

# Program Evaluation Topics & Questions Library for Program Participants

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

This document provides a menu of initial questions for a program administrator or implementer to build on and use in developing a real-time evaluation survey to collect qualitative data from program participants.

In this tool, program participants are grouped into 3 categories:

- applicants who were screened out of the program (“**Applicants**”),
- participants who completed an energy efficiency upgrade through the program (“**Participants**”), and
- participants who dropped out or opted out of the program at some point (“**Drop outs**”).

**Instructions:** Define your target group(s). Identify the topics which your program wants qualitative data on. Define questions that you want to have answered. Use the matrix below as a starting point for developing a real-time evaluation survey tailored to your program design and needs.

Research Question: How do potential participants become aware of the program?			
Topic	Applicants	Participants	Drop outs
Awareness	Q1. How did you first hear of the [name of program] project?	Q1. How did you first hear of the [name of program] project?	Q1. How did you first hear of the [name of program] project?
Research Question: Are the program processes functional for applicants?			
Topic	Applicants	Participants	Drop outs
Barriers	Q2. When you applied to the program: Did you have any difficulties navigating the website, Completing the online application, Finding answers to your questions on the website?		

Research Question: How do potential participants become aware of the program?			
Barriers		Q2. How easy was: Finding the online application Completing the online application Finding answers to your questions on the website	Q2. How easy was: Finding the online application, Completing the online application, Finding answers to your questions on the website
Barriers		Q2b. If you had any difficulties, what would have made the process easier?	Q2b. If you had any difficulties, what would have made the process easier?
Research Question: Do participants understand program components?			
Topic	Applicants	Participants	Drop outs
Expectations for Program Components		Q3. How strongly do you agree/disagree that you were informed about the following before you agreed to a home performance assessment: <ul style="list-style-type: none"> <li>• Low interest financing would be offered through a third party bank, payments could be made through your heating bill,</li> <li>• There were packages of measures that would be proposed,</li> <li>• Only certain project costs were eligible for financing,</li> <li>• Existing building conditions could lead to repairs not paid for by the program</li> </ul>	
Research Question: What factors motivate potential participants to participate in the program?			
Topic	Applicants	Participants	Drop outs
Motivation	Q3. How important was each of the following in your decision to participate: <ul style="list-style-type: none"> <li>• Increasing home value</li> <li>• Increasing the comfort of your home</li> <li>• Saving energy</li> <li>• Lowering heating bills</li> <li>• Keeping home warm/cool</li> <li>• Other</li> </ul>	Q4. How important was each of the following in your decision to participate: Making improvements as part of a larger project <ul style="list-style-type: none"> <li>• Increasing home value</li> <li>• Increasing home comfort, decreasing noise</li> <li>• Saving energy</li> <li>• Lowering heating bills</li> <li>• Keeping home warmer/cooler</li> </ul>	Q3. How important was each of the following in your decision to participate: <ul style="list-style-type: none"> <li>• Making improvements as part of a larger project</li> <li>• Increasing home value</li> <li>• Increasing home comfort</li> <li>• Decreasing noise</li> <li>• Saving energy</li> <li>• Lowering heating bills</li> <li>• Keeping home warmer/cooler</li> </ul>

Research Question: Are the program processes functional for participants?			
Topic	Applicants	Participants	Drop outs
Program Function: Assessment		Q5. How strongly do you agree that: <ul style="list-style-type: none"> <li>It was simple to schedule the initial assessment</li> <li>I appreciated the presence of my EA at the assessment</li> <li>The time required for the assessment was reasonable</li> <li>I learned valuable things about my home during the assessment</li> <li>The information in the assessment convinced me to move forward with my energy upgrade</li> </ul>	
		Q5b. If any of these aspects were difficult, what would have made them easier?	
Research Question: What factors motivate people to apply or participate in the program?			
Topic	Applicants	Participants	Drop outs
Motivation-Program	Q4: How important was each of the following in your decision to apply: <ul style="list-style-type: none"> <li>Help from a program rep to navigate decisions about efficiency upgrades</li> <li>Access to information obtained from program or audit</li> <li>The program helping you find or assigning you a contractor</li> <li>Access to a contractor with energy efficiency or building science background</li> </ul>	Q15. How important was each of the following in your decision to complete your project: <ul style="list-style-type: none"> <li>The services provided by [program staff]</li> <li>The program, the program finding/assigning a contractor</li> <li>Access to a contractor with energy efficiency/building science training</li> <li>Access to a “one stop shop” of services</li> <li>Access to information obtained from audit</li> </ul>	Q4: How important was each of the following in your decision to apply: <ul style="list-style-type: none"> <li>Help from a program rep to navigate decisions about efficiency upgrades</li> <li>Access to information obtained from program or audit</li> <li>The program helping you find or assigning you a contractor</li> <li>Access to a contractor with energy efficiency or building science background</li> </ul>
Motivation- Financial	Q5: How important are each of the following when considering energy efficiency upgrades: <ul style="list-style-type: none"> <li>Obtaining an incentive</li> <li>Tax credits</li> <li>Attractive interest rate, loan over time</li> <li>No money down/upfront costs</li> <li>Ability to pay back the money on your bill</li> </ul>	Q17. How important are each of the following when considering energy efficiency upgrades: <ul style="list-style-type: none"> <li>Obtaining an incentive</li> <li>Tax credits</li> <li>Attractive interest rate, loan over time</li> <li>No money down/upfront costs</li> <li>Ability to pay back the money on your bill</li> </ul>	Q5: How important are each of the following when considering energy efficiency upgrades: <ul style="list-style-type: none"> <li>Obtaining an incentive</li> <li>Tax credits</li> <li>Attractive interest rate, loan over time</li> <li>No money down/upfront costs</li> <li>Ability to pay back the money on your bill</li> </ul>

