Using Data for Better Program Management

Presented by:

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INTRODUCTION

→ **Research Into Action, Inc. an energy program evaluation and market research firm, based in Portland, Oregon**

→ **Jane S. Peters 30 years experience with energy efficiency programs**

→ **Presentation purpose: to inspire grantees to collect more data and use it to improve their programs**

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What is measured, can be managed!

VOLUNTARY DATA ITEMS

➡ **Target market information**

➡ **Retrofit market potential**

➡ **Building characteristics**

➡ **Occupant characteristics**

➡ **Additional equipment items**

➡ **Additional finance items**

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MARKET AND TECHNICAL POTENTIAL

➡ **Do all households or businesses qualify for program?**

- **Limitations due to fuel type?**
  - *Electric, gas, fuel oil, propane, etc.*
- **Limitations due to structural conditions?**
  - *Knob and tube wiring, repair needs, etc.*
- **Limitations due to equipment condition?**
  - *Ventilation requirements*

➡ **Do participants need to meet credit requirements?**

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TRACKING PROGRAM PROGRESS

Size of Target Market

Market Contacted

Applicants

Applicants Accepted

Done
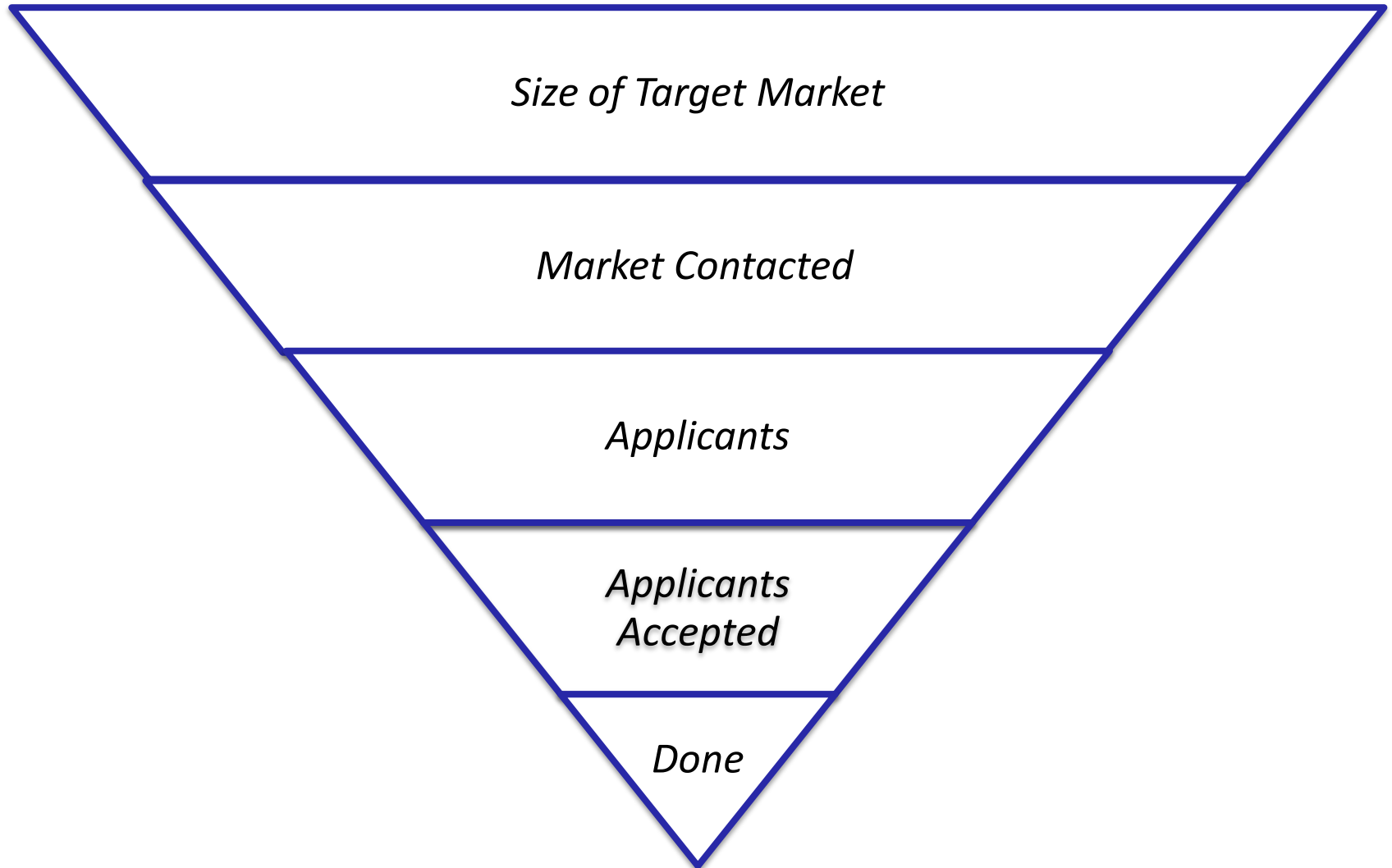
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TRACKING TO THE TARGET MARKET

