

## EVALUATION PLAN BUDGET DISCUSSION ITEMS - FOR JULY 2021 MEETING

### 2019-2021 Three Year Evaluation Plan

Rationale: Discuss enough before end of year that the changes can be contracted...

*Thousands*

#### **Projects Not Yet Underway - Discuss Committee interest**

\$280.0 <== X1940 Emerging issues project; not to be contracted.

\$75.0 R1963c Lighting Study - Sales or Shelf Stocking Analysis as needed for \$75K - **Discuss**

#### **Other possibly unspent items to confirm**

21K? Possibly 21K from the multi-state gas project if that was not paid from evaluation funds...

3K? R2023 RASS Database Additions - may not have additional work (HES?, SFWx?, other?); Leave available?

#### **Claims to Date on these Funds**

-\$69.0 <== EA Team Budget; Voted / added in April Evaluation Committee Meeting  
Rationale: Overseeing 13 (50%) more projects than "plan" from accumulated pile up in Year 3;  
Jan-March beyond project oversight: Legislative report, Roadmap Edits, Eval Plan Update,  
RFP/Socre/Contract. Some anticipation of perhaps 9 presentation June/July,  
209 PSD Rec'm and meetings; 3 year Eval Plan Oct/Nov.

-\$10.0 <== R2015 ZNE Project addition March 2021.  
(contingency; \$65K increased to \$75K, March RFP/memo decision to attract bidders)

#### **Possible Draws on funds being considered.**

-\$180.0 <== R1982 - Res HVAC / DHW Perf & Potential Assessment - Metering  
Discussion: Orig budget =790K. Plan added \$200K in 2020; removed -150K in 2021 (Plan dollars).  
New Request: Replace the \$200K metering Year 2  
+\$30K (on-hold management, stops/starts Covid; revised Covid methods)  
Net impact in Plan dollars is 230-50 or 180  
Note: Could be allocated in 2022 if other important demands for 2021 projects.

-\$55.4 <== R1983 - HES / HES-IE Process, Impact, Profiling Analysis - data efforts and Spanish survey translation  
data request efforts beyond expectations & Spanish survey translation  
Discussion: Double the data prep in one task, and 50% over in another much larger task.  
NMR has long-time familiarity with CT data and least likely to underestimate. Nearly daily data  
communications (see Data Tracking sheet). 80% UI.

#### **Considering additional budget overruns:**

C1901- Data preparation went beyond initial expectations and data were ultimately used for  
multiple projects; more extensive data work plus extra profiling - working on estimate.

Requests from a couple others, being vetted by EA Team.

**NOTE ALSO FOR UTILITIES: All existing contracts that do not complete by December 2021 will carry over to 2022.**