



**Statewide Marketing Education and Outreach (ME&O)
Residential Tracking Survey – Wave 1, Spring 2019
FINAL**

LANDING PAGE

Thank you for taking the time to complete this survey. The California Public Utilities Commission (CPUC) will use the results to help California meet its future energy needs so it is very important that we hear from households like yours.

CPUC has partnered with Opinion Dynamics, an independent research firm, to administer the survey. If you have any questions or technical difficulties with the survey, you may contact Anne Weaver at Opinion Dynamics at 1-888-507-0712 or feedback@opiniondynamics.com.

Any information you provide will remain confidential.

Please enter your Survey Access Code to begin the survey. This is the 5-digit PIN provided with the survey link on the letter you received.

Survey Access Code:

Ingrese su código de acceso a la encuesta en el casillero a continuación. Podrá seleccionar su idioma de preferencia en la siguiente página.

請在以上方框輸入問卷調查存取代碼。您可在下一頁選擇偏好語言。

INTRODUCTION

What is your preferred language?

1. English
2. Spanish (Español)
3. Chinese (中國)

In this survey, we will ask for your opinions and feedback about your energy usage and some energy efficiency programs available to California residents. Please be as detailed and honest as possible in your answers.

We sincerely appreciate your time and effort!

SCREENERS

S1. Do you live in the state of California?

1. Yes
2. No **[THANK AND TERMINATE]**

S2. In what year were you born? [RESPONSE REQUIRED]
00. [NUMERIC OPEN END, 1910 – 2001] **[TERMINATE IF LESS THAN 18 (2002 and up)]**

TERMINATE TEXT: “Unfortunately you do not qualify for this survey. Thank you for your time.”

- S3. Do you rent or own your home?
1. Rent
 2. Own
 0. Other: **[SPECIFY]**

[ASK IF S3=1]

- S3a. Do you pay your own electric bill or is it included in your rent?
1. Pay bill
 2. Included in rent

[ASK IF S3=1]

- S3b. Do you pay your own gas bill or is it included in your rent?
1. Pay bill
 2. Included in rent
 9. Don't have gas service to my home

[SKIP IF S3A=2]

S4. Do you receive an electric bill from any of the following service providers? (Select provider).

1. Pacific Gas and Electric Company (PG&E)
2. Southern California Edison (Edison/SCE)
3. San Diego Gas & Electric (SDG&E)
0. Another provider (please specify)
8. Don't Know

[SKIP IF S3B = 2 OR 9]

S5. Who provides gas service to your home?

1. Pacific Gas and Electric Company (PG&E)
2. Southern California Gas (SoCalGas/SCG)
3. San Diego Gas & Electric (SDG&E)
4. Southern California Edison (Edison Catalina)
0. Other: **[SPECIFY]**
6. None / don't have gas
8. Don't know

**[GENERATE DDB_FLAG SO THAT 25% GET DDB AWARENESS, MOTIVATION, INTENT AND 75% GET OPINION DYNAMICS AWARENESS, MOTIVATION, INTENT.
DDB_FLAG=1 FOR DDB SERIES,**

DDB_FLAG=0 FOR OPINION DYNAMICS SERIES]

SLOGAN AWARENESS

AA0. Do you recognize the following advertising slogan?

1. Yes
2. No



[ASK IF AA0=1]

AA0A. What brand is associated with this slogan?



[OPEN END]

AA0_2. Do you recognize the following advertising slogan?



1. Yes
2. No

[ASK IF AAO_2=1]

AA0_2a. What brand is associated with this slogan?



[OPEN END]

[ASK IF DDB_FLAG=0, ELSE SKIP TO NEXT SECTION]

BRAND AWARENESS

AA1. When you think of brands, campaigns, or initiatives that encourage Californians to save energy, which ones come to mind? *Please provide up to 5 responses.*
00. [OPEN END, PLEASE INCLUDE FIVE TEXT BOXES]

AA2. Below you will see a list of several brands, organizations, or campaigns. Please select the ones that you have heard of before today: [1=YES; 2=NO] [ROTATE ORDER OF CAMPAIGNS]

- a. Energy Upgrade California
- b. Go Solar California
- c. ENERGY STAR
- d. Save Our Water
- e. Flex Your Power
- f. Power Save California [Red Herring]
- g. Flex Alert

[ASK IF AA2a = 1, ELSE SKIP TO AA5]

AA3. How familiar are you with **Energy Upgrade California**?

