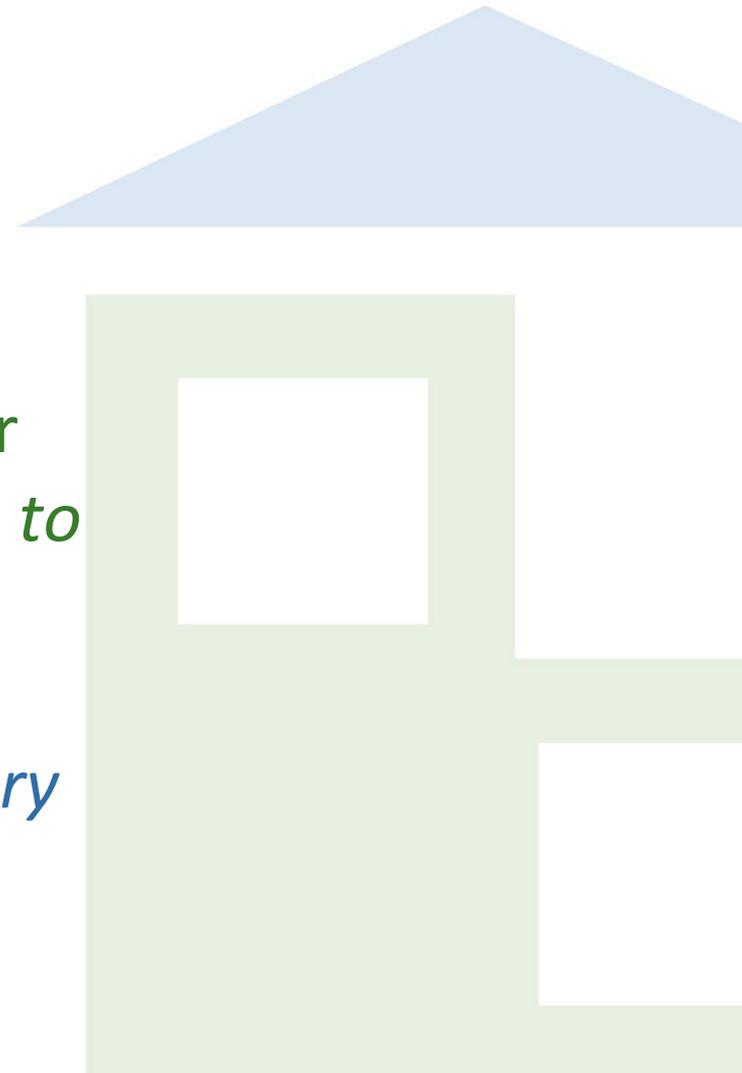




Better Buildings Neighborhood  
Program Data and Evaluation Peer  
Exchange Call: *Programs Planning to  
Do Evaluations*

*Call Slides and Discussion Summary*

August 2, 2012



- Call Logistics and Attendance
  - Has your program been conducted, or is it in the process of conducting or planning an evaluation?
- Program Experience and Lessons:
  - Jane Peters, Research Into Action
- Discussion:
  - Do you have clarifying questions or concerns about what was presented?
  - Are there parts of the coordination process that could be improved?
  - Do you have any additional ideas for better integrating the national evaluation with local efforts, based on your plans/ experiences?

# Participating Grant Programs

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- Austin, TX
  - Boulder County, CO
  - Cincinnati, OH
  - Connecticut
  - Michigan
  - Missouri
  - Philadelphia, PA
  - Portland, OR
  - San Francisco, CA
  - Southeast Community Consortium
  - St. Lucie County, FL
  - University Park, MD
  - Washington
  - Wisconsin
-

