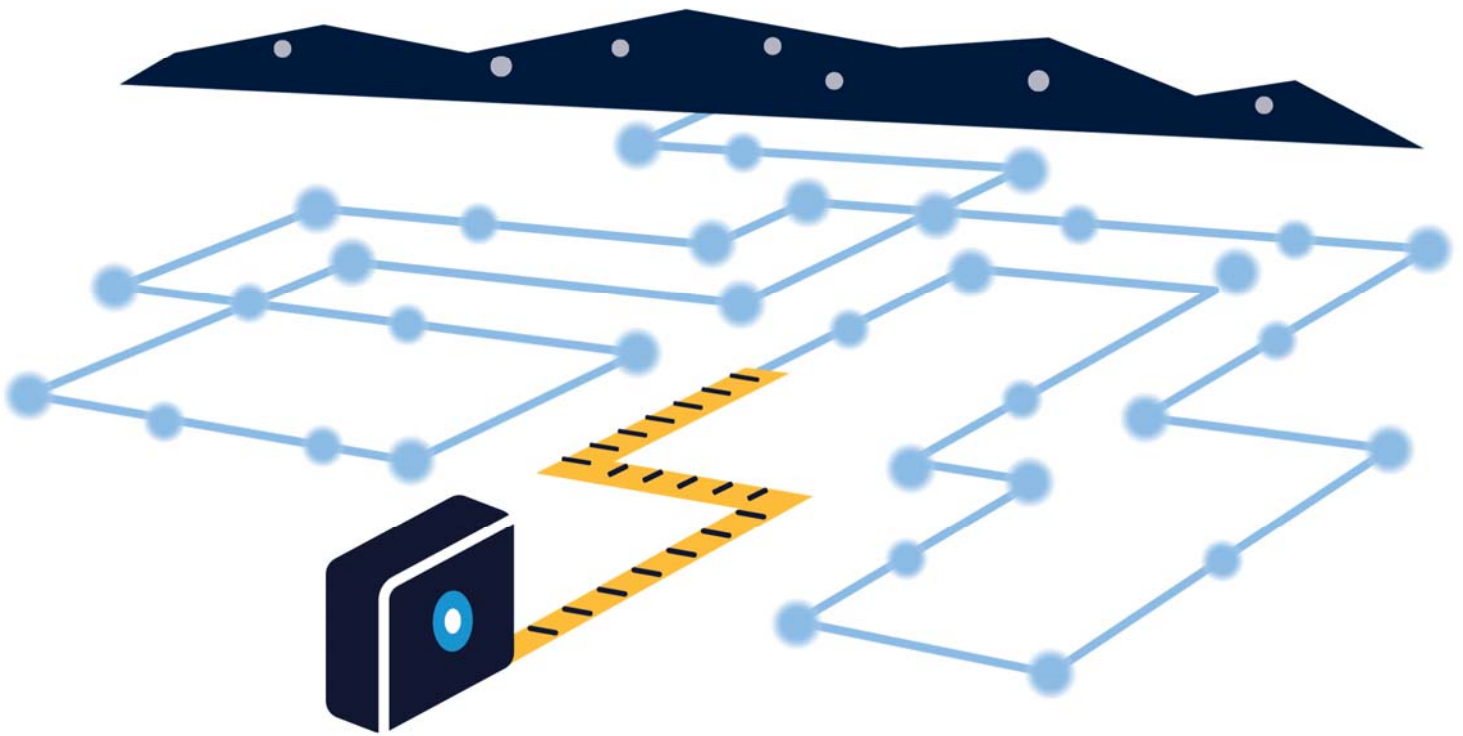




# ME&O Collaborative Process Assessment

2020 Annual Evaluation Update Report

CALMAC Study ID: CPU0227.01



February 25, 2021



This study is covered under CPUC Contract 17PS5017 between Opinion Dynamics and the California Public Utilities Commission (CPUC).

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# 1. Executive Summary

This report summarizes findings from evaluation activities conducted as part of the Collaborative Process Assessment over the course of 2020. The goal of the Collaborative Process Assessment is to ensure that ongoing collaborative efforts related to Statewide Marketing, Education, and Outreach (SW ME&O) are effective and that stakeholders are actively contributing to this process in a constructive way. The findings from this study are being used on an ongoing basis to inform refinements to the collaborative process.

The SW ME&O governance structure calls for the Investor-Owned Utilities (IOUs), Regional Energy Networks (RENS), and other stakeholder groups to play an active role in the implementation of the SW ME&O campaign. The five-year ME&O strategic roadmap defines how these stakeholders coordinate the implementation of the campaign through the Responsible, Accountable, Supportive, Consulted, and Informed (RASCI) model.

## 1.1 Methods

The findings from this assessment are based on: (1) in-depth interviews with eight key stakeholders involved in the SW ME&O campaign in various roles within the RASCI model, (2) observation of the collaborative process during monthly and quarterly stakeholder meetings, and (3) data collected from nine post-collaboration pulse surveys. Through these activities, we examined how stakeholders collaborate, how stakeholders perceive their ability to collaborate, and identified ways to improve the collaborative process.

## 1.2 Conclusions and Recommendations

Based on these research activities, the evaluation team presents the following summary of conclusions and recommendations:

- **The RASCI model is effective but collecting IOU feedback earlier could help ensure appropriate messaging.** Stakeholders agreed the RASCI model provides a useful structure for collaboration and IOU stakeholders agreed their level of involvement was appropriate given their RASCI role. However, the IOUs found DDB often solicited their feedback too late in the campaign idea development process to incorporate their suggestions. IOU stakeholders have specialized energy efficiency marketing experience in their respective service territories and can be used as a resource for the campaign to vet materials before going into production.
  - **Recommendation 1:** When feasible, DDB should consider soliciting feedback from the IOU stakeholders earlier when developing campaign materials.
- **The Looking Back section of monthly and quarterly meetings has room for improvement.** The Looking Ahead and Collaboration sections of each meeting provide a structured venue for collaboration. Given the amount of information shared however, the Looking Back section can be tedious and provides few opportunities for collaboration and discussion.
  - **Recommendation 2:** Distributing the meeting agenda and slide deck several days in advance of each meeting would allow stakeholders to come to meetings more prepared, and altering the Looking Back section to be a question-and-answer format would allow for more collaboration and discussion in this section.
- **Stakeholders were able to quickly adapt to emerging needs.** DDB Group promptly changed the monthly meeting format to be exclusively online in response to the COVID-19 pandemic. Stakeholders were

also quick to pivot from working on ongoing campaign messaging to prioritize messaging centered on energy efficiency during California's shelter-in-place order.

- **Stakeholder collaboration has been successful and improved the quality of the campaign.** DDB Group and IOU stakeholders agreed their collaborative efforts have created a campaign that is greater than the sum of its parts and viewed their collaborative efforts to be a major success.
- **The EUC Campaign emphasis on electricity-saving tips provides less benefit for natural gas ratepayers and IOUs.** Stakeholders from IOUs that provide natural gas service see little benefit to their organizations as a result of the campaign because of the emphasis EUC places on electricity-saving tips. As California puts increasing attention on climate goals, reducing natural gas usage will help California realize greenhouse gas reduction goals.
  - Recommendation 3: Including more natural gas tips will benefit both ratepayers and the natural gas-providing utilities.

## 2. Introduction

In 2012, the California Public Utilities Commission (CPUC) established Energy Upgrade California (EUC) as the brand for Statewide Marketing, Education, and Outreach (SW ME&O) activities to increase ratepayer awareness of energy efficiency, demand response, and distributed generation, and to offer ways for consumers to better manage their energy use. For the 2017–2019 campaign cycle, the CPUC established a competitive bid process and selected the marketing firm, DDB, as the new administrator for the SW ME&O Campaign. DDB works with its partner agencies, such as DDC and OMD to conduct various aspects of the campaign.<sup>1</sup> The CPUC also revisited the vision, goals, and governance structure for SW ME&O and directed DDB, with stakeholder input, to develop a five-year ME&O strategic roadmap and annual Joint Consumer Action Plans (JCAP).

### 2.1 RASCI Model

The SW ME&O governance structure calls for the Investor-Owned Utilities (IOUs), Regional Energy Networks (RENs), Community Choice Aggregators (CCAs), Local Government Partnerships (LGPs), and other stakeholder groups to play an active role in the implementation of the SW ME&O campaign. The five-year ME&O strategic roadmap defines how DDB, the IOUs, the CPUC, the CEC and other stakeholder groups should coordinate to implement the SW ME&O Campaign using the Responsible, Accountable, Supportive, Consulted and Informed (RASCI) model (Table 1). Concurrently, the IOUs, RENs, LGPs, and CCAs also undertake individual marketing efforts to meet internal objectives.

Table 1. Statewide ME&O Governance Structure

Role	Description of Role	Entity
Responsible	The one charged with delivering the successful outcome; Leads, coordinates, implements; can delegate to others as supportive	Statewide Implementer (DDB)
Accountable (also Approver)	The ultimate authority who assigns and approves the deliverable	The CPUC CEC
Supportive	Those who provide resources or play a supporting role in implementation or outcome and deems its success	Advisory Board IOUs RENs
Consulted	Those whose opinions are sought for input and/or buy-in and with whom there is two-way communication	IOUs RENs
Informed	Those kept up to date, often only upon completion, and with whom there is just one-way communication	Stakeholders Public

Source: Proposed Decision Approving Implementer for the 2017-2019 Statewide Marketing, Education and Outreach Program and Providing Guidance for 2017 Activities

### 2.2 Research Objectives

The evaluation team identified the following research objectives to guide the evaluation in 2020:

- Understand how stakeholders collaborate during and outside of monthly and quarterly EUC meetings, and how COVID-19 affected collaborative efforts.

<sup>1</sup> Throughout this memo, when we refer to DDB, this includes representatives from partner organizations, such as DDC and OMD. For context, DDC is charged with overseeing the relationships with community-based organizations while OMD oversees paid media.