	Whole Area	% of Market	Homes with gas or electric heat and no knob & tube wiring	% of Market
Target Market	2 million	100%	400,000	40%
Market Contacted	400,000	40%	60,000	15%
Applicants	1,000	.05%	650	.16%
		% of Applicants		% of Applicants
Applicants Approved	600	60%	600	92%
Done	200	20%	200	30%

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ASSESSING MARKET REACH

➡ **Reach and frequency data from mass media sources**

- **Same as used by advertisers**
- **Not necessarily accurate at the micro-market level**

➡ **Geographic tracking**

- **Doorbells rung and people spoken with**
- **Materials left on doors**
- **Information requests (pen and paper lists)**

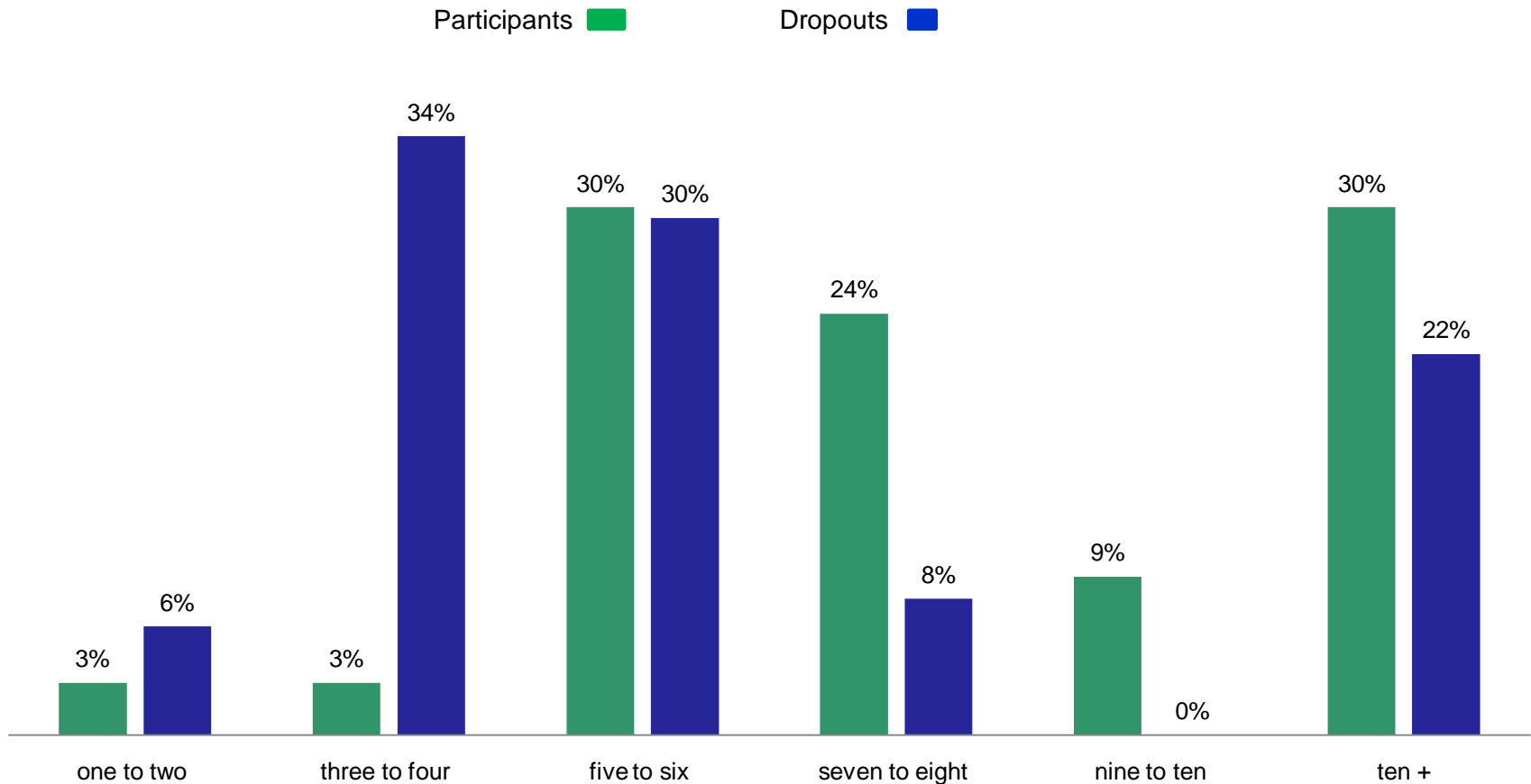research/into/action inc

COLLECT DATA ON THE PROGRAM

➡ **Satisfaction of customers, contractors, and staff**

➡ **Cycle time from entry to completion**

➡ **Concerns and barriers about program**

➡ **Actions taken or not taken**

➡ **Experience with specific program features**

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TRACKING NUMBER OF TOUCHES

How many times did you interact with program contact?

Participants ▪ (green)   Dropouts ▪ (blue)

Number of touches	Participants	Dropouts
one to two	3%	6%
three to four	3%	34%
five to six	30%	30%
seven to eight	24%	8%
nine to ten	9%	0%
ten +	30%	22%

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EXAMPLE SATISFACTION

Financing	Participants	Dropouts
Understood how future payments will occur	91%	65%
Financing process was simple	75%	62%
The interest rate was attractive	73%	68%
Overall Satisfaction	**Participants**	**Dropouts**
Would recommend project to family and friends	93%	89%
With program experience	87%	85%
Offered suggestions/improvements	46%	42%

Respondent rated aspect a "4" or a "5" on a 5-point scale

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UNDERSTANDING ENERGY BEHAVIORS

➜ **The type of equipment and its conditions at time of audit or assessment?**

➜ **Number of hours equipment was used before and after installation?**

➜ **Number of people in the home?**

➜ **Knowledge of energy saving solutions**

➜ **Reasons for not making energy efficiency investments on own**

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HOW TO DO THIS?

➡ **Data tracking system**

- **A database is better than spreadsheets**
- **Spreadsheets are better than paper**
- **Database programs are often included in basic software packages but programming requires expertise**

➡ **Stay up to date**

- **Enter data daily or weekly so as not to get behind**
- **Consider an online application so data are readily available**

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PRIMARY DATA COLLECTION

➡ **Surveys**

- **Require applicants to provide email addresses and phone numbers**

- **Require delivery organizations provide email addresses and phone numbers for staff**

