Example of Survey for Successful Participants

*Designed as Email Survey*

ID: ____________________

Thank you for participating in the [program]. Now that you have completed your interaction with [program] and weatherized your home, we would appreciate your feedback. Your responses to the following brief survey will help us improve services for future participants.

First, a few questions about your initial contact with the program...

How did you first hear of [program]?
- Word of mouth (co-worker, friend, family member, neighbor)
- Media (TV, newspaper, radio)
- List serv or forwarded email, electronic post
- Utility (bill insert, letter, website link)
- Someone knocked on my door
- Another way, please specify: ____________________
- Don’t remember

Using a one-to-five scale, where "1" means *strongly disagree* and "5" means *strongly agree*, to what extent do you agree that:

<table>
<thead>
<tr>
<th>Finding the application on-line was easy</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>DK</th>
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</thead>
<tbody>
<tr>
<td>Completing the on-line application was easy</td>
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<tr>
<td>I could find answers to my questions on the website</td>
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</table>

If you had any difficulty with any of these aspects, what would have made it easier for you?

We’d like to get a sense for how well various aspects of [program] were explained to participants...

For each of the items below, using a one-to-five scale, were "1" means *strongly disagree* and "5" means *strongly agree*, to what extent do you agree or disagree that you were informed of the following before you agreed to a home performance assessment:

| Low interest financing would be offered through a third party bank | 1 | 2 | 3 | 4 | 5 | DK |
| Payments could be made through my heating utility bills |   |   |   |   |   |    |
| There were packages of measures that would be |   |   |   |   |   |    |
We’d like to understand what motivated you to participate in [program]. For each of the following factors, please indicate how influential 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".

How important was it for you to...

| Make improvements as part of a larger home improvement project | 1 2 3 4 5 DK |
| Increase the value of my home |  |
| Increase the comfort of my home |  |
| Decrease noise |  |
| Save energy |  |
| Lower my heating bills |  |
| Keep my home warmer in the winter |  |
| Keep my home cooler in the summer |  |

Thinking about the first step—scheduling and attending the [name of assessment] assessment/audit—please indicate the extent to which you agree with the following statements.

Please use a one-to-five scale where one means “strongly disagree” and five means “strongly agree.”

| It was simple to schedule the initial audit. | 1 2 3 4 5 DK |
| I appreciated the presence of my energy advocate at the audit. |  |
| The time required for the audit was reasonable. |  |
| I learned valuable things about my home during the audit. |  |
| The information from the audit convinced me to move forward with my project. |  |
Example of Survey for Successful Participants

If you had any difficulty with any of these aspects, what would have made it more valuable to you?  
______________________________________________________________

We'd also like to know about your experience with your [program staff role name].

How many times did you interact with your [program staff role name]?
1-2, 3-4, 5-6, 7-8, 9-10, more than 10

Please indicate the level to which you agree with the following statements, using a one-to-five scale, where "1" means strongly disagree and "5" means strongly agree:

<table>
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<tr>
<th>1</th>
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</thead>
<tbody>
<tr>
<td>My [program staff role name] was knowledgeable about the program</td>
<td></td>
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<tr>
<td>My [program staff role name] was helpful</td>
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<tr>
<td>I was able to reach my [program staff role name] when I needed to</td>
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<tr>
<td>My [program staff role name] was able to answer my questions or direct me to someone who could</td>
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<td>My [program staff role name] considered my circumstances when presenting the bid and financing package</td>
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<tr>
<td>My [program staff role name] met my expectations</td>
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</table>

[If “3” or lower on the last question: how did your [program staff role name] fall short of your expectations?]  

We'd like to ask a few questions about your experience with your [program assigned] contractor.

For each statement, please indicate the level to which you agree or disagree, using a one-to-five scale, where "1" means strongly disagree and "5" means strongly agree:

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<tr>
<th>1</th>
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<tbody>
<tr>
<td>My contractor was an expert in energy efficiency</td>
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<tr>
<td>My contractor was able to address my concerns about the proposed work</td>
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<tr>
<td>I believed the information I received from my contractor.</td>
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</tbody>
</table>
I was able to reach my contractor when I needed to
My contractor considered my circumstances in his/her bid.
I received a fair bid from my contractor.

