



MEMORANDUM

To: Nick Warnecke, AIC; Elizabeth Horne, ICC Staff; Celia Johnson, SAG Facilitator
From: Hannah Howard and Zach Ross, Opinion Dynamics
Date: June 15, 2023
Re: Q1 2023 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q1 of 2023 as stipulated in our evaluation contract. The team conducted these activities in support of AIC's 2022-2025 Portfolio of Electric and Gas Energy Efficiency Programs.

OVERVIEW OF EVALUATION ACTIVITIES

KEY ACTIVITIES FOR Q1 2023

In the first quarter of 2023, the evaluation team focused on developing draft and final 2023 impact evaluation reports. The evaluation team also finalized 2023 evaluation plans and continued to execute select 2022 evaluation activities. In conjunction with these activities, the evaluation team actively participated in SAG Policy Manual Subcommittee, NTG Working Group, and TAC meetings over the course of Q1.

UPCOMING ACTIVITIES FOR Q2 2023

In the second quarter of 2023, the evaluation team will review and respond to AIC and stakeholder comments on the 2022 impact evaluation reports and issue final versions. The evaluation team will also issue the 2023 Integrated Evaluation Report and supporting evaluation materials such as the Portfolio CPAS and AAIG workbook.

Additional items of note include:

- Conducting the 2022 cost effectiveness analysis and submitting the cost effectiveness report
- Finalizing a summary of 2022 LLLC evaluation findings, as well as reviewing the LLLC natural market baseline and preparing customer and trade ally surveys
- Finalizing the Mobile Homes Community Mapping and TRM Gap Analysis memos
- Submitting the IQ Single Family Program Ally memo
- Ongoing Multifamily process evaluation activities including fielding a property manager survey
- Developing data collection instruments to support evaluation of the Residential Midstream HVAC Channel
- Kicking off Business Program NTG research for Standard, Midstream Lighting, Midstream HVAC and Virtual Commissioning
- Planning activities for the Custom Initiative process evaluation

- Development of the Non-Participant Spillover survey instrument
- Participating in SAG working group and TAC meetings as needed

SUMMARY OF EXPENDITURES

The tables below summarize expenditures through Q1 2023 based on team invoices received as of the end of Q1 2023.

Figure 1. Q1 2023 Expenditures for Evaluation of Program Year 2022

AIC 2022 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2022 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 1,094,300	\$ 986,915	\$ 107,385
Process EM&V	\$ 656,580	\$ 592,149	\$ 64,431
Report Development	\$ 437,720	\$ 394,766	\$ 42,954
<i>Program Specific Evaluation Efforts</i>	\$ 2,188,600	\$ 1,973,829.76	\$ 214,770
Independent EM&V QA/QC	\$ 30,000	\$ 11,161	\$ 18,839
Stakeholder Advisory Group	\$ 160,000	\$ 95,669	\$ 64,331
Statewide TRM Review and Participation	\$ 145,000	\$ 113,306	\$ 31,694
Cost-Effectiveness	\$ 50,000	\$ 16,514	\$ 33,486
Non-Energy Impacts	\$ 80,000	\$ 74,051	\$ 5,949
Pilots	\$ 247,000	\$ 160,558	\$ 86,442
Other Non-Program Activities	\$ 580,000	\$ 608,909	\$ (28,909)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,292,000	\$ 1,080,167	\$ 211,833
Contingency	\$ 98,963	\$ -	\$ 98,963
2022 Total	\$ 3,579,563	\$ 3,053,997	\$ 525,566

Figure 2. Q1 2023 Expenditures for Evaluation of Program Year 2023

AIC 2023 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs			
	2023 Budget	Expensed to Date	Remaining
Impact EM&V	\$ 1,233,100	\$ 5,283	\$ 1,227,818
Process EM&V	\$ 739,860	\$ -	\$ 739,860
Report Development	\$ 493,240	\$ -	\$ 493,240
<i>Program Specific Evaluation Efforts</i>	\$ 2,466,200	\$ 5,283	\$ 2,460,918
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Stakeholder Advisory Group	\$ 160,000	\$ 783	\$ 159,218
Statewide TRM Review and Participation	\$ 145,000	\$ 3,757	\$ 141,244
Cost-Effectiveness	\$ 50,000	\$ -	\$ 50,000
Non-Energy Impacts	\$ 80,000	\$ -	\$ 80,000
Pilots	\$ 160,000	\$ 12,017	\$ 147,984
Other Non-Program Activities	\$ 495,000	\$ 69,494	\$ 425,506
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,120,000	\$ 86,050	\$ 1,033,951
Contingency	\$ 96,527	\$ -	\$ 96,527
2023 Total	\$ 3,682,727	\$ 91,332	\$ 3,591,395