

# Memorandum

To: Jonathon Jackson, AIC; Jennifer Morris, ICC Staff;  
Annette Beitel, SAG Facilitator  
From: Hannah Howard, Opinion Dynamics  
Date: February 15, 2018  
Re: Q4 2017 Evaluation Expenditures

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This memorandum provides a summary of evaluation team activities and expenditures in Q4 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 Q4 2017

In the fourth quarter, the evaluation team wrapped up all data collection and analysis in support of the PY9 AIC and IPA programs, and submitted PY9 draft reports for almost all programs. Additional items of note include:

- Submission of two memos to inform the IL-TRM: (1) behavioral program weather normalization memo, and (2) HVAC metering memo
- Fielding and analysis of results from a residential non-participant survey
- Development of an evaluation plan for Transition Period programs, as well as a draft evaluation plan for 2018-2021 Plan programs

### 1.2 Upcoming Activities for Q1 2018

In the first quarter of 2018, the evaluation team will wrap up all reporting related to the PY9 AIC and IPA programs. The team will also complete all impact evaluation activities for the Transition Period in anticipation of issuing a draft report on March 15<sup>th</sup>. Additional items of note include:

- Conducting qualitative research with AIC's top 500 C&I customers, as well as public sector customers
- Conducting a low income need assessment with AIC's income qualified customers to understand barriers to participation, as well as energy burden
- Finalize a Strategic Energy Management literature review and evaluability assessment
- Responding to comments on and finalize the 2018-2021 Multiyear Evaluation Plan, as well as the 2018 Annual Evaluation Plan
- Participating in SAG and TAC meetings as needed

## 2. Summary of Expenditures

The table below provides a summary of expenditures through Q4 2017 based on team invoices received as of the end of Q4 2017.

Table 1. PY9 Q4 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*	\$ 867,500	\$ 867,110	\$ 390
Process EM&V	\$ 496,500	\$ 500,256	\$ (3,756)
Report Development	\$ 331,000	\$ 300,154	\$ 30,846
<i>Program Specific Evaluation Efforts</i>	<i>\$ 1,695,000</i>	<i>\$ 1,667,520</i>	<i>\$ 27,480</i>
Collaborate with IL Utilities	\$ 10,000	\$ 6,991	\$ 3,009
Independent EM&V QA/QC	\$ 30,000	\$ 6,244	\$ 23,756
Commission Staff	\$ 10,000	\$ -	\$ 10,000
Stakeholder Advisory Group	\$ 30,000	\$ 31,031	\$ (1,031)
Ameren Coordination/Program Design	\$ 25,000	\$ 4,088	\$ 20,912
Statewide TRM Review and Participation	\$ 70,000	\$ 56,160	\$ 13,840
Other Non-Program Activities*	\$ 556,000	\$ 547,382	\$ 8,618
<i>Non-Program Specific Evaluation Efforts</i>	<i>\$ 731,000</i>	<i>\$ 651,895</i>	<i>\$ 79,105</i>
<i>Contingency Funds</i>	<i>\$ 67,070</i>	<i>\$ -</i>	<i>\$ 67,070</i>
<b>PY9 Total</b>	<b>\$ 2,493,070</b>	<b>\$ 2,319,416</b>	<b>\$ 173,655</b>

\* During Q4, budget was re-allocated to these tasks from others where spend was lower than expected.