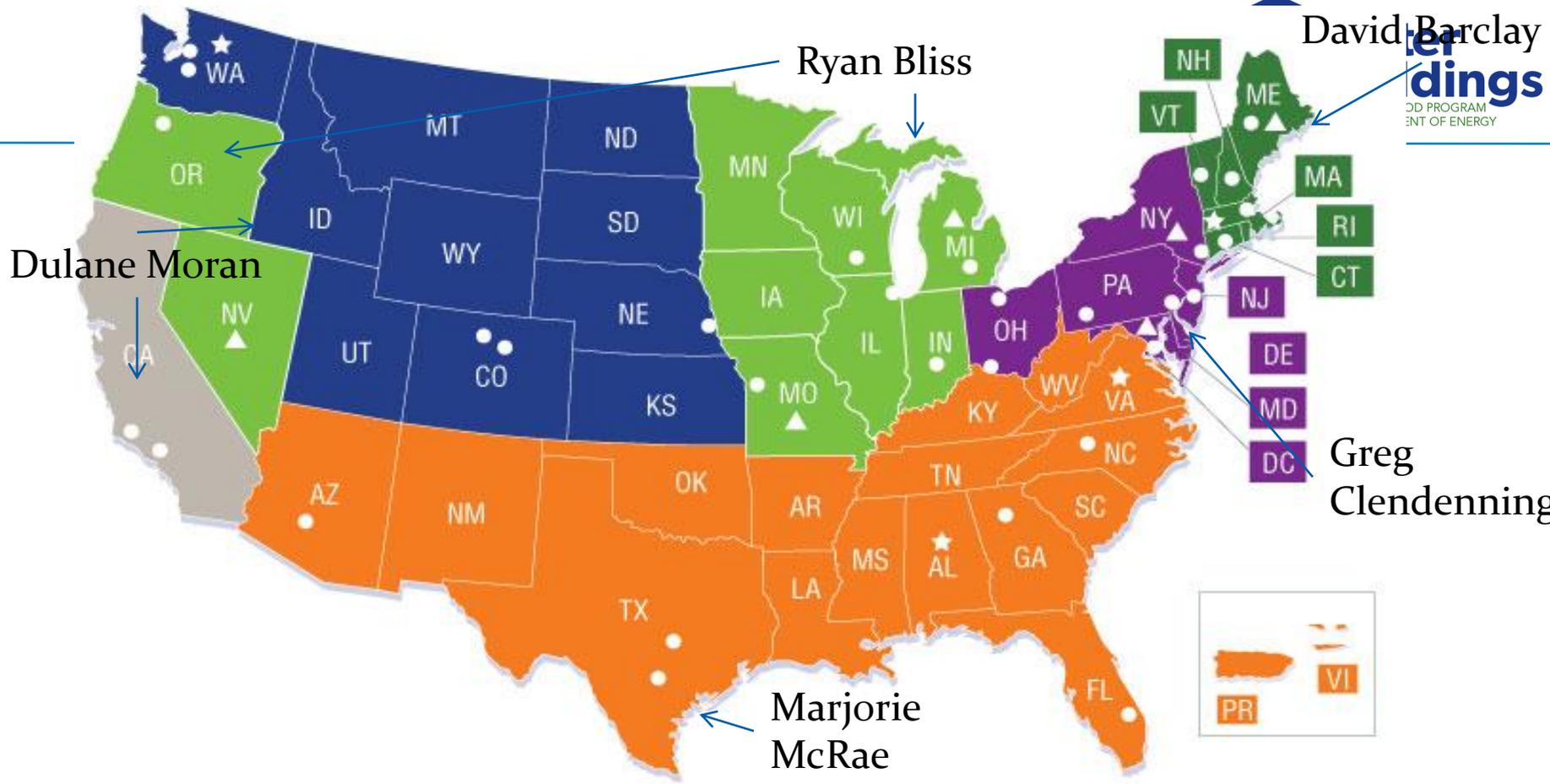


## Better Buildings Program Assessment

Research Into Action, Inc.,  
NMR Group,  
Evergreen Economic Consulting,  
and Nexant, Inc.



- The National Better Buildings Program Assessment
    - Team organization
    - Planned deliverables
    - Preliminary process evaluation status
    - Energy savings and market effects evaluation status
  - Role for Grantees in this process
    - In the data collection process
    - Coordination with Grantee evaluations
  - Discussion and Questions
-



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- △ **Statewide Grant**
- **City/County Level Grant**
- ☆ **Multi-State (AL, MA, VA, WA)**

# Evaluation Deliverables

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- Research Plans
    - Final Energy Impact Evaluation Plan – Oct 2012
    - Draft Process/Market Evaluation Plan – Sept 2012
  - Reports
    - Preliminary Process Evaluation – Sept 2012
    - Preliminary Impact Evaluation – June 2013
    - Final Process Evaluation – October 2014
    - Final Impact Evaluation – December 2014
-