1. Extremely Familiar
2. Very Familiar
3. Somewhat Familiar
4. Not too Familiar
5. I have only heard the name

AA4. Where did you see or hear something about “Energy Upgrade California”? Select all that apply.
[PLEASE MARK ALL THAT APPLY] [RANDOMIZE]

01. From a website
03. From an advertisement on television
04. From a video advertisement on a streamed online service (e.g. YouTube, Hulu)
05. From an outdoor display such as a billboard or a bus shelter

- 06. From advertisements on the radio
- 07. From friends or family
- 08. From local events such as a festival or community fair or parade
- 09. From a community group or non-profit agency in your community
- 10. From articles in the newspaper
- 00. Other, specify: [OPEN END]

[ASK IF DDB_FLAG=1, ELSE SKIP TO AA5]

DDB BRAND AWARENESS

AA1_DDB. We'd like you to think about energy efficiency actions, programs, and initiatives. Please type below the names of the different programs and initiatives you have heard of including the brands, companies, and government institutions promoting these programs, initiatives, and actions. You can type as many as you like, up to ten. ALLOW UP TO 10 MENTIONS. RECORD FIRST MENTION SEPARATELY FROM OTHER MENTIONS.

AA2_DDB. We'd like you to think about how familiar you are with the programs and initiatives listed below. Please mark the box that comes closest to describing how familiar you are with these programs and initiatives. RANDOMIZE.

	I feel like I know a lot about it	I feel like I know something about it	I feel I know a little bit about it	I've only heard the name	I've never heard of it
Energy Upgrade California	5	4	3	2	1
Conserve Energy SoCal	5	4	3	2	1
Power Save California	5	4	3	2	1
Flex Your Power	5	4	3	2	1
Keep It Golden	5	4	3	2	1

LOGO AWARENESS

AA5. Have you ever seen this logo?

- 1. Yes
- 2. No
- 3. Don't recall



BRAND ATTITUDES

Energy Upgrade California is a statewide campaign that helps Californians better manage their energy use by providing tools, knowledge, and inspiration. The campaign is a partnership between the State of California, utilities, regional energy networks, local governments, community choice aggregators, businesses and non-profits.

Now that you know more about Energy Upgrade California, we would like your opinion about the campaign and its mission.

AT1. How relevant is the mission of Energy Upgrade California for you?

1. A great deal
2. Quite a bit
3. Somewhat
4. Not very much
5. Not at all
6. Not sure

AT2. How much do you think the people of California need a campaign like Energy Upgrade California?

1. A great deal
2. Quite a bit
3. Somewhat
4. Not very much
5. Not at all
6. Not sure

AT3. How much do you think you can trust Energy Upgrade California to do the right thing for the people of California?

1. A great deal

2. Quite a bit
3. Somewhat
4. Not very much
5. Not at all
6. Not sure

ENERGY MANAGEMENT MINDSET

EM1. How knowledgeable would you say you are about saving energy in your home?

5. Extremely
4. Moderately
3. Somewhat
2. Slightly
1. Not at all

EM4. How much control do you feel you have over how much energy your household uses?

1. A great deal
2. Quite a bit
3. Some
4. Not very much
5. None at all

EM5. How often, if ever, do you make an effort to live in ways that reduce your energy use?

1. All the time
2. Some of the time
3. Not too often
4. Never

EM6. Would you describe yourself as particularly concerned or not particularly concerned about managing your energy use as you go about your daily life?

1. Particularly concerned
2. Not particularly concerned

[ASK IF DDB_FLAG=1] [MOTIVATION]

EM_DDB1. How well does the following statement describe you?

“I am always seeking out more ways to become energy efficient”

5. Strongly agree
4. Somewhat agree
3. Neither agree nor disagree
2. Somewhat disagree
1. Strongly disagree

[ASK IF DDB_FLAG=1] [INTENT]

EM_DDB2. In the next 6 months, how likely are you to make changes in your daily routine to become more energy efficient?

5. Very likely

4. Somewhat likely
3. Neither likely nor unlikely
2. Somewhat unlikely
1. Very unlikely

CC1B. How important is it for your household to do its part in making California more energy efficient?

1. Very important
2. Somewhat important
3. Slightly important
4. Not at all important

CCNEW_M2. Which of the following home electricity rate plans have you heard of? [MULTIPLE RESPONSE]

[RANDOMIZE]

1. Tiered rate plan: Your price for electricity will increase over the month if you use more than a certain amount of electricity
 2. Time-of-Use or T-O-U or time-varying rate plan: You pay a different price for electricity depending on the time of day you use that electricity
 3. Net Energy Metering or NEM: The rate plan for customers who have rooftop solar and are still connected to the grid
 4. Electric Vehicle or EV rate plan: Has lower prices during the night and morning hours when demand is lowest, making this the best time to charge a vehicle
98. None of the above [ANCHOR] [ME]

EM7. How often does someone in your household look at your household's utility bill or energy usage to see if you used more or less energy than usual?

