

RTR Appendix

Southern California Edison, Pacific Gas and Electric, Southern California Gas, and San Diego Gas and Electric (“Joint Utilities” or “Joint IOUs”) developed Responses to Recommendations (RTR) contained in the evaluation studies of the 2013-2015 Energy Efficiency Program Cycle and beyond. This Appendix contains the Responses to Recommendations in the report:

RTR for the Marketing, Education & Outreach Consensus Project Report (Opinion Dynamics, Calmac ID #CPU0214.01, ED WO #17PS5017)

The RTR reports demonstrate the Joint Utilities’ plans and activities to incorporate EM&V evaluation recommendations into programs to improve performance and operations, where applicable. The Joint IOUs’ approach is consistent with the CPUC Decision (D.) 07-09-043¹ and the Energy Division-Investor Owned Utility Energy Efficiency Evaluation, Measurement and Verification (EM&V) Plan² for 2013 and beyond.

Individual RTR reports consist of a spreadsheet for each evaluation study. Recommendations were copied verbatim from each evaluation’s “Recommendations” section.³ In cases where reports do not contain a section for recommendations, the Joint IOUs attempted to identify recommendations contained within the evaluation. Responses to the recommendations were made on a statewide basis when possible, and when that was not appropriate (e.g., due to utility-specific recommendations), the Joint IOUs responded individually and clearly indicated the authorship of the response.

The Joint IOUs are proud of this opportunity to publicly demonstrate how programs are taking advantage of evaluation recommendations, while providing transparency to stakeholders on the “positive feedback loop” between program design, implementation, and evaluation. This feedback loop can also provide guidance to the evaluation community on the types and structure of recommendations that are most relevant and helpful to program managers. The Joint IOUs believe this feedback will help improve both programs and future evaluation reports.

¹ Attachment 7, page 4, “Within 60 days of public release, program administrators will respond in writing to the final report findings and recommendations indicating what action, if any, will be taken as a result of study findings as they relate to potential changes to the programs. Energy Division can choose to extend the 60 day limit if the administrator presents a compelling case that more time is needed and the delay will not cause any problems in the implementation schedule, and may shorten the time on a case-by-case basis if necessary to avoid delays in the schedule.”

² Page 336, “Within 60 days of public release of a final report, the program administrators will respond in writing to the final report findings and recommendations indicating what action, if any, will be taken as a result of study findings. The IOU responses will be posted on the public document website.” The Plan is available at <http://www.energydataweb.com/cpuc>.

³ Recommendations may have also been made to the CPUC, the CEC, and evaluators. Responses to these recommendations will be made by Energy Division at a later time and posted separately.

DDB/IOU Joint Response to Recommendations (RTR) in Impact, Process, and Market Assessment Studies

Study Title: Marketing, Education & Outreach Consensus Project Report
Program: ME&O
Author: Opinion Dynamics
Calmac ID: CPU0214.01
ED WO: 17PS5017
Link to Report: http://calmac.org/publications/California_Marketing_Education_and_Outreach_Evaluation_Consensus_Project_Report_FINAL_for_CALMAC.pdf