# Preliminary Process Evaluation

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- Data Collection Activities
  - Interviews with Grantees - Completed
  - Interviews with DOE staff and support contractors – In process
  - Interviews with stakeholders – In process
  - Interviews with market informants - Completed
  - Interview surveys with contractors – In field
  - Interviews with vendors – In field
- Surveys of end users – discussing approach with Grantees

# Impact Evaluation Approach

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- Market effects evaluation
    - Data coordination with process evaluation
    - Initial market data (baseline) being collected
  - Energy savings evaluation
    - Draft research plan being revised
    - Energy usage data key for confirming savings
    - Audit data key for
      - Determining pre-audit conditions
      - Confirming savings
      - On-site verification of measures
-

# Role of Grantees in Assessment

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- Provide lists of contractors (received)
  - Participation in interviews (received)
  - Provide lists of business and home owner participants and partial participants (in process)
  - Energy usage and audit data (in process)
  - Grantee evaluation research plans and results (in process)
-

# Evaluation Coordination

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- We would like to reduce the burden on participants and expand breadth of national evaluation
    - Include questions of interest to national evaluation in Grantee evaluations
      - Need to know timing of evaluations
      - Need to develop these questions and share them with evaluators
    - Use data sets developed for Grantee level evaluations
      - Would like to have billing data, audit data, characteristics data in a single database
      - Currently talking with database contacts
-

# Evaluation Coordination (2)

- Possible use of results from Grantee evaluations in the national evaluation
  - Samples in grantee evaluations likely to be more robust for subgroups
    - Some grantee evaluations may provide insights to low-income or business owners, or perhaps to different types of neighborhoods
  - Lessons learned at the Grantee level may provide valuable insights
    - Compare across evaluations, compare to findings from national evaluation, etc.
  - Comparison of market or energy savings effects
    - Compare across evaluations, compare to findings from national evaluation, etc.

# Next Steps

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- Please provide contact name for Grantee evaluations
  - Please encourage Grantee evaluators to cooperate with national BBNP assessment team
  - Please provide a copy of evaluation research plan
    - Your contact person to the BBNP Assessment Team is the person from our team assigned to your region.
-

- Is the national process/program evaluation team receiving all of the data that the grantees have submitted to DOE for reporting?
  - Yes, however much of the information that will be important for the evaluation was voluntary to submit to DOE; additional program information is welcomed by the evaluators.
- Will the evaluation look at all sectors or just specific ones (i.e., residential)?
  - Yes, the evaluators will look at all sectors. The sampling will vary depending on the sector, however the evaluators will sample across all sectors for the impact evaluation. For example, there is only one grantee in the agricultural sector; the sampling will be different here than with the residential sector. For the process evaluation, the evaluators anticipate including information on all grantees.

- Are the research plans and/or questions available for grantees to gain understanding of what the evaluators would like to know?
  - Yes, the evaluators can make the preliminary process evaluation available. The impact evaluation should be available in October. Fundamental questions of the impact evaluation include:
    - What are the savings?
    - What are the greenhouse gas emissions reductions?
    - What are the job impacts?
    - What is the change in the market (if any) as a result of the program?
- Are there any research guidelines to evaluate the accuracy and effectiveness of audits being performed?
  - The evaluators want to do site visits where they can receive audit data; this will be used to determine if predictive savings are occurring.

- When you survey participants, how do you avoid self-selection?
  - Refusal rates tend to be fairly low. The evaluators use random samples, so the chances are as likely to survey happy and unhappy participants. Self-selection tends to occur more in who participates in the program (as participants tend to be more homogeneous) versus who participates in the survey.
- Should individual programs conduct a savings evaluation in addition to this national evaluation?
  - Yes if the budget is available; the national evaluation is not breaking out results program-by-program.

- Programs have been rapidly evolving throughout the grant period. In some cases there is little resemblance to the beginning, which raises some interesting challenges for characterizing success.
- Some programs are already in the process of data collection with end users.
  - Boulder County has been doing a residential survey and would like to do a more rigorous evaluation, including a phone interview, in the future.
  - Wisconsin has completed residential surveys of homeowners at least twice per year. It is unclear if they will continue to do this; they are determining whether to put the funds toward research and evaluation or toward more project completions.

# Potential Future Call Topics

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- Home Energy Scoring Systems
  - Experience with Software/CRM Options
  - Customer Data Tracking (accessible by contractors for leads on new jobs and data about completed jobs)
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