

# Non-Residential Process Evaluation Study: Attachment 3 – Data Collection Resources

## Contains:

**Attachment 3A – Main Survey Data Collection Resources, Main Survey – Participant Frequency Tables, Main Survey – Nonparticipant Frequency Tables**

**Attachment 3B – Third Party Data Collection Resources, Third Party Participant and Nonparticipant Frequency Tables**

---

**Final Report**

**CALMAC Study ID SCG0213.04**

March 29, 2012

Submitted to:

**Southern California Gas Company**

Rob Rubin  
8306 Century Park Court  
San Diego, CA 92123  
(858) 654-1244  
rrubin@semprautilities.com

Submitted by:



**Heschong Mahone Group, Inc.**

Gold River | Oakland | Encinitas

Phone: (916) 962-7001

Fax: (916) 962-0101

Douglas Mahone

e-mail: dmahone@h-m-g.com

website: www. h-m-g.com

---

This booklet includes Attachment 3 – Data Collection Resources, of the Southern California Gas Company (SoCalGas) Nonresidential Process Evaluation for 2010-2012. Specifically, it includes the following files, in the order shown here:

- ◆ Attachment 3A Main Survey – Data Collection Resources, including code books, sampling methodologies, and final disposition report.
- ◆ Main Survey Responses (Frequency Tables) - Participants
- ◆ Main Survey Responses (Frequency Tables) - Nonparticipants
- ◆ Attachment 3B Third Party Survey – Data Collection Resources, including code books and interview guides, for the following Third Party programs: Program for Resource Efficiency in Private Schools (PREPS) and SaveGas.
- ◆ Third Party Survey Responses – Participant and Nonparticipant Frequency Tables

The main report volumes (Main Report, Attachment 1 – Portfolio level evaluations, and Attachment 2 – Program-specific evaluations); and Attachment 4 (Evaluability Assessment and Work Plan) are in separate booklets.

The report structure is described in more detail in the “Introduction” section of the Main Report.

## ATTACHMENT 3A – DATA COLLECTION RESOURCES

---

This attachment is part of the SoCal Gas Nonresidential Process Evaluation project, conducted by the HMG team. This attachment has data collection resources used for the project.

Specifically, this attachment includes:

1. Program staff Interview Guides
  - Kick off meeting interview guide
  - Follow up interview guide
2. Vendor interview guides
  - Participating vendors
  - Nonparticipating vendors
3. Customer survey resources\*:
  - Participating customer survey codebooks
  - Nonparticipating customer survey codebook
  - Survey and sampling methodologies
4. Customer survey results (frequency tables) are attached as separate files
5. Account Executive (AE) forum guide
6. Segment advisor forum guide

All interviews were conducted by evaluation team members. All customer surveys were conducted by Tetra Tech.

\*In addition to the main customer survey (conducted by Tetra Tech), Research into Action conducted separate customer surveys for the following third-party programs: SaveGas, PREPS. The data collection resources for these programs are presented separately, in Attachment 3B.

## **1. PROGRAM STAFF INTERVIEW GUIDES**

---

This chapter includes interview guides primarily for Sempra staff.

### **1.1 Kick off meeting Interview guide**

The following guide was used for the kick off meetings. Most staff interviewed were program managers, although the guide was adjusted for other staff members as well.

### 1.1.1 Introduction

Summary of key points

- ♦ Interviewee's name, title, date of interview, etc.
- ♦ Key findings
- ♦ General observations - perhaps 'reading between the lines' comments, general trends, big picture observations
- ♦ Any compelling quotes that summarizes a key finding

### 1.1.2 Information obtained

Provide a summary (1-3 sentences) of each section covered in the staff interview. You can leave this in rough notes (not complete sentences); we might just use this section for internal (team) purposes, not for client. Depending on interviewee, some of these sections will be blank.

#### *Personal Details*

Role, job duties, information they'd like to come out of evaluation

#### *Program Details*

Program details (or portfolio level) responses – key people involved, who they interact with, key dates for their role.

Suggestions for improvement, recommendations, their suggestions for process evaluation.

#### *Marketing Information*

Key market actors, market arena involvement (upstream, downstream, midstream), market barriers, outreach strategies.

#### *Customer Information*

Participant satisfaction, feedback on incentive levels, technical assistance. How they track program participants, partial participants

#### *Program Coordination*

How program coordinates with other programs (utility and non -utility), other initiatives or regulatory efforts affecting program.

#### *California Strategic Plan*

If interviewee is familiar with Strategic plan, how it relates to program (or portfolio), if program will meet goals, other actors that will need to be coordinated to meet Strategic Plan.

### *PPMs / data tracking*

If interviewee is familiar with PPMs, how interviewee tracks PPMs or other progress metrics, other information that should be tracked.

### *Next Steps*

Follow up that is needed

- ◆ Other key stakeholders we should interview
- ◆ What program information will be available
- ◆ Key program information that is missing

## **1.2 (Post–kick off meeting) Staff Interview guide**

The following served as the general interview guide used for program managers and other Sempra staff. All interviews were conducted by the Sempra Nonresidential Process Evaluation team.

The evaluation team modified this general guide for each interview to include more specific questions, based on the program (for program manager interviews) or role of the staff member (for interviews with other staff members, such as marketing, inspections, IT, engineering, and other staff). Also, many general sections were modified or skipped, because they were not applicable, or because much of this information had been collected during the kick-off meeting interviews.

## Questions for Program Managers

General questions are listed first, followed by examples of some program-specific questions. (We do not list all program-specific questions here.)

### General Questions

#### Organizational questions – EMI

*Part of this evaluation is focused on identifying organizational issues that permeate throughout Sempra. I'm going to ask you some questions about the efficient use of resources, internal program coordination, clarification of roles and responsibilities, and staff retention and turnover within Sempra programs.*

#### Efficient Use of Resources

- ♦ Do you feel that the program offerings for customers are redundant? [If needed] For example, do multiple programs offer one kind of customer the same or very similar services or equipment?
  - Yes
  - No
- ♦ Do you think there is redundancy in staffing, for example, more than 1 person doing the same thing?
  - Yes
    - Which positions or roles?
  - No
- ♦ Do you have any ideas about what could be done to fix these issues?
  - (open-ended)

#### Internal Program Coordination

- ♦ Is coordinating with other Sempra program staff a challenge for you or your program?
  - Yes
    - In what way?
  - No
- ♦ Do you have any challenges managing your program due to the needs or requests of other programs or staff? [Probe for details, examples]
  - (open-ended)

#### Clarification of Roles and Responsibilities



- ◆ Does your program coordinate with account executives?
  - Yes
  - No
- ◆ Is this critical to the success of your program?
  - Yes
  - No
- ◆ Do you feel like the AE's goals are aligned with the goals of your program?
  - Yes
  - No
    - What do you think could be done to align AEs' goal with program goals?  
(open-ended)

### **General marketing questions**

- ◆ Who is most responsible for marketing the program to potential participants?
  - program staff
  - AEs
  - third-party implementer
- How effective has this lead person /group been in conducting program outreach?
- ◆ What outreach methods have each of the above groups utilized in reaching customers?
  - How effective have each of these methods been?
- ◆ What additional outreach methods are needed to reach the target population?
- ◆ Is the outreach budget sufficient to support the programs?
  - Yes
  - No
    - In what areas is it lacking?

### **IT and data tracking questions**

- ◆ How is the program currently tracking participant application data?
  - Standard program database created for general EE programs
  - Custom program database created by utility IT dept
  - Customer program database created by program staff/contractors

- ◆ Does your current participant database meet your program reporting needs?
  - Yes
  - No
    - How/why not?
- ◆ Are customer leads currently being tracked?
  - Yes
    - How is the program currently tracking customer leads data?
    - What are the pros and cons of your current database(s) created by
      1. the utility IT dept
      2. program staff/contractors
  - No
- ◆ What type of database user training does program staff receive?
  - Instructional materials
  - Face-to-face training
  - None available/offered
- ◆ Do you have any recommendation on improving EE program database applications?
  - Yes
    - What are they?
  - No

**Third Party Integration (if applicable)**

- ◆ How satisfied are you with the way 3P staff manage project data?
  - Not at all satisfied
  - Somewhat satisfied
  - Satisfied
  - Very Satisfied
  - NA / No opinion
- ◆ Do you feel the 3P firm has allocated sufficient resources to your program to ensure your program performs as expected?
  - Yes
  - No / Not sure (circle one)
    - What resources are lacking?

- Has this discussed this with the 3P firm—what was the result?
  - Why hasn't the 3P firm allocated enough resources to your program?
- ◆ Do you believe the 3P firm has sufficient market knowledge and connections to adequately promote your program?
  - Yes
  - No / Not sure (circle one)
    - Do you feel there are other 3P firms who have stronger relationships and market place knowledge?
- ◆ How regularly does your 3P firm follow Sempra's guidelines concerning the use of Sempra and your utility's logos?
  - Never follows the guidelines
  - Sometimes follows guidelines
  - Almost always follows guidelines
  - Always follows guidelines
  - Not sure / has not opinion
- ◆ Is the 3P firm using appropriate QA?
  - Yes
  - No / Not sure (circle one)
    - In what way is it not appropriate?
    - How will you ensure that they improve?

### **Benchmarking**

- ◆ What has been your experience with benchmarking for your program?
- ◆ Why do some customers decline benchmarking?
- ◆ To what extent does the benchmarking requirement impede or delay participation in IOU programs?
- ◆ Is the benchmarking tool easy to use?
  - Yes
  - No
- ◆ Are benchmarking results easy to interpret?
  - Yes
  - No

- ◆ Are benchmarking results useful?
  - Yes
  - No
- ◆ How could the benchmarking process and results be more useful to customers?

### **Statewide coordination**

- ◆ Do you see value in the statewide coordination of this program?
  - Yes
    - (explain)
  - No
- ◆ Are you aware of the statewide program reporting requirements?
  - Yes
    - Are you currently tracking them?
  - No
- ◆ Are you aware of the statewide energy strategic plan and its linkages with your program?
  - Yes
  - No
- ◆ Does statewide coordination increase the cost of delivering this program?
  - Yes
    - Estimated extent of increase?
  - No
- ◆ Can you recommend ways to improve the statewide coordination process and make it more valuable to SoCal Gas and its staff?

### **Regulatory**

- ◆ How would you characterize the relationship between the IOU program staff and the CPUC ED? Who at the ED do they routinely interact with?
- ◆ What issues is the CPUC ED most concerned with regarding this particular program?
- ◆ What are the major regulatory requirements that program staff spend their time on [or confirm from notes]
  - e.g., PPMs, DEER, monthly and quarterly reports, Statewide IOU coordination calls, other CPUC calls

[For each regulatory requirement discussed above, ask the following:]

- ◆ Regarding the requirement that <REQ from above>,
  - What are its objectives/intended outcomes?
  - How much of a priority for the state/IOU is this requirement?
    - high
    - medium
    - low
  - ➔ Why?
  - How much effort does it take the IOUs to track, follow and address this requirement?
  - Do you believe this is an appropriate level of effort?
  - Do you have suggestions for getting more value out of this requirement and/or reducing its required level of effort?
  - Are the objectives of this requirement being met?
    - Yes
    - No
  - ➔ Why not?
- ◆ Would you say that the IOU Program Managers are meeting the regulatory requirements in general?
  - Yes
  - No
    - Why not?

## Program Specific Questions

### HVAC Tune-up

[Laura at TT: I removed the question for 3P HVAC because I've started conducting ongoing calls. I can document questions or focus of my calls as I do them if that's useful for Rob or yourself. In terms of the logic model, because the program is shifting so much we didn't think it was worthwhile to review it again at this point. In time we may look at the QM program and draft that logic model.]

### BID

#### Target sector

- ◆ In which buildings sector(s) are most program projects?
- ◆ In which market sector(s) do you feel the BID program has the most future potential?
- ◆ What are the main differences between this program and the Calculated program? (e.g., customer size, program delivery, incentive structure)
  - Do you think there is any confusion within SCG / SDGE (e.g., with Account Executives or vendors) over these distinctions?

#### Customers

Based on your experiences with and feedback from participants

- ◆ What program aspects should be changed?
- ◆ Were there problems that needed to be worked out?
  - Yes
    - Can you describe them to me?
    - How would you recommend fixing these problems?
  - No
- ◆ In general, do owners feel that it was worth their effort and expense for program participation?
  - Yes
    - What was it about the owner that led them to make this conclusion?
    - Were they already “sold” on the concept before joining the program?
  - No

#### Applications

- ◆ How well do you feel the application process is working both for
  - Program staff?
  - Program participants?
- ◆ Do you see the need for any changes to be made?

- Yes
  - Can you provide some examples/suggestions?
- No
  - Why not?

#### Energy analysis

- ♦ How well do you feel the energy analysis process is working for
  - Program staff?
  - Program participants?
- ♦ Do you see the need for any changes to be made?
  - Yes
    - Can you provide some examples/suggestions?
  - No

#### Incentive verification and payment

- ♦ Is the incentive payment process currently working optimally or do you see room for improvement?
- ♦ What do you think about the
  - Timeliness of the verification inspection
  - Customer experience during this “last contact” with the utility before the incentive is paid?

#### Other

- ♦ Do you feel there are other program procedures that could be improved?
  - Yes
    - Which ones?
    - What would you recommend changing?
  - No

#### SCG ONLY

- ♦ [SCG only] At the kick off meeting, it sounded like this program had 1 participant, with another interested.
  - What is the participation status now?
  - What have you learned so far from these participants
    - Challenges?
    - Successes?

- ◆ [SCG only] This program is supposed to leverage WE&T efforts for marketing.
  - How well do you think this is working?

SDGE ONLY

- ◆ [SDGE only] According to the program reporting, the program should exceed projected kWh savings, but is not on track to meet therm savings. What are your thoughts on
  - how to reach more vendors that deliver therm savings (e.g., HVAC vendors)?
  - encouraging customers to implement such projects?
- ◆ [SDGE only] What do you think the major barriers are to achieving higher therm savings?
- ◆ [SDGE only] Regarding vendors ,
  - How effective have vendors been in driving participation?
  - What proportion of rebates are handled by vendors as opposed to the business customers themselves?



## Deemed SCG

How many steps are there in the application review process? What are they? Are any of these redundant or excessive? Which ones? Is there any flexibility in the application review process, or does it follow a regulatory-prescribed process? Has a flow-chart been created to document the rebate processing process?

Have the more streamlined user-friendly applications, which were recently implemented, been successful at reducing the amount of time it takes to process the applications? Have customer errors and unintentional omissions been minimized?

Has the idea of implementing an online application system gained traction? Has the legal department determined a way to create binding contracts without “wet signatures”? Is it possible to integrate an online DB with the CRM?

Do you believe there are other ways to increase the efficiency of rebate processing and improve the turn-around time for customers? How?

How does the inspection process work? What proportion of applications are inspected? Variation among measure types?

Do you believe that the inspection effort undertaken by this program is less than adequate, adequate, or excessive?

(If excessive) Are the inspections excessive from the point of view of the customer or the inspection team?

(If inspection team or both) Do you believe it is possible to optimize inspections so that they are less onerous for the inspection team? How?

(If customer or both) Do you believe it is possible to optimize inspections so that they are less onerous for the customer? How?

How effective have vendors been to drive participation? What proportion of rebates are handled by vendors as opposed to the business customers themselves?

How effective have Commercial and Industrial Service Technicians been at promoting the program and increasing participation? What proportion of rebate applications are the likely results of CST or IST influence? Has a way to track this been implemented?

How effective have Account Executives been at promoting the program and increasing participation? What proportion of rebate applications are the likely results of AE-only influence?

Are the AEs compensated based on performance? Are the CSTs and ISTs?

Who else is responsible for driving participating?

How do you think a Point of Service (POS), or Upstream, rebate would work in this sort of program? Would it be feasible for vendors to screen potential participants for eligibility requirements?

What other program delivery options may be feasible, considering the measure mix and target customer for the deemed program? Why?

Do you believe that benchmarking is useful to the program? Useful to the participants?

Does the benchmarking requirement have any impact on participation? How so? Why?

What, if any, new measures could you foresee this program offering in the future? Why?

Are there any measures that you believe should be discontinued or moved to another program? Which measures? Why?

We would like to request the list of vendors that have signed participation agreements, as well as the list of vendors to which you mail marketing materials. Could you provide this information?

### **Deemed SDGE**

How many steps are there in the application review process? What are they? Are any of these redundant or excessive? Which ones? Is there any flexibility in the application review process, or does it follow a regulatory-prescribed process? Has a flow-chart been created to document the rebate processing process?

Is there any way to reduce the amount of customer information needed on the application while maintaining a high level of confidence that applicants and their equipment are eligible? Do legal considerations mandate certain information be collected? Are CPUC requirements responsible for application length and difficulty? Do you believe there are other ways to increase the efficiency of rebate processing and improve the turn-around time for customers? How?

Why does SDG&E inspect 100% of the rebated equipment delivered through the Deemed program?

Do you believe that the inspection effort – considering the proportion of applications inspected, as well as the inspection activities themselves – undertaken by this program is less than adequate, adequate, or excessive?

(If excessive) Are the inspections excessive from the point of view of the customer or the inspection team?

(If inspection team or both) Do you believe it is possible to optimize inspections so that they are less onerous for the inspection team? How?

(If customer or both) Do you believe it is possible to optimize inspections so that they are less onerous for the customer? How?

What motivates certain vendors to participate in the program? Why does this not motivate other vendors – such as the ones who have signed participation agreements but have not submitted any applications – from participating? [Probe: Is the process to difficult or complicated? Or is the incentive to participate seen as less than adequate?] How effective have participating vendors been to drive participation? What proportion of rebates are handled by vendors as opposed to the business customers themselves? How effective have Account Executives been at promoting the program and increasing participation? What proportion of rebate applications are the likely results of AE-only influence? Are the AEs compensated based on performance?

Who else is responsible for driving participating? What options exist for marketing the program using internal resources? Are internal resources available for marketing efforts?

Why are rebate levels capped at 65% of incremental measure cost? Is this a CPUC-mandated requirement?

Why do chain accounts submit many rebate applications? Must they submit an application for each facility?

How do you think a Point of Service (POS), or Upstream, rebate would work in this sort of program? Would it be feasible for vendors to screen potential participants for eligibility requirements?

What other program delivery options may be feasible, considering the measure mix and target customer for the deemed program? Why?

Do you believe that benchmarking is useful to the program? Useful to the participants?

Does the benchmarking requirement have any impact on participation? How so? Why?

What, if any, new measures could you foresee this program offering in the future? Why?

Are there any measures that you believe should be discontinued or moved to another program? Which measures? Why?

We would like to request the list of vendors that have signed participation agreements, as well as the list of vendors to which you mail marketing materials. Could you provide this information?

### **Calculated**

How have program goals changed over time (are they dynamic)? Have they evolved with the market and regulatory environment, such as with development of the strategic energy plan or standardized program tracking database (2006 – 2008 evaluation cycle)?

What roles do AEs and other sources play in developing projects for the program? Are these channels sufficient to meet program goals?

How effective have vendors been in driving participation? What proportion of rebates are generated by vendors as opposed to the business customers themselves?

How effective have Account Executives been at promoting the program and increasing participation? What proportion of rebate applications are the likely results of AE-only influence?

Are the AEs compensated based on performance?

Who else is responsible for driving participation?

How many steps are there in the application review process? What are they? Are any of these redundant or excessive? Which ones? Is there any flexibility in the application review process, or does it follow a prescribed process?

Previous evaluation highlighted confusion amongst customers when dealing with multiple staff with varying responsibilities: Do program administrative issues remain a barrier to participation or lead to customer dissatisfaction? Do you believe there are other ways to increase the efficiency of rebate processing and improve the turn-around time for customers? How? What do you think about the timeliness of the verification inspection, and the customer experience with this “last touch point” with the customer before the incentive payment is made?

How does the inspection process work? What proportion of applications are inspected? Variation among measure types?

What, if any, new measures could you foresee this program offering in the future? Why?

Are there any measures that you believe should be discontinued or moved to another program? Which measures? Why?

We would like to request the list of vendors that have signed participation agreements, as well as the list of vendors to which you mail marketing materials. Could you provide this information?

Do you feel there are other program procedures that could be improved? If so, what would you recommend that needs changing?

