2. Summary of Expenditures

Each of the tables below provide a summary of expenditures through Q2 2017 based on team invoices received as of the end of Q2 2017.

Table 1. PY8 Q2 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	\$ 1,008,386	\$ (21,984)
Process EM&V	\$ 554,852	\$ 567,217	\$ (12,366)
Report Development	\$ 513,751	\$ 525,201	\$ (11,450)
<i>Program Specific Evaluation Efforts</i>	\$ 2,055,006	\$ 2,100,805	\$ (45,799)
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 Fund</i>	\$ -	\$ -	\$ -
PY8 Total	\$ 2,255,006	\$ 2,255,004	\$ 1

Table 2. PY9 Q2 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	\$ 209,506	\$ 614,494
Process EM&V	\$ 494,400	\$ 209,506	\$ 284,894
Report Development	\$ 329,600	\$ 26,746	\$ 302,854
<i>Program Specific Evaluation Efforts</i>	\$ 1,648,000	\$ 445,759	\$ 1,202,241
Collaborate with IL Utilities	\$ 10,000	\$ 1,026	\$ 8,974
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Commission Staff	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 30,000	\$ 24,039	\$ 5,961
Ameren Coordination/Program Design	\$ 25,000	\$ 1,790	\$ 23,210
Statewide TRM Review and Participation	\$ 100,000	\$ 16,583	\$ 83,417
Other Non-Program Activities	\$ 526,000	\$ 235,270	\$ 290,730
<i>Non-Program Specific Evaluation Efforts</i>	\$ 731,000	\$ 278,709	\$ 452,291
<i>Contingency Funds</i>	\$ 114,070	\$ -	\$ 114,070
PY9 Total	\$ 2,493,070	\$ 724,467	\$1,768,603