1. More than once a month
2. Every month
3. Most months but not every month
4. Every few months
5. About once a year
6. Never, we just pay the bill

EM8. When purchasing products that use energy such as electronics or household appliances, how often does the amount of energy used by the product influence your decision about which product to buy?

1. Always
2. Most of the time
3. Sometimes
4. Rarely
5. Never

EM_DDB12c. During the past month, have you talked with family, friends, coworkers, or neighbors about the importance of energy efficiency and energy management?

1. Yes

2. No

[ASK EM9 TO EM9C IF S3=2 (OWN HOME); ELSE SKIP TO EM10]

EM9. How much more energy efficient could you make your home if you tried? Please consider physical upgrades you could make to your home's lighting, appliances, electronics, heating and cooling systems, and building shell items such as windows and insulation. Could you change...

1. A lot of things
2. Some things
3. Just a few things
4. My home is already as energy efficient as possible

[ASK IF EM9 < 4; CHANGES COULD BE MADE]

EM9A. What changes could you make to your home to make it more energy efficient? Please provide up to 5 responses.

00. [OPEN END, PLEASE INCLUDE FIVE TEXT BOXES]

[ASK IF EM9 < 4; CHANGES COULD BE MADE]

EM9B. How likely are you to make changes to your home to make it more efficient in the next 12 months?

1. Extremely likely
2. Somewhat likely
3. Somewhat unlikely
4. Extremely unlikely

[ASK IF EM9B=3 OR 4; UNLIKELY TO MAKE CHANGES]

EM9C. Why are you unlikely to try to make your home more energy efficient? Select all that apply. [SELECT ALL THAT APPLY]

1. The upfront costs of the improvements would be too high
2. The energy savings are not big enough to justify the costs
3. Improvements to this home would not bring a return on investment
4. I plan to sell this home soon
5. I am waiting for appliances/systems to fail before making changes
0. Some other reason (specify)

[ASK IF EM9C=1]

EM9d. Would you be more likely to make energy efficient home improvements in the next 12 months if you could get a loan that would allow you to pay for the improvements by making affordable monthly payments?

1. Yes
2. No
3. It would depend on the terms and conditions of the loan

EM9e. Did you know that financing is available specifically for energy saving upgrades to your home through select credit unions and banks throughout California? This lending is also known as the Residential Energy Efficiency Loan Program. The program offers more attractive loan terms and conditions compared to other lending options and is specifically designed to finance projects that lead to energy savings.

1. Yes
2. No

[ASK EM10 TO EM10F IF S3=1 (RENT HOME); ELSE SKIP TO EM11]

EM10. How much more energy efficient could you and your landlord make your home if you tried? Please consider physical upgrades that could be made to your home's lighting, appliances, electronics, heating and cooling systems, and building shell items such as windows and insulation. Could you and your landlord change...

1. A lot of things
2. Some things
3. Just a few things
4. My home is already as energy efficient as possible

[ASK IF EM10 < 4; CHANGES COULD BE MADE]

EM10A. How many of the changes to make your home more efficient are things that you could do versus things your landlord would need to do?

1. Most are things my landlord would need to do
2. Some are things that I could do and some are things my landlord could do
3. Most are things that I could do

[ASK IF EM10 < 4; CHANGES COULD BE MADE]

EM10B. What changes could [READ "you" IF EM10A=3, READ "your landlord" if EM10A=1", READ "you or your landlord" IF EM10A=2"] make to your home to make it more energy efficient? Please provide up to 5 responses.

00. [OPEN END, PLEASE INCLUDE FIVE TEXT BOXES]

[ASK IF EM10A = 1 OR 2; LANDLORD NEEDS TO MAKE CHANGES]

EM10C. How likely is your landlord to make your home more efficient in the next 12 months?

1. Extremely likely
2. Somewhat likely
3. Not very likely
4. Not at all likely

[ASK IF EM10A = 2 OR 3; TENANT NEEDS TO MAKE CHANGES]

EM10D. How likely are you to make your home more efficient in the next 12 months?

1. Extremely likely
2. Somewhat likely
3. Somewhat unlikely
4. Extremely unlikely

[ASK IF EM10C=3 OR 4; LANDLORD UNLIKELY]

EM10E. Why do you think your landlord is unlikely to try to make your home more energy efficient? Select all that apply. [SELECT ALL THAT APPLY]

1. My landlord does not have to pay the energy bill so doesn't care that my home is not efficient
2. My landlord always waits for things to break before replacing them and things are in good condition
3. My landlord always buys the least expensive option possible and won't pay more for a more efficient option
4. My landlord does not have the money to make improvements
0. Some other reason (specify)

[ASK IF EM10D=3 OR 4; TENANT UNLIKELY]

EM10F. Why are you unlikely to try to make your home more energy efficient? Select all that apply. [SELECT ALL THAT APPLY]

1. The upfront costs of the improvements would be too high
2. The energy savings are not big enough to justify the costs
3. As a renter, it isn't worth the investment
4. I plan to move soon
0. Some other reason (specify)

[ASK IF EM10F=1]

EM10G. Would you be more likely to make energy efficient home improvements in the next 12 months if you could get a loan for the upfront costs through your electric or gas utility?