[SDGE only] According to the program reports, the program is not meeting therm savings. Why are gas savings not being realized? What changes should be made to increase savings? What are your thoughts on how to reach more vendors that deliver therm savings? On selling these projects to customers? What do you think the major barriers are to achieving higher therm savings?

**Save Gas HWC (SCG SDG&E)**

How often do you communicate with your implementer and by what method? Do you feel he/she lets you know about important information? Do any customer issues come up in these conversations? (How are these issues resolved)

Do you feel the program has secured enough savings to date in order to meet its goals?

Have any changes been made to increase participation?

Are these changes working and will you consider other changes?

What do you think are the barriers to getting more prospective clients? (open-ended response) [Probe for specifics]

**PREPS (SCG)**

In our initial interview, you noted that the program was still in its early stages. Can you give me an update on the status of the program?

What has the response been so far?

Have any changes been made to increase participation?

Are these changes working and will you consider other changes?

What do you think are the barriers to getting more prospective clients? [Probe for specifics]

Are the program's staff resources adequate to meet the demands of the program? What additional resources do you need?

Do you expect to meet your performance objectives? If not, why not?

**OBF (SDG&E)**

How well is OBF messaging on other program brochures working?

Do you communicate with other program managers and account executives about marketing? What do you hear from them regarding customer interest in OBF?

What are the OBF application approval and loan monitoring processes at SDG&E? (open-ended response)

(Probe: roles, forms, monitoring)

The utility often returns OBF applications to vendors for clarifications or “rework” on the application. What is the main reason applications need to be reworked? (open-ended response)

What might you do to reduce the number of applications requiring rework? (open-ended response)

What is the OBF vendor certification process? (open-ended response)

Are the certification standards adequate? (Yes/No)

- If No, ASK
- What improvements would you suggest? (open-ended response)

What kind of feedback have you gotten from vendors about the online vendor handbook? (open-ended response)

A couple of months ago you told us there were five loan defaults, how many defaults are there now?

Typically, what are the causes for loan default?

What is your process for approving/denying a loan? (open-ended response)

- Who performs these activities? (open-ended response)

What is the acceptable default rate for the OBF? (percent)

How are the loans financed? (Probe: by the utility, by a bank)

What do you feel is working well about the program? (open-ended response)

What needs to be improved? (open-ended response)

### *Sample Questions for other Sempra staff*

The following shows **sample** questions that the evaluation team asked other (non-program manager) Sempra staff. The interviewer added other questions to the list shown here. Also, other Sempra staff were interviewed than those shown here, including rebate processing, IT, engineering, regulatory, vendor coordinators, and other staff.

**PG&E and SCE Deemed program managers** re: best practices [to be supplemented with a review of best practices literature and review of similar programs nationwide]

Interview topics we will likely cover:

- ♦ Characterize the level of SW coordination, value of coordinating
- ♦ Describe the regulatory burden, objectives, intended outcomes, how it could be reduced

- ◆ How PG&E/SCE programs differ from Sempra's and what, if any, changes, modifications, improvements are being planned – what could be replicated in Sempra territories (e.g., to increase gas savings) – new measures, delivery strategies, inspection policies, rebate processing [first we will make sure we have a solid understanding of how Sempra does each of these from interviews, document review, etc.]

#### **SCG and SDG&E rebate processing staff**

- ◆ Confirm our understanding of how the process works, including how processes differ from the other Sempra utility (and PG&E, SCE)
- ◆ Identify issues, problems, opportunities for improvement
- ◆ Develop understanding why processes are different, if so, and explore whether changes could be made to improve efficiency and customer satisfaction, especially if practices deviate from standard practice in CA and elsewhere

#### **SCG and SDG&E inspections staff**

- ◆ Confirm our understanding of how the process works, including how policies and processes differ from the other Sempra utility (and PG&E, SCE)
- ◆ Identify issues, problems, opportunities for improvement
- ◆ Develop understanding why processes are different, if so, and explore whether changes could be made to improve efficiency and customer satisfaction, especially if practices deviate from standard practice in CA and elsewhere
  - Proportion of applications inspected varies among IOUs
  - Application review/QC process varies among IOUs (including the length of time to conduct review)

## 2. VENDOR INTERVIEW GUIDES

---

This chapter includes interview guides for participating and nonparticipating vendors (i.e., contractors).

## 2.1 Questions for Participating vendors

### General Questions – Opening

- ♦ Introduction section

Hello, my name is XX, and I'm calling from XX. We are conducting research on behalf of [IOU] to assess services and offerings they provide to their customers. I'm calling to find out about your experience as a trade ally with the [PROGRAM NAME and brief description – see below under Marketing / outreach].

Are you the correct person to speak with? [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY] Please be assured that this isn't a sales call and that all responses will be treated confidentially.

#### Respondent background

What is your position title? (open ended response)

What are your responsibilities? (open ended response)

Which sectors do you serve? (choose all that apply – Residential, Agriculture, Industrial, Commercial)

What products do you primarily sell or what services do you offer? Choose all that apply (Motors and pumps/ drives/ lighting/ HVAC / Boilers/ Food Service Equipment / Laundry Equipment/ Retro-commissioning / technical assistance or audits / Other - specify)

Does your company specialize in the specification of energy efficient (rather than standard) technologies? (Y/N/Don't know / Other – specify)

(SoCal Gas) How many rebate applications for SCG's Energy Efficiency Rebates for Businesses Program have you applied for, or helped customers apply for in the past 2 years?

#### Marketing / outreach and Program Participation

I'm going to read to you a list of [IOU] programs, with a brief description of each. Please tell me which of these programs you have heard of before this call.

(SDGE – Energy Efficiency Business Rebates - EEER / SoCal Gas – Energy Efficiency Rebates for Businesses - EERB)– provides fixed-amount rebates for energy efficiency upgrades.

(SDGE - Energy Efficiency Business Incentives - EEI [Calculated] / SoCal Gas - Energy Efficiency Calculated Incentive [Calculated]) provides custom incentives based on the cost per kWh or therm saved.

(ONLY SDGE) – Energy Savings BID program- provides custom incentives for large energy efficiency projects, or a bundle of energy efficiency projects.

(ONLY SDGE) - On Bill Financing - provides a 0% interest loan for large energy efficiency improvements.

Which of these energy efficiency programs do you participate in?



Are there energy efficiency programs that you are aware of, that you don't recommend? If so, which ones and why not? (open ended response)

For the programs that you participate in, how did you first hear of them? (vendor rep, Account Executive, program website, through other vendors, conferences or trade association meetings, other - specify)

What considerations or limitations do your customers face when deciding whether to upgrade to energy efficiency equipment? (open ended)

What considerations or limitations do your customers face when deciding whether to participate in an [IOU] program? (open ended) What information or messages have you found to be effective in overcoming those barriers?

Are there any additional tools or support that [IOU] could provide to you to better market energy efficiency equipment / services? (open ended)

### **Benchmarking – SKIP SECTION FOR SoCal Gas EERB**

Does the program that you serve include a benchmarking requirement? (Y/N)

For what percent of customers do you help fulfill the benchmarking requirement? (Y/N)

For projects where you assist customers, do you try to enter customer-specific information into the benchmarking software, or do you generally use the software's default values?

Do any customers decide to forgo an energy efficiency program due to the benchmarking requirement? (Y/N) (If YES: About what percent is this?)

How do you think this process can be improved so that more customers are willing to fulfill the benchmarking requirement? (open ended)

### **Program Specific Questions (one section to be asked of each trade ally)**

#### ***EERB (Deemed) (SDGE)***

*Now we'd like to ask some questions specifically about your involvement in the EERB Program.*

First, how many rebate applications have you applied for or helped customers apply for?

#### ♦ **Application Process**

For equipment sales that qualify for a program rebate, how often do you complete the application for the customer? Would you say it is:

1. 90%-100% of the time
2. 50%-89% of the time
3. Less than 50% of the time
4. Not sure

And of these projects, for what percent did you receive the rebate instead of the customer? (percent)

Do you pass along any of the savings to the customer? (Y/N)

If YES: Do you think these project “buy-downs” are a key participation driver for customers, or have relatively little purchase influence?

On average, approximately how long does it take for you to receive a rebate from [IOU] on behalf of a customer, once the rebate application has been submitted? (list)

Do you believe that this is an acceptable amount of time? (Y/N)

♦ **Program Design and Participation Experience**

Overall, do the EEBR rebates help to increase your business? (Y/N, also ask if a lot, somewhat, a little, etc.)

About what percentage of your sales receive rebates through the program? (open ended)

Are there any particular EEBR rebates that customers are not interested in, for equipment you offer? If YES: Which equipment, and why is that?

Did you participate in the EEBR program before 2010?

If YES: How do your sales of program equipment now compare to that earlier period? (If difference, probe on impacts of rebate changes, economy, promotion changes, etc.)

Looking forward, is there any energy efficient equipment that you would like to see included in the EEBR Program?

If YES: What equipment would you like to see added? (open ended)

***EERB (Deemed) (SoCal Gas)***

Same questions as above BUT CHANGE NAME TO EERB, and add:

Have you had any experience working with the Commercial and/or Industrial Service Technicians that help customers to complete energy efficiency projects?

If YES: How do you typically interact with these SoCal Gas staff, and how have these interactions helped or hindered your program involvement?

***Calculated/EEBI (SDGE)***

**Program participation**

About how long have you been participating in the Calculated program? \_\_\_\_\_ Months  
\_\_\_\_\_ Years

**Sales and Program Impact on Business**

How has participating in the program impacted your organization? (Increased / decreased / stayed the same / don’t know)

Have your [sales of measure/service] that qualify for the program increased since you began your program participation? (Y/N) If so, by how much? (open ended)

Has your program participation increased or decreased your cost of operation? (Y/N) How? (open ended)

About what percentage of your sales receive incentives through the program? (percent)

How often do you suggest a high efficiency option that qualifies for the program to your customers? (open ended) Do you recommend a higher efficiency unit *because* of the program? (Y/N)

### **Customers Purchasing Behavior**

What percentage of your customers bought a higher efficiency **[measure/service]** because of the rebates /price reduction available through the program? (percent)

What percentage of your customers request high efficiency **[measure/service]** or mention participating in the program? (percent)

### **Program Participation**

Is program participation easy for customers? (Y/N) Why or why not? (open ended)

What program changes would increase customers' ease of participation? (open ended)

Have you seen a change in the level of customer interest in the program since you joined the program? (Y/N)

If Yes, what do you think are some of the reasons? (Economic downturn / dissatisfaction with program / other – specify)

Of the sales that qualify for a rebate/price reduction, would you say that you complete the application for the program:

1. 90%-100% of the time
2. 50%-89% of the time
3. Less than 50% of the time
4. Not sure

Do you find any aspects of the application confusing or problematic? If so, which aspects?

Is participation in the program easy for you? (Y/N) How could it be made easier? (open ended)

What barriers prevent you from signing up more customers for the program? (open ended)

What improvements would you suggest for the program? (open ended)

### **Program Updates and Interaction**

When you first became active in the program, did you receive training on the details of the program? (Y/N) [If no training has been received] Would training be useful to you or your staff? (Y/N)

Did you receive marketing material? (Y/N) What marketing materials did you receive from the program implementer? (open ended) Were marketing materials informative? (Y/N) Have they helped you make a sale?

How do you typically learn about changes to the program? (Account Executive / Vendor Rep / other utility staff / program website / other – specify)

Are you satisfied with the account executive or other utility staff you interact with? (Y/N) [IF TIME PERMITS ASK NEXT QUESTION] What type of interactions have you had with them? (open ended) Is there any feedback you would like to give to the program administrators? (open ended)

Would you recommend participating in the program to other contractors? (Y/N)

### ***BID (SDGE)***

Now we'd like to ask some questions specifically about your involvement in the Energy Savings BID Program.

#### **Enrollment and participation**

About how many projects have you been involved in for this program in the past 2 years?

Do you generally work on defined projects or undefined aggregated projects? (If needed, clarify – for defined, you apply with a particular project in mind. If undefined, you propose the energy savings in the application, and then you find the sites and identify the measures later.)

Do you generally work on custom projects, or on projects with deemed measures?

What type(s) of equipment do you generally install or recommend for installation for the BID Program? Choose all that apply: interior lighting/ exterior lighting/ air conditioner and refrigeration compressors/ Compressor VFDs/ HVAC/ Boilers / Other – please specify.

Do you target equipment that saves electricity, gas, or both? (Electricity / Gas / Both / Don't know)

About what percentage of your sales receive rebates through the program? (percent)

#### **Marketing**

Do you approach customers to participate in BID, or do they approach you? If you approach them, how do you identify sites to target?

Do you ever work with SDG&E Account Executives to identify sites?

What are the main reasons why customers choose to participate in BID?

What are the main reasons why customers decline to participate in BID?

**Satisfaction with program elements: For each program aspect, how satisfied are you on a scale of 1-5, where 1 is very dissatisfied, 5 is very satisfied?**

Application submission

Pre-inspection (verifying old equipment is present)

Deemed savings estimates, for measures with energy savings in DEER or workpapers

Energy savings calculation review for custom measures

Post-inspection (verifying new, efficient equipment is present)

M&V (only for Custom projects, to verify energy savings)

Payment timing and amount

For any element where you are not satisfied, what is the issue?

#### **Energy Savings**

I understand that sometimes projects don't hit their projected (or bid) energy savings. About how often does this happen with the projects you work with?

What are some common reasons why projects do not achieve their projected energy savings? Choose all that apply: number of installations change, specifications change, changes in operation schedule, not enough aggregated sites, other - specify)

**Program Evolution –**

How do you typically learn about changes to the program? (Account Executive / Vendor Rep / other utility staff / program website / other – specify)

I understand that there have been changes to the program since June, as required by the California Public Utilities Commission. For example, deemed savings are tied to DEER or work papers, and the minimum energy savings threshold per site has increased. Are you aware of these changes? (If not, skip to next section.)

How did you first hear about these changes? (Account Executive / Vendor Rep / other utility staff / program website / other – specify)

Do you feel like you understand all of the changes?

How can SDG&E help vendors adapt to these changes?

**Future Participation**

Do you plan to participate in this program in the future, under its current implementation plan?

Are there changes you would suggest to the program?

**General Closing Questions**

**Program results and satisfaction**

Have the projects that you have assisted changed as a result of program participation? If so, how? (Added more of the same measure / increased efficiency for measure installed / installed measure earlier / other)

Overall, how satisfied would you say you are with the [IOU PROGRAM]? (1-5 scale, where 1 is not at all satisfied and 5 is extremely satisfied.)

Why did you say that? (open ended response)

What's working best about the [IOU PROGRAM] (open ended response)

What area(s) is most in need of improvement with the [IOU PROGRAM]? (open ended response)

We are about to wrap up. Do you have any other comments you'd like to make?

(NOT RIA - IF INDICATED THEY ARE AWARE OF SDGE OBF EARLIER) Finally, there is another survey for vendors that serve the On Bill Financing Program. Would you be willing to participate in another 20-minute interview for this program? (Get name, phone number, email address and inform RIA.)

(RIA for SDGE OBF) Finally, there is another survey for vendors that serve the Calculated, BID, or EEER programs. Earlier you indicated that you participate in the (A,B,C) programs.

Would you be willing to participate in another 20-minute interview for this/these program(s)? (Get name, phone number, email address and tell other teams.)

Thank you for your time!

## 2.2 Questions for Nonparticipating vendors

### ◆ Introduction section

Hello, my name is XX, and I'm calling from XX. We are conducting research on behalf of [IOU] to assess services and offerings they provide to their customers. I'm calling to find out about your experience as a trade ally with [IOU's] nonresidential energy efficiency programs. Are you the correct person to speak with? [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

Please be assured that this isn't a sales call and that all responses will be treated confidentially.

### **Respondent background**

What is your position title? (open ended response)

What are your responsibilities? (installing equipment / recommending equipment for installation / repairing equipment / management / other - specify)

Which sectors do you serve? (choose all that apply – Residential, Agriculture, Industrial, Commercial)

Do you provide technical assistance or audits to customers, or primarily provide the equipment? (technical assistance and audits / equipment / both / neither or other – specify)

What products do you primarily sell or what services do you offer? Choose all that apply (Motors and pumps/ drives/ lighting/ HVAC / Boilers/ Food Service Equipment / Laundry Equipment/ Retro-commissioning / Other - specify)

Does your company specialize in the specification of energy efficient (rather than standard) technologies? (Y/N/ Don't know / Other - specify)

### **Marketing / outreach and Program Participation**

I'm going to read to you a list of [IOU] programs, with a brief description of each. Please tell me which of these programs you have heard of.

(SDGE – Energy Efficiency Business Rebate program [EEBR]/ SoCal Gas – Energy Efficiency Rebates for Businesses [EERB] provides fixed-amount rebates for energy efficiency upgrades.

(SDGE – Energy Efficiency Business Incentives [Calculated] / SoCal Gas - Energy Efficiency Calculated Incentive [Calculated]) program provides custom incentives based on the cost per kWh or therm saved.

(ONLY SDGE) Energy Savings BID program - provides incentives for large energy efficiency projects, or a bundle of energy efficiency projects.

On Bill Financing provides a 0% interest loan for large energy efficiency improvements

For the programs that you have heard of, how did you first hear about them? (Account Executive / Vendor Rep / Other [IOU] staff / conference or trade association meeting/ [IOU] website / other – please specify)

Which (if any) energy efficiency programs do you participate in?

Are there energy efficiency programs that you are aware of, that you don't recommend? If so, which ones, and why not?

Have you been contacted by someone at [IOU] to support energy efficiency programs? (yes / no / don't know).

If yes,

- Which program(s) did the IOU staff person ask you to support? (list)
- Why have you chosen not to sign a participation agreement for these programs? (open ended)

Please describe any prior experience in participating in energy efficiency projects and/or programs. (open ended response)

What difficulties do your customers face when deciding whether to upgrade to energy efficient equipment? (high upfront cost / lack of familiarity with efficient equipment / other – specify)

What difficulties do your customers face when deciding whether to participate in an [IOU] program? (burdensome paperwork / have not heard of program / rebates or incentive levels too low / other – specify)

Are there any additional tools or support that [IOU] could provide to you in order to better market energy efficiency equipment / services? (Y/N/ Don't know)

If so, what could they provide? (open ended)

### **Participation interest**

For this last section, I will read the program names and descriptions again, and ask which you might be interested in recommending to your customers. Please rate your interest on a 5-point scale, with 1 being not at all interested, and 5 being very interested.

(SDGE – Energy Efficiency Business Rebates - EEER / SoCal Gas – Energy Efficiency Rebates for Businesses – EERB) provides fixed-amount rebates for energy efficiency upgrades.

Calculated program provides custom incentives based on the cost per kWh or therm saved. (This program applies when a rebate through Deemed isn't available.)

(SDGE only) Energy Savings BID program provides incentives for large energy efficiency projects, or a bundle of energy efficiency projects.

(SDGE only) On Bill Financing provides a 0% interest loan for large energy efficiency improvements

Those are all the questions I have for you. Do you have any other comments you'd like to make?

Thank you for your time!

## 3. CUSTOMER SURVEY CODEBOOKS

---

The following are codebooks that the evaluation team used to survey customers. Tetra Tech conducted all surveys.

The participating customer survey is presented first, followed by the nonparticipating customer survey.

We then present the survey and sampling methodology used to draw the customer sample, and the categorization of survey responses (final dispositions).

### 3.1 Participating customers



## SEMPRA UTILITIES

### NON-RESIDENTIAL PROCESS EVALUATION (PARTICIPANTS)

**NOTES:**

1. Variable names are in bold type.
2. A code of -3 means the respondent dropped out of survey, every variable after the last question they answered will be coded as -3.
3. A code of -4 means the question was not asked of the respondent, this could be because of a programming error, and interviewer error (coding a previous, qualifying answer incorrectly), or that the question was added during the survey's fielding period.
4. A code of -5 signifies a unique case where data was retained when a respondent mentioned something that was not one of the choices.
5. A code of -6 means the respondent was skipped from the question due to their response to a previous qualifying question.
6. A code of -7 means not applicable
7. A code of -8 means the respondent answered don't know.
8. A code of -9 means the respondent refused the question.
9. Response categories that contain an asterisk (\*) are codes that were added during cleaning because many respondents answered with the same category.

