BetterBuildings Data and Evaluation Peer Exchange Call

Kick-Off Call

Call Slides and Discussion Summary

May 12, 2011

Agenda

- Call logistics and Roll Call
- Discussion Questions:
  - What were your experiences/lessons learned in aggregating and reporting information?
  - What type of evaluation (outside of for the purposes of reporting) are you doing/planning on doing? Information to support it?
- Next steps
  - Future call topics
  - Call frequency, format, etc.

Participating Grant Programs

- Austin
- Boulder County
- Cincinnati
- Connecticut
- Greensboro
- Michigan
- Missouri
- Phoenix
- Sacramento
- San Jose
- Santa Barbara
- Seattle
- Virginia

Grantee experiences/lessons learned in aggregating and reporting information

- Seattle
  - Currently collaborating with EnergyWorks in Oregon to build an IT platform to support aggregation going forward
  - Seattle will send information on retrofits, contractors, etc. to Washington State University to aggregate, and then send aggregated data to DOE
  - Complexity of multi-sector program places an emphasis on partnerships with data collectors and providers
  - Building relationships up front is vital and can open other doors (e.g. in getting data from utilities)
  - Important to formalize data sharing through non-disclosure agreements
  - Large scale data model
    - Residential sector coming from a large IT platform (deal with standardization issues)
    - Non Residential Sector (not automated)
- Cincinnati
  - Recently launched a new IT tool
  - Biggest issue has been standardization of information needs/formats/reports
  - Program has established institutional controls (e.g. will not pay for retrofits until the correct information is in place)
  - Challenge in integrating information into spreadsheets, which resulted in unreliable information. Created a manual process; new IT tool expected to be an improvement to this approach

Grantee experiences/lessons learned in aggregating and reporting information

- Virginia
  - Four state award (also WA, MA, AL) , just getting started in Virginia
  - Important to identify what data to collect to inform decision-making
  - Need to balance accuracy and cost-effectiveness
- Santa Barbara
  - Current workflow complicated: homeowners have to apply for rebate to qualify for financing, recalcitrance from contractors in submitting project data to utilities
  - Interested in learning how other grantees are collecting data required for DOE reporting
  - Feedback requested on whether to ask contractors to submit project data to the program or lenders to aggregate on the program's behalf
- Sacramento
  - Have not yet started project reporting or retrofits; will kick off June/July
  - Program is the utility, so do not have the utility-data problem others have experienced
  - Interested in how others have overcome challenges populating the Excel spreadsheet
- Michigan
  - Using SalesForce to track homeowner data; has worked well
  - Similar challenges getting data from utilities.
  - Trying to get homeowners to give a release

Grantee experiences/lessons learned in aggregating and reporting information

- Austin
  - Municipally-owned utility, has access to data
  - Used Excel tools for last quarter reporting; interested in migrating to automated submissions with XML
  - Struggling with the drop off and pick up interface actions with delivering the file
  - Would also like initial analysis of errata with generated file
- Phoenix
  - Require commercial and residential participants to sign a release form with the utility to obtain the incentive
  - Utility is a program partner, so they will release the data
  - Given the potential for participants to change their behavior, utility data does not always reflect the retrofit or savings
- San Jose
  - Program launch is going to be May 14
  - Contractors have significant limitations (from utilities) on information they can share
  - Anticipate using in-office manual data entry/reconciliation

Grantee experiences/lessons learned in aggregating and reporting information

- Connecticut
  - Use SnugHomes as the SalesForce frontend, platform serves all outreach and analysis activities
  - Conducted first quarter reporting using XML interface
  - Using a homegrown audit tool, uncovered a lot of process and data issues around the audit tool related to contractor use and reporting to DOE (e.g. standard use, which contractor/sub is responsible for rerunning the audit tool when the upgrade is complete, etc.)
  - Challenge evaluating efficacy of outreach efforts
  - Negotiated with utilities to get access to rate-payer funded program data and utility data, but is 60-days old; contractor data will be primary, and will use utility data to QA/QC data from contractors
  - Utilities provided extensive baseline data: from 2008, penetration rates of audit program and rebate redemption rates, monthly gas use by sector
  - Existing relationship with utility has helped in obtaining utility data; worked through confidentiality issues, have homeowner release form and data sharing agreement
  - Program will measure and report back on whether rate-payer funded strategy is effective and could be deployed in the regulatory environment

Grantee experiences/lessons learned in aggregating and reporting information

- Missouri
  - Department of Ag is the primary reporter; MO Governor is very interested; program issues weekly reports
  - Using WebCATS as a front end data collection tool; robust, all players use; secure program requires consent forms from all clients (form has allowed for utility collection)
  - Some data mapping issues from WebCATS to MS Excel spreadsheet
  - Many different players and two different reporting business processes - Department of Ag involved in both
  - Had some challenges this quarter with homeowner reporting; some auditors were lumping gas and electric BTUs
- Several grantees are using Customer management software (e.g. SalesForce, WebCATS)
  - SalesForce costs vary depending on package
    - One program using basic version, $300/year, 5 different accounts, customized with 25 user-defined fields
    - Another program using enterprise version for non-profits with 10 licenses, and a portal version in addition at the non-profit rate of $84 per user for 9 contractors and subs
  - WebCATS costs $3300 to install; web-based program; one-stop shop – can capture detailed outreach and contact information, create custom forms for data collection

Types of evaluation (independent of reporting) being done/planned, and information to support it

- Different types of program evaluation require different data: energy use data evaluation to inform conclusions regarding which practices were most effective, and program process evaluation (linking program outreach to levels of adoption)
  - Anecdotal, narrative notes are important for program evaluation
  - Through WebCATS, can capture information for both kinds of evaluation
  - WebCATS supports custom report development
- Combination of qualitative and quantitative analysis: technical pre-post energy use, behavioral (attitudes, actions, penetration of the social network) and program process (examining what is most success to result in upgrades)
  - One program views evaluation as an ongoing iterative process (adaptive management), and will eventually reconcile resources with benefits (ROI)
  - CT is augmenting data with anecdotal events, and holds regular analysis sessions to review data qualitatively and ongoing quantitative analysis
- Interest in identifying stakeholders and their interests
  - Seattle conducted initial stakeholder interviews to identify key measurement items. In the process of getting the evaluation framework back to stakeholders (may be able to share)

Future Call Topics

- Reporting:
  - Feedback from DOE on anticipated changes to the reporting requirements (e.g. kWh to BTUs) based on first quarter submittals
  - XML reporting - best practices, drop-off/pick-up interface, errata analysis
  - Overcoming challenges with Excel reporting and reconciliation
- Evaluation:
  - Linking program outreach to levels of adoption
  - Identifying stakeholders and their interests
- Present info on potential customer management software packages (e.g. WebCATS, SalesForce)