Item #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	Disposition	Disposition Notes
				If incorrect, please indicate and redirect in notes.	Choose: Accepted, Rejected, or Other	Examples: Describe specific program change, give reason for rejection, or indicate that it's under further review.
1	33	Experts and key stakeholders agree on a core set of metrics for assessing the achievement of prioritized statewide ME&O campaign objectives.	The SW implementer should track core metrics that support the formative evaluation of campaign messaging and content. PAs should begin to track core metrics for their own internal campaigns where applicable.	DDB and all PAs	Other	The recommendation does not seem to reflect full awareness of existing tracking efforts and objectives. It would be more useful for Opinion Dynamic’s table of core metrics (“Marketing, Education & Outreach Effectiveness Assessment: Annual Performance Report” draft, April 7, 2020, p. 4.) to indicate which core metrics are already being tracked and by whom, as well as which new core metrics should be tracked, and by whom. For example, many of the core metrics in the report are tracked by the ED evaluation contractor because they are used to evaluate DDB’s effectiveness. Therefore, they are not tracked by DDB. DDB also notes that there were staffing changes as well as a hiatus in Energy Division third-party evaluations during the campaign. DDB did not receive assessment feedback from ED on the achievements of the SW campaign during the hiatus. DDB did contract with an independent firm (Millward Brown) to track the effectiveness of messaging and media investments for program management purposes. In addition, DDB uses monthly web analytics to track campaign effectiveness and believes all applicable core metrics are currently being tracked. The IOUs track operational KPIs and goals that are sufficient for IOU management purposes, and therefore believe all applicable IOU core metrics are being tracked. It may not be useful or appropriate to track the same metrics as the SW implementer or the CPUC evaluator. Both DDB and the IOUs support continuing discussions with ED evaluators to help with tracking longitudinal metrics per the CPUC’s original intent and to identify any gaps between existing metrics and recommended metrics. The IOUs note that the recommended core metrics are not immediately actionable, as they only list high-level concepts that need to be translated into useable metrics. For example, “awareness” is a concept for which there are many possible definitions and measures. Additionally, using a consistent quantification methodology is necessary to compare data on an “apples-to-apples” basis across campaigns.
2	33	Experts and key stakeholders have differing views on the importance of assessing campaign attribution.	The CPUC and its evaluation team should begin conversations on the attribution approach.	CPUC		
3	33	Stakeholders disagree about the role of the SW campaign in lead generation.	The PAs, CPUC, and the SW implementer should begin discussions on	CPUC, DDB, and all PAs	Accepted	The recommendation to “begin discussions” does not seem to reflect an awareness of lead generation in the SW MEO Program. A discussion about tracking between the IOUs, Energy Division, and the Implementer began early in the program, several years ago. Now that an ED evaluator has been hired, DDB and the IOUs are eager to work with the CPUC to reinstate the tracking and reporting process that had to be postponed during the above-mentioned evaluation hiatus.

Item #	Page #	Findings	Best Practice / Recommendations (Verbatim from Final Report)	Recommendation Recipient	Disposition	Disposition Notes
			<p>the role of the SW campaign in lead generation.</p> <p>The SW implementer should continue to provide monthly updates on the number of referrals to PA websites.</p>			<p>The IOUs previously had responsibility to report leads generated by the EUC campaign and the general awareness efforts of the IOUs. The ED third-party evaluator originally had responsibility for tracking the core metrics, and DDB took over management of those metrics using an independent market research firm (Millward Brown) for Years 2 and 3 of the JCAP. Although some core metrics were measured during this time, DDB didn't get feedback from ODC frequently enough to tune campaigns or answer some outstanding questions about brand awareness.</p> <p>The strategy for driving referrals was also developed previously, and both DDB and the IOUs support resuming discussions with ED on updating tracking protocols and website targets to make sure the links and pages are still appropriate and functional. DDB and the IOUs are ready to discuss with ED the process of verifying the process that had been set up to track referrals from the EUC website to the IOUs' websites; in particular, qualified referrals to previously identified targets including the ESA and the SMB audits programs. DDB and the IOUs suggest that future discussions with ED can revisit opportunity programs and overall referral strategy.</p> <p>The IOUs would also like to suggest that we take a step back and discuss not just incremental improvements from year to year, but the goals that the metrics are tracking towards. As we enter Year 4 of the current statewide campaign, it is important to assess where we are compared with where we were in Year 1, and consider how much progress SWME&O has made in changing attitudes, extending knowledge, and encouraging energy efficiency and management behavior.</p>
4	33	Further discussion is needed on targeting and measuring reductions in energy use.	The CPUC and stakeholders should begin discussions on the importance and feasibility of measuring reductions in energy usage.	CPUC, DDB, and all PAs	Other	<p>The recommendation to "begin discussions" does not seem to reflect an awareness of the ongoing discussions about the feasibility and costs of not only measuring, but attributing, reductions in energy usage. These are long-standing issues that go beyond the SW ME&O program. The recommendation would be more useful if the evaluators included a discussion of methodologies that Delphi panelists could recommend for either calculating or attributing energy savings.</p> <p>This recommendation is also premature and perhaps inappropriate in light of the fact that, as the evaluators point out, reductions in energy usage are not a formal objective of this non-resource program. As a non-resource program, DDB has taken actions to improve the attribution of behaviors and actions that may be taken in response to messaging campaigns; for example, by using a panel of customers who agree to partake in text-messaged spot surveys..</p> <p>DDB and the IOUs support a better understanding of the link between messaging campaigns and eventual energy savings and would welcome suggestions from the evaluator about methodologies to calculate aggregate (unattributed) reductions in energy usage as a result of collective marketing efforts.</p>
5	33	The role of SW ME&O evaluation is not addressed in current guidance documents.	The CPUC should more formally delineate the research responsibilities of the SW ME&O implementer and evaluator.	CPUC		