#### SAMPLE VARIABLES

<b>CaselD</b>	Unique case identifier
<b>Respnum\$</b>	Respondent number
<b>Aapor</b>	Disposition
	1100 Full completed survey
	1200 Survey that was partially completed, at least getting to section F (27 respondents)
<b>IOUFlag</b>	Utility
	1 San Diego Gas and Electric (SDG&E)
	2 Southern California Gas (SCG)
<b>Progflag</b>	Program
	1 Comprehensive Audit (SCG only)
	4 Premium Cooling Efficiency (SDG&E only)
	5 Direct Install (SDG&E)
	6 Deemed
	7 Calculated
	8 Energy Savings BID
<b>Sectflag</b>	Sector
	1 Agriculture
	2 Commercial
	3 Industrial

<b>Measflag</b>	Measure Flag (only used for premium cooling efficiency) 1 HVAC Tune-up 2 HVAC equipment Incentive
<b>Measure</b>	Measure installed
<b>DiFlag</b>	Direct Install Contractor 1 Matrix 2 Synergy 3 Wildan
<b>AcctNum</b>	Utility account number
<b>EvalLead</b>	Evaluation lead
<b>AcctName</b>	Name on the account, mostly often the name of the business
<b>ProgNumb</b>	Program number
<b>IOUClmID</b>	Utility claim ID
<b>IOUPrjID</b>	Utility project ID
<b>Address</b>	Service address
<b>City</b>	Service address city

## INTRODUCTION SECTION

**INTRO** Hello, my name is [INTERVIEWER], and I'm calling from Tetra Tech on behalf [IOU]. They hired us to speak with customers who have participated in their energy efficiency programs. May I speak with [TITLE]? *[IF DON'T HAVE GOOD TITLE, SAY: a facilities manager, or someone who makes decisions regarding equipment upgrades?]*

- 1 Yes
- 2 No

**INT2** I'm calling specifically to find out about your experience with the [PROGRAM – brief description] at [ADDRESS] in [CITY]. Are you the correct person to speak with?

- 1 Yes
- 2 No [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

Please be assured that this isn't a sales call and that all responses will be treated confidentially. For quality assurance and training purposes, this call will be recorded.



\*NOTE: Questions Sc1 and Sc2 were added about 1/3 of the way through the survey fielding period. It was added to make sure the interviewers were speaking with the correct respondent. If the respondent answered that they were not the best person to speak with, they were skipped out of the program specific questions, the G through L sections.

**Sc1** Some of our questions specifically ask about your organization's participation in the [PROGRAM] program, where [IOU] may have provided services or funding for installation of high-efficiency equipment. Are you the best person to ask these program-specific questions?

- 1 Yes, I am *[SKIP TO A1]*
- 2 Yes, but there are others
- 3 No, I am not
- 4 Not asked, program / interviewer error / added question

**Sc2** Could you tell me who else we should contact? *[RECORD NAME AND NUMBER IF PROVIDED]*

#### SECTION A: RESPONDENT AND FACILITY BACKGROUND

**A1** *[IF SECTOR=AGRICULTURE, SKIP TO A2]* Thank you. First, what is the main business activity at this facility? *[DO NOT READ LIST]*

- 1 Office
- 2 Retail (non-food) *[ASK A1A]*
- 3 College / University
- 4 School *[ASK A1B]*
- 5 Grocery Store
- 6 Restaurant
- 7 Health Care (other than Hospital) *[ASK A1C]*
- 8 Hospital *[ASK A1D]*
- 9 Hotel or Motel *[ASK A1E]*
- 10 Warehouse
- 11 Construction
- 12 Community Service / Church / Temple / Municipal *[ASK A1F]*
- 13 Industrial Process / Manufacturing / Assembly
- 14 Condo / Apartment
- 15 Greenhouse
- 16 Laundry / Cleaners
- 17 Other *[SPECIFY]*
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**A1oth** Other business type specified. *[OPEN ENDED RESPONSE]*

**A1A** *[ASK IF A1=2]* Is your business in an enclosed mall, strip mall, a stand-alone building, or something else?

- 1 Enclosed mall
- 2 Strip mall
- 3 Stand-alone building
- 4 Something else *[SPECIFY]*
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**A1Aoth** Other type of building specified. *[OPEN ENDED RESPONSE]*

**A1B** *[ASK IF A1=4]* How many students can be seated in all of the classrooms in this building at one time?

- Number of students
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**A1C** *[ASK IF A1=7]* Is this an inpatient facility, outpatient facility, or both?

- 1 Inpatient
- 2 Outpatient
- 3 Both
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED



**A1D** [ASK IF A1=8] Is this an inpatient facility, outpatient facility, or both?

- 1 Inpatient
- 2 Outpatient
- 3 Both
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**A1E** [ASK IF A1=9] How many guest rooms or occupant rooms are there in this building?

- \_\_\_\_ Number of rooms
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**A1F** [ASK IF A1=12] What is the total seating capacity of the communal areas (e.g., worship areas) in this building?

- \_\_\_\_ Seating capacity
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**A2** What are your responsibilities? [RECORD OPEN ENDED RESPONSE]

**SECTION B: ENERGY EFFICIENCY POTENTIAL**

**B1A** [ASK IF IOU=SDG&E] What type of equipment uses the most electricity at your facility?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other [SPECIFY]
- 8 \*Refrigerators/chillers/coolers
- 9 \*Office equipment (computers, servers, copiers)
- 6 Program skip
- 8 DON'T KNOW [SKIP TO B2A]
- 9 REFUSED [SKIP TO B2A]

**B1Aoth** Other equipment that uses the most electricity specified. [OPEN ENDED RESPONSE]

**B1Aconf** [INTERVIEWER: DO NOT READ THIS QUESTION]

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Program skip

**B1B** [ASK IF IOU=SDG&E] What type of equipment uses the second most electricity at your facility?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other [SPECIFY]
- 8 \*Refrigerators/chillers/coolers
- 9 \*Office equipment (computers, servers, copiers)
- 6 Program skip
- 8 DON'T KNOW [SKIP TO B2A]
- 9 REFUSED [SKIP TO B2A]

**B1Both** Other equipment that uses the second most electricity specified. [OPEN ENDED RESPONSE]



**B1Bconf** [INTERVIEWER: DO NOT READ THIS QUESTION]

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Program skip

**B2A** What type of equipment uses the most natural gas at your facility?

- 1 Boilers
- 2 HVAC and Furnaces
- 3 Food Service Equipment
- 4 Laundry Equipment
- 5 Pumps
- 6 Other [SPECIFY]
- 7 Doesn't use natural gas [SKIP TO B3]
- 8 Water heater(s)
- 8 DON'T KNOW [SKIP TO B3]
- 9 REFUSED [SKIP TO B3]

**B2Aoth** Other equipment that uses the most natural gas specified. [OPEN ENDED RESPONSE]

**B2Aconf** [INTERVIEWER: DO NOT READ THIS QUESTION]

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Program skip

**B2B** What type of equipment uses the second most natural gas at your facility?

- 1 Boilers
- 2 HVAC and Furnaces
- 3 Food Service Equipment
- 4 Laundry Equipment
- 5 Pumps
- 6 Other *[SPECIFY]*
- 7 Nothing else uses natural gas *[SKIP TO B3]*
- 8 Water heater(s)
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO B3]*
- 9 REFUSED *[SKIP TO B3]*

**B2Both** Other equipment that uses the second most natural gas specified. *[OPEN ENDED RESPONSE]*

**B2Bconf** *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Program skip

**B3** Has your organization developed a specific policy for the selection of energy-efficient equipment? (EXAMPLES: REQUIREMENT THAT ALL NEW FLUORESCENT LIGHTING SYSTEMS USE ELECTRONIC BALLASTS, OR THAT ALL BOILERS HAVE A MINIMUM THERMAL EFFICIENCY)?

- 1 Yes
- 2 No
- 8 DON'T KNOW
- 9 REFUSED

**B4** *[ASK IF B3=YES]* Can you describe those policies. *[RECORD OPEN ENDED RESPONSE]*





**B5** Who makes decisions on equipment purchases or upgrades?  
*[DO NOT READ, INDICATE ALL THAT APPLY]*

- B5\_1** Facilities Manager
- B5\_2** Building Manager
- B5\_3** Energy Manager
- B5\_4** Other facilities management/maintenance position
- B5\_5** Chief Financial Officer
- B5\_6** Other financial/administrative position
- B5\_7** Proprietor/Owner
- B5\_8** President/CEO
- B5\_9** Other *[SPECIFY]*
- B5\_10** DON'T KNOW
- B5\_11** REFUSED
- B5\_12** General Manager
- B5\_13** Corporate Office
- B5\_14** Board of directors
- B5\_15** Respondent

For B5\_1 to B5\_15

- 0 Not mentioned
- 1 Mentioned

**B5oth** Other people who make decisions on equipment purchases or upgrades specified.

*[OPEN ENDED RESPONSE]*

**B6** What difficulties have you had, if any, either inside or outside of your company, with purchasing and installing an energy efficiency upgrade through this or any [IOU] program?  
*[DO NOT READ; INDICATE ALL THAT APPLY]*

**B6\_1** No difficulties

**B6\_2** Other priorities for capital spending

**B6\_3** Lack of funds available for investment

**B6\_4** Lack of financing

**B6\_5** Amount of management time to oversee projects

**B6\_6** Incremental cost for more efficient equipment too high / payback period too long

**B6\_7** Rebate amount not high enough

**B6\_8** Business hesitant to replace existing working equipment

**B6\_9** Upper management doesn't see the benefit of energy efficient equipment

**B6\_10** We lease the space

**B6\_11** Contractors weren't familiar with program

**B6\_12** Rebate application process was demanding

**B6\_13** Economy

**B6\_14** Other *[SPECIFY]*

**B6\_15** DON'T KNOW

**B6\_16** REFUSED

For B6\_1 to B6\_16

0 Not mentioned

1 Mentioned

**B6oth** Other difficulties had with purchasing and installing an energy efficiency upgrade through an [IOU] program specified.

*[OPEN ENDED RESPONSE]*



## SECTION C: MARKETING

**C1** Now I'm going to ask you some questions about your facility's participation in the [PROGRAM – brief description].

How did you first hear about the program? *[DO NOT READ]*

- 1 [IOU] account executive
- 2 Other [IOU] staff
- 3 [IOU] call center
- 4 [IOU] utility bill insert
- 5 [IOU] mailing (hard copy)
- 6 [IOU] utility email message
- 7 [IOU] web site
- 8 From participation in another [IOU] program *[SPECIFY PROGRAM]*
- 9 Contractor/retailer/supplier/vendor
- 10 Conference/trade show
- 11 Colleague/ Peer
- 12 Television ad
- 13 Print media ad
- 14 Radio ad
- 15 Other *[SPECIFY]*
- 8 DON'T KNOW
- 9 REFUSED

**C1\_8oth** Other program participated in where learned about program specified.

*[OPEN ENDED RESPONSE]*

**C1oth** Other way(s) first heard about the program specified. *[OPEN ENDED RESPONSE]*

**C2** How would you prefer to receive information and updates about [IOU] energy efficiency programs? *[DO NOT READ]*

- 1 [IOU] account executive
- 2 Other [IOU] staff
- 3 [IOU] call center
- 4 [IOU] utility bill insert
- 5 [IOU] mailing (hard copy)
- 6 [IOU] utility email message
- 7 [IOU] web site
- 8 From participation in another [IOU] program *[SPECIFY PROGRAM]*
- 9 Contractor/retailer
- 10 Conference/trade show
- 11 Colleague/ Peer
- 12 Television ad
- 13 Print media ad
- 14 Radio ad
- 15 Other *[SPECIFY]*
- 8 DON'T KNOW
- 9 REFUSED

**C2oth** Other way(s) prefer to receive information and updates about [IOU] energy efficiency programs specified. *[OPEN ENDED RESPONSE]*

**C3** *[ASK IF C1≠7]* Have you visited the program's website for more information?

- 1 Yes
- 2 No
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED



## SECTION D: APPLICATION PROCESS

**D1** Why did you participate in this program?  
*[DO NOT READ; INDICATE ALL THAT APPLY]*

- D1\_1** To save money
- D1\_2** The equipment failed/worked poorly and I needed to replace it
- D1\_3** Contractor/engineer/technical assistant recommended we participate
- D1\_4** Account executive recommended we participate
- D1\_5** Corporate practice
- D1\_6** Availability of the [IOU] rebate
- D1\_7** Past participation with [IOU] program
- D1\_8** Other *[SPECIFY]*
- D1\_9** To save energy
- D1\_10** To help the environment
- D1\_11** DON'T KNOW
- D1\_12** REFUSED

For D1\_1 to D1\_12

- 0 Not mentioned
- 1 Mentioned

**D1oth** Other reason(s) for program participation specified. *[OPEN ENDED RESPONSE]*

**D2a** Who was responsible for getting the application completed and submitted?  
*[DO NOT READ; INDICATE ALL THAT APPLY]*

- D2a\_1** Internal staff in organization
- D2a\_2** Respondent
- D2a\_3** Vendor or contractor
- D2a\_4** [IOU] Account Executive
- D2a\_5** Other [IOU] staff
- D2a\_6** Other *[SPECIFY]*
- D2a\_7** DON'T KNOW
- D2a\_8** REFUSED

For D2a\_1 to D2a\_8

- 0 Not mentioned
- 1 Mentioned

**D2Aoth** Other person(s) responsible for completing and submitting application specified.

*[OPEN ENDED RESPONSE]*

- D2b** *[ASK IF D2a=3,4,5,6]* How likely were you to apply for the rebate on your own, if the [RESPONSE(S) FROM D2a] was unable or unwilling to do so on your behalf? Please rate on a 1 to 10 scale, where 1 is not at all likely and 10 is extremely likely.

\_\_\_ *[ENTER 1-10]*  
-6 Program skip  
-8 DON'T KNOW  
-9 REFUSED

- D3** *[READ FIRST SENTENCE IF RESPONDENT WASN'T MENTIONED IN D2A]*  
We know you may not have personally submitted the application, but you may still have been responsible for some of the steps.

From your perspective, was it very difficult, somewhat difficult, somewhat easy, or very easy to submit the application?

1 Very difficult  
2 Somewhat difficult  
3 Somewhat easy  
4 Very easy  
-8 DON'T KNOW  
-9 REFUSED

- D4** Did you have any problems with the application process?

1 Yes  
2 No *[SKIP TO NEXT SECTION]*  
-8 DON'T KNOW *[SKIP TO NEXT SECTION]*  
-9 REFUSED *[SKIP TO NEXT SECTION]*

- D5** *[ASK IF D4 = 1]* What were they and how were they resolved? *[RECORD OPEN ENDED RESPONSE- Try to postcode - e.g., finding model number, finding serial number, providing manufacturer specs, not sure about eligibility, etc.]*



## SECTION E: REBATE PROGRAMS

*[SKIP TO NEXT SECTION IF NOT DEEMED, CALCULATED, BID, OR HVAC TUNE-UP]*

**E0** Did you receive a rebate or incentive as part of your participation in the program?

- 1 Yes
- 2 No *[SKIP TO NEXT SECTION]*
- 3 Contractor received rebate/incentive *[SKIP TO NEXT SECTION]*
- 4 Was on bill financing *[SKIP TO NEXT SECTION]*
- 5 Someone else at company received rebate *[SKIP TO NEXT SECTION]*
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

**E1** Were you satisfied with the amount of time it took to receive the rebate?

- 1 Yes
- 2 No
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**E2** Was the rebate or incentive amount you received more, less, or about the same as you expected?

- 1 More
- 2 Less
- 3 About the same
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

## SECTION F: BENCHMARKING

**F1** Was it you, someone else, or no one that benchmarked your facility's energy use before participating in this program? (IF NEEDED: By "benchmarking", I'm referring to comparing your facility's energy use to a best practices facility, to identify potential energy savings at your facility.)

- 1 Respondent
- 2 Someone else
- 3 No one *[SKIP TO NEXT SECTION]*
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

**F2** Did you review the results of the benchmarking process?

- 1 Yes
- 2 No *[SKIP TO NEXT SECTION]*
- 3 Not asked, respondent dropped out of survey
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

**F3** How satisfied were you with the information provided through the benchmarking process? Please rate on a 10-point scale, where 1 is not at all satisfied and 10 is extremely satisfied.

- \_\_\_ *[ENTER 1-10]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**F4** How could the benchmarking process be changed to make the results more useful to you?

*[RECORD OPEN ENDED RESPONSE]*





### PROGRAM SPECIFIC QUESTIONS

[ASK ONE OF THE FOLLOWING SETS OF QUESTIONS (G-L), DEPENDING ON PROGRAM PARTICIPATION, SKIP PROGRAM SPECIFIC QUESTIONS IF Sc1=3 (NO)]

### SECTION G: NONRESIDENTIAL AUDITS (SO CAL GAS ONLY)

**G1** By participating in the program, you should have received an energy audit. Do you recall receiving this audit?

- 1 Yes
- 2 No *[SKIP TO NEXT SECTION]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

**G2** How many hours did you spend with someone as part of the audit process?

- \_\_\_ Number of Hours
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**G3** Did the auditor recommend that you install or replace equipment?

- 1 Yes
- 2 No *[SKIP TO G8a]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G8a]*
- 9 REFUSED *[SKIP TO G8a]*

**G4** What equipment was recommended through the audit?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other *[SPECIFY]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G8a]*
- 9 REFUSED *[SKIP TO G8a]*

**G4oth** Other equipment recommended through the audit specified. *[OPEN ENDED RESPONSE]*

**G4conf** *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response to G4?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

**G5** Did you install any of the recommended equipment?

- 1 Yes
- 2 No *[SKIP TO G8a]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G8a]*
- 9 REFUSED *[SKIP TO G8a]*



**G6** [G5<>YES, SKIP TO G8a] Which equipment? [SELECT ALL THAT APPLY]

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other [SPECIFY]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO G7]
- 9 REFUSED [SKIP TO G7]

**G6oth** Other audit-recommended-equipment installed specified. [OPEN ENDED RESPONSE]

**G6conf** [INTERVIEWER: DO NOT READ THIS QUESTION]

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

**G7** Were you planning to install some, all, or none of this equipment prior to receiving the audit?

- 1 Some
- 2 All
- 3 None
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**G8a** As a result of participating in the audit program, did you receive any information regarding other [IOU] programs?

- 1 Yes
- 2 No *[SKIP TO G12A]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G12A]*
- 9 REFUSED *[SKIP TO G12A]*

**G8b** Did you participate in any of those [IOU] programs?

- 1 Yes
- 2 No *[SKIP TO G12A]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G12A]*
- 9 REFUSED *[SKIP TO G12A]*

**G9** *[IF G8b=1]* Which programs? *[RECORD OPEN ENDED RESPONSE]*

**G10** *[IF G8b=1]* Were you planning on participating in this program before the audit was conducted?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**G11** *[IF G8b=1]* As a result of the audit, have you installed any other recommended equipment on your own without assistance from an [IOU] program? *[READ LIST; SELECT ALL THAT APPLY]*



- G11\_1** Motors and Pumps
- G11\_2** Drives
- G11\_3** Lighting
- G11\_4** HVAC
- G11\_5** Food Service Equipment
- G11\_6** Laundry Equipment
- G11\_7** Other *[SPECIFY]*
- G11\_8** Have not installed other recommended equipment on own
- G11\_9** DON'T KNOW *[SKIP TO G12a]*
- G11\_10** REFUSED *[SKIP TO G12a]*

For G11\_1 to G11\_10

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

**G11conf** *[INTERVIEWER: DO NOT READ THIS QUESTION]*

*[IF G8b=1]* Was the respondent confident in their response to G11?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

**G12** Please tell me how satisfied you were with the following components of the audit using a 1 to 10 scale, where 1 is not at all satisfied and 10 is extremely satisfied.

- G12A** The type of information provided
- G12B** The applicability of the information provided
- G12C** The knowledge of the auditor

For G12a-G12c

- \_\_\_ *[ENTER 1-10]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

- G13** Do you have any recommendations for improvements on the audit process?  
*[RECORD OPEN ENDED RESPONSE]*

#### SECTION H: PREMIUM COOLING EFFICIENCY PROGRAM

- H1** Our records indicate you received [TUNE-UP/INCENTIVE FOR INSTALLING HVAC EQUIPMENT] through the Premium Efficiency Cooling Program. Is that correct?

- 1 Yes *[SKIP TO H3]*
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

- H2** *[IF NOT CORRECT]* What did you receive?

