Process for Development of Evaluation Framework, Phase 1:
High-Priority Issues,
Plus Issues in Which Contractors Do Not Need to be Involved

Framework Component	Proposed Schedule	Notes on Proposed Schedule	Deliverables
Clarification of the contents, process and schedule for development of framework	September 2008	Drives all other framework activities.	This table.
Contents and format of evaluation workplans	October-November 2008	Beneficial to have settled before contractors begin to develop workplans	Template for workplans
Process for development, refinement and revision of evaluation plans	October-November 2008	Beneficial to have settled before contractors begin working on evaluation planning. Issue goes hand in hand with the preceding one.	Memo
Application of net savings results (e.g., prospective vs retrospective application)	October-November 2008	High priority because: (1) there appears to be a lack of clarity and consensus on the issue among stakeholders; (2) how the issue is resolved can have a significant effect on both programming and other evaluation issues.	Memo recommending approach to the application of net savings results
Early reporting requirements for implementation contractors	October-November 2008	Need to establish monthly reporting requirements to keep SAG informed on progress and provide source material for process evaluation.	Memo
Measurement of performance relative to legislatively mandated goals	October-November 2008	Issue needs to be clarified before evaluation planning process begins.	Memo

Process for Development of Evaluation Framework, Phase 2:
Issues in Which Contractors Need to be Involved

Framework Component	Proposed Schedule	Notes on Proposed Schedule	Deliverables
Principles governing allocation of evaluation resources	November-December 2008	Threshold issue that drives all evaluation planning activities. However, critical for eval contractors to provide input.	1. Memo providing high-level summary recommendations on all issues to the left of this cell – late October to early November 2008
Approach to coordination and collaboration between Com Ed and Ameren contractors	November 2008-January 2009	Clarity probably will not begin to emerge until contractors are on board and have made progress on developing workplans. However, it is important to resolve the issue as soon thereafter as possible.	2. Memo commenting on implications of winning proposals for these issues – late November to early December 2008
Type and depth of evaluation appropriate for each program element	November 2008 – January 2009	Issue needs to be resolved relatively early in the evaluation planning process, but significant back and forth between SAG consultants, eval contractors, and utilities will be needed.	
Approaches to the deeming of parameter values	November 2008 – February 2009	Evaluation contractors need to be heavily involved, and coordination between contractors is needed. That will take some time.	3. Memo reporting on evaluation planning process and progress toward consensus on these issues – January 2009
Methods for estimating net-to-gross ratios	November 2008 – February 2009	Full resolution of this issue could be very time consuming, so we recommend an incremental approach. Start by pinning down only the highest-level principles, and getting workable approaches in place for first year.	4. Memo critiquing draft workplans for these and other issues – March 2009
Level of statistical precision appropriate for evaluation of each program or program type	November 2008 – February 2009	Broad principles regarding precision requirements can be developed early, but because of the 3% spending limit, refinement of those principles and application to individual programs will take time and require extensive participation by contractors.	
Schedule for evaluation activities over three year period	February – March 2009	Eval contractors must be heavily involved, and resolution will only emerge by the end of the initial evaluation planning process.	
Contents and format of evaluation reports	Spring 2009	Should be a significant delay between hiring of eval contractors and first major evaluation reports, suggesting there is no hurry to resolve the issue.	Template for evaluation reports