**MEMORANDUM**

**DATE**: 7/7/21

**TO**: CT Evaluation Committee

**FROM**: Lisa Skumatz / SERA Team

**SUBJECT**: April, May and June 2021 invoices for SERA Team for approval

Attached is the SERA Team invoice for April, May, and June 2021. We are running hot, especially in June. In April’s meeting, we had expected results from perhaps 9 projects, but were able to provide 18 presentations of results. This includes scheduling, analysis review / drill-down / follow-up, presentations and memo development / review, presentations, and updates. We are also winding down the discussions of 2020 PSD recommendations with the utilities (last of 200+ recommendations).

The month of July will also be high because we will need to respond to Utility review of the June/July presentations for PSD and Plan implications (2-3 week memo responses), and work on getting the results into the PSD.

Sometime in Sept-Nov we will start the 2022-24 Three Year Evaluation Plan. We may develop and issue the Research Area RFPs before end of year.

We will need to monitor closely. Being off by 8% is almost a month of billing, and we are off by about $31K for 50% of the year. Note: We have requested consideration of budget in another memo in today’s meeting.

For your immediate approval – February and March invoices attached below.

* Invoice for January 2021: $35,647.50; 92% of year remaining, 89% of budget remaining.
* Invoice for February 2021: $33,311.50; 83% of year remaining, 79% of budget remaining.
* Invoice for March 2021: $39,542.75; 75% of year remaining; 67% of budget remaining.
* Invoice for April 2021: $33,761.75; 67% of year remaining; 64% of budget\* remaining.
* Invoice for May 2021: $36,652.75; 58% of year remaining; 56% of budget\* remaining.
* Invoice for June 2021: $51,682.00; 50% of year remaining; 42% of budget\* remaining.

*Note: (\*)Budget was augmented by $69K (from $329K to $398K) in April meeting.*