- Understand stakeholders' perception of their ability to participate in statewide ME&O efforts, including how they contribute to discussions and provide feedback on campaign development and collateral.
- Identify suggestions for improving the collaborative process to ensure a successful ME&O campaign.

## 2.3 Evaluation Approach and Methods

The evaluation team collected primary data in three ways in 2020. We expand upon each activity following Table 2.

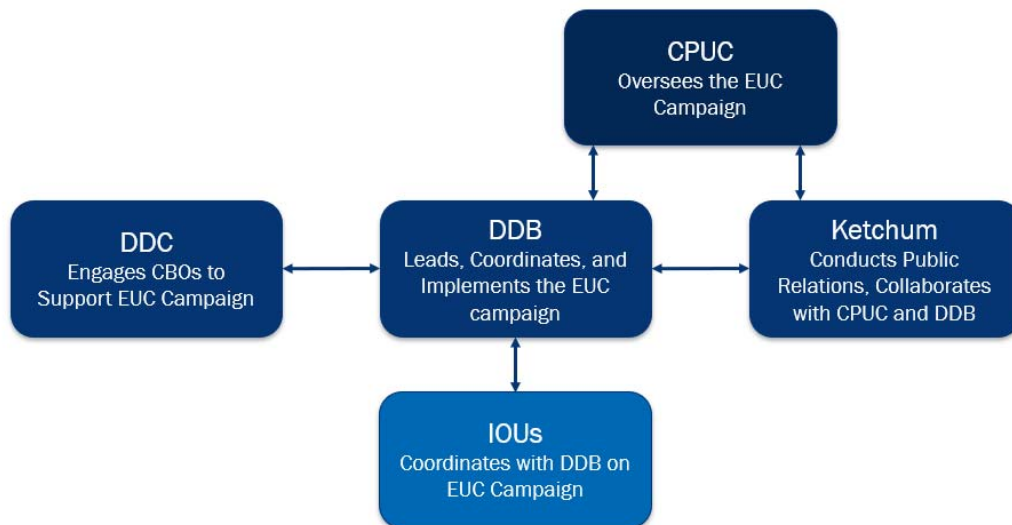
Table 2. Overview of 2020 Data Collection Activities

Research Task	Description
Stakeholder Interviews	Conducted interviews with key stakeholders to learn how stakeholders perceive SW ME&O collaborative efforts, successes, challenges, and identify suggestions for improvement.
Participant Observation of Collaborative Process	Conducted observations of SW ME&O monthly and quarterly meetings and to assess the collaborative process and stakeholder interactions.
Post-Collaboration Pulse Surveys	Conducted short online feedback surveys immediately following meetings or workshops with key stakeholders to get real-time feedback.

### 2.3.1 Stakeholder Interviews

During July 2020, the evaluation team conducted in-depth interviews with eight key stakeholders contributing to the statewide ME&O campaign. The purpose of these interviews was to understand how stakeholders perceive collaboration, how their organization participates in the statewide ME&O campaign, and the successes and challenges of collaboration. Figure 1 diagrams the interactions of the stakeholders the team interviewed in July. Throughout this memo, we refer to DDB, DDC, and Ketchum collectively as “DDB Group.”

Figure 1. EUC Stakeholders Interviewed in 2020



The team coded notes and transcripts from these interviews in NVivo and analyzed them to identify trends and patterns, both within and among the various stakeholder groups. All respondents had been involved in the statewide ME&O campaign for at least one year, and several interviewed stakeholders reported being involved in statewide ME&O efforts for five years or more. Table 3 shows the number of interviews we completed by organization, and the role respondents have within their organizations.

Table 3. Completed Stakeholder Interviews and Respondent Roles

Respondent Organization	Number of Interviews	Respondent Role(s)	Years of SW ME&O Involvement
Investor-owned utilities (IOUs)—one interview per IOU	4	SW Marketing leads, advisors, and strategists	5+ years
DDB and its partners—one interview per organization	3	Client director, account director and supervisor, and executive VP for client relations	1 to 4 years
California Public Utilities Commission (CPUC) Energy Division	1	Supervisor for SW ME&O Campaign—Energy Efficiency	4 years

### 2.3.2 Participant Observation

The evaluation team observed nine monthly and quarterly Energy Upgrade California Stakeholder meetings, as well as the 2020 annual JCAP meeting. Due to COVID-19, all but one meeting was held via video conferencing. The team filled out the observational rubric we developed in 2019 and took supplementary notes. We then coded these notes in NVivo to identify trends and patterns in the meeting dynamics and collaborative process.

### 2.3.3 Post-Collaboration Surveys

The evaluation team sent key stakeholders a short pulse survey following each meeting to confidentially collect their feedback on the collaborative process. In early 2020, the evaluation team revised the list of stakeholders who receive the survey. The revision included input from DDB to ensure we captured the perspectives of the stakeholders who contribute meaningfully to the collaborative process and help make strategic decisions about campaign direction.

The pulse survey includes a series of statements for the most recent meeting that reflect the dimensions of collaboration. It asks respondents to rank their agreement with each statement on a five-point scale, with five being "strongly agree" and one being "strongly disagree," along with one optional open-ended question. The evaluation team coded responses to the open-ended question in NVivo alongside the observational notes to support our supplementary notes. Table 4 shows the number of responses to each pulse survey, as well as the date and type of meeting.

Table 4. 2020 Pulse Survey Responses

Date of EUC Meeting	Type of Meeting	Number of Respondents	Key Stakeholders Invited to Respond
January 22, 2020	JCAP	11	12
February 26, 2020	Monthly	6	8
March 25, 2020	Monthly	8	13

Date of EUC Meeting	Type of Meeting	Number of Respondents	Key Stakeholders Invited to Respond
April 22, 2020	Quarterly	8	14
May 27, 2020	Monthly	7	11
June 24, 2020	Monthly	11	16
July 22, 2020	Quarterly	11	15
August 26, 2020	Monthly	8	14
September 23, 2020	Monthly	7	15
October 28, 2020	Quarterly	7	12

### 3. Key Findings

This section reviews the Collaborative Process Assessment's key findings, organized by the dimensions of collaboration.

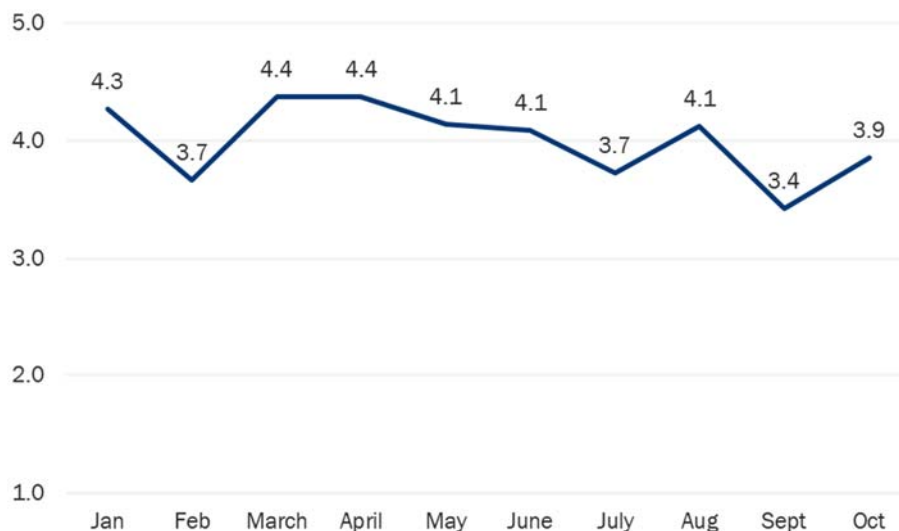
#### 3.1 Governance

The Governance dimension of collaboration is met when the parties agree to rules and a structure that guide joint decision-making. Overall, stakeholders adhere to the RASCI model structure. They agree that monthly meetings are useful in keeping ME&O efforts moving forward and are driving much of the collaboration between the IOUs and DDB group.

##### 3.1.1 RASCI Model

**The stakeholders' collaboration follows the RASCI model. Most view the arrangement positively and value the IOUs' expertise and feedback.** Data from the pulse surveys support the idea that stakeholders agree to and adhere to the RASCI model (Figure 2). Respondents agreed the decision-making structure of the collaborative process is appropriate as outlined by the RASCI model, rating it an average of 4.0 across all nine pulse surveys.

Figure 2. Respondent Agreement the RASCI Model is Appropriate



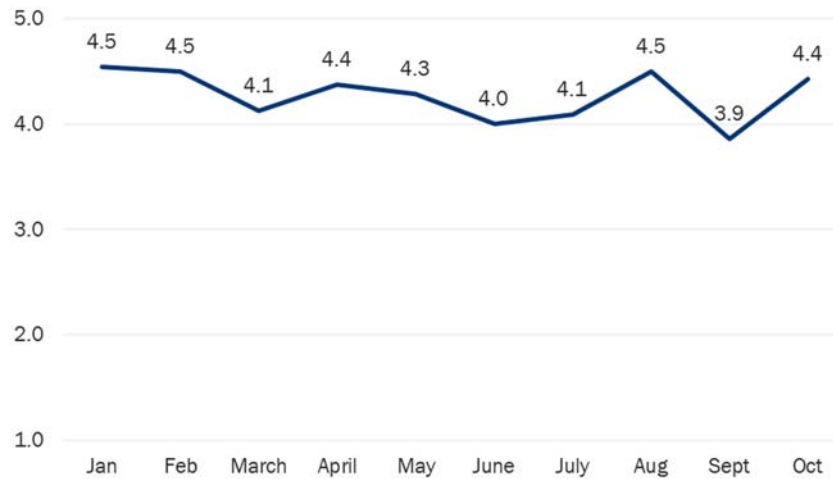
Pulse survey respondents were asked to rank their agreement on a five-point scale from "strongly agree" to "strongly disagree" with the statement, "Based on today's meeting, I would say the decision-making structure of the collaborative process, as outlined in the RASCI model, is appropriate."