1. Yes
2. No
3. It would depend on the terms and conditions of the loan

EM11. How many of your day-to-day actions could you change to save energy if you tried? Please consider possible changes at home with how you **use** lighting, appliances, electronics, and heating and cooling systems.

1. I have a lot that I could change
2. I have some things I could change
3. I have just a few things I could change
4. I have already done all that I can do

[ASK IF EM11 < 4; CHANGES COULD BE MADE]

EM11A. What changes could you make to your day-to-day actions to save energy? Please provide up to 5 responses.

00. [OPEN END, PLEASE INCLUDE FIVE TEXT BOXES]

[ASK IF EM11 < 4; CHANGES COULD BE MADE]

EM11B. How likely are you to attempt to change your day-to-day actions to save energy in the next 12 months?

1. Extremely likely
2. Somewhat likely
3. Somewhat unlikely
4. Extremely unlikely

[ASK IF EM11B=3 OR 4; UNLIKELY TO MAKE CHANGES]

EM11C. Why are you unlikely to change your actions to save energy? Select all that apply. [SELECT ALL THAT APPLY]

1. My energy bill is not high enough that I feel the need to make changes to my life
2. It's not convenient
3. I often forget even though I'd like to do more
4. My actions alone aren't enough to make a difference in the world
5. I can't control the actions of others in my household/Don't have control over most things that use energy
6. I want to be comfortable
0. Some other reason (specify)

MAX DIFF TRADEOFFS

MD1. [SHOWN ON FIRST CHOICE SET SCREEN] Now, we are going to show you several pairs of reasons for why you may want to personally become more energy efficient.

For each pair, we'd like you to pick the one reason that is more important. We'll go through this activity multiple times to determine what matters most to you. INSTRUCTION: ACCEPT ONE ANSWER PER SET.

[SHOWN FOR EACH ADDITIONAL CHOICE SET] Please pick the one reason that is more important for why you may want to personally become more energy efficient.

Desire to help lower carbon emissions	1
Cost savings on energy bill	
Being true to my values	2
Making my home more comfortable (i.e. warmer, dryer, cooler, etc.)	
Being a responsible, thoughtful human	3
Cost savings on energy bill	
Passing responsible values to my family/children	4
Making my home more comfortable (i.e. warmer, dryer, cooler, etc.)	
Contributing to a movement to keep my state number one in energy efficiency	5
Cost savings on energy bill	
Contributing to a movement to keep my state number one in energy efficiency	6
Being true to my values	
Helping my state set an example that can be replicated by other states and nations	7
Making my home more comfortable (i.e. warmer, dryer, cooler, etc.)	
Helping my state set an example that can be replicated by other states and nations	8
Passing responsible values to my family/children	
Helping my state meet its 2030 goals of 50% renewable energy and 40% less carbon emissions	9
Making my home more comfortable (i.e. warmer, dryer, cooler, etc.)	
Helping my state meet its 2030 goals of 50% renewable energy and 40% less carbon emissions	10
Making my home safer (e.g. replacing old/faulty appliances, eliminating dust, etc.)	
Helping my state meet its 2030 goals of 50% renewable energy and 40% less carbon emissions	11
Being a responsible, thoughtful human	
Helping my state meet its 2030 goals of 50% renewable energy and 40% less carbon emissions	12
Not being wasteful	
Not leaving energy issues to the next generation	13

ACCESS TO TECHNOLOGY AND INFORMATION

Now we have some questions about your technology use at home.

IS1a. Do you ever use the internet or email at HOME?

1. Yes
2. No

[ASK IF IS1a = 1, ELSE SKIP TO IS2a]

IS1b. Do you currently subscribe to internet service at HOME?

1. Yes
2. No

[ASK IF IS1b = 1, ELSE SKIP TO IS2a]

IS1c. Do you subscribe to a dial-up internet service at home OR do you subscribe to a higher-speed broadband service such as DSL, cable, or fiber optic service?

1. Subscribe to a dial-up internet service
2. Subscribe to high speed broadband service

IS2a. Do you have a cell phone?

