

*Prepared by Research into Action for the U.S. Department of Energy*

**Designed as phone survey**

*At some point in the last year, you applied to participate in [Program], a project that provides [home performance assessments and financing opportunities] for energy efficiency improvements in [target area]. You are part of a small group of initial participants, so your opinions and experiences about the program are very valuable to us. I would like to ask you some questions about your experience; it should take **about 15 minutes**.*

**Is this a good time?** *[If not, can we schedule a better time?]*

**Are you on a cell phone?** *If so, would you prefer I call you on a land line?*

**If they want to continue:** *Can you confirm that you are not driving and that you are able to complete the call safely right now? If not, I'm happy to call you back at a better time.*

**Thank you for your time today...**

I have a few questions about your first contact with the program...

*How did you first hear of [program] opportunity?*

- 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 came to 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?***

*I'm going to list several reasons you might have applied to [program], for each reason, please tell me how important it was on your decision to apply, using 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...



# Example Phone Survey For Participant Drop Outs

	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						

***Now I'm going to list several aspects of the [Program], we'd like to understand how important each program feature might have been in your decision to apply to the program.***

***Please rate the importance of each aspect from your perspective, using a one-to-five scale with "1" being not at all important and "5" being very important. How important was it to you to have ...?***

<b><i>Program features</i></b>	<b><i>1</i></b>	<b><i>2</i></b>	<b><i>3</i></b>	<b><i>4</i></b>	<b><i>5</i></b>	<b><i>DK/NA</i></b>	<b><i>[Comment]</i></b>
A program representative or [position name in program] help navigate decisions about efficiency upgrades.							
Access to information obtained from a [name of] Assessment or audit							
[program] identifies and assigns you a contractor							
Access to a contractor with specific training in energy efficiency or building science							

***[Program] also provides an opportunity for homeowners to take advantage of financial incentives and financing options to support energy efficiency projects.***

I'm going to read a list of financial products or benefits. Please indicate how important each aspect might be in your decision to go forward with your project in the future. 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 utility/sbc program]						
Qualifying for a(n) [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						

***When you applied, did you have any particular energy efficiency projects in mind?***

Yes/No/Don't know

***if yes*** (else skip to Q6):

5a. What were you hoping to do? \_\_\_\_\_

5b. What is the status of this project right now?

- Completed with help from another program
- Completed project as planned on my own
- Completed part of project: what part?
- Still thinking about project
- Focused on other, home improvements
- Decided not to do it
- Other: Record: \_\_\_\_\_

5c. About how much did you think your project would cost (probe to code)

- \$1,000-2,000
- \$2,000-4,000
- \$4-6
- \$6-8
- \$8-10
- \$10-12,000
- More than \$12,000
- Don't know

***if 5b=a, b or c:*** What did the energy efficiency improvements cost?

**[If no or don't know to Q5, else skip]** Since applying to [program], have you made any home improvements or taken any other action to reduce your home's energy use?

If yes:

**What did you do?**

If no:

**Are you still interested in obtaining help with energy efficiency upgrades to your home?**

If yes:

What might you do?

And, when might you do this?

Next, I have a couple of questions about your interaction with the [program staff role name] assigned to you.

**[Screening Question 1] Did you interact with your Energy Advocate)? Yes/No/DK**

**If yes, continue. If no, skip to Screening Question 2**

**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?]

***I'm going to list several topics you might have discussed with your [program staff role name]. Did you communicate with your Energy Advocate about:***

- Scheduling issues (yes/no/dk)
- Expected Cost (yes/no/dk)
- Bid questions (yes/no/dk)
- Expected energy savings (yes/no/dk)
- The equipment specified or recommended (yes/no/dk)
- Requesting or receiving another bid (yes/no/dk)
- Any issues with the financing package/loan details/interest rates (yes/no/dk)

***b. What topic would you say required the most communication?***

**Screening Question 2. Did you interact with the contractor assigned to you? [yes/no/dk]**

**If yes, continue. If no Skip to SQ3.**

***Please indicate the level to which you agree with the following statement, using a one-to-five scale, where one means strongly disagree and five means strongly agree: (1-5 plus don't know and "didn't get that far")***

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.						



# Example Phone Survey For Participant Drop Outs

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**How many times did you interact with your contractor?**

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

**Overall how would you rate your satisfaction with your [program] contractor?**

1 = very unsatisfied, 5 = very satisfied.

**Screening Question 3. Did you receive a financing proposal or loan paperwork? [yes/no/dk]**

**If yes continue. If no skip to SQ 4.**

**Did you have any questions or concerns about the financing package?**

Yes/No/Don't know

**If yes:**

**What were your questions or concerns? \_\_\_\_\_**

**Were you able to get these questions or concerns resolved?**

Yes/No/Don't know

**SQ 4: ASK ALL: According to our records, you chose not to go forward with a project through the program.**

**Is this correct? Yes/No/DK**

*[if No/DK: are you expecting to complete your project?*

*Then skip to Q20.]*

**At what point did you decide not to go forward with a project through x program?**

**[This is important. Probe if not clear from question above] Why did you decide to stop pursuing your project through [program]?**

**Were you referred to another program or told about other options to obtain rebates or assistance to complete energy efficiency projects in your home?**

**Yes/no/don't know.**

**If yes: what type of program(s) were you told about?**

***Since dropping out of [program], have you made any home improvements or taken any other action to reduce your home's energy use? Yes/no/don't know***

***If yes: what did you do?***

***Did you receive a rebate or other assistance with your project?***

***Are you interested in obtaining help with other energy efficiency upgrades to your home?***

***If no: do you anticipate doing so in the future?***

***If yes: what might you do?***

***And, when might you do this?***

***Q20. Do you have any suggestions for how we might improve [program] for future participants?***

Finally, we have a few demographic questions. These questions help us understand the characteristics of program participants.

***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.***

- Less than \$50,000 [skip to 24a]
- \$50,000 - \$109,999, or [SKIP TO Q24b]
- \$110,000 or more? [SKIP TO Q24c]
- (Refused) [SKIP TO END]

Q24a. Is it...

- Less than \$10,000 [SKIP TO End]
- \$10,000 - \$29,999 [SKIP TO End]
- \$30,000 - \$49,999 [SKIP TO End]
- (Refused) [SKIP TO End]



## Example Phone Survey For Participant Drop Outs

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Q24b. Is it...

- \$50,000 - \$69,999 [SKIP TO End]
- \$70,000 - \$89,999 [SKIP TO End]
- \$90,000 - \$109,999 [SKIP TO End]
- (Refused) [SKIP TO End]

Q24c. Is it...

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

***END: Thank you!***