Research Question: How do participants value the audit services?			
Topic	Applicants	Participants	Drop outs
Program Value		Q16. Considering your experience with the program, what would you pay for a similar audit [0-\$400]	
Research Question: How are participants interacting with the program? Are these interactions effective?			
Topic	Applicants	Participants	Drop outs
Program Interactions		Q6. How many times did you interact with [program staff name]?	Q8. How many times did you interact with [program staff name]?
Program interactions-satisfaction with program staff		Q7. How strongly do you agree: <ul style="list-style-type: none"> <li>• [staff person] was knowledgeable about the program</li> <li>• I was able to reach my staff person when I needed to</li> <li>• My [staff person] was able to answer my questions or direct me to someone who could</li> <li>• My [staff person] considered my circumstances when presenting the bid and financing package</li> <li>• My [staff person] my expectations</li> </ul>	Q9. How strongly do you agree: <ul style="list-style-type: none"> <li>• [staff person] was knowledgeable about the program</li> <li>• I was able to reach my staff person when I needed to</li> <li>• My [staff person] was able to answer my questions or direct me to someone who could</li> <li>• My [staff person] considered my circumstances when presenting the bid and financing package</li> <li>• My [staff person] my expectations</li> </ul>
Program interactions			Q11. Did you interact with the contractor assigned to you?
Program Interactions-Contractor		Q8. How strongly do you agree that: <ul style="list-style-type: none"> <li>• My contractor was an expert in energy efficiency</li> <li>• My contractor was able to address my concerns about the proposed work</li> <li>• I believed the information I received from my contractor</li> <li>• I was able to reach my contractor when I needed to</li> <li>• My contractor considered my circumstances in the bid</li> <li>• I received a fair bid from my contractor</li> </ul>	Q12. How strongly do you agree that: <ul style="list-style-type: none"> <li>• My contractor was an expert in energy efficiency</li> <li>• My contractor was able to address my concerns about the proposed work</li> <li>• I believed the information I received from my contractor</li> <li>• I was able to reach my contractor when I needed to</li> <li>• My contractor considered my circumstances in the bid</li> <li>• I received a fair bid from my contractor</li> </ul>

<b>Research Question: How do potential participants become aware of the program?</b>			
Contractor			Q13. How many times did you interact with your contractor?
<b>Research Question: Are there specific items that create issues for participants?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Program interactions			Q10. Did you communicate with your Energy Advocate about: <ul style="list-style-type: none"> <li>• Scheduling issues</li> <li>• Expected costs</li> <li>• Bid questions</li> <li>• Expected energy savings</li> <li>• The equipment specified or recommended</li> <li>• Requesting or receiving another bid</li> <li>• Any issues with the financing package/loan details/interest rates</li> </ul>
Program interactions			Q10a. What topic would you say required the most communication?
<b>Research Question: Are contractors meeting participant expectations?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Contractor		Q9. Did your contractor complete the work as proposed?	
Contractor		Q10. Did your contractor complete the work as scheduled?	
Inspection		Q11. Did any issues emerge at the final inspection?	
Inspection		Q11b. If yes, what issues?	
Inspection		Q11c. If yes, how was the issue resolved?	
Contractor			Q14. Overall, how would you rate your satisfaction with your program assigned contractor? (1-5)