Did your contractor complete the work as proposed?
Yes/No/Don’t know

Did your contractor complete the work as scheduled?
Yes/No/Don’t know

Did any issues emerge at the final inspection?
Yes/No/Don’t know

If yes: What emerged?
How was the issue resolved?

Is there anything you’d like to add about your experience with your contractor?

Now we’d like to ask you a few questions about your experience with the [project-provided] financing resource.

Did you interact with a representative from the financing firm?
Yes/No/Don’t know

Did you have any questions or concerns about the financing proposal or loan paperwork?
Yes/No/Don’t know

If yes: What were your questions or concerns?

Given your experience, please rate how important each aspect listed was in your decision to complete your project; please use a one-to-five scale with "1" being "not very important" and "5" being "very important".  How important was it to have...

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<tbody>
<tr>
<td>The services provided by the [program staff role name]</td>
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<td>The program identify and assign you a contractor</td>
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<tr>
<td>Access to a contractor with specific training in energy efficiency or building science</td>
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<tr>
<td>Access to a “one-stop shop”—a program opportunity to obtain all the services and information needed to define</td>
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and complete the project
Access to the information obtained from a [name of] Assessment or audit

Considering your experience with [the program], and the information you obtained from the [program name] Assessment or audit, about how much would you pay for a similar audit?

[ ] nothing
[ ] less than $100
[ ] $100-200
[ ] $200-300
[ ] $300-$400
[ ] more than $400

I’m going to read a list of financial products or benefits. Please indicate how important each aspect was in your decision to go forward with your project.

Please use a 1-to-5 scale, where one means “not at all important” and five means “very important”. How important was...

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<tbody>
<tr>
<td>Obtaining an incentive from [local energy program]</td>
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<td>Qualifying for an [state] tax credit (if applicable)</td>
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<tr>
<td>Qualifying for the $1500 federal tax credit</td>
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<td>Getting an attractive interest rate</td>
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<td>Having the loan spread out over 20 years</td>
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<td>No money down; Avoiding upfront costs associated with your project</td>
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<td>Having the option to repay the loan on your utility bill</td>
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Please tell us a bit about your experience with the paperwork required to participate:

After your initial participation agreement, were there other forms that you had to fill out?

Yes/No/Don’t know

Were any of the forms difficult to complete?

Yes/No/Don’t know
   If yes: Which ones? What was difficult about them?
Example of Survey for Successful Participants

Did your your [program staff role name] complete any forms for you?
Yes/No/Don’t know

Did your contractor complete any forms for you?
Yes/No/Don’t know

Did you need assistance with the loan paperwork?
Yes/No/Don’t know

We have a few general questions about your experience...
Because of your interaction with [the program], do you have better information about how to minimize your energy use beyond the specific improvements you’ve just completed. Yes/No/Don’t know

Which of the following statements best describe what you would have done if you had not had access to [the program]:
• I would not have completed this project.
• I would have completed a project, but done less.
• I would have done the same project, but with less efficient equipment.
• I would have done the same project, but postponed it for more than one year.
• I would have done the same project.

And how did the project’s overall cost match your expectations? [cost less than I expected, more than I expected, about what I expected]

Using a scale of one-to-five where "1' means very dissatisfied and "5" means very satisfied, please rate your overall satisfaction with your [program] experience:

Would you recommend the program to family and friends?
Yes/No/Don’t know

Do you have any suggestions for how we might improve this program for future participants?
______________________________________________________________

Finally, we have a few demographic questions. These questions help us understand the characteristics of those participating in this program.
• About when was your home built?
• About how many square feet is your home?
• How many people, including yourself, live in your home now?

Please stop me when I get to the range of your household’s total annual income before taxes.
Example of Survey for Successful Participants

() Less than $50,000 [Continue to X]
() $50,000 - $109,999, or [SKIP TO Y]
() $110,000 or more? [SKIP TO Z]
() (Refused)

X. Is it...
() Less than $10,000
() $10,000 - $29,999
() $30,000 - $49,999
() (Refused)

Y. Is it...
() $50,000 - $69,999
() $70,000 - $89,999
() $90,000 - $109,999
() (Refused)

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

May we contact you again if we have further questions?
[ ] Yes
[ ] No

If you have any questions about this survey please contact name and number.

Thank you for your time!