**Stakeholders did not see a need to add any new organizations to the collaboration and thought the organizations currently involved were all necessary to the success of the campaign.** Stakeholders largely agreed there are no other groups or entities that should be involved in the EUC campaign that are not currently. The information DDB Group receives from the current stakeholder group is adequate and additional groups or organizations may complicate the message and goal of the campaign. Additionally, the stakeholders agreed all groups currently involved in the campaign are necessary. The other stakeholders also agree that every group brings an important and appropriate perspective to the campaign.

### 3.1.2 Monthly and Quarterly Meetings

Following the RASCI model, stakeholders collaborate primarily through the monthly and quarterly stakeholder meetings. When needed, they will also convene ad hoc meetings on a particular topic. Stakeholders' average pulse survey rating of 4.3 indicates relatively strong agreement that these meetings are effective in keeping statewide ME&O efforts moving forward (Figure 3).

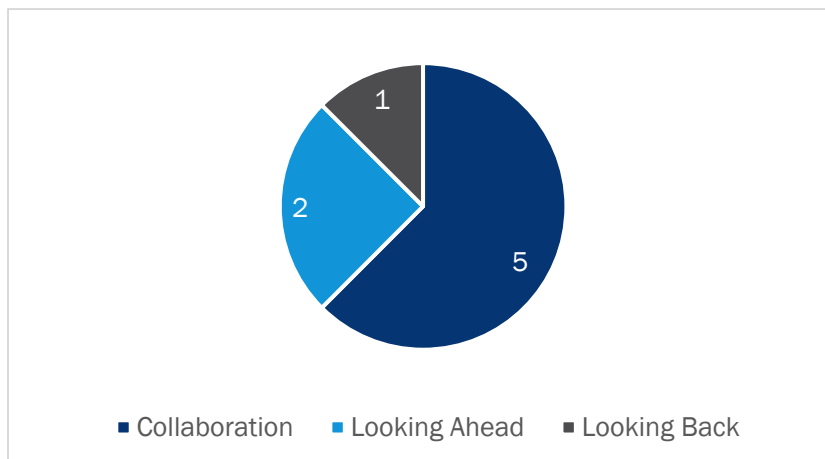
Figure 3. Respondent Agreement the Monthly Meetings Keep ME&O Efforts Moving Forward



Pulse survey respondents were asked to rank their agreement on a five-point scale from "strongly agree" to "strongly disagree" with the statement, "Today's meeting was effective in keeping statewide ME&O efforts moving forward."

The monthly and quarterly meetings typically have a standard structure divided into three sections that occur in the same order: Looking Back, Looking Ahead, and Collaboration. The agenda for each meeting is flexible and the time spent on each section can be adjusted based on the goals of the meeting. Stakeholders from all interviewed organizations suggested improvements to the way the Looking Back section is conducted and only one of eight interviewed stakeholders found the Looking Back section to be the most useful part of the meeting (Figure 4).

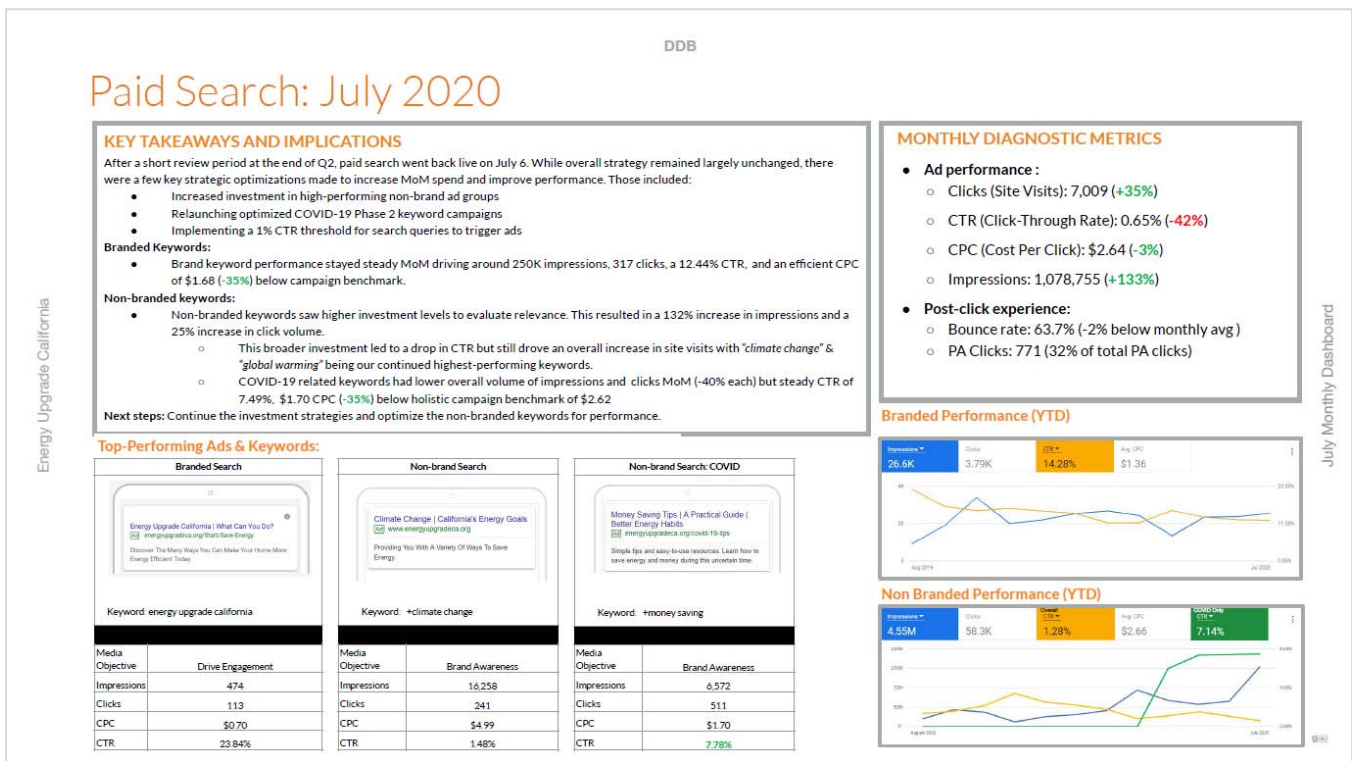
Figure 4. Most Useful Part of Monthly and Quarterly Meetings (n=8)



## Looking Back Section

The Looking Back section of meetings is intended to inform stakeholders of what has and has not worked to guide future campaign direction. Stakeholders report this section can be tedious however, citing dense and difficult to read slides, little explanation behind key campaign metrics, and few opportunities for collaboration. Stakeholders agreed that the slides in the Looking Back section tended to have a lot of tiny text and can be filled with numbers. DDB Group uses color to indicate increases or decreases from the prior month, which helps readability (Figure 5). Yet, the presenters tend to review the slides quickly and move between them quickly. DDB Group members sensed that it can be difficult for the other stakeholders to stay engaged when presenters are swiftly moving through many numbers and statistics. One stakeholder reported that there is so much information on the slides and they are presented so quickly, “it’s hard to read it and identify parts I would have questions on.”

Figure 5. Example Slide from Looking Back Section



Source: DDB Group

During the October meeting however, the evaluation team observed improvement to the interpretation of metrics presented in the Looking Back section. DDB Group compared paid display media performance in Q3 against an industry benchmark as well as to performance in years three and four and in Q2 of 2020. DDB Group also explained that lower performance in some channels was due to lower reach in the African American community, and that they had seen this in other campaigns.

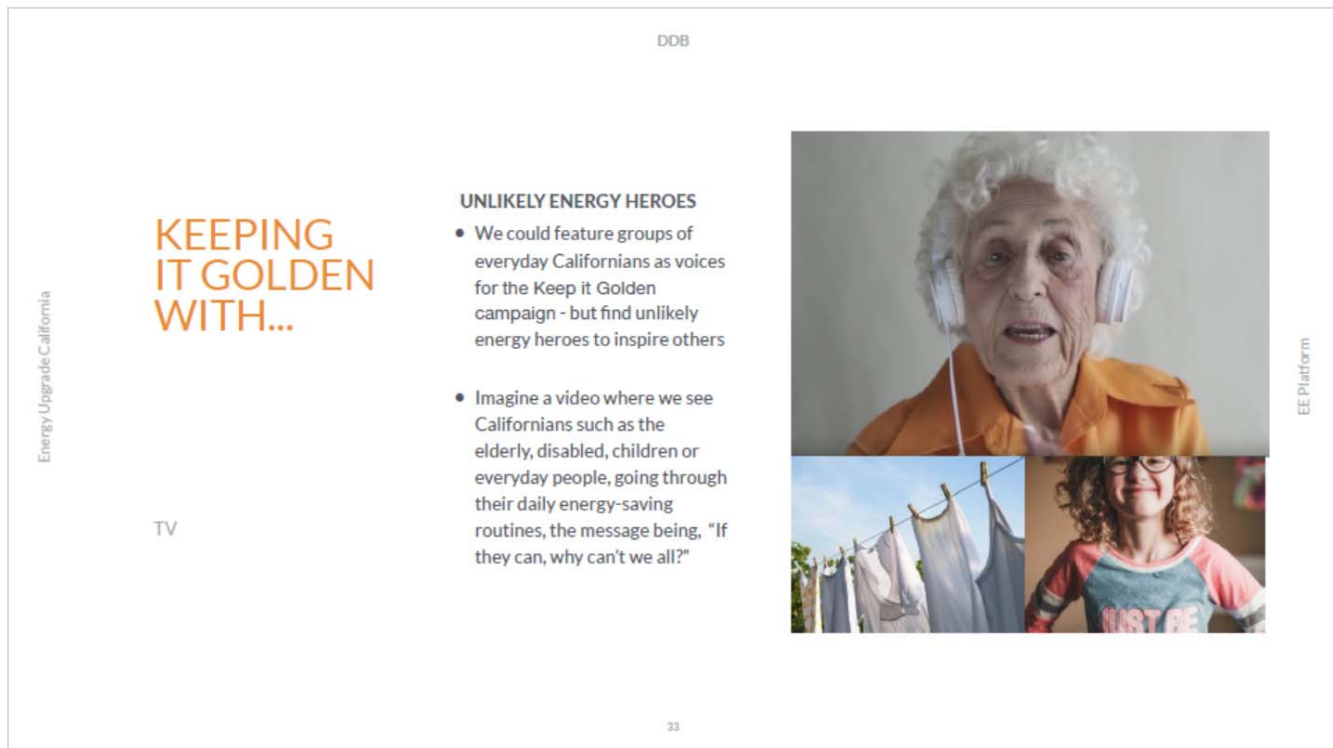
Stakeholders from the DDB Group noted the lack of group discussion in the Looking Back section and suggested a change to make it more engaging, which was also independently suggested by IOU stakeholders. The suggestion was to distribute the slide deck earlier than the day before, which would allow IOU stakeholders enough time to review the slides and develop questions. Then, in the monthly meeting, the Looking Back