<b>Research Question: Is the required paperwork excessive?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Paperwork		Q18. After the initial participation agreement, were there other forms you had to fill out?	
Paperwork		Q18a. Were any of the forms difficult to complete?	
Paperwork		Q18b. Did your [program staff] complete any forms for you?	
Paperwork		Q18c. Did your contractor complete any forms for you?	
Paperwork		Q18d. Did you need assistance with the loan paperwork?	
<b>Research Question: Did the program influence people to take actions they would not have otherwise taken?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Plans	Q6. Did you have any energy efficiency projects in mind when you applied to the program?		Q6. Did you have any energy efficiency projects in mind when you applied to the program?
Plans	Q6a. What projects?		Q6a. What projects?
Plans	Q6b. What is the status of this project now? <ul style="list-style-type: none"> <li>• Completed with help from another org</li> <li>• Completed on own, partially completed</li> <li>• Still thinking about it</li> <li>• Focused on other projects</li> <li>• Decided not to do it</li> <li>• OTHER</li> </ul>		Q6b. What is the status of this project now? <ul style="list-style-type: none"> <li>• Completed with help from another org</li> <li>• Completed on own, partially completed</li> <li>• Still thinking about it</li> <li>• Focused on other projects</li> <li>• Decided not to do it</li> <li>• Other</li> </ul>
Plans	Q6c. About how much did you think the project would cost?		Q6c. About how much did you think the project would cost?
Plans	Q6d. [If applicable] How much did the project cost?		Q6d. [If applicable] How much did the project cost?

<b>Research Question: Did the program influence people to take actions they would not have otherwise taken?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Actions	Q7. Since applying, have you made any home improvements or taken other actions to reduce your energy use?		Q7. Since applying, have you made any home improvements or taken other actions to reduce your energy use?
Actions	7a. What actions?		7a. What actions?
Actions	Q7b. Did you receive a rebate or other assistance?		
Actions	Q7c. Are you interested in obtaining help with other energy efficiency upgrades to your home?		Q7c. Are you interested in obtaining help with other energy efficiency upgrades to your home?
Actions	Q7d. [If no action taken] Are you still interested in obtaining help with energy efficiency upgrades to your home?		Q7d. [If no action taken] Are you still interested in obtaining help with energy efficiency upgrades to your home?
Actions	Q7e. What might you do?		
Actions	Q7f. And when you might you do this?		
<b>Research Question: Is the financing process a barrier for participants or program success?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Program contact-financing		Q13. Did you interact with a representative from the financing firm?	Q15. Did you receive a financing proposal or loan paperwork?
<b>Research Question: Are there any issues with the financing process?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Financing		Q14. Did you have any questions concerning the financing proposal of loan paperwork?	Q16. Did you have any questions concerning the financing proposal of loan paperwork?
Financing		Q14b. If yes, what were your questions?	Q16b. If yes, what were your questions?
Financing			Q16c. Were you able to get those questions of concerns resolved?
<b>Research Question: Why are some people withdrawing from the program?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>

<b>Research Question: How do potential participants become aware of the program?</b>			
Program contact			Q17. According to our records, you chose not to go forward with your project through the program. Is that correct?
Program contact			Q17a. At what point did you decide not to go through with your project?
Program contact			Q17b. Why did you decide to stop pursuing your project through the program?
Program contact	Q8. After you applied, were you contacted by the program?		
<b>Research Question: What other avenues might potential participants explore?</b>			
Topic	Applicants	Participants	Drop outs
Other Programs			Q18. Were you referred to another program or told about other options to obtain rebates of assistance to complete energy efficiency projects in your home?
Other Programs			Q18a. [If yes] What type of programs were you told about?
<b>Research Question: Why are some people withdrawing from the program?</b>			
Topic	Applicants	Participants	Drop outs
Withdrawal	Q9. Why did you not participate in the program?		
<b>Research Question: Are screened out participants aware why they were screened out?</b>			
Topic	Applicants	Participants	Drop outs
Withdrawal	Q9a. [If screened out/rejected] Do you know why you didn't qualify?		



<b>Research Question: What actions are people willing to take outside of the program?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Future Actions	Q10. How likely is it that you will do the following: <ul style="list-style-type: none"> <li>• Have an energy audit</li> <li>• Replace of or inefficient appliances</li> <li>• Install a more efficient heating/cooling system</li> <li>• Add insulation/air sealing/weatherization</li> <li>• Install new windows</li> <li>• Install solar electric/hot water</li> <li>• Recycle a refrigerator or freezer</li> </ul>		
<b>Research Question: What other benefits does program participation offer? Are there energy savings beyond the equipment?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Program effectiveness		Q19. Because of the program do you have better information about how to minimize your energy use beyond the specific improvements you've just completed?	
<b>RESEARCH QUESTION: DID THE PROGRAM INFLUENCE THE PARTICIPANTS TO TAKE ACTIONS THEY WOULD NOT HAVE OTHERWISE TAKEN?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Free Ridership		Q20. Which of the following statements best describes what you would have done if you did not have access to the program: <ul style="list-style-type: none"> <li>• NOT completed the project</li> <li>• Completed the project but done less</li> <li>• Done the same project but with less efficient equipment</li> <li>• Done the project but waited a year or more</li> <li>• Done the same exact project.</li> </ul>	

