



MEMORANDUM

To: Nick Warnecke, AIC; Elizabeth Horne, ICC Staff; Celia Johnson, SAG Facilitator
From: Zach Ross and Rose Williamson, Opinion Dynamics
Date: January 8, 2025
Re: Q2 2023 Evaluation Expenditures

This memorandum provides a summary of evaluation team activities and expenditures in Q2 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 Q2 2023

In the second quarter of 2023, the evaluation team reviewed and responded to AIC and stakeholder comments on the 2022 impact evaluation reports and issued final versions. The evaluation team also issued the 2022 Cost-Effectiveness report and continued interim research efforts for the Smart Savers, IQ MHAS, MRSF MHVAC and HE, and Multifamily Programs. 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 Q2.

UPCOMING ACTIVITIES FOR Q3 2023

In the third quarter of 2023, the evaluation team plans on delivering interim reports for the Residential Channel, including the following programs: Retail Products, IQ J-U, IQ CAA, MRSF - Home Efficiency, and IQ Single-Family Channels. Additionally, the team will finalize interim reports for the Business Channel's Standard Core, Online Store, MHVAC, MSL, and SBDI programs. Net-to-Gross (NTG) memos will be delivered for the Standard Trade Ally SO, Midstream HVAC, Efficient Choice Tool, Non-Residential NPSO, and Virtual Commissioning programs, while NTG research will continue for the Midstream Lighting program.

SUMMARY OF EXPENDITURES

The tables below summarize expenditures through Q2 2023 based on team invoices received as of the end of Q2 2023.

Figure 1. Q2 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	\$ 1,085,828	\$ 8,472
Process EM&V	\$ 656,580	\$ 651,497	\$ 5,083
Report Development	\$ 437,720	\$ 434,331	\$ 3,389
<i>Program Specific Evaluation Efforts</i>	\$ 2,188,600	\$ 2,171,655.45	\$ 16,945
Independent EM&V QA/QC	\$ 30,000	\$ 11,161	\$ 18,839
Stakeholder Advisory Group	\$ 160,000	\$ 100,794	\$ 59,206
Statewide TRM Review and Participation	\$ 145,000	\$ 120,492	\$ 24,508
Cost-Effectiveness	\$ 50,000	\$ 46,896	\$ 3,105
Non-Energy Impacts	\$ 80,000	\$ 95,454	\$ (15,454)
Pilots	\$ 247,000	\$ 165,545	\$ 81,455
Other Non-Program Activities	\$ 580,000	\$ 661,051	\$ (81,051)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,292,000	\$ 1,201,393	\$ 90,607
Contingency	\$ 98,963	\$ -	\$ 98,963
2022 Total	\$ 3,579,563	\$ 3,373,048	\$ 206,515

Figure 2. Q2 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	\$ 138,616	\$ 1,094,484
Process EM&V	\$ 739,860	\$ 83,170	\$ 656,690
Report Development	\$ 493,240	\$ 55,446	\$ 437,794
<i>Program Specific Evaluation Efforts</i>	\$ 2,466,200	\$ 277,232	\$ 2,188,968
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Stakeholder Advisory Group	\$ 160,000	\$ 20,613	\$ 139,387
Statewide TRM Review and Participation	\$ 145,000	\$ 44,783	\$ 100,217
Cost-Effectiveness	\$ 50,000	\$ 605	\$ 49,395
Non-Energy Impacts	\$ 80,000	\$ 19,178	\$ 60,822
Pilots	\$ 160,000	\$ 86,879	\$ 73,121
Other Non-Program Activities	\$ 495,000	\$ 158,060	\$ 336,941
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,120,000	\$ 330,117	\$ 789,883
Contingency	\$ 96,527	\$ -	\$ 96,527
2023 Total	\$ 3,682,727	\$ 607,349	\$ 3,075,378