1. Yes
2. No

[ASK IF IS2a = 1]

IS2b. Some cell phones are called “smartphones” because of certain features they have. Is your cell phone a smartphone such as an iPhone, Android, Blackberry, or Windows phone?

1. Yes
2. No
8. Not sure

IS12. How familiar are you with **smart home devices**? Smart home devices are electronic versions of household products (i.e. TVs, thermostats, sensors, cameras, light switches, speakers) that are usually connected to the internet and have advanced features including being able to be controlled or monitored remotely through a smartphone, tablet, computer (laptop or desktop), or voice assistant.

1. Have heard of them and know a lot about them but do not own one
2. Have heard of them before but don't know much about them
3. Have never heard of them before
4. My household owns a smart home device

IS11. If public officials asked everyone to conserve water or electricity because of some emergency, how likely is it that people in your community would cooperate — would you say it is...?

1. Very Likely
2. Likely
3. Unlikely
4. Very unlikely

CLIMATE CHANGE ATTITUDES

CC2. How important are environmental challenges like climate change?

1. Very important
2. Somewhat important
3. Slightly important
4. Not at all important

CC3A (P). How often, if ever, do you make an effort to live in ways that help protect the environment?

1. All the time
2. Some of the time
3. Not too often
4. Not at all

CC4 (P). Which of these statements about the Earth's temperature comes closest to your view?

1. The earth is getting warmer mostly because of human activity such as burning fossil fuels
2. The earth is getting warmer mostly because of natural patterns in the Earth's environment
3. There is no solid evidence that the Earth is getting warmer
9. Not sure

[ASK IF CC4 = 9]

CC4A(P). Even if you are not sure, which of these three statements about the Earth's temperature comes closest to your view?

1. The earth is getting warmer mostly because of human activity such as burning fossil fuels
2. The earth is getting warmer mostly because of natural patterns in the Earth's environment
3. There is no solid evidence that the Earth is getting warmer

DEMOGRAPHICS

D1. Which of the following best describes your home/residence?

1. Single-family detached home (Not a duplex, townhome, or apartment; attached garage is OK)
2. Single family attached home (includes townhouse)
3. Mobile home
4. Apartment or condominium (includes multifamily home)
0. Other (specify)

[ASK IF D1=4]

D1a. How many housing units are in your building?

1. 1
2. 2-3
3. 4-9
4. 10 or more

D2. How long have you lived in this residence?

1. Less than 1 year
2. 1-3 years
3. 4-10 years
4. 11-20 years
5. More than 20 years

D3. Including yourself, how many people currently live in your residence year-round?

[NUMERIC OPEN END 0-10]

[ASK IF D3>1]

D3A. How many people under the age of 18 live in your residence?

[NUMERIC OPEN END 0-D3 QUANTITY]

D4. Approximately when was your residence first built?

01. Before 1950
02. 1950-1959
03. 1960-1969
04. 1970-1979
05. 1980-1989
06. 1990-1999
07. 2000-2005
08. 2006-2009
09. 2010 or later
99. Not sure

D5. Approximately how many square feet is your residence?

1. Less than 1,000 sq. ft.
2. Between 1,000 and 1,999 sq. ft.
3. Between 2,000 and 2,999 sq. ft.
4. Between 3,000 and 3,999 sq. ft.
5. Between 4,000 and 4,999 sq. ft.
6. Greater than 5,000 sq. ft.
9. Not sure

D6. What is your highest level of education?

1. Less than a high school degree
2. High school degree
3. Technical/trade school program
4. Associates degree or some college
5. Bachelor's degree
6. Graduate / professional degree, e.g., J.D., MBA, MD, Ph.D.

D7. What best describes your current employment status?

1. Employed full-time
2. Employed part-time
3. Retired
4. Not employed, but actively looking
5. Not employed, and not looking

D8. In politics today, do you consider yourself a Republican, Democrat, or Independent?

1. Republican
2. Democrat
3. Independent
4. Other
5. No preference

D9. General speaking, would you describe your political views as very conservative, somewhat conservative, moderate, somewhat liberal, or very liberal?

1. Very Conservative
2. Somewhat Conservative
3. Moderate
4. Somewhat Liberal
5. Very Liberal

D10. Are you of Hispanic, Latino or Spanish descent? [RESPONSE NOT REQUIRED]

1. Yes
2. No

[ASK IF D10>1]

D11. Which of the following describes your race? [ALLOW MULTIPLE RESPONSES] [RESPONSE NOT REQUIRED]

01. White or Caucasian
02. Black or African American
03. American Indian or Alaskan Native
04. Chinese
05. Korean
06. Vietnamese
07. Japanese
08. Filipino
09. Native Hawaiian

- 10. Guamanian or Chamorro
- 11. Samoan
- 12. Other Asian
- 13. Other Pacific islander
- 00. Other. Specify

D12. What is the primary language spoken in your home?