- **Tell applicants and delivery organizations that surveys will be conducted and their response is valuable to the program**
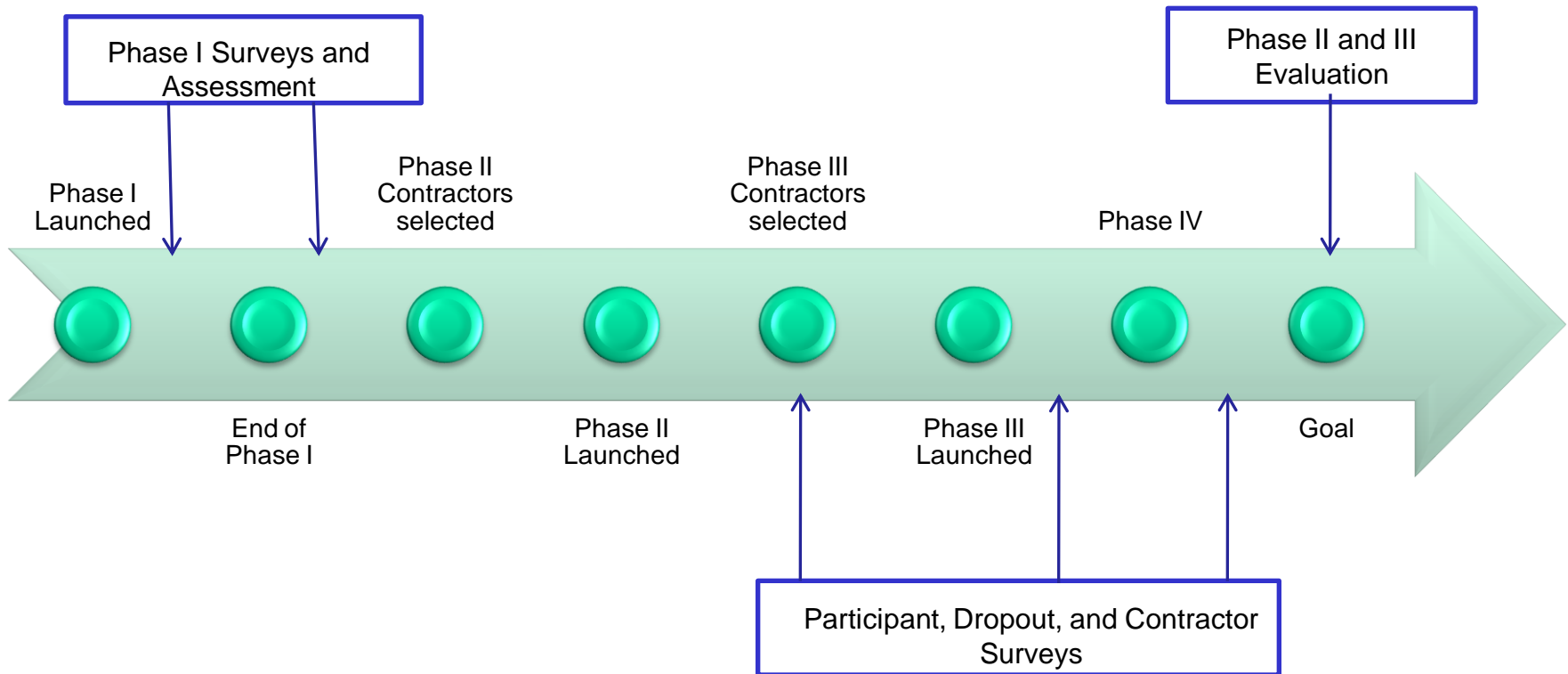
➡ **Many email survey systems are easy to use**

- **Real time data collection**

- **Use professional evaluators to help design questions**

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CONDUCT ONGOING EVALUATION

Phase I Surveys and Assessment

Phase II and III Evaluation

Phase I Launched

Phase II Contractors selected

Phase III Contractors selected

Phase IV

End of Phase I

Phase II Launched

Phase III Launched

Goal

Participant, Dropout, and Contractor Surveys

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RECOMMENDATIONS: GOING FORWARD

→ **Programs can be improved if:**

- **Everyone knows what the program did,**
- **What worked, and**
- **What did not work.**

→ **Data tracking provides the information needed to answer these questions**

→ **Surveys or focus groups can provide information to identify opportunities to improve programs**

→ **An evaluation approach makes data collection systematic and more useful**

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