*[RECORD OPEN ENDED RESPONSE]*

- H3** Who primarily did you work with through this program?

- 1 SDG&E program staff
- 2 Conservation Services Group (CSG) staff
- 3 HVAC contractors
- 4 Manufacturers
- 5 Other *[SPECIFY]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

- H3oth** Other person primarily worked with through the program. *[OPEN ENDED RESPONSE]*

- H5** Did the contractor provide a written report of services performed?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED



**H6** Did the contractor discuss the report or services performed with you or your staff?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**H11** Did you conduct routine maintenance or tune-ups on your HVAC system prior to participating in the program? (INTERVIEWER: "routine maintenance" excludes any maintenance on failed or malfunctioning systems.)

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**H12** How often did you conduct maintenance or tune-ups of your system?

*[RECORD OPEN ENDED RESPONSE]*

**H13** Did your participation in the program influence you to change your routine maintenance of your HVAC equipment?

- 1 Yes
- 2 No *[SKIP TO H15]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO H15]*
- 9 REFUSED *[SKIP TO H15]*

**H14** [ASK IF H13=1] What did you change?

- 1 Now will do / currently do more frequently
- 2 Now will do / currently do more thoroughly
- 3 Other [SPECIFY]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO H18]
- 9 REFUSED [SKIP TO H18]

[IF MEASFLAG≠2, (DID NOT RECEIVE A REBATE FOR HVAC EQUIPMENT) SKIP TO H18]

**H15** Did the equipment replace another piece of equipment, or was it an addition to your facility?

- 1 Replaced equipment
- 2 New addition [SKIP TO H17]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO H17]
- 9 REFUSED [SKIP TO H17]

**H16** [IF H15=1] Did the equipment replace...

- 1 Functional, but inefficient equipment
- 2 Functional, and efficient, equipment
- 3 Functional equipment that needed significant repairs
- 4 Failed equipment
- 5 Other [SPECIFY]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**H17** Approximately what percent of the project did the rebate cover?

- Percent
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**H18a** Did you install controllers as part of your participation in the program?





- 1 Yes
- 2 No [SKIP TO H21]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO H21]
- 9 REFUSED [SKIP TO H21]

**H18b** [ASK IF INSTALLED CONTROLLERS, OTHERWISE SKIP TO H21] Think about the equipment for which controllers were installed. What statement is most correct?

- 1 All equipment previously had controllers; the program replaced those controllers
- 2 Some equipment previously had controllers; the program replaced some controllers and added controllers to the equipment where there was none
- 3 None of the equipment previously had controllers
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**H19** What benefits, if any, have you experienced from installation of the controllers?  
[DO NOT READ; INDICATE ALL THAT APPLY]

- H19\_1** Increased energy savings
- H19\_2** Increased comfort
- H19\_3** Decreased noise for customers staying in hotel
- H19\_4** Improved cooling performance
- H19\_5** Other [SPECIFY]
- H19\_6** DON'T KNOW
- H19\_7** REFUSED
- H19\_8** Haven't noticed any benefits so far

For H19\_1 to H19\_8

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

**H19oth** Other benefits experienced from installation of the controllers specified.

[OPEN ENDED RESPONSE]

H20 What drawbacks, if any, have you experienced from installation of the controllers?  
*[DO NOT READ; INDICATE ALL THAT APPLY]*

- H20\_1 No drawbacks so far
- H20\_2 Rooms not as comfortable
- H20\_3 More difficult to manage the temperature
- H20\_4 Customer complaints
- H20\_5 Have had repair issues
- H20\_6 Other *[SPECIFY]*
- H20\_7 DON'T KNOW
- H20\_8 REFUSED

For H20\_1 to H20\_8

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

H20oth Other drawbacks experienced from installation of the controllers specified.

*[OPEN ENDED RESPONSE]*

H21 What would you have done differently had the program not been available?  
*[DO NOT READ; INDICATE ALL THAT APPLY]*

- H21\_1 Would have done nothing differently
- H21\_2 Would not have completed the work or installed the equipment
- H21\_3 Installed a lower efficiency equipment / completed a lesser tune-up
- H21\_4 Repaired rather than replacing the equipment
- H21\_5 Installed less equipment / completed tune-ups on fewer systems
- H21\_6 DON'T KNOW
- H21\_7 REFUSED
- H21\_8 Other *[SPECIFY]*

For H21\_1 to H21\_8

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

H21oth What else would have been done differently had program not been available specified.



*[OPEN ENDED RESPONSE]*

**H22** Did you receive any other financing to fund the project?

- 1 Yes
- 2 No *[SKIP TO H24INT]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO H24INT]*
- 9 REFUSED *[SKIP TO H24INT]*

**H23** *[IF H22=1]* What did you receive?

*[RECORD OPEN ENDED RESPONSE; PROBE FOR ON-BILL FINANCING, OTHER MANUFACTURER REBATES, ETC.]*

**H24INT** On a scale of 1 to 10, where 1 is not at all influential and 10 is extremely influential, how influential were the following factors in your decision to [INSTALL THE ENERGY SAVING EQUIPMENT / COMPLETE THE HVAC TUNE-UP]

*[READ, LIST ROTATES]*

- H24a** Rebate received
- H24b** Information provided by contractor
- H24c** Marketing materials received from the program
- H24d** *[IF H22=1]* Other financing received
- H24e** Company standard practices

For H24a to H24e

- *[ENTER 1-10]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 7 NOT APPLICABLE
- 8 DON'T KNOW
- 9 REFUSED

**SECTION I: ENERGY SAVINGS BID PROGRAM**

- I1** How satisfied were you with the incentive calculation process used to determine how much assistance you would receive through the program? Please answer on a 10-point scale, where 1 is not at all satisfied, and 10 is extremely satisfied.

\_\_\_ [ENTER 1-10]

- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 7 NOT APPLICABLE
- 8 DON'T KNOW
- 9 REFUSED

- I2** *[ASK IF I1<6] What was the issue? [RECORD OPEN ENDED RESPONSE]*

- I3** Did your energy efficiency project for this program target electricity savings, gas savings, or both?

- 1 Electricity
- 2 Gas
- 3 Both
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

- I4a** Did the planned energy efficiency project differ from what was actually installed?

- 1 Yes
- 2 No *[SKIP TO I6]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO I6]*
- 9 REFUSED *[SKIP TO I6]*

- I4b** What energy efficiency upgrades were included in the planned project in your application?  
*[RECORD OPEN ENDED RESPONSE]*



**I6** How did your installed savings compare with the targeted savings in your application? Were your installed savings:

- 1 Much less
- 2 Slightly less
- 3 About the same
- 4 Slightly greater
- 5 Much greater
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**I7** *[SKIP IF I4a <> YES]* Please explain why the installed energy efficiency project differed from the planned project. *[RECORD OPEN ENDED RESPONSE]*

**I10** Did you change your plans in order to participate in the [IOU] program?

- 1 Yes
- 2 No *[SKIP TO NEXT SECTION]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

**I11** *[ASK IF I10=1]* How so? *[RECORD OPEN ENDED RESPONSE]*

## SECTION J: CALCULATED PROGRAM

**J1** How satisfied were you with the customized rebate calculation process? Please answer on a 10-point scale, where 1 is not satisfied at all, and 10 is extremely satisfied.

- *[ENTER 1-10]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**J2** *[ASK IF J1<6]* What was the issue? *[RECORD OPEN ENDED RESPONSE]*

**J3** Without the program’s assistance, how different might the timing have been for these improvements? Would your organization have undertaken the project:

- 1 About the same time
- 2 1 year later or less
- 3 More than 1 year later
- 4 Never
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON’T KNOW
- 9 REFUSED

#### SECTION K: DEEMED PROGRAM

**K1a** We understand you may have also installed other measures, but for the purposes of this survey we are focusing on just one measure. According to our records, you installed [MEASURE]. Is that correct?

- 1 Yes *[SKIP TO K2]*
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON’T KNOW *[SKIP TO K3]*
- 9 REFUSED *[SKIP TO K3]*

**K1b** *[IF K1a=2] What equipment did you receive? [RECORD OPEN ENDED RESPONSE]*

**K2** How likely were you to install the [MEASURE / “EQUIPMENT”] without the rebate? Please answer on a 10-point scale, with 1 being not at all likely to install without rebate, and 10 being extremely likely to install without the rebate.

- \_\_\_ [ENTER 1-10]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON’T KNOW
- 9 REFUSED



**K3** If you plan to participate in the program again, what types of new equipment do you think you might install through the program? [READ LIST; SELECT ALL THAT APPLY]

- K3\_1** Lighting
- K3\_2** Food service equipment
- K3\_3** HVAC equipment
- K3\_4** Water heating
- K3\_5** Refrigeration
- K3\_6** Laundry equipment
- K3\_7** Motors and/or pumps
- K3\_8** Drives
- K3\_9** Other process-related equipment [SPECIFY]
- K3\_10** DON'T KNOW
- K3\_11** REFUSED
- K3\_12** \*None/nothing needs replacing

For K3\_1 to K3\_12

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

**K3oth** Other equipment that might be installed through the program, if plan to participate again, specified.

[OPEN ENDED RESPONSE]

**K4** Are you interested in any other energy efficient equipment for your business that is currently not offered through the program?

- 1 Yes
- 2 No [SKIP TO NEXT SECTION]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO NEXT SECTION]
- 9 REFUSED [SKIP TO NEXT SECTION]

**K5** [IF K4=1] What type(s) of other equipment are you interested in?

[RECORD OPEN ENDED RESPONSE]

**SECTION L: DIRECT INSTALL PROGRAM**

*[IF IOU=SO CAL GAS, SKIP TO SECTION M]*

**L1** Did more than one SDG&E representative contact you about installing free energy efficiency equipment at your business?

- 1 Yes
- 2 No *[SKIP TO L3]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO L3]*
- 9 REFUSED *[SKIP TO L3]*

**L2** *[ASK IF L1=1]* Please explain who contacted you and what was discussed?

*[RECORD OPEN ENDED RESPONSE]*

**L3** Did you receive any follow up from the SDG&E representative who installed the equipment at your business?

- 1 Yes
- 2 No *[SKIP TO L5]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 Don't know *[SKIP TO L5]*
- 9 REFUSED *[SKIP TO L5]*

**L4** Did the SDG&E representative tell you about other SDG&E programs?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED





**L5** Has anyone else besides SDG&E, such as another contractor or neighborhood business organization, contacted you about installing free energy efficiency equipment at your business?

- 1 Yes
- 2 No *[SKIP TO L7]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO L7]*
- 9 REFUSED *[SKIP TO L7]*

**L6** *[ASK IF L5=1]* Please explain who contacted you and what was discussed.

*[RECORD OPEN ENDED RESPONSE]*

**L7** Have you participated in any other SDG&E programs besides the Direct Install program?

- 1 Yes
- 2 No *[SKIP TO M1]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO M1]*
- 9 REFUSED *[SKIP TO M1]*

**L8** Which programs have you participated in? *[RECORD OPEN ENDED RESPONSE]*

#### SECTION M: PROGRAM EXPERIENCE / SATISFACTION

**M1** *[SKIP TO M4 IF AUDIT-ONLY PROGRAM]* As part of the program, did someone come to inspect the energy efficient equipment?

- 1 Yes
- 2 No *[SKIP TO M4]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO M4]*
- 9 REFUSED *[SKIP TO M4]*

**M2** How satisfied were you with the inspection process? Again, please use a 10-point scale, where 1 is not at all satisfied, and 10 is extremely satisfied.

- \_\_\_ [ENTER 1-10]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO M4]
- 9 REFUSED [SKIP TO M4]

**M3** How could the inspection process be improved, if at all? [RECORD OPEN ENDED RESPONSE]

**M4** Overall, how satisfied were you with the program? Again, please rate on a 10-point scale, where 1 is not at all satisfied and 10 is extremely satisfied.

- \_\_\_ [ENTER 1-10]
- 3 Not asked, respondent dropped out of survey
- 8 DON'T KNOW
- 9 REFUSED

**M5** [ASK IF M4<6] Why do you say this? [RECORD OPEN ENDED RESPONSE]

**M6** Would you be interested in participating in this program again? Please rate on a 10-point scale, where 1 is not at all interested and 10 is extremely interested in participating.

- \_\_\_ [ENTER 1-10]
- 3 Not asked, respondent dropped out of survey
- 8 DON'T KNOW
- 9 REFUSED

**M7** [ASK IF M6<6] Why do you say that? [RECORD OPEN ENDED RESPONSE]

**M8** Besides this program, are you aware of other assistance you could receive from [IOU] to promote energy efficiency in businesses like yours?

- 1 Yes
- 2 No [SKIP TO M12]
- 8 DON'T KNOW [SKIP TO M12]
- 9 REFUSED [SKIP TO M12]



**M9** [IF M8=1] What types of programs are you aware of? [RECORD OPEN ENDED RESPONSE]

**M10** Has your organization participated in any of the programs you mentioned?

- 1 Yes
- 2 No [SKIP TO M12]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO M12]
- 9 REFUSED [SKIP TO M12]

**M11** [ASK IF M10=1] Which ones has your organization participated in?

[RECORD OPEN ENDED RESPONSE]

**M12** [IF IOU = SCG, SKIP TO M16] How interested would you be in using an online tool from SDG&E that shows your business's current energy costs to date for the month and an estimation of what your bill will be? Would you say you are. . .? [READ LIST]

- 1 Not interested at all
- 2 Not very interested
- 3 Somewhat interested
- 4 Very interested
- 3 Not asked, respondent dropped out of survey
- 5 \*Already using it / something like it
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**M13** SDG&E "Reduce Your Use" days (also known as "event days") are days when there is an unusually high demand for electricity, such as very hot summer days. Prior to Reduce your Use days, SDG&E notifies customers to reduce their electricity use during peak hours.

In general how difficult would it be for you to shift or make adjustments to your business's electricity usage during weekdays from 11am-6pm? Would it be...?

*[READ LIST]*

- 1 Very difficult to make
- 2 Somewhat difficult to make
- 3 Not very difficult to make
- 4 Not at all difficult to make
- 3 Not asked, respondent dropped out of survey
- 5 \*Already using it / something like it
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**M14** Now I'd like to ask you a question about timing of the notification. How difficult would it be for you to shift or make adjustments to your business's electricity usage from 11am-6pm on Reduce Your Use days, if you received only one day notice? Would it be...? *[READ LIST]*

- 1 Very difficult
- 2 Somewhat difficult
- 3 Not very difficult
- 4 Not at all difficult
- 3 Not asked, respondent dropped out of survey
- 5 \*Already using it / something like it
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO M16]*
- 9 REFUSED *[SKIP TO M16]*

\*NOTE: Question M14B was added about 2/3 of the way through the survey fielding period. Interviewers were saying respondents were going on about why or why not it would be difficult, this question was added to capture these responses.

**M14B** Why do you say that it would be [RESPONSE FROM M14]?

*[RECORD OPEN ENDED RESPONSE]*



**M15** Thank you. I only have a few remaining questions.

For the next two questions, I'd like you to again use a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree. How much do you agree that your business has control over the amount of electricity it uses?

- \_\_\_ [ENTER 1-10]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

\*NOTE: The survey was originally programmed so that SCG customers did not get question M16, 2/3 of the way through the fielding period, we allowed SCG customers to answer. 78 SCG customers were asked the following question, and appear in the dataset.

**M16** How much do you agree that energy efficiency is an important consideration when your business buys any devices or equipment that use energy?

*[IF NEEDED: Where 1 is strongly disagree and 10 is strongly agree]*

- \_\_\_ [RECORD NUMBER 1-10]
- 3 Not asked, respondent dropped out of survey
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

**M17INT** I want to describe 2 other programs for which your facility may be eligible. For each, please tell me how interested you might be in participating on a 10-point scale, where 1 is not at all interested, and 10 is extremely interested.

**M17a** *[ASK IF IOU=SDG&E AND PROGRAM≠BID]* The Energy Savings BID program, which provides incentives for a large energy efficiency project, or a bundle of energy efficiency projects. Projects must save 500,000 kWh or 25,000 therms annually.

**M17b** An On Bill Financing program ,which provides a zero percent interest rate loan to large energy efficiency improvement projects

For M17a and M17b

— [ENTER 1-10]

-3 Not asked, respondent dropped out of survey

-6 Program skip

-8 DON'T KNOW

-9 REFUSED

**M18** Are you planning any repairs or replacements to your equipment in the next 2 years, aside from routine preventative maintenance?

1 Yes

2 No *[SKIP TO M21]*

-3 Not asked, respondent dropped out of survey

-8 DON'T KNOW *[SKIP TO M21]*

-9 REFUSED *[SKIP TO M21]*

**M19** *[ASK IF M18=1]* What type(s) of repairs or replacements are you considering at this site?

*[RECORD OPEN ENDED RESPONSE]*

**M20** *[ASK IF M18=1]* Do you plan to participate in an [IOU] program for these purchases?

1 Yes

2 No

-3 Not asked, respondent dropped out of survey

-6 Program skip

-8 DON'T KNOW

-9 REFUSED



**M21** Those are all the questions we have for you. Do you have any other comments you would like to make?

*[RECORD OPEN ENDED RESPONSE]*

**END** Thank you for your time. Have a nice [day/afternoon/evening].

## **3.2 Non-participating Customers**



## SEMPRA UTILITIES

### NON-RESIDENTIAL PROCESS EVALUATION (NON-PARTICIPANTS)

**NOTE:**

- Variable names are in bold type.
- A code of (-3) means partial interview.
- A code of (-6) means programmed skip.
- A code of (-8) means don't know.
- A code of (-9) means refused.
- Questions were asked of all respondents unless indicated otherwise.
- Response codes with an asterisk (\*) are recoded responses to open-ended questions, or responses added during data cleaning.

### INTRODUCTION SECTION

INTRO Hello, my name is [INTERVIEWER]. We are conducting research on behalf of [IOU] to assess services and offerings they provide to their customers.

May I speak with the facilities manager, or someone who makes decisions regarding equipment upgrades?

- 1 Yes
- 2 No [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

INT2 [INTERVIEWER: READ IF THIS IS A NEW PERSON ON THE PHONE: Hi, my name is [INTERVIEWER], and I'm calling on behalf of [IOU]. We are conducting research to assess services and offerings they provide to their customers.]

We are calling regarding the building located at [ADDRESS] in [CITY]. Are you the correct person to speak with?

- 1 Yes
- 2 No [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

**INFO** Please be assured that this isn't a sales call and that all responses will be treated confidentially. For quality assurance and training purposes, this call will be recorded.

(Who is doing this study: [IOU] has hired our firm to assess services and offerings they provide to their customers. )

(Why are you conducting this study: Studies like this help [IOU] better understand customers' need for, and interest in, energy efficiency programs and services.)

(Timing: This survey should take between 10 and 15 minutes of your time. Is this a good time for us to speak with you? [IF NOT, SET UP CALL BACK APPOINTMENT OR OFFER TO LET THEM CALL US BACK AT 1-800-454-5070])

(Sales concern: I am not selling anything; we would simply like to learn about your facility needs. Your responses will be kept confidential and not revealed to anyone unless you grant permission. If you would like to talk with someone from Tetra Tech , you can call Mandy Pom at 800-454-5070. If you would like to speak with someone from [IOU] about this study, feel free to call Hector Montes at 858-654-1723, or email him at [HMontes@semprautilities.com](mailto:HMontes@semprautilities.com)

[PRESS 1 TO CONTINUE]



## SECTION A: RESPONDENT AND FACILITY BACKGROUND

**A1** *[IF SECTOR=AGRICULTURE, SKIP TO A2]* Thank you. First, what is the main business activity at this facility? *[DO NOT READ LIST]*

- 1 Office
- 2 Retail (non-food) *[ASK A1A]*
- 3 College / University
- 4 School *[ASK A1B]*
- 5 Grocery Store
- 6 Restaurant
- 7 Health Care (other than Hospital) *[ASK A1C]*
- 8 Hospital *[ASK A1D]*
- 9 Hotel or Motel *[ASK A1E]*
- 10 Warehouse
- 11 Construction
- 12 Community Service / Church / Temple / Municipal *[ASK A1F]*
- 13 Industrial Process / Manufacturing / Assembly
- 14 Condo / Apartment
- 15 Greenhouse
- 16 Laundry/Cleaners
- 17 Other *[SPECIFY]*
- 18 \*Agriculture
- 8 DON'T KNOW
- 9 REFUSED

**O\_A1** OTHER SPECIFY RESPONSE (from A1 above)

**A1A** *[ASK IF A1=2]* Is your business in an enclosed mall, strip mall, a stand-alone building, or something else?

- 1 Enclosed mall
- 2 Strip mall
- 3 Stand-alone building
- 4 Something else *[SPECIFY]*
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

**O\_A1A** OTHER SPECIFY RESPONSE (from A1a above)

**A1B** [ASK IF A1=4] How many students can be seated in all of the classrooms in this building at one time?

- \_\_\_\_\_ Number of students
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

**A1C** [ASK IF A1=7] Is this an inpatient facility, outpatient facility, or both?

- 1 Inpatient
- 2 Outpatient
- 3 Both
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

**A1D** [ASK IF A1=8] Is this an inpatient facility, outpatient facility, or both?

- 1 Inpatient
- 2 Outpatient
- 3 Both
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

**A1E** [ASK IF A1=9] How many guest rooms or occupant rooms are there in this building?

- \_\_\_\_\_ Number of rooms
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED



**A1F** [ASK IF A1=12] What is the total seating capacity of the communal areas (e.g., worship areas) in this building?

- \_\_\_\_\_ Seating capacity
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

**A2** What are your responsibilities? [RECORD OPEN ENDED RESPONSE]

**A4** Has your facility applied for or participated in an [IOU] program? For example, has your facility received a rebate, audit, incentive, education?