section would take more of a question-and-answer format. Such a change would allow the meeting time to be focused on the takeaways stakeholders want to know and would facilitate an engaged discussion.

## Looking Ahead Section

The Looking Ahead section provides a preview of where the campaign is headed and allows stakeholders to provide feedback and insights on new creative ideas. The slides in this section tend to be more readable and typically include more images than the Looking Back section (Figure 6).

Figure 6. Example Slide from Looking Ahead Section



Source: DDB Group

The Looking Ahead section is the most valuable part of the meeting for two stakeholders (Figure 4) because this meeting section is prospective and allows for decisions to be made about upcoming campaign elements. DDB Group presents the campaign content under development and solicits feedback. Many interviewed stakeholders recognized the importance of the Looking Ahead section as it provides an opportunity to express concerns or make suggestions. DDB group considers this section an important checkpoint to ensure all stakeholders have a chance to provide input on the work they are doing and to have an open discussion about what the stakeholders feel is working or not working. One stakeholder commented, "it's helpful when there's great feedback because that helps us make decisions."

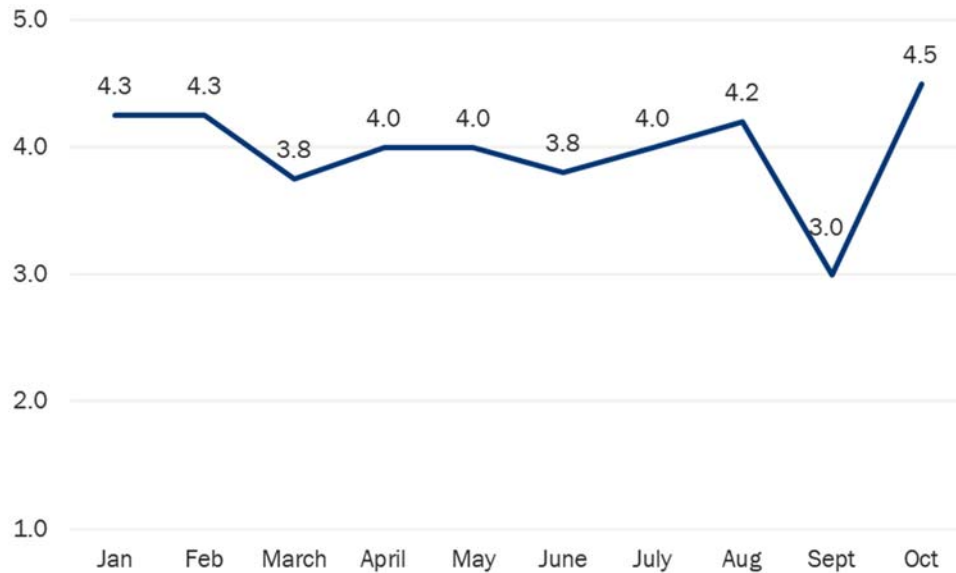
Although only two stakeholders reported the Looking Ahead section as most important, meeting observations indicate this is where stakeholders ask the most questions and where the majority of discussion and collaboration occurs. Representatives from the IOUs and RENs ask questions, give feedback, and provide key insights in this section more than any other. The Looking Back Section is dense and has few takeaways that lead to collaboration, and the Collaboration section has evolved into more of a program updates section. The



content and aim of the Looking Ahead section facilitate a high level of collaboration among stakeholders because they can discuss specific statewide campaign ideas and materials.

Indeed, stakeholders' vocal participation in this meeting section might derive from the fact that they believe DDB will seriously consider opinions shared in meetings. IOU stakeholders' average rating of four indicates agreement they trust DDB to consider their opinions when making decisions about campaign creative and collateral (Figure 7).

Figure 7. Respondent Agreement that DDB will Seriously Consider the Opinions Shared



Pulse survey respondents were asked to rank their agreement on a five-point scale from "strongly disagree" to "strongly agree" with the statement, "I believe DDB will seriously consider the opinions I shared in today's meeting when making decisions about campaign creative and collateral." Only IOU and REN stakeholders responded to this question. The number of responses each month ranged from two to five.

## Collaboration Section

**The Collaboration section of each meeting is the most valuable section to most interviewed stakeholders; however, stakeholders reported the Collaboration section is often short on time and collaborative efforts have dwindled since the outset of the campaign.** Discussion among stakeholders is second-most common in the Collaboration section. Several stakeholders agreed that this was the most valuable aspect of the recurring meetings.

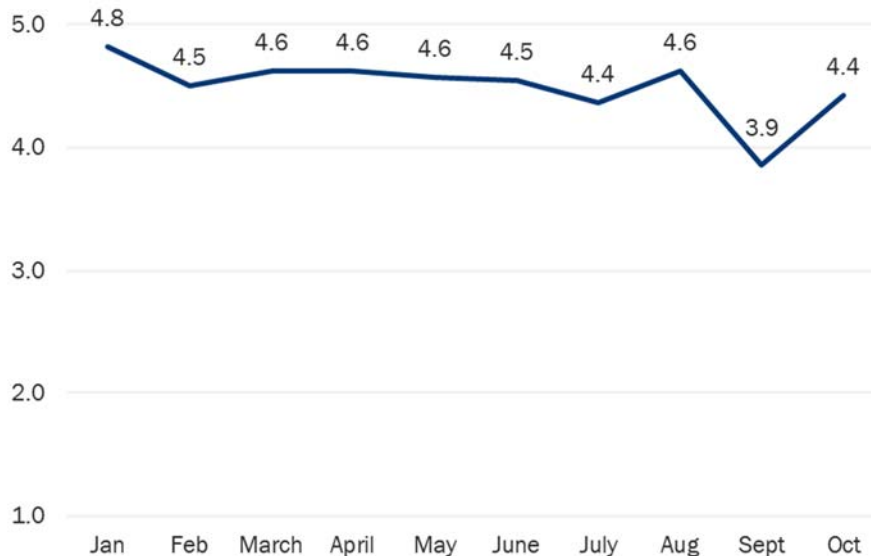
Prior to May 2020, DDB Group would use this section to provide updates on specific campaign ideas and ask the IOUs to provide feedback. In the latter half of 2020, DDB used the Collaboration section to ask the IOUs and RENs for updates on their programs. DDB reported this change helps to figure out how they can “piggyback” off what the Program Administrators are doing with programs in their respective territories to avoid a duplication of efforts.

Two IOU representatives reported in the interviews however, that they felt a bit constrained on time to offer their suggestions and report on what their organization was planning with the Collaboration section occurring at the end of the meeting. One stakeholder from the DDB Group sensed that it might be “tough” for the IOU representatives to collaborate “after an hour of just sitting there.” In spite of this, pulse survey data suggest



stakeholders strongly agree they have sufficient opportunity to share what they had to say at meeting, giving it an average score of 4.5(Figure 8).

Figure 8. Respondent Agreement They had Sufficient Opportunity to Share During Meetings



Pulse survey respondents were asked to rank their agreement on a five-point scale from "strongly agree" to "strongly disagree" with the statement, "I had sufficient opportunity to share what I wanted to say at today's meeting."

## 3.2 Administration

The Administration dimension of collaboration is met when roles, responsibilities, and communication channels are outlined and followed. Although most collaboration occurs during the monthly and quarterly meetings, stakeholders also convene ad hoc meetings to discuss specific topics or homework assignments. Stakeholders agree that comments made during monthly and quarterly meetings were productive and that others bring information they promised to bring, although some wish they had more opportunity to share their feedback during those meetings.

### 3.2.1 Ad Hoc Meetings

**Outside of regular monthly or quarterly meetings, IOU and other stakeholders provide feedback and collaborate on ideas during ad hoc meetings, often concerning specific program areas or topics.** The stakeholders convene an ad hoc meeting when a project schedule is moving faster than the cadence of monthly meetings and DDB needs IOU feedback sooner than the next monthly meeting. The stakeholders also hold ad hoc meetings to focus on specific subject areas, such as the Energy Savings Assistance Program (ESA) or small businesses and take a deep dive into that topic area. For these targeted-topic meetings, DDB sends questions and homework in advance. One IOU representative reflected on the value of the ad hoc meetings and said, "That's where we have a chance to have more collaboration and kick around some ideas." Another IOU representative stated, "They come up a little less frequently because it really depends on the need at the time, but those sessions have been particularly effective."

