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 a project that provides home performance assessments and financing opportunities for energy efficiency projects in [location] homes.

Applying for this program required you to [do something] and complete an application. I know you did not end up participating in the program, but I'd like to ask you a few questions about your experience and what you were looking for when you applied.

You are part of a small group of initial applicants, so your opinions and experiences about the program are very valuable to us and will inform discussions about program improvements. I would like to ask you some questions about your experience; it should take **about 10 minutes.**

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

Are you on a cell phone?

> **If yes:**

> *Would you prefer I call you on a landline phone number?*

> **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…

1. How did you first hear of the [name of program] project?

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

2. Thinking back to when you applied to the program, did you have any difficulties

   a) Navigating the [program] website? [Yes/no/don't know or don't remember]

      If yes: what happened?

b) Completing the on-line application? [Yes/no/don't know or don't remember]

If yes: what happened?

c) Finding answers to your questions on the website? [Yes/no/don't know or don't remember]

If yes: which questions?

Motivation

People participate in programs like [name of program] *for a variety of reasons. We'd like to understand what motivated you to sign up. I'm going to list some reasons, for each one please tell me how much of an influence it was on your decision to apply.*

3. *For each of the following factors, please indicate how important 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."*

	Not important			Very important		
How important was …	1	2	3	4	5	DK
Increasing the value of your home	☐	☐	☐	☐	☐	☐
Increasing the comfort of your home	☐	☐	☐	☐	☐	☐
Saving energy	☐	☐	☐	☐	☐	☐
Lowering your heating bills	☐	☐	☐	☐	☐	☐
Keeping your home warmer in the winter	☐	☐	☐	☐	☐	☐
Keeping your home cooler in the summer	☐	☐	☐	☐	☐	☐

Was there any other important reason?

If yes: what?

4. I'm going to read a list of items that are provided through the [program]. I know you did not ultimately participate in the program, and therefore, did not receive any of the following services. However, I'd like to know how important the prospect of obtaining the following services was in your decision to apply to the program.

Please rate the importance of each program feature 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 …?

Program features	1	2	3	4	5	DK /NA
A program representative or [name used by program] help you navigate decisions about efficiency upgrades.						
Access to information obtained from a [name of program assessment] or audit						
The program identify and assign you a contractor Access to a contractor with specific training in energy efficiency or building science						

5. *I'm going to read a list of financial products or benefits. Please tell me how important each of the following financial products or benefits are when considering whether to go forward with an energy efficiency project in your home.*

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

Financial aspects	1	2	3	4	5	DK/NA	[Comment]
How important is							
Obtaining an incentive							
Qualifying for an state tax credit (if available)							
Qualifying for the $1500 federal tax credit							
Getting an "attractive" interest rate							
Having the loan spread out over 20 years							
No money down; Avoiding the upfront costs associated with your project							

Having an option to repay the loan on your
utility bill

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

Yes/No/Don't know

If yes (else skip to Q7):

6a. What were you hoping to do?

6b. What is the status of this project right now?

   a) *Completed with help from another [name of organization offering other programs] program*
   b) *Completed project as planned on my own*
   c) *Completed part of project: what part?*
   d) *Still thinking about project*
   e) *Focused on other home improvements*
   f) *Decided not to do it*
   g) *Other:*

6c. About how much did you think your project would cost (probe to code)

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

   If 6b=a, b or c: What did the energy efficiency improvements cost?

7. [if no or don't know to Q6, 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:

   a. **What did you do?**

   b. Did you receive a rebate or other assistance?

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

  If no:

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

    1. If yes: what might you do?

     a. And, when might you do this?

8. After you applied, were you contacted by the program?

  If yes: If so, how or when?_____

9. If not clear above: Why did you not participate in the program (do not read, probe to code)
   a) I didn't qualify (screened out/rejected)
   b) Changed my mind
   c) Never heard from them
   d) Change in circumstances [moved/lost job/divorce]
   e) Don't know
   f) Other reason:

If Q9=Screened out/rejected by program:
Do you know why you didn't qualify? ___Y/N_____

Thinking about your interaction with [program], do you have any suggestions that might have made participating work better for applicants like you?

10. I'm going to list several of the most common energy efficiency improvements made by homeowners. For each one, please tell me if it is likely you will do this in the next year, if it's unlikely, or if you've already done it. [Allow other comment]

[] have energy audit (likely to do/unlikely to do/already done/other comment: record_____
_____)

[] replace old or inefficient appliances

[] install a more efficient heating/cooling system

[] install a more efficient water heating system

[] add insulation, air sealing, or weather stripping

[] install new windows

[] install a solar electric or solar hot water system

[] recycle a refrigerator or freezer

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

11. About when was your home built?
12. About how many square feet is your home?
13. How many people, including yourself, live in your home now?
14. Please stop me when I get to the range of your household's total annual income before taxes.
    () Less than $50,000 [continue to a]
    () $50,000 - $109,999, or [SKIP TO b]
    ()$110,000 or more? [SKIP TO c]
    () (Refused) [SKIP TO End]

    Qa. Is it…
    () Less than $10,000 [SKIP TO End]
    () $10,000 - $29,999 [SKIP TO End]
    () $30,000 - $49,999 [SKIP TO End]
    () (Refused) [End]

    Qb. Is it…
    () $50,000 - $69,999 [End]
    () $70,000 - $89,999 [End]
    () $90,000 - $109,999 [End]
    () (Refused) [End]

    Qc. Is it…

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

End:

Thank you for your time!