- 1 Yes
- 2 No – Skip to B1a
- 8 DON'T KNOW – Skip to B1a

**A4A** Did you apply for, or participate in, the [IOU] program in 2009 or before, or was it in 2010 or later?

- 1 Before 2010 – Skip to B1a
- 2 2010 or later
- 6 Programmed skip
- 8 DON'T KNOW – Skip to B1a

**A5** Did your facility complete its participation in the program?

- 1 Yes
- 2 No
- 6 Programmed skip

**A6** What was the program that your company participated in? (name of program or description)

[If A4a=2, terminate after A6]

**SECTION B: ENERGY EFFICIENCY POTENTIAL**

**B1A** *[ASK IF IOU=SDG&E]* What type of equipment uses the most electricity at your facility?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other *[SPECIFY]*
- 6 Programmed skip
- 8 DON'T KNOW *[SKIP TO B2A]*
- 9 REFUSED *[SKIP TO B2A]*

**O\_B1A** OTHER SPECIFY RESPONSE (from B1a above)

**B1Aconf** *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Programmed skip

**B1B** *[ASK IF IOU=SDG&E]* What type of equipment uses the second most electricity at your facility?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other *[SPECIFY]*
- 6 Programmed skip
- 8 DON'T KNOW *[SKIP TO B2A]*
- 9 REFUSED *[SKIP TO B2A]*



**O\_B1B** OTHER SPECIFY RESPONSE (from B1b above)

**B1Bconf**      *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1      Yes
- 2      No
- 6      Programmed skip

**B2A**      What type of equipment uses the most natural gas at your facility?

- 1      Boilers
- 2      HVAC and Furnaces
- 3      Food Service Equipment
- 4      Laundry Equipment
- 5      Pumps
- 6      Other *[SPECIFY]*
- 7      Doesn't use natural gas      *[SKIP TO B3]*
- 8      Water heater(s)
- 8      DON'T KNOW      *[SKIP TO B3]*
- 9      REFUSED      *[SKIP TO B3]*

**O\_B2A** OTHER SPECIFY RESPONSE (from B2a above)

**B2Aconf**      *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1      Yes
- 2      No
- 6      Programmed skip

**B2B** What type of equipment uses the second most natural gas at your facility?

- 1 Boilers
- 2 HVAC and Furnaces
- 3 Food Service Equipment
- 4 Laundry Equipment
- 5 Pumps
- 6 Other *[SPECIFY]*
- 7 Nothing else uses natural gas *[SKIP TO B3]*
- 8 Water heater(s)
- 6 Programmed skip
- 8 DON'T KNOW *[SKIP TO B3]*
- 9 REFUSED *[SKIP TO B3]*

**O\_B2B** OTHER SPECIFY RESPONSE (from B2b above)

**B2Bconf** *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Programmed skip

**B3** Has your organization developed a specific policy for the selection of energy-efficient equipment? (EXAMPLES: REQUIREMENT THAT ALL NEW FLUORESCENT LIGHTING SYSTEMS USE ELECTRONIC BALLASTS, OR THAT ALL BOILERS HAVE A MINIMUM THERMAL EFFICIENCY)?

- 1 Yes
- 2 No
- 3 Other
- 8 DON'T KNOW
- 9 REFUSED

**O\_B3** OTHER SPECIFY RESPONSE (from B3 above)





**B4** [ASK IF B3=YES] Can you describe those policies. [RECORD OPEN ENDED RESPONSE]

**B5** Who makes decisions on equipment purchases or upgrades?  
[DO NOT READ, INDICATE ALL THAT APPLY]

**B5\_1** Facilities Manager

**B5\_2** Building Manager

**B5\_3** Energy Manager

**B5\_4** Other facilities management/maintenance position

**B5\_5** Chief Financial Officer

**B5\_6** Other financial/administrative position

**B5\_7** Proprietor/Owner

**B5\_8** President/CEO

**B5\_9** General Manager

**B5\_10** Other [SPECIFY]

**B5\_13** Board of directors

For B5\_1 to B5\_13

-9 REFUSED

0 Not mentioned

1 Mentioned

**O\_B5** OTHER SPECIFY RESPONSE (from B5\_10 above)

**B6** What difficulties have you had, if any, either inside or outside of your company, with purchasing and installing an energy efficiency upgrade through this or any [IOU] program?

*[DO NOT READ; INDICATE ALL THAT APPLY]*

- B6\_1** No difficulties
- B6\_2** Other priorities for capital spending
- B6\_3** Lack of funds available for investment
- B6\_4** Lack of financing
- B6\_5** Amount of management time to oversee projects
- B6\_6** Incremental cost for more efficient equipment too high / payback period too long
- B6\_7** Rebate amount not high enough
- B6\_8** Business hesitant to replace existing working equipment
- B6\_9** Upper management doesn't see the benefit of energy efficient equipment
- B6\_10** We lease the space
- B6\_11** Contractors weren't familiar with program
- B6\_12** Rebate application process was demanding
- B6\_13** Economy
- B6\_14** Other *[SPECIFY]*
- B6\_17** Have not done any upgrades

For B6\_1 to B6\_17

- 8 DON'T KNOW
- 0 Not mentioned
- 1 Mentioned

**O\_B6** OTHER SPECIFY RESPONSE (from B6\_14 above)

### SECTION C: MARKETING

**C1A** Before this call, were you aware that [IOU] offers programs to help you increase the energy efficiency of your organization?

- 1 Yes
- 2 No – Skip to C2
- 8 DON'T KNOW – Skip to C2

**C1B** Which programs were you aware of? (open-ended – gather description of program and [if known] program name)



**C1C** Did you know that your facility was eligible for any of these programs in the past, but chose not to participate?

- 1 Yes- I was aware that the facility was eligible, but chose not to participate
- 2 No- I was not aware the facility was eligible, or the facility was not eligible for programs
- 3 Other - including if was past participant
- 3 Partial
- 8 DON'T KNOW
- 9 REFUSED

**C1D** (If C1c=Yes) If so, please describe the program? (prompt with list of program type descriptions if needed)

**C1E** (If C1c=Yes) Why did you choose not to participate in the program? (open ended)

**C1F** What type of equipment did you install *without* assistance from the program, that you believe would have been eligible? (Do not read; indicate all that apply)

**C1F\_1** Motors and Pumps

**C1F\_2** Drives

**C1F\_3** Lighting

**C1F\_4** HVAC and furnaces

**C1F\_5** Boilers

**C1F\_6** Food Service Equipment

**C1F\_7** Laundry Equipment

**C1F\_8** Other [SPECIFY]

**C1F\_9** None

**C1F\_10** Water heaters

For C1F\_1 to C1F\_10

- 9 REFUSED
- 8 DON'T KNOW
- 6 Programmed skip
- 0 Not mentioned
- 1 Mentioned

**O\_C1F** OTHER SPECIFY RESPONSE (from C1F\_8 above)

**C1** How did you first hear about the program? *[DO NOT READ]*

- 1 [IOU] account executive
- 2 Other [IOU] staff
- 3 [IOU] call center
- 4 [IOU] utility bill insert
- 5 [IOU] mailing (hard copy)
- 6 [IOU] utility email message
- 7 [IOU] web site
- 8 From participation in another [IOU] program *[SPECIFY PROGRAM]*
- 9 Contractor/retailer/supplier/vendor
- 10 Conference/trade show
- 11 Colleague/ Peer
- 12 Television ad
- 13 Print media ad
- 14 Radio ad
- 15 Other *[SPECIFY]*
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

**O\_C1** OTHER SPECIFY RESPONSE (from C1 above)



**C2** How would you prefer to receive information and updates about [IOU] energy efficiency programs? *[DO NOT READ]*

- C2\_1** [IOU] account executive
- C2\_2** Other [IOU] staff
- C2\_3** [IOU] call center
- C2\_4** [IOU] utility bill insert
- C2\_5** [IOU] mailing (hard copy)
- C2\_6** [IOU] utility email message
- C2\_7** [IOU] web site
- C2\_8** From participation in another [IOU] program *[SPECIFY PROGRAM]*
- C2\_9** Contractor/retailer
- C2\_10** Conference/trade show
- C2\_11** Colleague/ Peer
- C2\_12** Television ad
- C2\_13** Print media ad
- C2\_14** Radio ad
- C2\_15** Other *[SPECIFY]*

For C2\_1 to C2\_15

- 9 REFUSED
- 8 DON'T KNOW
- 3 Partial
- 0 Not mentioned
- 1 Mentioned

**O\_C2** OTHER SPECIFY RESPONSE (from C2\_15 above)

**C3** *[ASK IF C1≠7]* Have you visited the program's website for more information?

- 1 Yes
- 2 No
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

## SECTION D: PROGRAM INTEREST

- D1** I would like to describe a few types of [IOU] programs for which your facility may be eligible for participating. For each, please describe your interest in participating on a 1-10 scale (where 1 is not at all interested, and 10 is extremely interested).
- D1A** An audit type program, providing a site walk through and recommendations on energy efficiency upgrades for your facility [SCG Audit / SDG&E Comprehensive Industrial Energy Efficiency]
- D1B** An HVAC Retrocommissioning program, to tune up your HVAC equipment to make it run more efficiently
- D1C** A program to provide premium tune-ups and maintenance of HVAC equipment, and incentives for HVAC equipment and controls [SDGE only - Premium Cooling Efficiency]
- D1D** A Direct Install program, providing free installation of low-cost energy efficiency measures at small to medium sized businesses (demand < 100 kW)
- D1E** A rebate program, where the rebate amounts are based on the equipment installed- [Deemed]
- D1F** An incentive program, where the incentive amount is calculated based on the predicted energy savings [Calculated/ BID]
- D1G** A program offering 0% interest loans for energy efficiency upgrades [OBF]

For D1A to D1G

- |     |                        |
|-----|------------------------|
| ___ | Interest rating (1-10) |
| 11  | Not applicable         |
| -3  | Partial                |
| -9  | REFUSED                |



**D2** For the program types for which you are interested, what would motivate your organization to participate? (DO NOT READ UNLESS CUSTOMER NEEDS PROMPT; INDICATE ALL THAT APPLY)

**D2\_1** Upgrading or replacing equipment

**D2\_2** Saving money on energy bills

**D2\_3** Obtaining a rebate

**D2\_4** Technical assistance

**D2\_5** Protecting environment

**D2\_6** Corporate policies

**D2\_7** Other (specify)

**D2\_8** Government/non-profit policy

For D2\_1 to D2\_8

-8 DON'T KNOW

-3 Partial

0 Not mentioned

1 Mentioned

**O\_D2** OTHER SPECIFY RESPONSE (from D2\_7 above)

**D3A** Why might you not participate in a program? (DO NOT READ; INDICATE ALL THAT APPLY)

**D3A\_1** Application takes too much time

**D3A\_2** Rebate not high enough

**D3A\_3** Don't have enough program information

**D3A\_4** Don't believe energy savings claims

**D3A\_5** Other (specify)

**D3A\_6** Up-front costs

**D3A\_7** Money issues

For D3A\_1 to D3A\_7

- 8 DON'T KNOW
- 3 Partial
- 0 Not mentioned
- 1 Mentioned

**O\_D3A** OTHER SPECIFY RESPONSE (from D3A\_5 above)

**M12** [IF IOU = SCG, SKIP TO M16] How interested would you be in using an online tool from SDG&E that shows your business's current energy costs to date for the month and an estimation of what your bill will be? Would you say you are. . .? *[READ LIST]*

- 1 Not interested at all
- 2 Not very interested
- 3 Somewhat interested
- 4 Very interested
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

**M13** SDG&E "Reduce Your Use" days (also known as "event days") are days when there is an unusually high demand for electricity, such as very hot summer days. Prior to Reduce your Use days, SDG&E notifies customers to reduce their electricity use during peak hours.

In general how difficult would it be for you to shift or make adjustments to your business's electricity usage during weekdays from 11am-6pm? Would it be...?

*[READ LIST]*

- 1 Very difficult to make
- 2 Somewhat difficult to make
- 3 Not very difficult to make
- 4 Not at all difficult to make
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED





**M14** Now I'd like to ask you a question about timing of the notification. How difficult would it be for you to shift or make adjustments to your business's electricity usage from 11am-6pm on Reduce Your Use days, if you received only one day notice? Would it be...? *[READ LIST]*

- 1 Very difficult
- 2 Somewhat difficult
- 3 Not very difficult
- 4 Not at all difficult
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW *[SKIP TO M15]*
- 9 REFUSED *[SKIP TO M15]*

**M14A** Can you elaborate more on your response?

*[RECORD OPEN ENDED RESPONSE]*

**M15** For the next two questions, I'd like you to again use a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree. How much do you agree that your business has control over the amount of electricity it uses?

- \_\_\_ Agree/disagree rating (1-10)
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

**M16** How much do you agree that energy efficiency is an important consideration when your business buys any devices or equipment that use energy?

*[IF NEEDED: Where 1 is strongly disagree and 10 is strongly agree]*

- \_\_\_ Agree/disagree rating (1-10)
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

**M18** Are you planning any repairs or replacements to your equipment in the next 2 years, aside from routine preventative maintenance?

- 1 Yes
- 2 No *[SKIP TO M21]*
- 3 Partial
- 8 DON'T KNOW *[SKIP TO M21]*
- 9 REFUSED *[SKIP TO M21]*

**M19** *[ASK IF M18=YES]* What type(s) of repairs or replacements are you considering at this site?

*[RECORD OPEN ENDED RESPONSE]*

**M20** *[ASK IF M18=YES]* Do you plan to participate in an [IOU] program for these purchases?

- 1 Yes
- 2 No
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED



**M21** Those are all the questions we have for you. Do you have any other comments you would like to make?

- 1 Yes, record comments
- 2 No
- 3 Partial

**O\_M21** OTHER SPECIFY RESPONSE (from M21 above)

END Thank you for your time. Have a nice [day/afternoon/evening].

### SAMPLE AND DATA CLEANING VARIABLES

**CASEID** Unique case identification number

**IOU** Investor Owned Utility

**ACCTNUM** Account number

**NAICS** NAICS code

**RESPNUM\$** Respondent number

**COMPLETE** Completion flag

1 Complete survey

0 Not a complete survey (partial)

**PARTIAL**

1 Partial survey

0 Not a partial survey (complete)

**SUMOFCONSM\_TOT\_BILLED** MARROONKWHBLUEGAS SDG&E only

**MAXOFDMND\_MAX** SDG&E only

**@2010THMS** SCG only

### **3.3 Survey and Sampling Methodologies**



### 3.3.1 Introduction

As part of the Nonresidential process evaluation for SoCal Gas, the HMG team conducted surveys of customers.

As a preliminary step in the process, we created a sample of customers to contact for the two surveys conducted – those that have participated in energy efficiency programs in the 2010-12 cycle as of Quarter 2 of 2011 (the “participant survey”), and those that are not participating as of Q2 2011 (the “nonparticipant survey”).

This section describes, for each survey, our sampling strategy, followed by a disposition report (i.e., number of responses and categorization of responses by NAICS code.)

### 3.3.2 Customer sampling restrictions (limiting results)

When reviewing the customer counts and responses, it is important to note that many customers were removed from the sample frames for a number of reasons. Customers were removed before and during the survey because of the following:

- Recently contacted for a recent SoCal Gas mass markets survey or soon to be contacted for a Commercial/Industrial survey- approximately 300 assigned accounts were in this list
- Request for customer removal by AE
- [Participant survey] - Participation in multiple programs (e.g., Calculated participants may have participated in the audit program). Only one program was assessed in the survey to avoid overburdening the customer.
- [Nonparticipant survey] - Participation in a program
- Included in the pre-test (small number of cases)
- Identification through the survey that a central company or individual made purchasing decisions for multiple organizations
- No telephone number. This was less of a problem for the participant surveys (pulled from the program database), and attempts were made to look up bad telephone numbers. For the nonparticipant surveys, only 22 percent of customers had a phone number listed in the customer database. We did not attempt to look up correct numbers.

In general, many assigned accounts were removed from the participant and nonparticipant sample, because of the overlap with the mass markets survey. For example, nonparticipant respondents were 24% assigned, and 76% assigned.

Also, it sometimes was not possible to survey as many customers as we targeted in a segment, because segment included a few, very large customers (e.g., hospitals). Thus, segments with only a few respondents (e.g., petroleum facilities) were not well represented.

Also, for the nonparticipant survey, we discovered that the listed phone number was often incorrect or referred to a home (not business) phone number.

### 3.3.3 Pretesting

Tetra Tech, who administered the majority of the customer surveys, conducted six survey pretests prior to implementation. The pretest assessed the wording and order of program-specific and general batteries, calculated survey length, and identified if there were questions that respondents had difficulty answering. Minor changes were made to the instrument as a result of the pretest, such as: adding skip instructions to avoid redundant questions, clarifying question wording, and adding transition text to aid in the flow of the survey. A small number of questions that were redundant or unnecessary were also removed to reduce length.

### 3.3.4 Participant Survey

#### *Sampling approach*

Our approach for developing a sample of participating customers to survey differed based on the program. If a program was tracked in the utility-wide program database, we pulled the participating customers from the 2011 Q2 database. If not, we obtained lists from the program manager and/or implementation contractor(s).

Some programs had small enough participation that all participants were targeted for the survey, and no sampling was needed. This was because some programs have fewer participation, a low completion rate was expected (i.e., we expected 1 complete per approximately four calls made), customers would be removed from the sample due to AE requests or overlap with other surveys, and/or there were a significant number of participants were listed without phone numbers. For other programs with much larger participation than the number of surveys targeted. In these cases, we drew a sample based on the strategy described in the figure below.



Program	Program ID	Source of participating customers	Sampling strategy used	No. of distinct participants with phone #	No. of completed surveys	Comment
Calculated	SCG3602, SCG3607, SCG3611	SoCal Gas program database	None – all participants targeted	111 (95 in sample frame)	28	
Deemed	SCG3603, SCG3608, SCG3612	SoCalGAs program database	None – all participants targeted	785 (496 in sample frame)	167	Stratified by end-use equipment installed and segment
Nonres Audits	SCG3604, SCG3609, SCG3613	SoCal Gas program Manager	None – all participants targeted	224 (201 in sample frame)	39	
SaveGas	SCG3673	SoCal Gas program database	None – all participants targeted	18	6	
PREPS	SCG3663	Implementer's database	None – all participants targeted	13	6	

*Figure 1 – SoCal Gas Customers Targeted and Surveys Completed*

### ***Categorization of Survey Responses (Final Dispositions)***

The evaluation team completed 234 participant surveys. The team attempted to contact customers that participated in SoCal Gas programs from October 11<sup>th</sup> to November 4<sup>th</sup>. We achieved a response rate of 30 percent and a cooperation rate of 32 percent. There were a small number of customers that completed a majority of the survey (through the program-specific questions) that terminated before full completion. We retained the data from 5 of these customers.

