



# 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:** Q3 2023 Evaluation Expenditures

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This memorandum provides a summary of evaluation team activities and expenditures in Q3 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 Q3 2023

In the third quarter of 2023, the evaluation team delivered 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 finalized interim reports for the Business Channel's Standard Core, Online Store, MHVAC, MSL, and SBDI programs. Net-to-Gross (NTG) memos were delivered for the Standard Trade Ally SO, Midstream HVAC, Efficient Choice Tool, Non-Residential NPSO, and Virtual Commissioning 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 Q3.

### UPCOMING ACTIVITIES FOR Q4 2023

In the fourth quarter of 2023, the evaluation team plans on presenting IQ Participant NEI results and the proposed LLLC MT energy savings framework and evaluation plan to SAG. The team also plans on delivering the Virtual Commissioning memo, Midstream HVAC process memo, and 2024 NTG research recommendations. The remaining Residential interim impact memos will be delivered for IQ CAA and Retail Products and all interim impact reports for the Business Channel will be finalized. Lastly, the evaluation team will begin 2024 evaluation planning.

## SUMMARY OF EXPENDITURES

The tables below summarize expenditures through Q3 2023 based on team invoices received as of the end of Q3 2023.

Figure 1. Q3 2023 Expenditures for Evaluation of Program Year 2022

<b>AIC 2022 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs</b>			
	<b>2022 Budget</b>	<b>Expensed to Date</b>	<b>Remaining</b>
Impact EM&V	\$ 1,094,300	\$ 1,141,323	\$ (47,023)
Process EM&V	\$ 656,580	\$ 684,794	\$ (28,214)
Report Development	\$ 437,720	\$ 456,529	\$ (18,809)
<i>Program Specific Evaluation Efforts</i>	\$ 2,188,600	\$ 2,282,646.20	\$ (94,046)
Independent EM&V QA/QC	\$ 30,000	\$ 12,426	\$ 17,574
Stakeholder Advisory Group	\$ 160,000	\$ 100,794	\$ 59,206
Statewide TRM Review and Participation	\$ 145,000	\$ 121,905	\$ 23,095
Cost-Effectiveness	\$ 50,000	\$ 47,245	\$ 2,755
Non-Energy Impacts	\$ 80,000	\$ 95,454	\$ (15,454)
Pilots	\$ 247,000	\$ 165,545	\$ 81,455
Other Non-Program Activities	\$ 580,000	\$ 665,295	\$ (85,295)
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,292,000	\$ 1,208,664	\$ 83,336
Contingency	\$ 98,963	\$ -	\$ 98,963
<b>2022 Total</b>	<b>\$ 3,579,563</b>	<b>\$ 3,491,310</b>	<b>\$ 88,253</b>

Figure 2. Q3 2023 Expenditures for Evaluation of Program Year 2023

<b>AIC 2023 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs</b>			
	<b>2023 Budget</b>	<b>Expensed to Date</b>	<b>Remaining</b>
Impact EM&V	\$ 1,233,100	\$ 441,158	\$ 791,942
Process EM&V	\$ 739,860	\$ 264,695	\$ 475,165
Report Development	\$ 493,240	\$ 176,463	\$ 316,777
<i>Program Specific Evaluation Efforts</i>	\$ 2,466,200	\$ 882,316	\$ 1,583,884
Independent EM&V QA/QC	\$ 30,000	\$ -	\$ 30,000
Stakeholder Advisory Group	\$ 160,000	\$ 54,297	\$ 105,704
Statewide TRM Review and Participation	\$ 145,000	\$ 76,568	\$ 68,432
Cost-Effectiveness	\$ 50,000	\$ 1,655	\$ 48,346
Non-Energy Impacts	\$ 80,000	\$ 41,305	\$ 38,695
Pilots	\$ 160,000	\$ 141,660	\$ 18,341
Other Non-Program Activities	\$ 495,000	\$ 255,213	\$ 239,787
<i>Non-Program Specific Evaluation Efforts</i>	\$ 1,120,000	\$ 570,696	\$ 549,304
Contingency	\$ 96,527	\$ -	\$ 96,527
<b>2023 Total</b>	<b>\$ 3,682,727</b>	<b>\$ 1,453,013</b>	<b>\$ 2,229,714</b>