DDB also encourages the IOU representatives to include other members of their organization that may have more expertise on the particular subject area of the ad hoc meeting. It can be easier for the IOU representatives

to include a knowledgeable colleague in an ad hoc meeting rather than a large monthly stakeholder meeting, and that way DDB receives the information necessary to develop successful campaign materials. At the time of the July 2020 interview, one stakeholder estimated about six of these topic-focused ad hoc meetings were held in the last couple years.

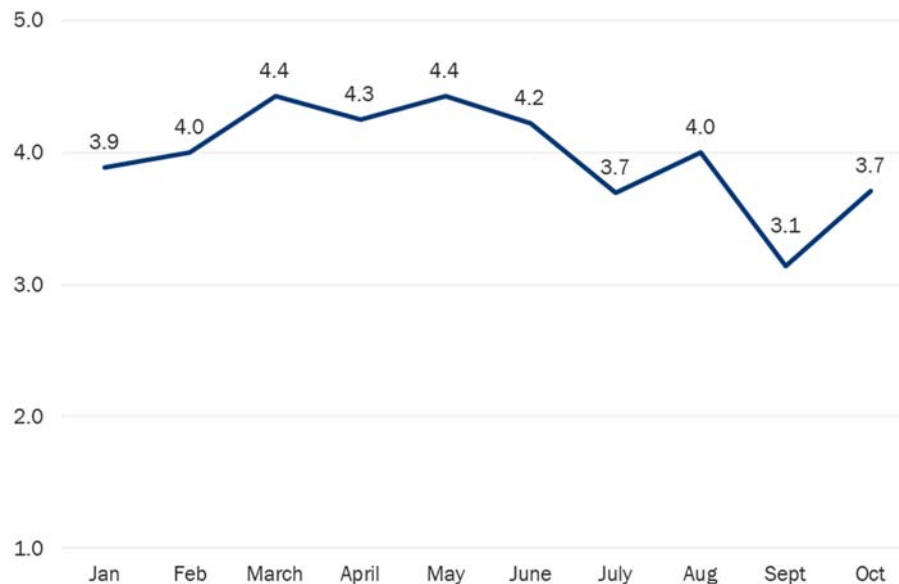
The IOU representatives reported that they will also get together among themselves to discuss homework and data requests they have received from DDB. Meeting together allows them to share their opinions, discuss options, and align their perspectives to present a unified voice to DDB. Sometimes those discussions involve compromises, but as one IOU stakeholder opined, “I think that's one of the biggest successes, is that when we come to DDB, it's not four utilities talking about four agendas; it's one.” One IOU stakeholder reported how well-integrated and collaborative the relationship is among the ME&O leads at the IOUs compared to other IOU programs. The close relationship allows for more-informed planning when each IOU knows what the other is doing in respect to the same topic, particularly in the shared territories of SCE and SCG.

**Having notice of the meeting topics and homework assignments well in advance helps stakeholders arrive at each meeting well prepared for the discussion, but enough advanced notice is not always provided.** DDB Group provides IOU stakeholders advanced notice to gather specific program information for an upcoming meeting and will sometimes give the IOUs homework assignments to collect specific topic or program information and report back their findings at the next meeting. DDB Group representatives found stakeholders come well prepared to meetings and strive to ensure topic experts from their respective organizations are on the call if necessary. IOU stakeholders, on the other hand, were sometimes unable to fully prepare for meetings when agendas were distributed a day or less before the meeting or details from DDB Group on specific discussion topics or program areas were vague.

In addition, homework assignments can be time consuming for already busy representatives and can require IOU stakeholders to do research and talk to program experts within their organizations. IOU stakeholders expect to have homework assignments at the annual JCAP meeting and sometimes at quarterly meetings, but other homework assignments can be sporadic and DDB Group often has a quick due date for these assignments. Although the IOU stakeholders understand these assignments better prepare them for discussions at meetings, they agree that more time to complete them would be helpful.

Despite feedback from stakeholder interviews, pulse survey data indicates providing information during meetings is not a large challenge. Stakeholders provided an average score of 4.0, indicating agreement, when asked if they agreed that stakeholders who were supposed to bring information to the day's meeting brought it (Figure 9).

Figure 9. Respondent Agreement that Stakeholders Brought Promised Information to Meetings



Pulse survey respondents were asked to rank their agreement on a five-point scale from "strongly agree" to "strongly disagree" with the statement, "Stakeholders who were supposed to bring information to today's meeting followed through and brought it"

### 3.2.2 In-Person vs. Virtual Dynamic

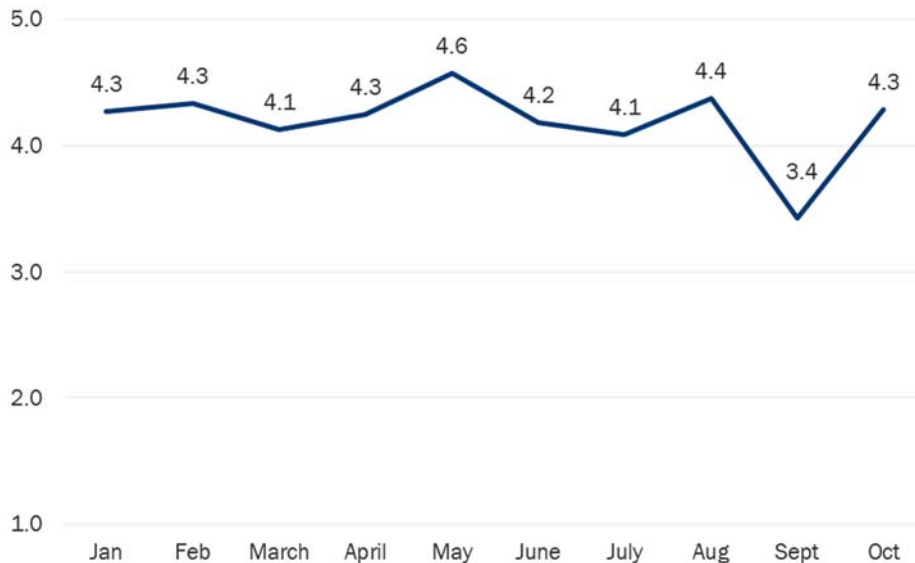
**Stakeholders agreed that the virtual meetings made collaboration more challenging than it was for in-person meetings, but the virtual meetings have been successful and are keeping the campaign moving forward.** During the in-person quarterly meetings, stakeholders were able to have informal conversations during the breaks or returning from lunch, which supported learning from each other and overall collaboration. The interpersonal dynamics of being in the room together also facilitated discussions and made it easier for DDB to call on someone to share their input if they noticed body language indicating they might have something to say. One IOU representative said the quarterly in-person meetings were valuable and productive because they were effectively like half-day working sessions. Following the July Quarterly meeting, another IOU stakeholder left a comment in the pulse survey, "I look forward to us being able to meet in person again when it's safe because these quarterly meetings are more productive and engaging with us all in the same room." Stakeholders noted that it has been a little harder to collaborate when all meetings are virtual, but that "for what we're dealing with, we're doing a really good job." Reflecting upon the latest monthly meeting, another stakeholder opined in their interview that "This last time on the phone, collaboration felt more normal and natural than ever."

### 3.2.3 Speaking in Meetings

**DDB Group works to ensure other stakeholders have an opportunity to provide feedback or ask questions during meetings, and to ensure questions and feedback are productive.** DDB Group representatives often expressed verbal appreciation for IOU feedback on campaign ideas during meetings, even if they could not make the suggested changes. Meeting observations indicate that DDB Group stakeholders also work hard to address questions and provide additional information stakeholders may request during meetings. For example, in the September meeting, an IOU stakeholder requested more information regarding a specific

metric. A DDB Group representative quickly found the information and reported it back to the group within a few minutes. Stakeholders also largely agreed that questions and comments offered by others in the meeting were productive and/or contributed meaningfully to meeting discussions, providing an average rating of 4.2 out of five in our pulse survey (Figure 10).

Figure 10. Respondent Agreement that Questions and Comments were Productive and/or Contributed Meaningfully



Pulse survey respondents were asked to rank their agreement on a five-point scale from "strongly agree" to "strongly disagree" with the statement, "Comments and questions in today's meeting were productive and/or contributed meaningfully to the discussion."

The contact report sent in the days after the monthly meetings provides a follow-up mechanism if a question was not able to be addressed in the meeting. DDB strives to provide clarification and resolve discrepant IOU feedback during the stakeholder meetings or on the phone to avoid a back and forth via email, which can be challenging with such a large group. One IOU stakeholder left a comment in the April pulse survey, "I appreciate the effort from all to make sure our meetings are comprehensive and meaningful."

### 3.2.4 Feedback on Campaign Materials

The IOU stakeholders have deep experience marketing energy efficiency programs and tips to customers in their respective service territories and understand what their customers will and will not respond to, both of which are valuable contributions to the campaign. IOU stakeholders, however, desire opportunities to provide advice earlier in the development of campaign materials. As the Consulted members of the RASCI model, IOUs provide feedback on the JCAP roadmap that guides the priorities for the year, as well as on ideas for campaign direction and collateral. DDB stakeholders reported the IOU feedback is very clear, and the insight each IOU can provide into their respective service territories helps DDB refine their creative direction for EUC.

Despite DDB stakeholder appreciation for IOU insight, IOU stakeholders reported their feedback is often solicited too late in the development process for their ideas to be incorporated into campaign materials, which may result in inaccurate or inappropriate messaging. IOU stakeholders reported it would be advantageous to be involved earlier in the materials development process to avoid messaging that could mislead or potentially alienate consumers.

Stakeholder interviews and observational notes revealed several examples where DDB Group did not incorporate IOU stakeholder suggestions, either because DDB Group solicited their feedback too late to incorporate, or for another reason.