Research Into Action completed surveys with PREPS and SaveGas customers separate from the other participant surveys. PREPS customers were surveyed from 10/10/11 through 11/3/11 with a response rate of 46%. SaveGas customers were surveyed from 10/14/11 through 11/3/11 with a response rate of 35%.

Neither the PREPS nor SaveGas dispositions are reflected in the figures below. Research into Action conducted surveys with the target customers for these programs: PREPS with schools and universities (6 participants surveyed), and SaveGas with hotels and motels (without casinos) (6 participants surveyed).





Sample Disposition	Number of Sample Points
<b>Starting sample size</b>	<b>792</b>
Fax/data line	0
Residential number	2
Number not in service	21
No listing	13
Other bad phone #s	8
Duplicate case	21
<b>Adjusted Sample Size</b>	<b>727</b>
Hard Refusal	15
Soft Refusal	60
Immediate Hang-up	10
Incapable	1
Incompletes (partial interviews not retained in the data)	8
Language barrier/non-English	11
Can't find the right person to talk to	23
Doesn't recall participation	16
Unavailable for duration	7
Respondent no longer at company	14
Out of business	3
Called out - 14 attempts	4
Active	321
<b>Completed &amp; Partially Completed Surveys</b>	<b>234</b>
Completed surveys	229
Partials - retained in the data	5
<b>Cooperation Rate</b>	<b>32.2%</b>
<b>Response Rate</b>	<b>29.6%</b>

*Figure 2 – Response to SoCal Gas Customer Participant Survey*

The next figure documents the total number of completes by program and stratification of interest if applicable (e.g., measure, company). Both partially and fully completed surveys are included in the completed survey counts.

<b>Program / Stratification</b>	<b>Completed Surveys</b>
<b>Total Completes</b>	<b>234</b>
<b>Calculated</b>	<b>28</b>
Agriculture	5
Industrial	14
Commercial	9
<b>Deemed</b>	<b>167</b>
Food Service Equipment	51
Boiler	17
Heat Curtain	2
Pipe insulation	3
Steam Trap	17
Water Heater	65
Water tank insulation	6
Window film	6
<b>Nonresidential Audit</b>	<b>39</b>

*Figure 3 –Fully and Partially Completed Surveys by Program and Stratification*

### 3.3.5 Nonparticipant survey

#### *Sampling Approach*

To develop a nonparticipant survey sample, we first stratified the customer database by segment (e.g., petroleum, food and beverage processing, manufacturing, etc.) We checked with the C/I mass markets segment manager and the Customer Communications department, but we could not find a documented list of segments. However, we developed a list of segments through discussions with an SoCal Gas segment advisor and Customer Communications. SoCal Gas staff interviewed also did not have a document classifying facilities based on North American Industry Classification System (NAICS) codes (i.e., which



segment a facility should fall under based on its NAICS), so we assigned segments with a census website: <http://www.census.gov/epcd/naics02/naicod02.htm> We sampled more heavily in segments responsible for a high energy use.

We then stratified each segment by energy use, and drew a sample with the highest therm users. It sometimes was not possible to survey as many customers as we targeted in a segment, because segment included a few, very large customers (e.g., petroleum). Also, we only included customers listed with a phone number in the database.

### ***Categorization of Survey Responses (Final Dispositions)***

We surveyed 82 SoCal Gas non-residential customers through this nonparticipant survey effort. As with the participant group, the number of completes includes respondents that completed the majority of the survey, in this case interest in SoCal Gas programs (n=7).

The survey fielded October 18, 2011 through November 4, 2011. As shown in Figure 4, the overall cooperation rate was 22 percent and response rate was 19 percent. Note that the sample was adjusted for bad telephone numbers and reported participation in SoCal Gas programs prior to calculating the response and cooperation rates.

The tables below do not include PREPS or SaveGas survey responses. Research into Action conducted surveys with 42 PREPS nonparticipants (schools and universities) and 34 SaveGas nonparticipants (hotels and motels).

<b>Sample Disposition</b>	<b>Number of Sample Points</b>
<b>Starting sample size</b>	<b>481</b>
Temporarily disconnected	6
Fax/data line	19
Residential number	30
Number not in service	44
Already participating in program	8
Ineligible - other	1
<b>Adjusted Sample Size</b>	<b>382</b>
Hard Refusal	48
Soft Refusal	14

<b>Sample Disposition</b>	<b>Number of Sample Points</b>
Immediate Hang-up	1
Incompletes (partial interviews not retained in the data)	3
Language barrier/non-English	60
Can't find the right person to talk to	14
Not SoCal Gas customer (self-report)	5
Called out - 20 attempts	25
Active	130
<b>Completed &amp; Partial Surveys</b>	<b>82</b>
Completed surveys	75
Partials - retained in the data	7
<b>Cooperation Rate</b>	<b>21.5%</b>
<b>Response Rate</b>	<b>18.5%</b>

*Figure 4 – Response to Customer Nonparticipant Survey*

We reviewed the sampled population with the surveyed population to ensure that the resulting data reflected the population from which the sample was drawn (the sample frame). One means to do that is to review the distribution of customers by the NAICS codes. The assessment was primarily based on NAICS codes, although did review energy usage as well to ensure the survey included high energy users.

The survey completes are fairly reflective of the sample frame. Figure XX provides a summary of percentage of customers within NAICS codes and within the sample frame which illustrates the types of facilities targeted and reached. Note that due to the expansive nature of the NAICS codes we provide the analysis at the highest, two-digit level. There are many subgroups that fall within these NAICS industry classifications.

<b>NAICS Industry Classification</b>	<b>% Representation in Sample Frame</b>	<b>% Representation in Survey Completes</b>
Accommodations and food services	13%	10%
Administration and support and waste management and remediation services	0%	0%
Agriculture, forestry, fishing, hunting	9%	12%
Arts, entertainment, and recreation	2%	2%



NAICS Industry Classification	% Representation in Sample Frame	% Representation in Survey Completes
Construction	1%	0%
Educational services	0%	0%
Finance and insurance	0%	0%
Health care and social assistance	0%	0%
Information	0%	0%
Manufacturing	42%	48%
Mining, quarrying, and oil and gas extraction	0%	0%
Other services except public administration	9%	6%
Professional, technical, and scientific services	0%	0%
Public administration	0%	0%
Real estate and rental and leasing	14%	13%
Retail trade	8%	6%
Transportation and warehousing	0%	0%
Utilities	2%	2%
Wholesale trade	0%	0%

*Figure 5 – Characteristics of Nonparticipant Sample Frame and Completes by NAICS Classification*

## **4. ACCOUNT EXECUTIVE FORUM GUIDES**

---

This chapter presents the request for the account executive forum, and the interview guide that was used.

### ♦ Introduction

For Sempra nonresidential process study, the HMG team is studying the facilitation between the energy efficiency programs and the utility account executives. As part of this effort, the study team proposes holding an account executive forum for each utility to gather insight, feedback, and recommendations. The account executive forum will be facilitated by two HMG team members, Laura Schauer (TetraTech) and Marian Goebes (HMG). Below are specific requests for the forum. Please let us know if you have any further questions. We look forward to your response in organizing the forums.

- ♦ To be held on September 26<sup>th</sup> – 27<sup>h</sup> or September 26<sup>th</sup> – 27<sup>h</sup>, with the first day at one Sempra utility and the second day at the second Sempra utility
- ♦ Ideally, the first day forum will be held in the afternoon (1 – 3 pm) of the first day, and morning (9:30 – 11:30 am) of the second day
- ♦ The forum will be on-site at each utility, in a reserved conference room.
- ♦ The room should be set up in conference table style (one large table with attendees sitting around the table)
- ♦ Ideally, 8-10 account executives attending in each forum. We would like a representative from each division. For SDG&E, we request an account executive representing each business type. For SoCalGas, we request an account executive representing each account executive territory.

### 4.1.1 Interview Guide

#### *General Questions*

Thank you for taking your time to be with us, before, we kick off, could you please introduce yourself and your role with IOU.

#### **[introduce ourselves and process evaluation]**

**[introduce format]** We have an interview guide for this forum. We'll refer to this guide throughout; and will try to focus on key substantive errors we're assessing in our evaluation such as marketing, customer feedback, communications, application processes, etc. However, we want this to be an open dialogue where we capture information that is important to you. So please don't hesitate to bring up other issues that we may not raise.

**(Probing questions across:** What sector of customers do you primarily work with? Are there any energy efficiency programs where you have more experience than others)

#### **Marketing questions**

How do you typically educate customers about the EE programs available to them? (probe for materials use, frequency of training, etc.)

Are customers typically aware of the programs that are available from SCG / SDGE before you speak with them?

In your experience, how effective are the marketing materials provided by the programs? Which programs' materials are working well? Which could use the most improvement?

How do you target customers? (probe for savings potential – for both elec and gas at SDGE).

Do you coordinate with the segment advisors and, if so, how?

#### **Customer feedback**

Why do some customers that would benefit from a resource-based program decline to participate? For an audit type program?

What are the barriers to increase program participation?

#### ◆ **Database tracking**

How do you use the program database (CRM)?

What customer information do you track outside of CRM?

What training have you received on using CRM?



How do you think the program database could be improved?

### **Benchmarking**

What has been your experience with benchmarking?

What affect does the benchmarking requirement have on participation? (probe for any impediments, delays, or increase in participation).

Who generally uses the benchmarking tool (e.g., AE, customer, someone else – specify)?  
If not the customer, why not?

Why do some customers decline benchmarking?

Are your customers using the benchmarking results? (probe for how they're using them, how often, etc. )

How could the benchmarking results be made more useful to customers?

### **Rebates / application process**

How involved are you in helping your customers complete the application forms or receive rebates?

Are there any programs where the process is particularly difficult of them, or you have to help more? Any where it's a fairly easy process?

How can Sempra make it easier for customers to apply for rebates?

### ◆ **Audit integration questions**

In your experience, what are the main benefits customers receive from participating in an audit-type program (e.g., RCx, HEEP, LEEP)?

After a customer completes the study/audit, does anyone follow-up with them? Who is this and what is the process?

Do you receive any notification that the audit has been completed (either by program staff or 3P)?

(If follow-up) Do you need to explain any of the study/audit findings? Do you set any time table for completing the recommendations of the study/audit?

What have you found to be the biggest barriers to customers moving from an audit type program to a resource-based program?

### ◆ **Third-party integration**

How do you interact with third party programs? Is the process any different than how you operate with your internal program managers?

In what ways, if any, do you promote third-party programs to your customers?

Have you received enough information from third-party firms to promote the programs they are managing?

What types of issues do customers contact you with regarding third-party managed programs?

- ◆ **Organization and internal coordination**

Do you see any gaps in communication or problems with integration with other SDGE / SCG staff (e.g., program managers, marketing department, sector advisors)? If so, what are these?

## **5. INTERVIEW GUIDE FOR SEGMENT ADVISOR FORUMS**

---

This chapter presents the request for the segment advisor forum, and the interview guide that was used.

## Introduction

Laura Schauer (Tetra Tech) and Marian Goebes (HMG) will interview segment advisors for **1 hour** at each utility after the Account Executive forums. The questions below will be used as an interview guide.

Due to the short time frame and multiple segment advisors (4-6), we must minimize the number of questions we ask.

## General Questions

### ♦ Organizational

What are your roles (which sectors do you advise)?

How long have you been in your role?

### ♦ Marketing

What marketing or outreach activities have you undertaken for your market segment? Which have you found most effective?

Are there marketing initiatives you'd like to undertake but lack the resources (e.g., no time, budget, support)? What are they and what are the barriers to completing them?

From your perspective, are there any specific groups within your market that are being underserved by the programs?

How do you target sectors?

What are your goals? What do they have to meet, what do they have to do?

Is there a process for customer complaints and inquiries on programs?

### ♦ Coordination

What are your interactions with other parties – inside and outside of your utility (e.g., AE interaction, vendor interaction)? What challenges (if any) do you face with coordination?

How do you interact with and report marketing activity to the PMs? Could this be improved? Do you need more or different info from program managers?

Do you see yourselves as the "primary" marketing channel, or do you rely on others? Are the marketing responsibilities well defined, and has everyone bought into their roles? Are project leads pursued methodically?

For underperforming programs how do you coordinate with program staff (PM, Implementer, AEs) to improve outreach activities?

## SoCalGas Participant Survey Responses - Frequencies by Question

This file provides participant responses for the SoCalGas Nonresidential Process Evaluation. This survey was conducted October 2011 - November 2011 by Tetra Tech, Inc., and the overall study was led by the Heschong Mahone Group, Inc.

Data collection resources, including the survey code books, survey and sampling methodologies, and sample dispositions, are provided in Attachment 3A. **Readers are strongly encouraged to review the survey code book in conjunction with review of the frequency tables to understand the full questions and survey skip logic.** Analysis of the customer surveys are included in the final report volumes, including Main Report, Attachment 1 - Portfolio-level Evaluations, and Attachment 2 - Program Specific Evaluations. Customer survey frequency tables for select 3P programs are provided separately.

Note that some for some questions, respondents could provide more than one response. Consequently, the total number of responses may exceed the n value, and the total percentages of responses may exceed 100%, for some questions.

Are you the best person to ask these program-specific questions? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Not asked, program / interviewer error / added question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Yes, I am	97.4%	.0%	.0%	98.2%	92.9%	.0%	97.4%
Yes, but there are others	2.6%	.0%	.0%	.6%	3.6%	.0%	1.3%
No, I am not	.0%	.0%	.0%	1.2%	3.6%	.0%	1.3%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempre Non-residential Process Evaluation Survey (Participant), Question SC1.

Main business activity (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Industrial Process / Manufacturing / Assembly	74.4%	.0%	.0%	17.4%	50.0%	.0%	30.8%
Restaurant	.0%	.0%	.0%	25.7%	.0%	.0%	18.4%
Other	5.1%	.0%	.0%	14.4%	.0%	.0%	11.1%
Laundry/Cleaners	2.6%	.0%	.0%	9.0%	3.6%	.0%	7.3%
School	.0%	.0%	.0%	7.8%	3.6%	.0%	6.0%
Greenhouse	5.1%	.0%	.0%	5.4%	.0%	.0%	4.7%
Hotel or Motel	.0%	.0%	.0%	6.0%	3.6%	.0%	4.7%
Health Care (other than Hospital)	2.6%	.0%	.0%	3.0%	3.6%	.0%	3.0%
Hospital	2.6%	.0%	.0%	2.4%	3.6%	.0%	2.6%
College / University	.0%	.0%	.0%	1.8%	10.7%	.0%	2.6%
Retail (non-food)	2.6%	.0%	.0%	2.4%	.0%	.0%	2.1%
Program skip	.0%	.0%	.0%	.0%	17.9%	.0%	2.1%
Community Service / Church / Temple / Municipal	.0%	.0%	.0%	1.8%	3.6%	.0%	1.7%
Office	2.6%	.0%	.0%	1.8%	.0%	.0%	1.7%
Condo / Apartment	.0%	.0%	.0%	.6%	.0%	.0%	.4%
Warehouse	2.6%	.0%	.0%	.0%	.0%	.0%	.4%
Grocery Store	.0%	.0%	.0%	.6%	.0%	.0%	.4%
Construction	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question a1.

Type of retail business facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	97.6%	.0%	.0%	97.4%	97.9%
Not asked, program / interviewer error / added question	.0%	.0%	1.8%	.0%	.0%	2.6%	1.7%
Stand-alone building	.0%	.0%	.6%	.0%	.0%	.0%	.4%
Something else	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Strip mall	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Enclosed mall	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question a1a.



Number of students that can be seated in all classrooms of education facilities (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Maximum capacity of school building	.	.	.	1577.2	1000.0	.	1519.5
	n=0	n=0	n=0	n=9	n=1	n=0	n=10

Sempra Non-residential Process Evaluation Survey (Participant), Question a1b.

Number of students that can be seated in all classrooms of education facilities (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
560	.0%	.0%	.0%	11.1%	.0%	.0%	10.0%
685	.0%	.0%	.0%	11.1%	.0%	.0%	10.0%
700	.0%	.0%	.0%	22.2%	.0%	.0%	20.0%
850	.0%	.0%	.0%	11.1%	.0%	.0%	10.0%
900	.0%	.0%	.0%	11.1%	.0%	.0%	10.0%
1000	.0%	.0%	.0%	.0%	100.0%	.0%	10.0%
3000	.0%	.0%	.0%	11.1%	.0%	.0%	10.0%
3100	.0%	.0%	.0%	11.1%	.0%	.0%	10.0%
3700	.0%	.0%	.0%	11.1%	.0%	.0%	10.0%
Total	n=0	n=0	n=0	n=9	n=1	n=0	n=10

Sempra Non-residential Process Evaluation Survey (Participant), Question a1b.

Type of health care facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	96.4%	97.0%	.0%	.0%	97.4%	97.0%
Inpatient	.0%	.0%	2.4%	.0%	.0%	2.6%	2.1%
Both	.0%	.0%	.6%	.0%	.0%	.0%	.4%
Not asked, program / interviewer error / added question	.0%	3.6%	.0%	.0%	.0%	.0%	.4%
Outpatient	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question a1c.

Type of hospital facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	96.4%	97.6%	.0%	.0%	97.4%	97.4%
Both	.0%	3.6%	1.8%	.0%	.0%	.0%	1.7%
Inpatient	.0%	.0%	.6%	.0%	.0%	2.6%	.9%
Outpatient	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, program / interviewer error / added question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question a1d.

Number of occupant rooms in hotel/motel facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Number of quest rooms in hotel	.	.	.	73.2	195.0	.	84.3
	n=0	n=0	n=0	n=10	n=1	n=0	n=11

Sempra Non-residential Process Evaluation Survey (Participant), Question a1e.

Number of occupant rooms in hotel/motel facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
6	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
28	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
31	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
32	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
70	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
72	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
92	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
110	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
131	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
160	.0%	.0%	.0%	10.0%	.0%	.0%	9.1%
195	.0%	.0%	.0%	.0%	100.0%	.0%	9.1%
Total	n=0	n=0	n=0	n=10	n=1	n=0	n=11

Sempra Non-residential Process Evaluation Survey (Participant), Question a1e.

Total seating capacity of communal/worship areas (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Maximum capacity of communal area(s)	.	.	.	1642.0	.	.	1642.0
	n=0	n=0	n=0	n=2	n=0	n=0	n=2

Sempra Non-residential Process Evaluation Survey (Participant), Question a1f.

Total seating capacity of communal/worship areas (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
304	.0%	.0%	.0%	50.0%	.0%	.0%	50.0%
2980	.0%	.0%	.0%	50.0%	.0%	.0%	50.0%
Total	n=0	n=0	n=0	n=2	n=0	n=0	n=2

Sempra Non-residential Process Evaluation Survey (Participant), Question a1f.

Type of equipment that uses the most electricity at facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	100.0%	.0%	.0%	100.0%	100.0%
*Office equipment (computers, servers, copiers)	.0%	.0%	.0%	.0%	.0%	.0%	.0%
*Refrigerators / chillers / coolers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Other	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Laundry Equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Food Service Equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
HVAC	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Lighting	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Drives	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Motors and Pumps	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b1a.

Confident in answer? Type of equipment that uses the most electricity at facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	100.0%	100.0%	.0%	100.0%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b1aconf.

Type of equipment that uses the second most electricity at facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	100.0%	.0%	.0%	100.0%	100.0%
*Office equipment (computers, servers, copiers)	.0%	.0%	.0%	.0%	.0%	.0%	.0%
*Refrigerators / chillers / coolers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Other	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Laundry Equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Food Service Equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
HVAC	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Lighting	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Drives	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Motors and Pumps	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b1b.



Confident in answer? Type of equipment that uses the second most electricity at facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	100.0%	100.0%	.0%	100.0%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b1bconf.

Type of equipment that uses the most natural gas at facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Boilers	.0%	32.1%	27.5%	.0%	.0%	66.7%	34.6%
Food Service Equipment	.0%	3.6%	38.3%	.0%	.0%	2.6%	28.2%
Other	.0%	28.6%	7.2%	.0%	.0%	17.9%	11.5%
HVAC and Furnaces	.0%	14.3%	10.2%	.0%	.0%	7.7%	10.3%
Laundry Equipment	.0%	14.3%	6.6%	.0%	.0%	2.6%	6.8%
Water heater	.0%	.0%	8.4%	.0%	.0%	.0%	6.0%
Don't know	.0%	.0%	1.8%	.0%	.0%	2.6%	1.7%
Pumps	.0%	7.1%	.0%	.0%	.0%	.0%	.9%
Doesn't use natural gas	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b2a.

