

Designed as Email Survey

ID: _____

Thank you for participating in the [program]. Now that you have completed your interaction with [program] and weatherized your home, we would appreciate your feedback. Your responses to the following brief survey will help us improve services for future participants.

First, a few questions about your initial contact with the program...

How did you first hear of [program]?

- Word of mouth (co-worker, friend, family member, neighbor)
- Media (TV, newspaper, radio)
- List serv or forwarded email, electronic post
- Utility (bill insert, letter, website link)
- Someone knocked on my door
- Another way, please specify: _____
- Don't remember

Using a one-to-five scale, where "1" means *strongly disagree* and "5" means *strongly agree*, to what extent do you agree that:

	1	2	3	4	5	DK
Finding the application on-line was easy						
Completing the on-line application was easy						
I could find answers to my questions on the website						

If you had any difficulty with any of these aspects, what would have made it easier for you?

We'd like to get a sense for how well various aspects of [program] were explained to participants...

For each of the items below, using a one-to-five scale, where "1" means strongly disagree and "5" means strongly agree, to what extent to you agree or disagree that you were informed of the following before you agreed to a home performance assessment:

	1	2	3	4	5	DK
Low interest financing would be offered through a third party bank						
Payments could be made through my heating utility bills						
There were packages of measures that would be						

proposed
 Only certain project costs were eligible for financing
 Existing building conditions could lead to repairs not paid for by the program

We'd like to understand what motivated you to participate in [program]. For each of the following factors, please indicate how influential the factor was in your decision to participate.

Please use a one-to-five scale where one means "this factor was not important" and five means "this factor was very important".

How important was it for you to...

	1	2	3	4	5	DK
Make improvements as part of a larger home improvement project						
Increase the value of my home						
Increase the comfort of my home						
Decrease noise						
Save energy						
Lower my heating bills						
Keep my home warmer in the winter						
Keep my home cooler in the summer						

Thinking about the first step—scheduling and attending the [name of assessment] assessment/audit—please indicate the extent to which you agree with the following statements.

Please use a one-to-five scale where one means "strongly disagree" and five means "strongly agree."

	1	2	3	4	5	DK
It was simple to schedule the initial audit.						
I appreciated the presence of my energy advocate at the audit.						
The time required for the audit was reasonable.						
I learned valuable things about my home during the audit.						
The information from the audit convinced me to move forward with my project.						

If you had any difficulty with any of these aspects, what would have made it more valuable to you?

We'd also like to know about your experience with your [program staff role name].

How many times did you interact with your [program staff role name]?

1-2, 3-4, 5-6, 7-8, 9-10, more than 10

Please indicate the level to which you agree with the following statements, using a one-to-five scale, where "1" means strongly disagree and "5" means strongly agree:

	1	2	3	4	5	DK
My [program staff role name] was knowledgeable about the program						
My [program staff role name] was helpful						
I was able to reach my [program staff role name] when I needed to						
My [program staff role name] was able to answer my questions or direct me to someone who could						
My [program staff role name] considered my circumstances when presenting the bid and financing package						
My [program staff role name] met my expectations						

[If "3" or lower on the last question: how did your [program staff role name] fall short of your expectations?]

We'd like to ask a few questions about your experience with your [program assigned] contractor.

For each statement, please indicate the level to which you agree or disagree, using a one-to-five scale, where "1" means strongly disagree and "5" means strongly agree:

	1	2	3	4	5	DK
My contractor was an expert in energy efficiency						
My contractor was able to address my concerns about the proposed work						
I believed the information I received from my contractor.						

I was able to reach my contractor when I needed to
 My contractor considered my circumstances in his/her bid.
 I received a fair bid from my contractor.

Did your contractor complete the work as proposed?

Yes/No/Don't know

Did your contractor complete the work as scheduled?

Yes/No/Don't know

Did any issues emerge at the final inspection?

Yes/No/Don't know

If yes: What emerged?