- During stakeholder interviews, two IOU stakeholders recalled the Million Heirs campaign. One IOU stakeholder noted this was a beautiful campaign and it reminded them of a tourism advertisement, but they felt the images used in the campaign were geared toward upper-middle class Californians and left out low-income and disadvantaged communities. This IOU stakeholder was also concerned that some of the terminology used in this campaign was inappropriate, and not language the IOU would use in their marketing materials. Another IOU stakeholder reported that DDB solicited feedback too late in the development process for this campaign, and when the IOUs provided feedback there was not much that could be done since the materials were already being produced.
- In another example, an IOU stakeholder recalled a creative that featured images of horses running freely. This stakeholder acknowledged this imagery was beautiful and the materials looked good, but there had recently been a wildfire in Southern California in which many horses died. All the IOU representatives pushed back on running this campaign creative with the images of horses, yet it was published.
- During the August meeting, DDB Group presented a draft script and images for an EUC manifesto video. After DDB presented their idea, one IOU stakeholder suggested altering the script to use “will” in place of “can” to evoke more personal responsibility to Californians who may see the video. DDB Group stakeholders agreed that “will” did sound stronger and suggested altering the script to use “will” in the latter half of the video. Another IOU stakeholder suggested a similar minor script alteration: changing “but” to “and” in one of the last frames. During the September meeting, DDB Group provided an update on the status of the manifesto video along with a copy of the script and images used in the video, the evaluation team noticed they had not incorporated either IOU suggestion.

The IOUs have specialized knowledge built on decades of experience and are highly aware of what will resonate with customers in their respective service territories. IOU feedback can help ensure messaging is accurate and appropriate for the statewide campaign and all audience members. One IOU stakeholder praised DDB for acknowledging and correcting mistakes in campaign materials, even when they have already gone into the field. This IOU stakeholder suggested the IOUs can be a resource to vet campaign materials for accuracy since each IOU may administer programs slightly differently.

Representatives from DDB Group mentioned they can get conflicting feedback from the IOU stakeholders and incorporating each point can be a challenge. DDB Group values all the stakeholders' perspectives and they feel it is important to hear feedback from each region since programs are often regionally based. They understand that each IOU is unique, and they cannot make blanket statements in communications. DDB Group is actively working toward making sure they address all stakeholder concerns and ensuring all stakeholders feel heard.

### 3.3 Organizational Autonomy

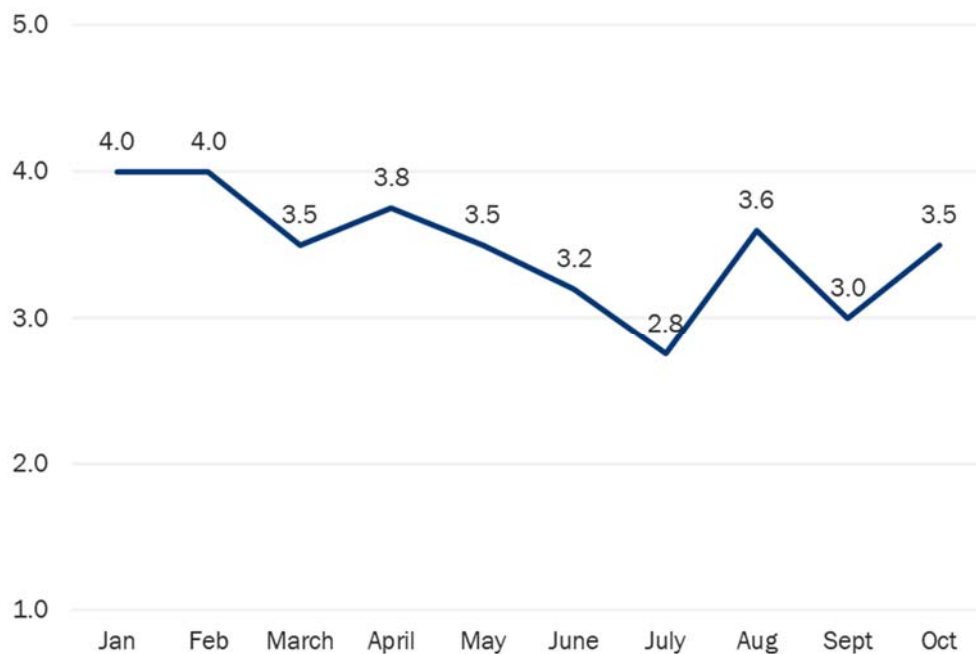
The Organizational Autonomy dimension of collaboration recognizes that each stakeholder has their own organizational interests while also cooperating with others in pursuit of group interests. Stakeholders' reactions on this dimension varied from neutral to light agreement that the discussions in monthly meetings were useful to their own ME&O efforts.

#### 3.3.1 Usefulness to Stakeholders

Although most stakeholders agreed the Collaboration section of each meeting was the most useful to their organization, some stakeholders questioned the usefulness of monthly meetings to their organization. Several stakeholders questioned the usefulness of the monthly meetings to their organizations' own ME&O efforts, especially with the current format. One stakeholder even went so far as to suggest DDB Group hold only quarterly meetings.

Pulse survey data show that IOU and other energy-focused stakeholders do not strongly agree the discussion and collaboration during each meeting is useful to their organization's ME&O efforts. Although respondents generally agreed discussion was useful at the beginning of the year, pulse survey responses trended more neutral and negative as the year progressed. Stakeholders had lower levels of agreement with this statement more than any other we asked about, giving it an average rating of 3.5. Figure 11 shows the average rating by month respondents gave to that statement.

Figure 11. Respondent Agreement that Discussions are Useful to Their Organization's ME&O Efforts



Pulse survey respondents were asked to rank their agreement on a five-point scale from "strongly agree" to "strongly disagree" with the statement, "Today's discussion will be useful to my organization's ME&O efforts." Only IOU and REN stakeholders responded to this question. The number of responses each month ranged from two to five.

This issue is especially pronounced for the utilities that provide natural gas service to their customers. The energy efficiency tips and messaging of the statewide campaign is focused mostly on electricity savings, while natural gas tips and messaging are sometimes omitted from campaign materials. Several stakeholders brought up this issue, saying they understand the importance of including all perspectives in the campaign and appreciate when the natural gas IOU stakeholders speak up during meetings to advocate for more natural gas inclusion. Notably, one IOU stakeholder reported even though they frequently recommend DDB Group add more natural gas tips to the campaign, they have not seen any benefit to their IOU as a result of the campaign.

Given that the EUC campaign is funded by consumers who use both natural gas and electricity, focusing on electricity and deemphasizing natural gas tips in the campaign is not serving a large portion of ratepayers with natural gas loads. In the October quarterly meeting, a DDB Group representative mentioned that upcoming



wintertime messaging will include natural gas tips. Residential and commercial natural-gas-saving tips are particularly important in helping California realize its greenhouse gas reduction and clean energy goals.

### 3.3.2 EUC Funding

**Two IOU stakeholders expressed concern that the campaign's funding rules prevented important information from going out to their customers.** The EUC campaign is funded through ratepayer dollars that must be used for energy efficiency or demand response. However, the economic downturn during the pandemic meant that many Californians were now eligible for income-based rate plans, yet the campaign cannot promote the California Alternative Rates for Energy (CARE) and the Family Electric Rate Assistance (FERA) rate plans because they are not efficiency programs. DDB Group understands how important these programs are for vulnerable Californians and that the IOUs are working hard to promote these programs independent of the statewide campaign. One interviewed DDB Group representative said, "Right now things the IOUs need help with the most, we can't help with." IOU stakeholders echoed this sentiment and underscored the need to promote these programs as much as possible to help their customers, "These are things that can't be amplified through the statewide campaign, but they are very important information for our customers to be aware of right now."

The CPUC made a special allowance to add a section to the homepage of the EUC website with information on CARE and FERA. The IOU stakeholders are grateful for this allowance, but some would like the CPUC to do more to promote these programs.

## 3.4 Mutuality

The Mutuality dimension of collaboration is satisfied when the stakeholders mutually appreciate the issue on which they are collaborating. Stakeholders were proud of their collaboration and teamwork and how they were able to quickly adapt to changing circumstances, though some felt better communication was needed about campaign performance around key metrics.

### 3.4.1 Campaign Outcomes

**Stakeholders have unanswered questions about the campaign's achievements to-date, including if the campaign is on track to meeting the goals set out in the five-year JCAP.** Absent the presentation of campaign performance against metrics across years, stakeholders were unsure how successful the SW ME&O campaign has been. In our interviews, the stakeholders asked broad questions, such as: "How effective is the campaign overall?" and "Is this campaign making a difference?" One stakeholder stated, "We don't really understand what we get out of the marketing." Other questions they wanted answered where possible included:

- How is the campaign performing in relation to what it set out to accomplish in the five-year JCAP? Is the campaign on or off track to meeting those goals?
- What is the success of the campaign as a whole and how does it compare to similar campaigns of this size and funding?
- For how long do the marketing messages and energy-saving tips stick with the consumer (one day, one week, two years)? How much does the messaging resonate with them (i.e., how much do they care)?
- Are the customers doing the energy-saving tips? Are they hearing the energy-saving tips from other sources in addition to EUC?

- How much energy has been saved because of the campaign? While the stakeholder who mentioned this recognized it is “not realistic” to know—they wish they could know how much energy different groups saved and at what cost.
- Is the campaign cost-effective? How much are we spending per lead generated to an IOU program?

While some of these questions are outside the scope of what is currently being assessed related to campaign performance (e.g., energy savings achieved), DDB Group may be able to improve stakeholder confidence in the campaign by providing more interpretation of campaign performance metrics or a year-over-year comparison of key performance indicators. Additionally, DDB Group and the evaluation team should continue to leverage the monthly and quarterly stakeholder meetings to present key research findings related to campaign performance to ensure all stakeholders have insight into how the campaign is performing.