Confident in answer? Type of equipment that uses the most natural gas at facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	2.6%	.0%	.0%	1.8%	.0%	.0%	1.7%
Yes	92.3%	.0%	.0%	90.4%	100.0%	.0%	91.9%
No	5.1%	.0%	.0%	7.8%	.0%	.0%	6.4%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b2aconf.

Type of equipment that uses the second most natural gas at facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Nothing else uses natural gas	.0%	32.1%	15.6%	.0%	.0%	33.3%	20.5%
Water heater	.0%	7.1%	19.8%	.0%	.0%	17.9%	17.9%
HVAC and Furnaces	.0%	17.9%	15.0%	.0%	.0%	15.4%	15.4%
Food Service Equipment	.0%	.0%	18.0%	.0%	.0%	7.7%	14.1%
Other	.0%	28.6%	7.2%	.0%	.0%	17.9%	11.5%
Boilers	.0%	3.6%	9.0%	.0%	.0%	2.6%	7.3%
Laundry Equipment	.0%	3.6%	6.6%	.0%	.0%	2.6%	5.6%
Don't know	.0%	3.6%	7.2%	.0%	.0%	.0%	5.6%
Program skip	.0%	.0%	1.8%	.0%	.0%	2.6%	1.7%
Pumps	.0%	3.6%	.0%	.0%	.0%	.0%	.4%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b2b.

Confident in answer? Type of equipment that uses the second most natural gas at facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	35.9%	.0%	.0%	24.6%	35.7%	.0%	27.8%
Yes	53.8%	.0%	.0%	64.7%	60.7%	.0%	62.4%
No	10.3%	.0%	.0%	10.8%	3.6%	.0%	9.8%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b2bconf.

Has your organization developed a specific policy for the selection of energy-efficient equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	12.8%	.0%	.0%	6.6%	3.6%	.0%	7.3%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Yes	33.3%	.0%	.0%	38.3%	46.4%	.0%	38.5%
No	53.8%	.0%	.0%	55.1%	50.0%	.0%	54.3%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b3.

Decision-maker for utility purchases or upgrades (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Proprietor/Owner makes decisions on equipment purchases or upgrades	.0%	17.9%	38.9%	.0%	.0%	7.7%	31.2%
Other person makes decisions on equipment purchases or upgrades	.0%	28.6%	22.2%	.0%	.0%	12.8%	21.4%
President/CEO/Vice President makes decisions on equipment purchases or upgrades	.0%	25.0%	10.2%	.0%	.0%	23.1%	14.1%
Facilities Manager makes decisions on equipment purchases or upgrades	.0%	10.7%	12.6%	.0%	.0%	17.9%	13.2%
Other facilities management/maintenance position makes decisions on equipment purchases or upgrades	.0%	14.3%	13.8%	.0%	.0%	10.3%	13.2%
*Respondent makes decisions on equipment purchases or upgrades	.0%	7.1%	10.8%	.0%	.0%	12.8%	10.7%
General Manager makes decisions on equipment purchases or upgrades	.0%	14.3%	8.4%	.0%	.0%	2.6%	8.1%
*Corporate office makes decisions on equipment purchases or upgrades	.0%	10.7%	6.6%	.0%	.0%	10.3%	7.7%
Other financial/administrative position makes decisions on equipment purchases or upgrades	.0%	7.1%	3.0%	.0%	.0%	7.7%	4.3%
Building Manager makes decisions on equipment purchases or upgrades	.0%	3.6%	2.4%	.0%	.0%	5.1%	3.0%
*Board/Board of directors makes decisions on equipment purchases or upgrades	.0%	3.6%	3.0%	.0%	.0%	2.6%	3.0%
Energy Manager makes decisions on equipment purchases or upgrades	.0%	7.1%	.6%	.0%	.0%	5.1%	2.1%
Chief Financial Officer makes decisions on equipment purchases or upgrades	.0%	7.1%	.0%	.0%	.0%	.0%	.9%
Don't know who makes decisions on equipment purchases or upgrades	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused B5 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b5.

Difficulties with purchasing/installing energy efficiency upgrades through utility programs (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
No difficulties with purchasing and installing energy efficiency upgrade through [IOU] programs	64.1%	.0%	.0%	79.6%	75.0%	.0%	76.5%
Other difficulties faced when purchasing equipment through [IOU] programs	23.1%	.0%	.0%	12.0%	7.1%	.0%	13.2%
Lack of funds available for investment is a difficulty faced when purchasing equipment through [IOU] programs	7.7%	.0%	.0%	4.2%	.0%	.0%	4.3%
Don't know if had any difficulties when purchasing equipment through [IOU] program	2.6%	.0%	.0%	1.8%	7.1%	.0%	2.6%
Rebate application process was demanding is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	1.2%	10.7%	.0%	2.1%
Amount of management time to oversee projects is a difficulty faced when purchasing equipment through [IOU] programs	2.6%	.0%	.0%	1.2%	.0%	.0%	1.3%
Other priorities for capital spending is a difficulty faced when purchasing equipment through [IOU] programs	2.6%	.0%	.0%	.6%	.0%	.0%	.9%
Lack of financing is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Economy is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.6%	.0%	.0%	.4%
Incremental cost for more efficient equipment too high / payback period too long is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Rebate amount not high enough is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Business hesitant to replace existing working equipment is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Upper management doesn't see the benefit of energy efficient equipment is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.0%	.0%	.0%	.0%
We lease the space is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Contractors weren't familiar with program is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused B6 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question b6.



How respondent first heard about the program (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
[IOU] account executive	.0%	60.7%	32.9%	.0%	.0%	69.2%	42.3%
Contractor/retailer/supplier/vendor	.0%	7.1%	23.4%	.0%	.0%	7.7%	18.8%
Other	.0%	7.1%	8.4%	.0%	.0%	2.6%	7.3%
[IOU] web site	.0%	3.6%	8.4%	.0%	.0%	.0%	6.4%
Don't know	.0%	14.3%	4.8%	.0%	.0%	5.1%	6.0%
Other [IOU] staff	.0%	.0%	6.6%	.0%	.0%	5.1%	5.6%
Colleague/ Peer	.0%	.0%	4.2%	.0%	.0%	.0%	3.0%
Conference/trade show	.0%	3.6%	1.8%	.0%	.0%	2.6%	2.1%
[IOU] utility email message	.0%	3.6%	1.2%	.0%	.0%	5.1%	2.1%
[IOU] mailing (hard copy)	.0%	.0%	2.4%	.0%	.0%	2.6%	2.1%
[IOU] utility bill insert	.0%	.0%	2.4%	.0%	.0%	.0%	1.7%
[IOU] call center	.0%	.0%	1.8%	.0%	.0%	.0%	1.3%
Print media ad	.0%	.0%	.6%	.0%	.0%	.0%	.4%
Television ad	.0%	.0%	.6%	.0%	.0%	.0%	.4%
From participation in another [IOU] program	.0%	.0%	.6%	.0%	.0%	.0%	.4%
Radio ad	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question c1.

How respondent prefers to receive information and updates regarding energy efficiency programs (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
[IOU] utility email message	.0%	42.9%	53.9%	.0%	.0%	56.4%	53.0%
[IOU] account executive	.0%	42.9%	12.0%	.0%	.0%	38.5%	20.1%
[IOU] mailing (hard copy)	.0%	7.1%	15.0%	.0%	.0%	2.6%	12.0%
[IOU] web site	.0%	3.6%	6.0%	.0%	.0%	.0%	4.7%
[IOU] utility bill insert	.0%	.0%	6.0%	.0%	.0%	.0%	4.3%
Other	.0%	.0%	1.8%	.0%	.0%	.0%	1.3%
Contractor/retailer/supplier/vendor	.0%	.0%	1.8%	.0%	.0%	.0%	1.3%
[IOU] call center	.0%	.0%	1.2%	.0%	.0%	2.6%	1.3%
Conference/trade show	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
Don't know	.0%	3.6%	.6%	.0%	.0%	.0%	.9%
Television ad	.0%	.0%	.6%	.0%	.0%	.0%	.4%
Radio ad	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Print media ad	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Colleague/ Peer	.0%	.0%	.0%	.0%	.0%	.0%	.0%
From participation in another [IOU] program	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Other [IOU] staff	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question c2.

Have you visited the program's website for more information? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.6%	.0%	.0%	.4%
Program skip	.0%	.0%	.0%	8.4%	3.6%	.0%	6.4%
Yes	38.5%	.0%	.0%	46.7%	32.1%	.0%	43.6%
No	61.5%	.0%	.0%	44.3%	64.3%	.0%	49.6%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question c3.

Why respondent participated in this program (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
To save money is reason for program participation	53.8%	.0%	.0%	39.5%	64.3%	.0%	44.9%
Availability of the [IOU] rebate is reason for program participation	23.1%	.0%	.0%	50.3%	21.4%	.0%	42.3%
*To save energy was reason for program participation	20.5%	.0%	.0%	19.8%	35.7%	.0%	21.8%
The equipment failed/worked poorly and needed to be replaced is reason for program participation	2.6%	.0%	.0%	15.6%	17.9%	.0%	13.7%
Participated in program for another reason	20.5%	.0%	.0%	10.2%	3.6%	.0%	11.1%
*To help environment was reason for program participation	10.3%	.0%	.0%	4.2%	10.7%	.0%	6.0%
Account executive recommended we participate	.0%	.0%	.0%	3.6%	7.1%	.0%	3.4%
Don't know why participated in program	2.6%	.0%	.0%	1.8%	3.6%	.0%	2.1%
Contractor/engineer/technical assistant recommended we participate is reason for program participation	.0%	.0%	.0%	1.8%	.0%	.0%	1.3%
Corporate practice is reason for program participation	2.6%	.0%	.0%	.6%	.0%	.0%	.9%
Past participation with [IOU] program is reason for program participation	.0%	.0%	.0%	.6%	3.6%	.0%	.9%
Refused D1 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question d1.

Person responsible for completing and submitting the application (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Respondent was responsible for completing and submitting application	64.1%	.0%	.0%	73.7%	60.7%	.0%	70.5%
Internal staff in organization was responsible for completing and submitting application	35.9%	.0%	.0%	19.2%	21.4%	.0%	22.2%
[IOU] Account Executive was responsible for completing and submitting application	12.8%	.0%	.0%	15.6%	28.6%	.0%	16.7%
Vendor or contractor was responsible for completing and submitting application	2.6%	.0%	.0%	6.6%	10.7%	.0%	6.4%
Don't know who was responsible for completing and submitting the application	7.7%	.0%	.0%	1.2%	7.1%	.0%	3.0%
Other [IOU] staff was responsible for completing and submitting application	.0%	.0%	.0%	1.8%	3.6%	.0%	1.7%
Somebody else was responsible for completing and submitting application	.0%	.0%	.0%	.6%	.0%	.0%	.4%
Refused D2A question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question d2a.

Likelihood of respondent applying for rebate if person mentioned in d2a was unable/unwilling to do so (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Likelihood of applying for rebate on own if other party wasn't able to do so	6.0	.	.	6.5	6.4	.	6.4
	n=6	n=0	n=0	n=40	n=12	n=0	n=58

Sempra Non-residential Process Evaluation Survey (Participant), Question d2b.

Likelihood of respondent applying for rebate if person mentioned in d2a was unable/unwilling to do so (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	.0%	.0%	7.5%	16.7%	.0%	8.6%
2	16.7%	.0%	.0%	2.5%	.0%	.0%	3.4%
3	16.7%	.0%	.0%	10.0%	8.3%	.0%	10.3%
4	.0%	.0%	.0%	2.5%	.0%	.0%	1.7%
5	16.7%	.0%	.0%	12.5%	8.3%	.0%	12.1%
6	16.7%	.0%	.0%	10.0%	8.3%	.0%	10.3%
7	.0%	.0%	.0%	12.5%	16.7%	.0%	12.1%
8	.0%	.0%	.0%	15.0%	8.3%	.0%	12.1%
9	.0%	.0%	.0%	7.5%	8.3%	.0%	6.9%
10	33.3%	.0%	.0%	20.0%	25.0%	.0%	22.4%
Total	n=6	n=0	n=0	n=40	n=12	n=0	n=58

Sempra Non-residential Process Evaluation Survey (Participant), Question d2b.

Was it very difficult, somewhat difficult, somewhat easy, or very easy to submit the application? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.6%	.0%	.0%	.0%	.4%
Don't know	.0%	10.7%	1.2%	.0%	.0%	7.7%	3.4%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Very difficult	.0%	3.6%	3.0%	.0%	.0%	.0%	2.6%
Somewhat difficult	.0%	14.3%	13.2%	.0%	.0%	12.8%	13.2%
Somewhat easy	.0%	42.9%	47.3%	.0%	.0%	48.7%	47.0%
Very easy	.0%	28.6%	34.7%	.0%	.0%	30.8%	33.3%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question d3.

Did you have any problems with the application process? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	5.1%	.0%	.0%	1.2%	10.7%	.0%	3.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Yes	.0%	.0%	.0%	15.0%	10.7%	.0%	12.0%
No	94.9%	.0%	.0%	83.8%	78.6%	.0%	85.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question d4.



Did you receive a rebate or incentive as part of your participation in the program? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Yes	.0%	75.0%	85.0%	.0%	.0%	.0%	69.7%
Program skip	.0%	.0%	.0%	.0%	.0%	100.0%	16.7%
Don't know	.0%	3.6%	8.4%	.0%	.0%	.0%	6.4%
No	.0%	17.9%	5.4%	.0%	.0%	.0%	6.0%
Someone else at company received rebate	.0%	.0%	.6%	.0%	.0%	.0%	.4%
Was on bill financing	.0%	3.6%	.0%	.0%	.0%	.0%	.4%
Contractor received rebate/incentive	.0%	.0%	.6%	.0%	.0%	.0%	.4%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question e0.

Were you satisfied with the amount of time it took to receive the rebate? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	1.2%	3.6%	.0%	1.3%
Program skip	100.0%	.0%	.0%	15.0%	25.0%	.0%	30.3%
Not asked, program / interviewer error / added question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Yes	.0%	.0%	.0%	72.5%	67.9%	.0%	59.8%
No	.0%	.0%	.0%	11.4%	3.6%	.0%	8.5%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question e1.

Was the rebate or incentive amount you received more, less, or about the same as you expected? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	3.0%	.0%	.0%	.0%	2.1%
Program skip	.0%	25.0%	15.0%	.0%	.0%	100.0%	30.3%
Not asked, program / interviewer error / added question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
More	.0%	3.6%	3.6%	.0%	.0%	.0%	3.0%
Less	.0%	7.1%	3.0%	.0%	.0%	.0%	3.0%
About the same	.0%	64.3%	75.4%	.0%	.0%	.0%	61.5%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempre Non-residential Process Evaluation Survey (Participant), Question e2.

Person responsible for benchmarking energy use before program participation (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
No one	.0%	17.9%	43.1%	.0%	.0%	20.5%	36.3%
Respondent	.0%	28.6%	24.6%	.0%	.0%	33.3%	26.5%
Someone else	.0%	46.4%	21.0%	.0%	.0%	28.2%	25.2%
Don't know	.0%	7.1%	11.4%	.0%	.0%	17.9%	12.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question f1.

Did you review the results of the benchmarking process? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	2.6%	.0%	.0%	3.6%	.0%	.0%	3.0%
Program skip	38.5%	.0%	.0%	54.5%	25.0%	.0%	48.3%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Yes	56.4%	.0%	.0%	26.9%	60.7%	.0%	35.9%
No	2.6%	.0%	.0%	15.0%	14.3%	.0%	12.8%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question f2.

Satisfaction with information provided through benchmarking process (scale 1-10) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the information provided by the benchmarking process	8.2	.	.	7.8	7.5	.	7.8
	n=22	n=0	n=0	n=43	n=17	n=0	n=82

Sempra Non-residential Process Evaluation Survey (Participant), Question f3.

Satisfaction with information provided through benchmarking process (scale 1-10) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	.0%	.0%	2.3%	.0%	.0%	1.2%
2	.0%	.0%	.0%	.0%	11.8%	.0%	2.4%
3	4.5%	.0%	.0%	2.3%	5.9%	.0%	3.7%
5	4.5%	.0%	.0%	9.3%	.0%	.0%	6.1%
6	4.5%	.0%	.0%	4.7%	.0%	.0%	3.7%
7	9.1%	.0%	.0%	18.6%	23.5%	.0%	17.1%
8	31.8%	.0%	.0%	23.3%	11.8%	.0%	23.2%
9	18.2%	.0%	.0%	16.3%	23.5%	.0%	18.3%
10	27.3%	.0%	.0%	23.3%	23.5%	.0%	24.4%
Total	n=22	n=0	n=0	n=43	n=17	n=0	n=82

Sempra Non-residential Process Evaluation Survey (Participant), Question f3.

Do you recall receiving this energy audit? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	5.1%	.0%	.0%	.0%	.0%	.0%	.9%
Program skip	2.6%	.0%	.0%	98.8%	100.0%	.0%	82.9%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	64.1%	.0%	.0%	.0%	.0%	.0%	10.7%
No	28.2%	.0%	.0%	.0%	.0%	.0%	4.7%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g1.

Number of hours spent as part of the audit process (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Number of hours spent with someone as part of the audit process	5.2	.	.	.	.	.	5.2
	n=23	n=0	n=0	n=0	n=0	n=0	n=23

Sempra Non-residential Process Evaluation Survey (Participant), Question g2.

Number of hours spent as part of the audit process (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	8.7%	.0%	.0%	.0%	.0%	.0%	8.7%
2	21.7%	.0%	.0%	.0%	.0%	.0%	21.7%
3	17.4%	.0%	.0%	.0%	.0%	.0%	17.4%
4	4.3%	.0%	.0%	.0%	.0%	.0%	4.3%
5	13.0%	.0%	.0%	.0%	.0%	.0%	13.0%
8	21.7%	.0%	.0%	.0%	.0%	.0%	21.7%
10	8.7%	.0%	.0%	.0%	.0%	.0%	8.7%
16	4.3%	.0%	.0%	.0%	.0%	.0%	4.3%
Total	n=23	n=0	n=0	n=0	n=0	n=0	n=23

Sempra Non-residential Process Evaluation Survey (Participant), Question g2.



Did the auditor recommend that you install or replace equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	35.9%	.0%	.0%	98.8%	100.0%	.0%	88.5%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	43.6%	.0%	.0%	.0%	.0%	.0%	7.3%
No	20.5%	.0%	.0%	.0%	.0%	.0%	3.4%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g3.

Equipment recommended through audit (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	98.8%	.0%	.0%	56.4%	91.9%
Other	.0%	.0%	.0%	.0%	.0%	25.6%	4.3%
Food service equipment	.0%	.0%	.0%	.0%	.0%	5.1%	.9%
HVAC	.0%	.0%	.0%	.0%	.0%	5.1%	.9%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
Laundry Equipment	.0%	.0%	.0%	.0%	.0%	2.6%	.4%
Lighting	.0%	.0%	.0%	.0%	.0%	2.6%	.4%
Motors and pumps	.0%	.0%	.0%	.0%	.0%	2.6%	.4%
Drives	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g4.

Confident in answer? Equipment recommended through audit (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	56.4%	.0%	.0%	98.8%	100.0%	.0%	91.9%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	43.6%	.0%	.0%	.0%	.0%	.0%	7.3%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g4conf.

Did you install any of the recommended equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	56.4%	.0%	.0%	98.8%	100.0%	.0%	91.9%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	28.2%	.0%	.0%	.0%	.0%	.0%	4.7%
No	15.4%	.0%	.0%	.0%	.0%	.0%	2.6%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g5.

Equipment installed as recommended by audit (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	98.8%	.0%	.0%	71.8%	94.4%
Other	.0%	.0%	.0%	.0%	.0%	15.4%	2.6%
Refused	.0%	.0%	.0%	.0%	.0%	7.7%	1.3%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
Laundry Equipment	.0%	.0%	.0%	.0%	.0%	2.6%	.4%
Lighting	.0%	.0%	.0%	.0%	.0%	2.6%	.4%
Food service equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
HVAC	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Drives	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Motors and pumps	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempre Non-residential Process Evaluation Survey (Participant), Question g6.