- 01. English
- 02. Spanish
- 03. Mandarin
- 04. Cantonese
- 05. Tagalog
- 06. Korean
- 07. Vietnamese
- 08. Russian
- 09. Japanese
- 00. Other, please specify _____

D13a. Is anyone in your household deaf or have serious difficulty hearing?

- 1. Yes
- 2. No

D13b. Is anyone in your household blind or have serious difficulty seeing **even when wearing glasses**?

- 1. Yes
- 2. No

Now, thinking just about members of your household who are **at least 5 years old...**

D13c. Because of a physical, mental, or emotional condition, does anyone in your household 5 years of age or older have serious difficulty concentrating, remembering, or making decisions?

- 1. Yes
- 2. No

D13d. Does anyone 5 years of age or older have serious difficulty walking or climbing stairs?

- 1. Yes
- 2. No

D13e. Does anyone 5 years of age or older have serious difficulty dressing or bathing?

- 1. Yes
- 2. No

Now, thinking just about members of your household who are **at least 15 years old...**

D13f. Because of a physical, mental, or emotional condition, does anyone in your household 15 years of age or older have serious difficulty doing errands alone such as visiting a doctor's office or shopping?

- 1. Yes
- 2. No

D14b. Do you spend more than half of your yearly income on housing costs? (Housing costs include rent payments, mortgage payments, utility bills, condominium fees, real estate taxes, and home insurance premiums.)

1. Yes
2. No
8. Not sure

D15. What was your annual household income from all sources in 2018, before taxes? [RESPONSE NOT REQUIRED]

01. Less than \$20,000 per year
02. \$20,000 to \$29,999
03. \$30,000 to \$39,999
04. \$40,000 to \$49,999
05. \$50,000 to \$59,999
06. \$60,000 to \$74,999
07. \$75,000 to \$99,999
08. \$100,000 to \$149,999
09. \$150,000 to \$199,999
10. \$200,000 or more

[ASK IF D15=1]

D15A. Is it... [RESPONSE NOT REQUIRED]

1. Less than \$10,000, or
2. \$10,000 to \$15,000, or
3. \$15,000 to \$20,000

INCENT. Thank you for your participation in this important study. To be eligible to receive your \$<AMOUNT> Tango emailed gift card, please provide the information below. You can use this Tango gift card with popular retailers such as Target, Amazon, Lowe's or Walmart. If you do not wish to receive a gift card, please check the box below and leave all other fields blank.

Please allow 4-6 weeks for processing and delivery of the gift cards.

1. Name [Text box]
2. Email Address [text box]
99. No gift card

Thank you for taking the time to complete this survey. We appreciate your responses.

[No redirect]

EUC Effectiveness Study: CBO Staff Interview Guide

October 15, 2019

Instrument Information

Table 1. Overview of Data Collection Activity

Descriptor	This Instrument
Instrument Type	In-depth interview
Estimated Time to Complete	45 minutes to an hour
Population Description	Staff at CBOs partnering with DDB on EUC
Population Size	311
Contact List Size	46
Completion Goal(s)	20
Contact List Source and Date	DDC
Type of Sampling	Purposive Proportional representation with category type; event participation activity; and geographic spread.
Contact Sought	Senior staff member involved in EUC partnership
Fielding Firm	Opinion Dynamics

Table 2. Research Objectives and Associated Questions

Research Objective	Associated Questions
Explore how the CBOs interact with their local communities	Q1-Q8
Gain insights into the effectiveness of DDB communications, materials, trainings, and events.	Q9-Q31

Table 3. Database Inputs

Variable Name	Variable Description and Values
ORGANIZATION	CBO name

Interviewer Information

Interviewer instructions are in italics.

Program Description

Energy Upgrade California is the statewide marketing campaign. One way that EUC is attempting to connect with low income customers is by partnering with CBOs. The goal of these interviews is to support the assessment of the effectiveness of these partnerships and their impact on reaching low-income customers, cultural and ethnic minorities, and disabled customers.

Email Scheduling Script

Subject line: Scheduling a time to talk about Energy Upgrade California

Hi [FIRST NAME],

I'm contacting you on behalf of the California Public Utilities Commission (CPUC). My firm is working with the CPUC to assess the effectiveness of the Energy Upgrade California marketing campaign. We understand your organization is partnering with DDB and/or DDC to help the campaign connect with customers like the ones you serve. As part of the effectiveness evaluation, we're contacting people like you to hear your perspectives on how it's going working with the Energy Upgrade California campaign.

