

Memorandum

To: Jonathon Jackson, AIC; Jennifer Morris, ICC Staff;
Annette Beitel, SAG Facilitator
From: Hannah Arnold, Opinion Dynamics
Date: October 23, 2017
Re: Q3 2017 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q3 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 Q3 2017

In the third quarter of 2017, the evaluation team implemented planned PY9 evaluation activities. Items of note include:

- Finalized participant surveys and interview guides for all residential and C&I programs
- Completed all Wave 1 site visits planned for the Custom Program, and scheduled Wave 2 visits
- Conducted in-depth interviews and surveys with all selected C&I participants
- Developed and finalized the residential general population survey
- Completed the Behavioral Modification impact analysis except for program channeling
- Completed the Home Efficiency Income Qualified participation analysis
- Submitted interim memos containing literature review findings for the Multifamily and Home Efficiency Income Qualified programs
- Completed interviews with small business program allies and began drafting the results memo
- Developed and fielded the small business general population survey
- Collected lighting loggers installed as part of the Statewide Lighting Logger Study from participating customer homes and began analysis of the data
- Submitted draft reports for Small Business Cooler Savings, Home Efficiency Standard, Community-Based CFL Distribution, Rural Kits, and Appliance Recycling programs

1.2 Upcoming Activities for Q4 2017

In the fourth quarter of 2017, the evaluation team will wrap up all data collection and analysis in support of the PY9 AIC and IPA programs. The team will also submit PY9 reports for all programs. Items of note include:

- Field and analyze results from the residential non-participant survey
- Complete all C&I Custom and Retro-Commissioning site visits, and conduct meetings with AIC and implementation staff to review results
- Finalize all pending impact and process analyses, and reporting
- Submit draft and final reports for all pending residential and C&I programs
- Participate in TAC meetings regarding the 2018 Plan cycle
- Develop an evaluation plan for Transition Period programs
- Begin developing an evaluation plan for 2018 Plan programs

2. Summary of Expenditures

The table below provides a summary of expenditures through Q3 2017 based on team invoices received as of the end of Q3 2017.

Table 1. PY9 Q3 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	\$ 827,500	\$ 612,607	\$ 214,893
Process EM&V	\$ 496,500	\$ 388,770	\$ 107,730
Report Development	\$ 331,000	\$ 176,713	\$ 154,287
<i>Program Specific Evaluation Efforts</i>	<i>\$ 1,655,000</i>	<i>\$ 1,178,090</i>	<i>\$ 476,910</i>
Collaborate with IL Utilities	\$ 10,000	\$ 4,825	\$ 5,175
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Commission Staff	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 30,000	\$ 24,837	\$ 5,163
Ameren Coordination/Program Design	\$ 25,000	\$ 2,921	\$ 22,079
Statewide TRM Review and Participation	\$ 100,000	\$ 18,720	\$ 81,280
Other Non-Program Activities	\$ 526,000	\$ 366,350	\$ 159,650
<i>Non-Program Specific Evaluation Efforts</i>	<i>\$ 731,000</i>	<i>\$ 417,653</i>	<i>\$ 313,347</i>
<i>Contingency Funds</i>	<i>\$ 107,070</i>	<i>\$ -</i>	<i>\$ 107,070</i>
PY9 Total	\$ 2,493,070	\$ 1,595,743	\$ 897,328