### 3.4.2 COVID-19 Pivot

**The campaign’s pivot in response to COVID-19 represented a fast turnaround project that provided timely information to help Californians in crisis.** In March of 2020, Californians found themselves under a “shelter-in-place” order and staying home. Many had lost their jobs and income at a time when their home energy bills would likely rise due to being home all day. As a result, the CPUC asked DDB to create a workstream that highlighted energy efficiency messaging to save energy at home. A “wide range of CPUC offices,” DDB, and its partners collaborated to produce a TV commercial, radio ads, and social media posts to help Californians save energy at home.

At the same time, the pandemic paused many of the IOUs’ programs, including those for which DDB had been creating campaign collateral—particularly the ESA program and small business programs. DDB Group had been working closely with the IOUs and other stakeholders in late 2019 and early 2020 to develop promotions to encourage households to see if they are eligible for ESA and connect small and medium businesses (SMBs) with resources to save energy. Once the Governor issued the shelter-in-place order, DDB Group reacted nimbly and put those campaigns on pause. As one interviewed DDB representative described it, “We had a SMB campaign ready to launch before the businesses all shut down, and only some can come back. The purpose of those campaigns was to drive interest for the IOU programs and there’s no point if the IOUs aren’t prepared to go out and fulfill the new customers.” It was disappointing for all parties to have to shelve the SMB campaign, but it was necessary given the situation. An IOU representative echoed this sentiment, saying:

Nobody wants to see all of that hard work get scrapped. But it's the very reason why we have to have those collaboration sessions, because things like a pandemic can drastically impact what is priority for the IOUs and how we're moving forward or not with certain programs. So, we can't have something at the statewide level be in the market when we're not supporting it locally in the way that we would pre-COVID.

Another stakeholder reflected on the campaign's response to COVID in their interview and said, “Being able to activate quickly and help Californians was a high point.”

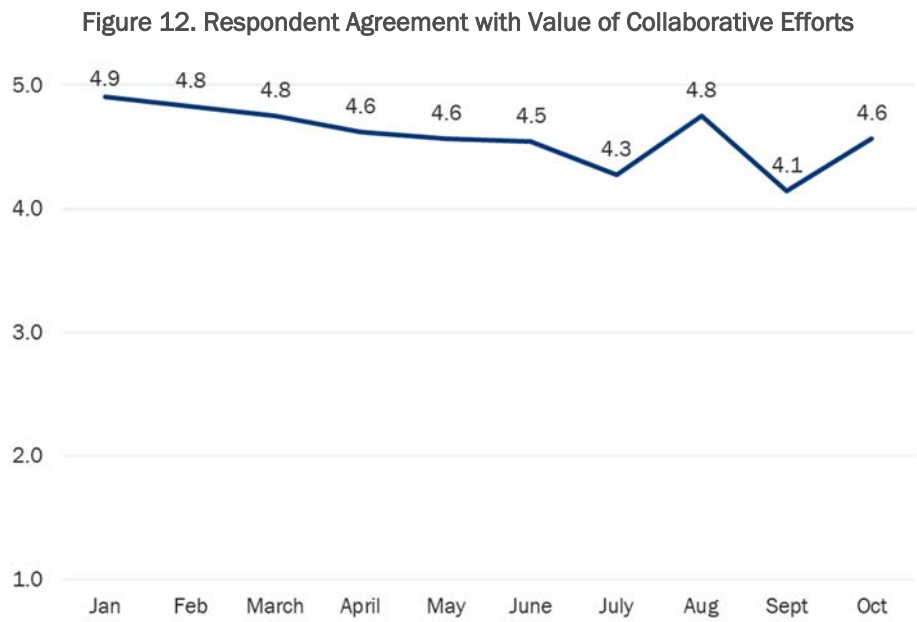
### 3.4.3 Collaborative Success

**The interviewed representatives agreed that the teamwork and collaborative efforts have been the greatest success of their work so far.** Stakeholders from DDB Group and the IOUs agreed that their teamwork has improved the quality of the campaign. The IOU stakeholders praised the groups' willingness to hear ideas from other stakeholders and ability to bring their diverse knowledge together to create a campaign that is greater than the sum of its parts. DDB Group also hailed specific campaign efforts like ESA, small business initiatives,



and the National Night Out event last year. One IOU stakeholder wrote in the pulse survey that "this is a great team and I'm proud of our collective efforts."

Pulse survey data also support the notion that stakeholders find collaboration to be extremely valuable. Two of the pulse survey questions aimed to gauge how respondents felt about the collaborative efforts. Stakeholders strongly agreed that there is value in collaboration with the other stakeholders, giving it an average rating of 4.6, the highest average score of all the statements in the pulse survey (Figure 12).



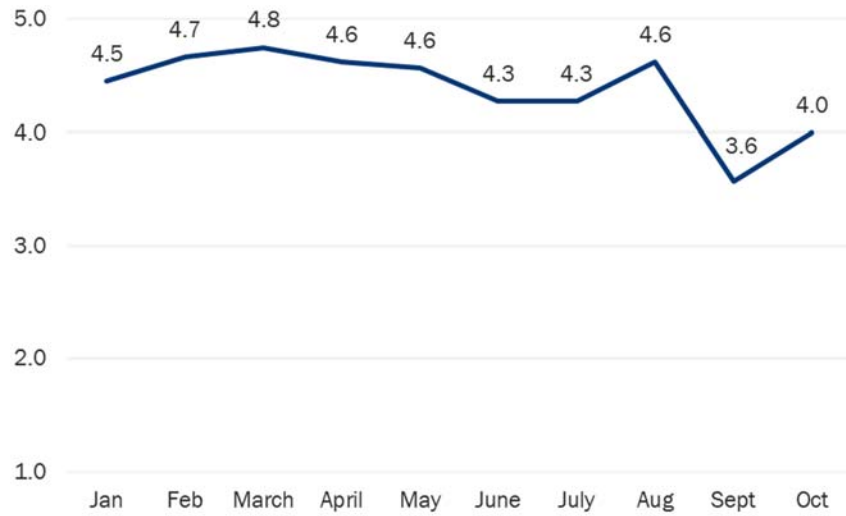
Pulse survey respondents were asked to rank their agreement on a five-point scale from "strongly agree" to "strongly disagree" with the following statement, "Based on my experience in today's meeting, I think there is value in collaborating with the other EUC stakeholders."

### 3.5 Norms

The Norms dimension of collaboration is met when involved parties feel that each organization is committed to the collaborative process and desired outcomes. Surveyed stakeholders agreed that other organizations care about the success of the campaign.

**Stakeholders recognized that other stakeholders involved in the statewide ME&O seem to genuinely care about the success of the statewide ME&O campaign.** Indeed, stakeholder respondents provided an average rating of 4.4 for this statement, indicating they strongly agree their colleagues care about the success of the EUC campaign (Figure 13).

Figure 13. Respondent Agreement that Others Genuinely Care About the Success of the ME&O Campaign



Pulse survey respondents were asked to rank their agreement on a five-point scale from "strongly agree" to "strongly disagree" with the following statement, "The representatives from the stakeholder organizations seem to genuinely care about the success of the statewide ME&O campaign."

## 4. Conclusions and Recommendations

The evaluation team offers the following conclusions and recommendations:

- **The RASCI model is appropriate but soliciting IOU feedback earlier in the material development process could ensure more useful messaging.** The RASCI model provides a structure for collaboration and stakeholders follow their defined role within the model. The IOU stakeholders agree their current level of involvement in the EUC campaign is appropriate given their RASCI model role; however, some suggested they could improve the campaign by providing strategic feedback earlier in the campaign idea development process to help ensure messaging is accurate and appropriate for the statewide campaign and all audience members.
  - **Recommendation 1:** When feasible, DDB should consider seeking IOU input earlier when developing campaign ideas and utilize their expertise as a resource to ensure appropriate messaging.
- **Meetings provide a structured setting for collaboration to take place, but one meeting section has room for improvement.** Monthly and quarterly meetings are an effective venue for IOU stakeholders to stay plugged into the campaign. The Looking Ahead and Collaboration sections of each meeting provide valuable opportunities for stakeholders to ask questions, discuss new campaign ideas, and provide program updates. However, the Looking Back section can sometimes be tedious and provide fewer opportunities for collaboration.
  - **Recommendation 2:** DDB should consider distributing meeting slides earlier and changing the Looking Back section of meetings to a question-and-answer format to allow for more collaboration.
- **EUC stakeholders quickly adapted to emerging needs.** In response to the COVID-19 pandemic, DDB Group switched the format of the quarterly meetings from in person to online and utilized WebEx as a video conferencing and screensharing tool. Although the online format is not as engaging as meeting in person, stakeholders agreed the virtual meetings are successful in keeping the campaign moving forward. DDB Group was also able to pivot the campaign's messaging to focus on helping Californians save energy during shelter-in-place orders. DDB Group reacted swiftly to the statewide order to put other campaign efforts on hold, including the SMB campaign the group had been collaborating on for several months at that point, to provide messaging that promoted saving energy while staying at home.
- **Stakeholder collaboration has been successful and improved the quality of the campaign.** Stakeholders from DDB Group and the IOUs all remarked positively on their teamwork and collaboration on campaign ideas, creating a product better than any organization could do individually. DDB Group stakeholders understand the importance of including the IOU perspective, and the IOU stakeholders appreciate DDB Group's willingness to hear their ideas. Collaboration in the ad hoc meetings, in particular, has been especially valuable for stakeholders to discuss specific program areas and ideas.
- **The EUC Campaign places more emphasis on electricity-saving tips, providing relatively less benefit for natural gas ratepayers and service providers.** As California is putting increasing attention on climate goals, reducing natural gas usage will help California realize greenhouse gas reduction goals. Stakeholders from IOUs that provide natural gas service suggested they see little benefit to this part of their organizations as a result of the EUC campaign.
  - **Recommendation 3:** Though EUC prioritizes natural gas tips during winter and cooler months, including more natural gas tips will benefit both ratepayers and the natural-gas-providing utilities.