I'd like to schedule a time to talk over the phone in the next week or two. We'll need about 45 minutes to cover all the questions. The questions allow me to learn more about your organization and the clientele you serve, learn about your activities with DDB/DDC, and hear your thoughts on what's working well and what might be improved. Everything you say is confidential and not tied to your name or company name in what we report to the CPUC.

To schedule a time that works well for you or if there's any questions I can answer for you about this research, please either reply to this email or give me a call at 503-943-2125.

I look forward to chatting with you soon,

Jen Loomis

Instrument

Introduction

Hi [FIRST NAME]. This is _____ from Opinion Dynamics, calling to chat about your involvement with the Energy Upgrade California marketing campaign. Is now still a good time to talk?

Great. My questions cover your organization, your activities in the campaign, and your perspectives on how it's going so far. I'll be taking notes as we talk, but I'd like to record the conversation to help with my notetaking. Is that okay with you?

Do you have any questions for me before we begin?

Organizational Background [ASK ALL]

- Q1. To start, I'd like a little information about you and your organization. Can you please tell me your title and briefly describe your role at [ORGANIZATION]?
- Q2. How long have you been in that position?
- Q3. How would you describe the goals of your organization?
 1. [If unclear]: What type of clients/members do you serve? [Interviewer: Get specific details such as ethnic group type, or income qualifications and what term they prefer (clients/members). Use that term throughout interview.]

- Q4. What type of services does your organization provide?
1. [If unclear] Does your organization connect your clients/members with resources to help them save energy or save money on their energy bill?
- Q5. [If not obvious] How do you find your clients/members, or do they come to you?
- Q6. How would you describe the nature of the relationships with your clients/members – is it mostly one-time interactions or do you build ongoing relationships with them?
- Q7. What types of events or community activities does your organization sponsor or attend?
- Q8. What is your service territory? *[Interviewer – try to get a concrete geographical description that uses counties, zip codes, or towns. For example, Bay area is too broad.]*

Involvement in Energy Upgrade California Campaign

Now, let's talk about the Energy Upgrade California campaign. I'll refer to it as EUC.

- Q9. How did your organization first get involved in the EUC campaign?
1. [If unclear] Why were you interested in getting involved?
- Q10. How would you describe your organization's role in the EUC campaign?
1. Do you have participation goals you are supposed to meet?
- Q11. Did anyone from your organization attend the training/orientation designed to familiarize your staff with the EUC campaign?
1. [If yes and it's them] What's your impression of the training/orientation?
 2. [If yes and it's not them] What sort of feedback, if any, did you hear about the training/orientation from your colleague(s)?
 3. [If no] Why not, to the best of your knowledge?
- Q12. How is your ongoing communication with DDC going so far? [If needed: DDC is the marketing agency in charge of CBO engagement within the EUC campaign.]
1. [If unclear] What are the primary ways you communicate with them? [If needed: Email, phone, any in-person meetings]
 2. [If any challenges] How do you try to overcome [challenge]?

EUC Materials Effectiveness

My next few questions are about the EUC marketing materials specifically.

- Q13. What type of EUC marketing materials has DDB provided to your organization?
1. [If none] Were you expecting to get materials from them to distribute at events?
 2. [If some] How does your organization use them?

- Q14. Do you ever need to request materials from EUC before an event?
1. [If yes] How has that process gone? [If needed: Is there timely response, so that you get them on time?]
- Q15. Do you think the materials you received were appropriate for your clients/members/attendees? Why do you say that?
- Q16. Do you receive a sufficient quantity of the materials?
- Q17. To what extent do you think your clients/members/attendees learned things from the materials? [If needed: Things like where to go for more information or how to action to save energy]
- Q18. Does the reaction of your clients/members/attendees to the material differ at all – I'm thinking of differences between older/younger or urban/rural?
- Q19. To what extent do you think your clients/members/attendees are taking action in response to the materials, such as performing energy-saving actions or looking for more information?
1. Why do you think that is?
 2. Does that likelihood of taking action vary by client/member/attendee? How?
- Q20. Is there a process in place for you to provide feedback to DDC on the marketing materials, whether about content or type?
1. [If yes] Have you provided feedback before?
 2. [If no] Do you wish you had a way to provide feedback on the materials to DDC?
- Q21. [If yes to Q20_1] What kind of feedback did you provide?
1. Were any changes made as a result of your feedback?
- Q22. To what extent do you think DDC would be able to reach the types of clients/members you serve without your help?
- Q23. To what extent would you say your clients/members trust their utility company?
1. Why do you think that is?
- Q24. To what extent do you think your clients/members trust the Energy Upgrade California brand?
1. Why do you think that is?

EUC Events

Now let's talk a little bit about the events where you promote EUC.

