Using Data for Better Program Management

Presented by:
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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
WHY VOLUNTARILY COLLECT MORE DATA?

What is measured, can be managed!
→ Target market information
→ Retrofit market potential
→ Building characteristics
→ Occupant characteristics
→ Additional equipment items
→ Additional finance items
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?
TRACKING PROGRAM PROGRESS

Size of Target Market

Market Contacted

Applicants Accepted

Applicants

Done
## Tracking to the Target Market

<table>
<thead>
<tr>
<th></th>
<th>Whole Area</th>
<th>% of Market</th>
<th>Homes with gas or electric heat and no knob &amp; tube wiring</th>
<th>% of Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Market</td>
<td>2 million</td>
<td>100%</td>
<td>400,000</td>
<td>40%</td>
</tr>
<tr>
<td>Market Contacted</td>
<td>400,000</td>
<td>40%</td>
<td>60,000</td>
<td>15%</td>
</tr>
<tr>
<td>Applicants</td>
<td>1,000</td>
<td>.05%</td>
<td>650</td>
<td>.16%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>% of Applicants</td>
<td>% of Applicants</td>
</tr>
<tr>
<td>Applicants Approved</td>
<td>600</td>
<td>60%</td>
<td>600</td>
<td>92%</td>
</tr>
<tr>
<td>Done</td>
<td>200</td>
<td>20%</td>
<td>200</td>
<td>30%</td>
</tr>
</tbody>
</table>
→ 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)
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
How many times did you interact with program contact?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Participants</th>
<th>Dropouts</th>
</tr>
</thead>
<tbody>
<tr>
<td>one to two</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>three to four</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>five to six</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>seven to eight</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>nine to ten</td>
<td>9%</td>
<td>0%</td>
</tr>
<tr>
<td>ten +</td>
<td>30%</td>
<td>22%</td>
</tr>
</tbody>
</table>
## EXAMPLE SATISFACTION

<table>
<thead>
<tr>
<th>Financing</th>
<th>Participants</th>
<th>Dropouts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understood how future payments will occur</td>
<td>91%</td>
<td>65%</td>
</tr>
<tr>
<td>Financing process was simple</td>
<td>75%</td>
<td>62%</td>
</tr>
<tr>
<td>The interest rate was attractive</td>
<td>73%</td>
<td>68%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overall Satisfaction</th>
<th>Participants</th>
<th>Dropouts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Would recommend project to family and friends</td>
<td>93%</td>
<td>89%</td>
</tr>
<tr>
<td>With program experience</td>
<td>87%</td>
<td>85%</td>
</tr>
<tr>
<td>Offered suggestions/improvements</td>
<td>46%</td>
<td>42%</td>
</tr>
</tbody>
</table>

*Respondent rated aspect a “4” or a “5” on a 5-point scale*
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
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
→ **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
CONDUCT ONGOING EVALUATION

Phase I Surveys and Assessment
- Phase I Launched
- End of Phase I

Phase II Contractors selected
- Phase II Launched

Phase III Contractors selected
- Phase III Launched

Phase II and III Evaluation
- Phase IV

Participant, Dropout, and Contractor Surveys
- Goal
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.