

Better Buildings Peer Exchange Call

Who's Evaluating What? - Planned Program Evaluations

November 17th, 2011

General Notes

The Department of Energy (DOE) began the call with a review of the agenda and introductions of call participants (noted on the last page).

Featured Speakers:

- Dale Hoffmeyer, DOE
- Shannon Khal, WI Energy Conservation Corps (WECC)
- Alex Castelazo, ASU Global Institute of Sustainability

Participants are conducting or are interested in the following evaluation topics:

- Lawrence Berkley National Lab (LBNL) is developing a program-wide evaluation and is interested in hearing about the types of evaluations and questions used by grantees
- Evaluation Measurement and Verification (EM&V)
- Impact evaluations for residential programs
- Techniques that can be used for both residential and commercial programs
- Evaluations of marketing and outreach techniques
- Qualitative and quantitative evaluations
- Methods for identifying cost effectiveness of pilot programs
- How to conduct quality assurance of implemented techniques
- Customer satisfaction (via project contractors) – customer surveys, use of Salesforce and other platforms that track customer relationships, etc.

DOE is conducting a full impact evaluation of the Better Buildings program via LBNL. They are currently developing a framework of questions that align with the four Better Buildings program pillars to identify the lessons learned from the program. Evaluation developers are looking to grantees to provide input on the questions and will draw on the types of information already collected. The program is currently informed by anecdotal information but in the future more data will be available from evaluations and grantee reporting allowing more quantitative evaluations.

- The draft framework was circulated to participants and can be found on the BB Google Site at: <https://sites.google.com/a/betterbuildingsnetwork.doe.gov/betterbuildings-collaboration-forum/home/data-and-evaluation?pli=1>

Many grantees have expressed an interest in understanding consumer motivation as the demand is lagging behind the supply and grant timeframe.

The following resources are available to grantees via DOE:

- “Get Useful Real-Time Feedback about Your Program” which includes example evaluation questions - <https://sites.google.com/a/betterbuildingsnetwork.doe.gov/betterbuildings-collaboration-forum/home/data-and-evaluation>

- National Action Plan for Energy Efficiency - http://www.epa.gov/cleanenergy/documents/suca/evaluation_guide.pdf

Wisconsin Energy Conservation Corps Program (WECC) – Shannon Khal

The WECC began their evaluation last spring and has developed a schedule that repeats activities every six months. This includes a combination of interviews, surveys, and other tools that were designed using the tools circulated by DOE and input from other grantees. The evaluation process has identified the following:

- New training opportunities (specifically around reporting software)
- Specific communications challenges
- Recommendations to standardize and/or streamline aspects of the program
- The need to clearly define roles and responsibilities within the program
- Opportunities for staff and contractors to meet and discuss the program since they don't normally work together day-to-day

The WECC program is trying to find ways to increase participation from residential and commercial sectors and identify what is motivating customers to do retrofits. Want to find out if they are providing a valuable service. As of the summer of 2011, a number of initial audits have been completed but no consumers have completed a full retrofit. Based on a consumer survey it appears that many are planning on completing an upgrade but it is taking longer than originally planned.

Key takeaway messages:

- Internal and external communications are key
- Standardization of process and deliverables increases uptake
- Incentives may need to be increased – the program is considering a tiered approach to retrofit incentives

Next Steps: The WECC program is now seeing more retrofit completions and has pulled more customers into the pipeline. They have started a more in-depth participant and non-participant survey and are also planning to survey participating contractors. Now that they have identified the marketing that brings consumers into the program they would like to focus on marketing that will get consumers to complete the program.

ASU Global Institute of Sustainability - Alex Castelazo

Energize Phoenix has just released their one-year report for their commercial and residential programs. They are piggybacking on existing incentives promoted by the local utilities – a series of rebates and training offers. A marketing firm is working on outreach strategies using billboards, earned media, and social media. For the commercial program the most successful technique was to knock on doors of businesses that expressed an interest in retrofits. Ninety percent of commercial consumers noted that they heard about the program via a participating contractor.

The residential program has been harder to get started and the program is just now seeing retrofit projects getting started.

Program evaluation is currently measuring (just beginning and do not have enough data yet for statistics):

- What affects the average energy savings?
 - Conducted a survey and collected data from utilities.
- Evaluation of behaviors and attitudes via a survey
 - The survey had about a 30% response rate and the program is currently working on phone follow-ups.
- Effectiveness of specific retrofit techniques
 - Engineers are going out to individual sites and developing case studies for projects that are more complex and/or interesting, installing measuring devices where appropriate, etc.
- Economic impacts – how many jobs have been created?

The program has also inserted a survey into their application process which was developed by a behavioral team at ASU. The commercial program survey includes questions that capture attitudes for businesses, policies in place for energy efficiency, types of measures they have already installed. The residential survey focuses on how consumers feel about energy conservation, if they value economic benefits over comfort benefits, etc. This was a paper survey that was included with applications and has a 30% response rate.

Open Discussion and Questions

Is there a repository of RFPs from grantees soliciting contractors or consultants to help with their evaluation process?

- There isn't one currently but any grantees that are comfortable sharing their RFP should email DOE and they will post them on the Google site.

How was participation in the WECC survey incentivized?

- Emailed the survey to participants (b/c that was what was available), response rate was about 40%.
- There was no incentive for completing the email survey.
- The consultant survey was circulated to a small group of consultants with an email link and almost 100% responded.
- Contractor survey will start with an email and follow up with phone for any contractors that do not respond.

How are grantees coordinating with other effectiveness monitoring evaluations (e.g. state level, local level, and federal program)?

- In California there are multiple evaluations conducted by the Energy Commission, LA County, and two of the three major utilities. The utilities are the "big muscle" and the EDP does not have as much pull.
- This is a challenge for a number of programs – how to balance communications, simultaneous evaluations, consumers getting tired of answering questions repeatedly, etc.
- Also running into issues with contractors conducting customer satisfaction surveys.
- In Phoenix the program has stayed very involved with the utility and developed a partnership so that they are not "stepping on toes". This has taken a long time but they are now seeing better communications and cooperation between the program and the utility.

How are programs evaluating cost effectiveness (not at the utility level)?

- CT is starting to use a traditional business model that identifies the acquisition costs and the lifetime costs of each customer to see which outreach strategies are working for the lowest cost.

Other challenges identified by grantees:

- In CA they have challenges around resource allocation with multiple climate zones and a mix of new and old neighborhoods. They are conducting installment methodology testing to try and determine how to consolidate different methods across pilot projects.
- Access to data from other entities outside each program (including CDC and DOE).
- Accessing data from utilities – where the data are held, how they are distributed, etc.

Participants are interesting in the following topics for future calls:

- Program sustainability given the grant timeline
- List of contact information so that grantees can collaborate on specific questions
- A call similar to this one to address specific questions and listen to other grantee experiences
- Line up experts to participate and provide more information on a specific evaluation issues

Call Participants

- Arizona State University
- Austin Energy
- BKi
- Boulder County
- Camden POWER
- City of Milwaukee
- City of Seattle
- Clean Energy Solutions
- Connecticut Neighbor to Neighbor Energy Challenge
- Conservation Services Group
- CNT Energy
- Efficiency Maine Trust
- EnergyWorksNow
- Greater Cincinnati Energy Alliance
- Lawrence Berkeley National Labs
- LEAP
- MAESTRO
- NMR Group, Inc.
- Nexant, Inc
- St. Lucie County FL
- Town of University Park
- Wisconsin Energy Conservation Corps