- Q25. What types of events has your organization attended or organized where you distribute EUC materials?
1. [If unclear, for each] How often do those occur?
 2. [For each] How well do you think those went?
 3. [If some better than others] What do you think contributed to a more successful event?

Q26. What events do you have planned for the upcoming year where you'll be promoting EUC?

1. [If any] Would you be able to send me a list of your upcoming events?

Q27. Does DDC ever suggest events for you to go to?

1. Are you satisfied with that, or do you wish the arrangement was a little different?
2. Why do you say that?

Closing

We're almost done. Just a few more questions.

Q28. What is going well working with DDC on the EUC campaign?

Q29. What is the biggest challenge working with DDC on the EUC campaign?

1. [If any] How have you overcome those challenges, if at all?

Q30. What's your one piece of advice to improve the EUC campaigns' ability to reach and make an impression on the types of clients/members you serve?

Q31. Those were all the questions I had, is there anything else you think is important for me to know about your organization or its work with the Energy Upgrade California campaign?

Thank you very much for your time.

DDB Staff Interviews on CBO Partnerships

September 13, 2019

DDB staff attendees:

Instrument

Introduction

Hi. We're _____ from Opinion Dynamics. Opinion Dynamics is conducting an evaluation of the Energy Upgrade California campaign. One aspect of that evaluation is assessing the effectiveness of partnerships with community-based organizations to reach hard to reach populations. The purpose of our conversation today is for me to learn about how DDB partners with the CBOs on the EUC campaign. My questions cover topics like what types of CBOs DDB is partnering with, how you collaborate with them, and any expectations you may have for them.

I'll be taking notes as we talk, but I'd like to record the conversation to help with my notetaking. Is that ok with you?

Any questions for me before we begin?

Introduction

First, can you tell me a little bit about you guys – you're at DDC, is that right?

How is DDC related to DDB, if at all?

- Q1. In your own words, describe for me DDB's goals for partnering with CBOs on Energy Upgrade California.
- Q2. How did you find the CBOs you're working with?
 1. [If unclear] What was your criteria for selecting CBOs to work with?
- Q3. How would you describe the types of CBOs you're working with? [If needed: Are they big organizations, small organizations, environmentally focused, or focused on a cultural group or faith-based group; any relation to energy? I just want to know the types or how you'd characterize the range of CBOs]
- Q4. Approximately how many CBOs are you partnering with on the EUC campaign?
- Q5. What's the length of their commitment to EUC? Do you do one-year partnerships, or are they more longer-term, does it vary?
- Q6. What types of expectations do you have for the CBOs?
 1. [If unclear] Are there specific goals the CBOs are supposed to meet?
- Q7. What sort of information or metrics are you asking the CBOs to track?

Q8. What sort of information is DDB tracking related to the CBOs?

Collaboration with CBOs

Now let's talk more specifically about how DDB interacts with the CBOs.

Q9. What types of orientation or training did DDB do for the CBOs to become familiar with EUC?

1. [If unclear] Were those in-person or over the phone?
2. [If unclear] Was there more than one CBO present at a time or was it individualized?
3. Did you provide them training materials? [If yes] Can we get a copy of those?
4. What went well with those?
5. What didn't go so well?

Q10. Are there other events that DDB sponsors for the CBOs? If yes, what are those?

Q11. What types of EUC collateral or materials does DDB give to the CBOs to distribute?

Q12. Does DDB provide advice on how the CBOs engage should with their customers, or do the CBOs do as they wish?

Q13. What sort of events have the CBOs held so far in 2019?

Q14. What sort of ongoing communication does DDB have with the CBOs?

Q15. How's the ongoing communication going?

1. [If unclear] Any challenges around communication? [If needed: Are staff pretty consistent or is your point of contact continually changing? Are you able to get ahold of the people you need to?]
2. [If unclear] Do CBO representative attend the monthly EUC meetings?

Q16. What kind of results, if any, have you seen so far coming out of your relationship with CBOs?

Q17. Do you think the CBOs are helping you reach customers you would otherwise have a difficult time reaching?

Data Request

Q18. We're close to the end. I'd like to spend a little time talking about the data request I sent you yesterday. The first part is getting the contact information for the primary contact at each CBO. Do you have any questions or concerns about that part?

Q19. The second part was getting a list of events. We're planning to conduct some observations at these events.

1. Can you provide us a list of events that DDB holds for CBOs, such as trainings?
2. Can you provide us a list of events where CBOs are promoting EUC, or should that list come from the CBOs themselves?

Q20. Can you provide that information to us in an Xcel sheet in the next couple weeks?

Closing

Q21. Is there anything else you think is important for me to know about DDB's partnering with CBOs or the CBOs' role in EUC?

Thank you so much for your time.