<b>Research Question: Is the program meeting participant expectations?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Costs		Q21. How did the project’s overall cost match your expectations? <ul style="list-style-type: none"> <li>• Less</li> <li>• As expected</li> <li>• More</li> </ul>	
<b>Research Question: How satisfied are participants with the program?</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Satisfaction		Q22. Please rate your overall satisfaction with your program experience (1-5)	
Satisfaction		Q23. Would you recommend the program to family and friends?	
Satisfaction		Q24. Do you have any suggestions for how we might improve this program for future participants?	Q19. Do you have any suggestions for how we might improve this program for future participants?
<b>Research Question: Demographics</b>			
<b>Topic</b>	<b>Applicants</b>	<b>Participants</b>	<b>Drop outs</b>
Demographics	Q11. When was your home built?	Q25. When was your home built?	Q20. When was your home built?
Demographics	Q12. How many square feet is your home?	Q26. How many square feet is your home?	Q21. How many square feet is your home?
Demographics	Q13. How many people live in your home?	Q27. How many people live in your home?	Q22. How many people live in your home?

Research Question: Is the program meeting participant expectations?			
Demographics	<p>Q14. Please stop me when I get to the range of your household's total annual income before taxes. Is it...</p> <ul style="list-style-type: none"> <li>• Less than \$50,000</li> <li>• \$50,000-\$109,999</li> <li>• \$110,000 or more</li> </ul> <p><b>[If less than \$50,000]</b></p> <ul style="list-style-type: none"> <li>• Less than \$10,000</li> <li>• \$10,000-\$29,999</li> <li>• \$30,000-\$49,999</li> </ul> <p><b>[If \$50,000-\$109,999]</b></p> <ul style="list-style-type: none"> <li>• \$50,000-\$69,999</li> <li>• \$70,000-\$89,999</li> <li>• \$90,000-\$109,999</li> </ul> <p><b>[If \$110,000 or more]</b></p> <ul style="list-style-type: none"> <li>• \$110,000-\$149,999</li> <li>• \$150,000-\$199,999</li> <li>• \$200,000 or more</li> <li>• Refused to answer</li> </ul>	<p>Q28. Please stop me when I get to the range of your household's total annual income before taxes.</p> <ul style="list-style-type: none"> <li>• Less than \$50,000</li> <li>• \$50,000-\$109,999</li> <li>• \$110,000 or more</li> </ul> <p><b>[If less than \$50,000]</b></p> <ul style="list-style-type: none"> <li>• Less than \$10,000</li> <li>• \$10,000-\$29,999</li> <li>• \$30,000-\$49,999</li> </ul> <p><b>[If \$50,000-\$109,999]</b></p> <ul style="list-style-type: none"> <li>• \$50,000-\$69,999</li> <li>• \$70,000-\$89,999</li> <li>• \$90,000-\$109,999</li> </ul> <p><b>[If \$110,000 or more]</b></p> <ul style="list-style-type: none"> <li>• \$110,000-\$149,999</li> <li>• \$150,000-\$199,999</li> <li>• \$200,000 or more</li> <li>• Refused to answer</li> </ul>	<p>Q23. Please stop me when I get to the range of your household's total annual income before taxes.</p> <ul style="list-style-type: none"> <li>• Less than \$50,000</li> <li>• \$50,000-\$109,999</li> <li>• \$110,000 or more</li> </ul> <p><b>[If less than \$50,000]</b></p> <ul style="list-style-type: none"> <li>• Less than \$10,000</li> <li>• \$10,000-\$29,999</li> <li>• \$30,000-\$49,999</li> </ul> <p><b>[If \$50,000-\$109,999]</b></p> <ul style="list-style-type: none"> <li>• \$50,000-\$69,999</li> <li>• \$70,000-\$89,999</li> <li>• \$90,000-\$109,999</li> </ul> <p><b>[If \$110,000 or more]</b></p> <ul style="list-style-type: none"> <li>• \$110,000-\$149,999</li> <li>• \$150,000-\$199,999</li> <li>• \$200,000 or more</li> <li>• Refused to answer</li> </ul>
Research Question: Other			
Topic	Applicants	Participants	Drop outs
		Q29. May we contact you again if we have further questions?	