## Appendix A. Dimensions of Collaboration

In 2019, the evaluation team established a set of evaluation criteria to measure the success of the collaborative process. Table 5. Dimensions of Collaboration **Error! Reference source not found.** lists the dimensions of collaboration and how the evaluation team operationalized them to examine stakeholder collaboration in the SW ME&O efforts.

Table 5. Dimensions of Collaboration

Dimension	Evaluation Criteria	Research Question(s)
Governance	Parties agree to rules and a structure that guide joint decision-making	Do stakeholders find the structure of the collaborative process effective and appropriate? Do stakeholders feel the point at which various parties provide feedback in the campaign and materials development process is appropriate? Do stakeholders feel they have enough time to review, consider, and provide feedback on campaign direction and associated materials?
Administration	Roles, responsibilities, and communication channels are outlined and followed	Do stakeholders provide resources or information when asked? Do stakeholders feel their contributions are taken into account?
Organizational autonomy	Recognition that each stakeholder has its own organizational interests while also cooperating with others in pursuit of group interests	What benefits do stakeholders see to their participation in the process? Do stakeholders feel monthly and quarterly stakeholder meetings are useful to their organization and its ME&O efforts? What value do the smaller, ad hoc meetings add to the collaborative process from the stakeholders' perspectives?
Mutuality	Involved parties mutually appreciate the issue on which they are collaborating	Do stakeholders think the collaborative process will lead to an effective ME&O campaign?
Norms	Involved parties feel that each organization is committed to the collaborative process and desired outcomes	Do stakeholders feel that all parties are committed to participating in the process? Do stakeholders feel that all parties are committed to making the SW ME&O campaign as effective as it can be? Do stakeholders feel their perspective/input is valued?

## Appendix B. Post-Collaboration Pulse Survey Instrument

To start the survey about your experience in the latest Energy Upgrade California stakeholder meeting, click “next” below to begin. Please rate your level of agreement with each of the following statements.

PROGRAMMER:

[SINGLE RESPONSE FOR ALL QUESTIONS]

[DO NOT DISPLAY HEADINGS “GOVERNANCE,” “ORGANIZATIONAL AUTONOMY” ETC.]

### Governance

[SHOW ALL]

Q1. I had sufficient opportunity to share what I wanted to say at today’s meeting.

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree

[SHOW ALL]

Today’s meeting was effective in keeping statewide ME&O efforts moving forward.

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree

[SHOW ALL]

Based on today’s meeting, I would say the decision-making structure of the collaborative process, as outlined in the RASCI model, is appropriate. (RASCI defines each party’s role in the structure and stands for Responsible, Accountable, Supportive, Consulted, and Informed.)

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree

## Organizational Autonomy

[ASK IF DDB\_Q6 = 1]

Today's discussion will be useful to my organization's ME&O efforts.

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree

## Mutuality

[SHOW ALL]

Based on my experience in today's meeting, I think there is value in collaborating with the other EUC stakeholders.

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree

## Administration

[ASK IF DDB\_Q6 = 1]

I believe DDB will seriously consider the opinions I shared in today's meeting when making decisions about campaign creative and collateral.

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree
6. Not applicable – I did not share opinions or feedback

[SHOW ALL]

Stakeholders who were supposed to bring information to today's meeting followed through and brought it.

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree
6. Don't know

## Norms

[SHOW ALL]

The representatives from the stakeholder organizations seem to genuinely care about the success of the statewide ME&O campaign.

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree

[SHOW ALL]

Comments and questions in today's meeting were productive and/or contributed meaningfully to the discussion.

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree

[SHOW ALL]

If you have any comments you would like to provide about today's EUC meeting or the collaborative process, please provide them here: [RESPONSE NOT REQUIRED]

1. [OPEN-END RESPONSE BOX]

[SHOW ALL ON NEW PAGE]

Thank you for taking the survey. You may now close your browser.

## Appendix C. Stakeholder Interview Guide

### Introduction

Hi,

I'm \_\_\_\_ from Opinion Dynamics. Is this still a good time to talk about Energy Upgrade California? As I mentioned in my email, the goal of today's conversation is to learn from you how it's been going collaborating with the other stakeholders on the statewide marketing campaign. We'll start with talking about the ways in which your organization has participated, what's been going well and not so well, and talk about some of the outcomes of the campaign.

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?

### Background [ASK ALL]

Q1. To begin, I'd like to know a little bit about you. Please briefly tell me your role and your responsibilities at [ORGANIZATION]?

How long have you been in that role?

And, for how long have you been involved in the Energy Upgrade California campaign?

### Campaign Development and Collateral Review [ASK IOUs/RENS]

Thinking broadly, please tell me about how your organization is involved with the EUC campaign development activities.

1. Does your level of involvement feel appropriate? Why/why not?
2. How sufficient is the amount of time available to provide feedback on campaign strategy and creative?

When you make comments or offer suggestions to DDB, how do you feel like those contributions tend to be received?

To what extent do you feel like your feedback and suggestions are incorporated into the campaign?

1. Are you satisfied with that, or do you wish it was different?
2. Do you see the finalized materials? Are you satisfied with that (seeing or not seeing the final materials)?

### Campaign Development and Collateral Review [ASK DDB]

Please comment on your overall experience working with the stakeholders on the EUC campaign.

1. How is working with stakeholders beneficial?
2. What are the biggest challenges working with stakeholders?



How do the stakeholders contribute to campaign development?

1. Do they provide you the information you asked for? Are they bringing things up that you didn't anticipate to ask for?
2. How useful is their advice?
3. Is advice on campaign direction and advice on collateral equally helpful?
4. Besides verbal feedback in the meetings, how else do stakeholders contribute to the campaign?
5. How timely is their feedback? Is there feedback at the appropriate juncture (not too early or late)?

What is your process for reviewing and responding to stakeholder comments?

1. How often do you need to go back to stakeholders for more detail or with follow-up questions? How does that process go? Are you able to get what you need easily?
2. How do you communicate with stakeholders about changes made (or not made) in response to their feedback?

## Meetings [ASK DDB]

Let's talk about the monthly and quarterly EUC stakeholder meetings.

Broadly speaking, what are your thoughts on the monthly and quarterly stakeholder meetings?

1. To what extent are you getting what you need out of those meetings?

Are the monthly and quarterly stakeholder meetings an effective place to collect comments and feedback for campaign development?

1. How else do you receive feedback and commentary?
2. How do those compare to the monthly meetings? Do you have more time for discussion, more ability to share materials, are the suggestions more actionable?

The meetings have a three-part structure of looking back, looking ahead, and a collaboration element. To what extent do you think this meeting structure is helping facilitate collaboration?

1. When you present, are you able to provide the right level of detail or do you feel constrained?
2. Is the right amount of time spent on each section?
3. Which section is the most useful for your organization?
4. How satisfied are you with the level of discussion at the meetings?

Do you feel like the other stakeholders are able to fully participate in the monthly and quarterly meetings or is there something getting in the way?

1. Are the right people from their organizations at the meetings?
2. Can they invite someone else to a meeting?
3. If taking turns among staff, does that introduce challenges or advantages? (If needed: multiple points of contact; have to re-explain things)

Does your organization plan to make any changes this year to the stakeholder meetings or how you collect stakeholder feedback? If yes, what are they? What prompted that?

How did the pivot in March and April to focus on the COVID support campaign affect the way you're collaborate with stakeholders and get their input, if at all? (If needed: Did collaboration occur differently for the COVID support campaign compared to the normal EUC energy efficiency campaign?)

What changes to the meetings do you suggest to increase collaboration among the stakeholders? (If needed: more communication, sharing of resources, different roles)

## Meetings [ASK IOUs/RENs]

Let's talk about the monthly and quarterly EUC stakeholder meetings.

Broadly speaking, what are your thoughts on the monthly and quarterly stakeholder meetings?

Are the monthly and quarterly stakeholder meetings an effective place to offer comments and feedback on campaign development activities?

1. How else do you provide feedback and commentary?
2. How do those compare to the meetings? Do you have more time for discussion, more ability to share materials, are your suggestions acted on more frequently?

The meetings have a three-part structure of looking back, looking ahead, and a collaboration element. To what extent do you think this meeting structure is helping facilitate collaboration?

1. Are you getting the right level of detail?
2. Is the right amount of time spent on each section?
3. Which section is the most useful?
4. How satisfied are you with the level of discussion at the meetings?

Do you feel like your organization is able to fully participate in the monthly and quarterly stakeholder meetings or is there something getting in the way?

1. Are the right people from your organization there? (Can you invite someone else to a meeting? If taking turns among staff, does that introduce challenges or advantages?)
2. Do you know the topic with enough advance notice to collect information you need to be productive at the meeting?

What changes to the meetings do you suggest to increase collaboration among the stakeholders? (If needed, more communication, sharing of resources, different roles)

## Stakeholder Roles [ASK ALL]

Now I have a few questions about roles.

What other groups or entities do you think should be involved in the EUC campaign that are not currently?

1. [If any] What would they contribute?

Is there a group currently involved that you think doesn't need to be?

1. If yes, what group?
2. What would they contribute?

## Outcomes [ASK IOUs/RENS]

Are you satisfied with the amount of information you receive on campaign outcomes?

1. What else would you like to see?
2. What outcomes results would be most useful to you? Same information but more frequent, or different information?
3. If you had a need for more information, do you think you could get it?

## Closing [ASK ALL]

We are almost done, Just a couple more questions. What has been the biggest challenge for you as you collaborate with other stakeholders on Energy Upgrade California?

What has been one of the biggest successes so far coming out of the collaboration with other stakeholders on EUC? (Or what's been most beneficial working with them?)

Those were all the questions I had prepared. Is there anything else important for me to know about your experience collaborating with other stakeholders on Energy Upgrade California?

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