



# MEMORANDUM

**To:** Nick Warnecke, AIC; Elizabeth Horne, ICC Staff; Celia Johnson, SAG Facilitator  
**From:** Zach Ross, and Rose Williamson, Opinion Dynamics  
**Date:** December 16, 2024  
**Re:** Q3 2024 Evaluation Expenditures

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This memorandum provides a summary of evaluation team activities and expenditures in Q3 of 2024 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 2024

In the third quarter of 2024, the evaluation team focused on delivering interim reports for the following Residential Program Channels: Kits, Midstream MHVAC, IQSF, IQ Multifamily, Smart Savers, and MHAS. In the Business Program Channels, the evaluation team focused on Net-to-Gross research and interim impact reports. In conjunction with these activities, the evaluation team actively participated in SAG, the Illinois NTG Working Group, and Illinois TAC meetings during Q3.

### UPCOMING ACTIVITIES FOR Q4 2024

In the fourth quarter of 2024, the evaluation team will continue ongoing research projects and provide interim impact memos on Residential, Business, and Pilots/Emerging Programs. Specifically, we expect these to include final deliverables for Healthier Homes/Accessibility Pilot NEI research, the Multifamily OSS Evaluability Assessment, and the IQ SF Tree Planting Study. The evaluation team will also begin the 2025 AIC Energy Efficiency Evaluation Plan.

## SUMMARY OF EXPENDITURES

The tables below summarize expenditures through Q3 2024 based on team invoices received as of the end of Q3 2024.

Figure 1. Q3 2024 Expenditures for Evaluation of Program Year 2024

<b>AIC 2024 Evaluation of the Commercial, Industrial, and Residential Energy Efficiency Programs</b>			
	<b>2024 Budget</b>	<b>Expensed to Date</b>	<b>Remaining</b>
Impact EM&V	\$ 1,172,950	\$ 671,997	\$ 500,953
Process EM&V	\$ 703,770	\$ 403,198	\$ 300,572
Report Development	\$ 469,180	\$ 268,799	\$ 200,381
<i>Program Specific Evaluation Efforts</i>	\$ 2,345,900	\$ 1,343,994	\$ 1,001,906
Compliance and Stakeholder Engagement Activities	\$ 410,000	\$ 122,385	\$ 287,616
Cross-Cutting Evaluation Research	\$ 416,500	\$ 200,874	\$ 215,626
Quality Assurance and Control	\$ 30,000	\$ 7,604	\$ 22,397
Portfolio Evaluation Reporting	\$ 50,000	\$ -	\$ 50,000
Other Non-Program Activities (Project Management, Evaluation Planning, Program Design Support, etc.)	\$ 429,500	\$ 271,360	\$ 158,141
<b>Total Non-Program Specific Evaluation Efforts</b>	\$ 1,336,000	\$ 401,348	\$ 733,779
Contingency	\$ 6,573	\$ -	\$ 6,573
<b>2024 Total</b>	<b>\$ 3,688,473</b>	<b>\$ 1,745,341</b>	<b>\$ 1,742,258</b>