

Memorandum

To: Jonathon Jackson, AIC; Jennifer Morris, ICC Staff;
Annette Beitel, SAG Facilitator
From: Hannah Arnold, Opinion Dynamics
Date: March 1, 2017
Re: Q4 2016 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q4 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 Electric and Gas Energy Efficiency Programs.

1. Overview of Evaluation Activities

1.1 Key Activities for Q4 2016

During the fourth quarter of 2016, the evaluation team focused on completing all remaining PY8 evaluation activities and submitting draft evaluation reports. In particular, we completed the following activities:

- Completed all pending data collection and analyses to support the PY8 evaluation.
- Presented draft impact results from both the C&I Custom and C&I Retro-Commissioning programs to AIC and Leidos.
- Completed NTG analyses and submitted NTG recommendations by the November 1 and December 1 deadlines.
- Participated in TRM and SAG meetings, including ongoing participation in the NTG Working Group.
- Submitted inputs to the TRM V6.0 update process.
- Developed and submitted draft and final reports to AIC and ICC staff for review and comment.
- Continued work on the HVAC incremental cost study.
- Prepared for and began recruiting customers to participate in the lighting logger portion of the in-home lighting study.

1.2 Upcoming Activities for Q1 2017

In the first quarter of 2017, the evaluation team will finalize all pending PY8 reports and begin PY9 evaluation planning activities. A couple of items of note include:

- Respond to any final comments on the PY8 reports.
- Prepare evaluation binders and PY8 TRC inputs.

- Participate in SAG meetings including those related to PY10 NTG Recommendations.
- Develop the PY8 Integrated Report.
- Began development of the PY9 evaluation plan.

2. Summary of Expenditures

Each of the tables below provide a summary of expenditures through Q4 2016 based on team invoices received as of the end of Q4 2016.

Table 1. PY8 Q4 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	\$ 1,019,365	\$ (17,915)
Process EM&V	\$ 600,870	\$ 611,619	\$ (10,749)
Report Development	\$ 400,580	\$ 407,746	\$ (7,166)
<i>Program Specific Evaluation Efforts</i>	\$ 2,002,900	\$ 2,038,730	\$ (35,830)
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	\$ 2,430	\$ 12,570
Ameren Coordination/Program Design	\$ 10,000	\$ 5,582	\$ 4,418
Statewide TRM Review and Participation	\$ 130,000	\$ 120,426	\$ 9,574
<i>Non-Program Specific Evaluation Efforts</i>	\$ 200,000	\$ 135,283	\$ 64,717
<i>Contingency Funds</i>	\$ 52,106	\$ -	\$ 52,106
PY8 Total	\$ 2,255,006	\$ 2,174,013	\$ 80,993