How was the issue resolved?

Is there anything you'd like to add about your experience with your contractor?

Now we'd like to ask you a few questions about your experience with the [project-provided] financing resource.

Did you interact with a representative from the financing firm?

Yes/No/Don't know

Did you have any questions or concerns about the financing proposal or loan paperwork?

Yes/No/Don't know

If yes: What were your questions or concerns?

Given your experience, please rate how important each aspect listed was in your decision to complete your project; please use a one-to-five scale with "1" being "not very important" and "5" being "very important". How important was it to have...

	1	2	3	4	5	DK
The services provided by the your [program staff role name]						
The program identify and assign you a contractor						
Access to a contractor with specific training in energy efficiency or building science						
Access to a "one-stop shop"—a program opportunity to obtain all the services and information needed to define						

and complete the project
 Access to the information obtained from a [name of]
 Assessment or audit

Considering your experience with [the program], and the information you obtained from the [program name] Assessment or audit, about how much would you pay for a similar audit?

- nothing
- less than \$100
- \$100-200
- \$200-300
- \$300-\$400
- more than \$400

I'm going to read a list of financial products or benefits. Please indicate how important each aspect was in your decision to go forward with your project.

Please use a 1-to-5 scale, where one means "not at all important" and five means "very important". How important was...

	1	2	3	4	5	DK
Obtaining an incentive from [local energy program]						
Qualifying for an [state] tax credit (if applicable)						
Qualifying for the \$1500 federal tax credit						
Getting an attractive interest rate						
Having the loan spread out over 20 years						
No money down; Avoiding upfront costs associated with your project						
Having the option to repay the loan on your utility bill						

Please tell us a bit about your experience with the paperwork required to participate:

After your initial participation agreement, were there other forms that you had to fill out?

Yes/No/Don't know

Were any of the forms difficult to complete?

Yes/No/Don't know

If yes: Which ones? What was difficult about them?

Did your [program staff role name] complete any forms for you?

Yes/No/Don't know

Did your contractor complete any forms for you?

Yes/No/Don't know

Did you need assistance with the loan paperwork?

Yes/No/Don't know

We have a few general questions about your experience...

Because of your interaction with [the program], do you have better information about how to minimize your energy use beyond the specific improvements you've just completed. Yes/No/Don't know

Which of the following statements best describe what you would have done if you had not had access to [the program]:

- I would not have completed this project.
- I would have completed a project, but done less.
- I would have done the same project, but with less efficient equipment.
- I would have done the same project, but postponed it for more than one year.
- I would have done the same project.

And how did the project's overall cost match your expectations? [cost less than I expected, more than I expected, about what I expected]

Using a scale of one-to-five where "1" means very dissatisfied and "5" means very satisfied, please rate your overall satisfaction with your [program] experience:

Would you recommend the program to family and friends?

Yes/No/Don't know

Do you have any suggestions for how we might improve this program for future participants?

Finally, we have a few demographic questions. These questions help us understand the characteristics of those participating in this program.

- About when was your home built?
- About how many square feet is your home?
- How many people, including yourself, live in your home now?

Please stop me when I get to the range of your household's total annual income before taxes.

Example of Survey for Successful Participants

- Less than \$50,000 [Continue to X]
- \$50,000 - \$109,999, or [SKIP TO Y]
- \$110,000 or more? [SKIP TO Z]
- (Refused)

X. Is it...

- Less than \$10,000
- \$10,000 - \$29,999
- \$30,000 - \$49,999
- (Refused)

Y. Is it...

- \$50,000 - \$69,999
- \$70,000 - \$89,999
- \$90,000 - \$109,999
- (Refused)

Z. Is it...

- \$110,000 – \$149,999
- \$150,000 - \$199,999
- \$200,000 or more
- (Refused)

May we contact you again if we have further questions?

- Yes
- No

If you have any questions about this survey please contact name and number.

Thank you for your time!