Confident in answer? Equipment installed as recommended by audit (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	79.5%	.0%	.0%	98.8%	100.0%	.0%	95.7%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	20.5%	.0%	.0%	.0%	.0%	.0%	3.4%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g6conf.

Were you planning to install some, all, or none of this equipment prior to receiving the audit? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	98.8%	.0%	.0%	71.8%	94.4%
Some	.0%	.0%	.0%	.0%	.0%	15.4%	2.6%
None	.0%	.0%	.0%	.0%	.0%	10.3%	1.7%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
All	.0%	.0%	.0%	.0%	.0%	2.6%	.4%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g7.

As a result of participating in the audit program, did you receive any information regarding other utility programs? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	5.1%	.0%	.0%	.0%	.0%	.0%	.9%
Program skip	35.9%	.0%	.0%	98.8%	100.0%	.0%	88.5%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	35.9%	.0%	.0%	.0%	.0%	.0%	6.0%
No	23.1%	.0%	.0%	.0%	.0%	.0%	3.8%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g8a.



Did you participate in any of the utility programs suggested as part of the audit program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	64.1%	.0%	.0%	98.8%	100.0%	.0%	93.2%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	7.7%	.0%	.0%	.0%	.0%	.0%	1.3%
No	28.2%	.0%	.0%	.0%	.0%	.0%	4.7%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g8b.

Were you planning on participating in this program before the audit was conducted? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	92.3%	.0%	.0%	98.8%	100.0%	.0%	97.9%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	7.7%	.0%	.0%	.0%	.0%	.0%	1.3%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g10.

Equipment installed as a result of the audit without assistance from utility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Have not installed other recommended equipment without assistance as result of the audit	66.7%	.0%	.0%	.0%	.0%	.0%	66.7%
Motors and Pumps have been installed without assistance as result of the audit	33.3%	.0%	.0%	.0%	.0%	.0%	33.3%
Drives have been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Lighting has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
HVAC equipment has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Food Service Equipment has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Laundry Equipment has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Other equipment has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know if installed any equipment on own without assistance as a result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused G11 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=3	n=0	n=0	n=0	n=0	n=0	n=3

Sempre Non-residential Process Evaluation Survey (Participant), Question g11.

Confident in answer? Equipment installed as a result of the audit without assistance from utility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	92.3%	.0%	.0%	98.8%	100.0%	.0%	97.9%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	7.7%	.0%	.0%	.0%	.0%	.0%	1.3%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question g11conf.

Satisfaction with the type of information provided through audit (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the type of information provided by the audit	7.7	.	.	.	.	.	7.7
	n=25	n=0	n=0	n=0	n=0	n=0	n=25

Sempra Non-residential Process Evaluation Survey (Participant), Question g12a.

Satisfaction with the type of information provided through audit (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	4.0%	.0%	.0%	.0%	.0%	.0%	4.0%
3	4.0%	.0%	.0%	.0%	.0%	.0%	4.0%
5	4.0%	.0%	.0%	.0%	.0%	.0%	4.0%
6	8.0%	.0%	.0%	.0%	.0%	.0%	8.0%
7	12.0%	.0%	.0%	.0%	.0%	.0%	12.0%
8	24.0%	.0%	.0%	.0%	.0%	.0%	24.0%
9	28.0%	.0%	.0%	.0%	.0%	.0%	28.0%
10	16.0%	.0%	.0%	.0%	.0%	.0%	16.0%
Total	n=25	n=0	n=0	n=0	n=0	n=0	n=25

Sempra Non-residential Process Evaluation Survey (Participant), Question g12a.

Satisfaction with the applicability of the information provided through audit (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the applicability of the information provided by the audit	8.0	.	.	.	.	.	8.0
	n=25	n=0	n=0	n=0	n=0	n=0	n=25

Sempra Non-residential Process Evaluation Survey (Participant), Question g12b.

Satisfaction with the applicability of the information provided through audit (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
5	4.0%	.0%	.0%	.0%	.0%	.0%	4.0%
6	20.0%	.0%	.0%	.0%	.0%	.0%	20.0%
7	8.0%	.0%	.0%	.0%	.0%	.0%	8.0%
8	28.0%	.0%	.0%	.0%	.0%	.0%	28.0%
9	20.0%	.0%	.0%	.0%	.0%	.0%	20.0%
10	20.0%	.0%	.0%	.0%	.0%	.0%	20.0%
Total	n=25	n=0	n=0	n=0	n=0	n=0	n=25

Sempra Non-residential Process Evaluation Survey (Participant), Question g12b.

Satisfaction with the knowledge of the auditor (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the knowledge of the auditor	8.4	.	.	.	.	.	8.4
	n=25	n=0	n=0	n=0	n=0	n=0	n=25

Sempra Non-residential Process Evaluation Survey (Participant), Question g12c.

Satisfaction with the knowledge of the auditor (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
3	4.0%	.0%	.0%	.0%	.0%	.0%	4.0%
5	4.0%	.0%	.0%	.0%	.0%	.0%	4.0%
6	8.0%	.0%	.0%	.0%	.0%	.0%	8.0%
7	4.0%	.0%	.0%	.0%	.0%	.0%	4.0%
8	24.0%	.0%	.0%	.0%	.0%	.0%	24.0%
9	20.0%	.0%	.0%	.0%	.0%	.0%	20.0%
10	36.0%	.0%	.0%	.0%	.0%	.0%	36.0%
Total	n=25	n=0	n=0	n=0	n=0	n=0	n=25

Sempra Non-residential Process Evaluation Survey (Participant), Question g12c.

Did you receive a tune-up/incentive for installing HVAC equipment through the Premium Efficiency Cooling Program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.8%	100.0%	.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h1.



Who primarily did you work with through the Premium Efficiency Cooling Program? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	98.8%	.0%	.0%	100.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
Other	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Manufacturers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
HVAC contractors	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Conservation Services Group (CSG) staff	.0%	.0%	.0%	.0%	.0%	.0%	.0%
SDG&E program staff	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h3.

Did the contractor provide a written report of services performed? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.8%	100.0%	.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h5.

Did the contractor discuss the report or services performed with you or your staff? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.8%	100.0%	.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h6.

Did you conduct routine maintenance or tune-ups on your HVAC system prior to participating in the program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.8%	100.0%	.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h11.

Did your participation in the program influence you to change your routine maintenance of your HVAC equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.8%	100.0%	.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h13.

Changes made as result of participation in Premium Cooling Efficiency Program (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	98.8%	.0%	.0%	100.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
Other	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Now will do/currently do more thoroughly	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Now will do/currently do more frequently	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h14.

Did the equipment replace another piece of equipment, or was it an addition to your facility? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	98.8%	.0%	.0%	100.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
New addition	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Replaced equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h15.

Condition of the replaced equipment (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	98.8%	.0%	.0%	100.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
Other	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Failed equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Functional equipment that needed significant repairs	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Functional, and efficient, equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Functional, but inefficient equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h16.



Percentage of overall project cost covered by program (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Percent of project rebate paid for	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h17.

Did you install controllers as part of your participation in the program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.8%	100.0%	.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h18a.

Think about the equipment for which controllers were installed. What statement is most correct? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	98.8%	.0%	.0%	100.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
None of the equipment previously had controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Some equipment had controllers; the program replaced some controllers and added controllers to equipment that had none	.0%	.0%	.0%	.0%	.0%	.0%	.0%
All equipment previously had controllers; the program replaced those controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h18b.

Benefits experienced as result of the controllers (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Increased energy savings since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Increased comfort since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Decreased noise for customers staying in hotel since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Improved cooling performance since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Have noticed other benefits since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know if experienced any benefits since controller installation	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused H19 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Haven't noticed any benefits so far since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h19.

Drawbacks experienced as result of the controllers (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
No drawbacks so far from installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Rooms not as comfortable since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
More difficult to manage the temperature since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Customer complaints since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Have had repair issues since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Experienced other drawbacks since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know if experienced any drawbacks since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused H2O question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h20.

What respondent would have done differently if program had not been available (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Would have done nothing differently if program wasn't available	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Would not have completed the work or installed the equipment if program wasn't available	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Installed a lower efficiency equipment / completed a lesser tune-up if program wasn't available	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Repaired rather than replacing the equipment if program wasn't available	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Installed less equipment / completed tune-ups on fewer systems if program wasn't available	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know if anything would have been done differently without program	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused H21 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Would have done something else if program wasn't available	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h21.

Did you receive any other financing to fund the project? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.8%	100.0%	.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question h22.

Level of influence of rebate received on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence of the rebate received had in decision to [complete tune-up/install equipment]	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h24a.



Influence of information provided by contractor on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence of the information provided by the contractor had in decision to [complete tune-up/install equipment]	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h24b.

Influence of program marketing materials on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence of the marketing materials received from the program had in decision to [complete tune-up/install equipment]	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h24c.

Influence of other financing received on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence of the other financing received had in decision to [complete tune-up/install equipment]	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h24d.

Influence of company standard practices on decision to install equipment/complete tune-up (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence the company standard practices had in the decision to [complete tune-up/install equipment]	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h24e.

Mean response: Level of satisfaction with rebate calculation process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the incentive calculation process used to determine amount of assistance	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question i1.

Did your energy efficiency project for this program target electricity savings, gas savings, or both? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	98.8%	.0%	.0%	100.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
Both	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Gas	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Electricity	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question i3.

Did the planned energy efficiency project differ from what was actually installed? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.8%	100.0%	.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question i4a.

How did your installed savings compare with the targeted savings in your application? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	98.8%	.0%	.0%	100.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
Much less	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Slightly less	.0%	.0%	.0%	.0%	.0%	.0%	.0%
About the same	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Slightly greater	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Much greater	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question i6.



Did you change your plans in order to participate in the [IOU] program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.8%	100.0%	.0%	99.1%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question i10.

Level of satisfaction with custom rebate calculation process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level with the customized rebate calculation process	.	.	.	.	8.6	.	8.6
	n=0	n=0	n=0	n=0	n=26	n=0	n=26

Sempra Non-residential Process Evaluation Survey (Participant), Question j1.

Level of satisfaction with custom rebate calculation process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
5	.0%	.0%	.0%	.0%	7.7%	.0%	7.7%
6	.0%	.0%	.0%	.0%	7.7%	.0%	7.7%
7	.0%	.0%	.0%	.0%	3.8%	.0%	3.8%
8	.0%	.0%	.0%	.0%	23.1%	.0%	23.1%
9	.0%	.0%	.0%	.0%	15.4%	.0%	15.4%
10	.0%	.0%	.0%	.0%	42.3%	.0%	42.3%
Total	n=0	n=0	n=0	n=0	n=26	n=0	n=26

Sempra Non-residential Process Evaluation Survey (Participant), Question j1.

Without the program's assistance, when would you have undertaken the project, if at all? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	7.1%	.0%	.0%	.0%	.0%	.9%
Program skip	.0%	3.6%	98.8%	.0%	.0%	100.0%	87.6%
Not asked, respondent dropped out of survey	.0%	.0%	1.2%	.0%	.0%	.0%	.9%
About the same time	.0%	17.9%	.0%	.0%	.0%	.0%	2.1%
1 year later or less	.0%	10.7%	.0%	.0%	.0%	.0%	1.3%
More than 1 year later	.0%	46.4%	.0%	.0%	.0%	.0%	5.6%
Never	.0%	14.3%	.0%	.0%	.0%	.0%	1.7%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question j3.

Confirmation of measure installed (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.6%	.0%	.0%	.4%
Program skip	100.0%	.0%	.0%	1.2%	100.0%	.0%	29.5%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.8%	.0%	.0%	1.3%
Yes	.0%	.0%	.0%	93.4%	.0%	.0%	66.7%
No	.0%	.0%	.0%	3.0%	.0%	.0%	2.1%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question k1a.

Likelihood of installing the equipment without rebate (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Likelihood of installing the equipment without the rebate	.	.	.	7.5	.	.	7.5
	n=0	n=0	n=0	n=159	n=0	n=0	n=159

Sempra Non-residential Process Evaluation Survey (Participant), Question k2.

Likelihood of installing the equipment without rebate (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	.0%	.0%	5.7%	.0%	.0%	5.7%
2	.0%	.0%	.0%	2.5%	.0%	.0%	2.5%
3	.0%	.0%	.0%	4.4%	.0%	.0%	4.4%
4	.0%	.0%	.0%	1.9%	.0%	.0%	1.9%
5	.0%	.0%	.0%	12.6%	.0%	.0%	12.6%
6	.0%	.0%	.0%	5.0%	.0%	.0%	5.0%
7	.0%	.0%	.0%	6.9%	.0%	.0%	6.9%
8	.0%	.0%	.0%	11.9%	.0%	.0%	11.9%
9	.0%	.0%	.0%	6.9%	.0%	.0%	6.9%
10	.0%	.0%	.0%	42.1%	.0%	.0%	42.1%
Total	n=0	n=0	n=0	n=159	n=0	n=0	n=159

Sempra Non-residential Process Evaluation Survey (Participant), Question k2.

Equipment respondent might install if participating in program again (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Food service equipment might be installed if participated in program again	.0%	.0%	.0%	38.9%	.0%	.0%	38.9%
HVAC equipment might be installed if participated in program again	.0%	.0%	.0%	37.0%	.0%	.0%	37.0%
Water heating equipment might be installed if participated in program again	.0%	.0%	.0%	34.0%	.0%	.0%	34.0%
Lighting might be installed if participated in program again	.0%	.0%	.0%	28.4%	.0%	.0%	28.4%
Refrigeration equipment might be installed if participated in program again	.0%	.0%	.0%	25.3%	.0%	.0%	25.3%
Motors and/or pumps might be installed if participated in program again	.0%	.0%	.0%	19.8%	.0%	.0%	19.8%
Laundry equipment might be installed if participated in program again	.0%	.0%	.0%	16.0%	.0%	.0%	16.0%
Drives might be installed if participated in program again	.0%	.0%	.0%	14.2%	.0%	.0%	14.2%
Don't know what other equipment might be installed through program	.0%	.0%	.0%	13.0%	.0%	.0%	13.0%
Other process-related equipment might be installed if participated in program again	.0%	.0%	.0%	9.3%	.0%	.0%	9.3%
*None/nothing needs replacing	.0%	.0%	.0%	3.1%	.0%	.0%	3.1%
Refused K3 question	.0%	.0%	.0%	.6%	.0%	.0%	.6%
Total	n=0	n=0	n=0	n=162	n=0	n=0	n=162

Sempre Non-residential Process Evaluation Survey (Participant), Question k3.

Are you interested in any other energy efficient equipment for your business that is currently not offered through the program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	16.8%	.0%	.0%	12.0%
Program skip	100.0%	.0%	.0%	1.2%	100.0%	.0%	29.5%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.8%	.0%	.0%	1.3%
Yes	.0%	.0%	.0%	9.6%	.0%	.0%	6.8%
No	.0%	.0%	.0%	70.7%	.0%	.0%	50.4%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question k4.

Did more than one SDG&E representative contact you about installing free energy efficiency equipment at your business? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.2%	100.0%	.0%	98.7%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.8%	.0%	.0%	1.3%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question I1.



Did you receive any follow up from the SDG&E representative who installed the equipment at your business? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.2%	100.0%	.0%	98.7%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.8%	.0%	.0%	1.3%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question I3.

Did the SDG&E representative tell you about other SDG&E programs? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.2%	100.0%	.0%	98.7%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.8%	.0%	.0%	1.3%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question I4.

Has anyone else besides SDG&E contacted you about installing free energy efficiency equipment at your business? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.2%	100.0%	.0%	98.7%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.8%	.0%	.0%	1.3%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question I5.

Have you participated in any other SDG&E programs besides the Direct Install program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	100.0%	.0%	.0%	98.2%	100.0%	.0%	98.7%
Not asked, respondent dropped out of survey	.0%	.0%	.0%	1.8%	.0%	.0%	1.3%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question I7.

As part of the program, did someone come to inspect the energy efficient equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	12.0%	14.3%	.0%	10.3%
Program skip	94.9%	.0%	.0%	.0%	.0%	.0%	15.8%
Not asked, respondent dropped out of survey	5.1%	.0%	.0%	1.8%	.0%	.0%	2.1%
Yes	.0%	.0%	.0%	67.1%	78.6%	.0%	57.3%
No	.0%	.0%	.0%	19.2%	7.1%	.0%	14.5%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question m1.

Level of satisfaction with inspection process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level with the inspection process	.	.	.	9.4	9.1	.	9.3
	n=0	n=0	n=0	n=108	n=22	n=0	n=130

Sempra Non-residential Process Evaluation Survey (Participant), Question m2.

Level of satisfaction with inspection process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
4	.0%	.0%	.0%	.9%	.0%	.0%	.8%
5	.0%	.0%	.0%	1.9%	.0%	.0%	1.5%
7	.0%	.0%	.0%	2.8%	4.5%	.0%	3.1%
8	.0%	.0%	.0%	13.0%	27.3%	.0%	15.4%
9	.0%	.0%	.0%	13.9%	22.7%	.0%	15.4%
10	.0%	.0%	.0%	67.6%	45.5%	.0%	63.8%
Total	n=0	n=0	n=0	n=108	n=22	n=0	n=130

Sempra Non-residential Process Evaluation Survey (Participant), Question m2.

Satisfaction with program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level with the program	8.2	.	.	8.7	8.9	.	8.7
	n=36	n=0	n=0	n=163	n=27	n=0	n=226

Sempra Non-residential Process Evaluation Survey (Participant), Question m4.

Satisfaction with program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	.0%	.0%	.6%	.0%	.0%	.4%
3	2.8%	.0%	.0%	.0%	.0%	.0%	.4%
4	.0%	.0%	.0%	1.2%	.0%	.0%	.9%
5	8.3%	.0%	.0%	4.3%	3.7%	.0%	4.9%
6	2.8%	.0%	.0%	1.8%	.0%	.0%	1.8%
7	13.9%	.0%	.0%	5.5%	7.4%	.0%	7.1%
8	25.0%	.0%	.0%	25.2%	18.5%	.0%	24.3%
9	16.7%	.0%	.0%	16.6%	29.6%	.0%	18.1%
10	30.6%	.0%	.0%	44.8%	40.7%	.0%	42.0%
Total	n=36	n=0	n=0	n=163	n=27	n=0	n=226

Sempra Non-residential Process Evaluation Survey (Participant), Question m4.

Level of interest in participating in the program again (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Interest level in participating in the program again	8.6	.	.	9.4	9.3	.	9.2
	n=37	n=0	n=0	n=162	n=26	n=0	n=225

Sempra Non-residential Process Evaluation Survey (Participant), Question m6.

Level of interest in participating in the program again (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	2.7%	.0%	.0%	.6%	.0%	.0%	.9%
3	.0%	.0%	.0%	.0%	3.8%	.0%	.4%
5	5.4%	.0%	.0%	3.1%	.0%	.0%	3.1%
6	5.4%	.0%	.0%	.0%	.0%	.0%	.9%
7	8.1%	.0%	.0%	2.5%	3.8%	.0%	3.6%
8	13.5%	.0%	.0%	13.6%	7.7%	.0%	12.9%
9	16.2%	.0%	.0%	8.6%	11.5%	.0%	10.2%
10	48.6%	.0%	.0%	71.6%	73.1%	.0%	68.0%
Total	n=37	n=0	n=0	n=162	n=26	n=0	n=225

Sempra Non-residential Process Evaluation Survey (Participant), Question m6.



Besides this program, are you aware of other utility assistance you could receive to promote energy efficiency? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	2.6%	.0%	.0%	4.2%	7.1%	.0%	4.3%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, respondent dropped out of survey	5.1%	.0%	.0%	1.8%	.0%	.0%	2.1%
Yes	53.8%	.0%	.0%	29.3%	35.7%	.0%	34.2%
No	38.5%	.0%	.0%	64.7%	57.1%	.0%	59.4%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question m8.

Has your organization participated in any of the programs you mentioned? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	3.6%	.0%	.0%	2.6%
Program skip	41.0%	.0%	.0%	68.9%	64.3%	.0%	63.7%
Not asked, respondent dropped out of survey	5.1%	.0%	.0%	1.8%	.0%	.0%	2.1%
Yes	28.2%	.0%	.0%	15.0%	25.0%	.0%	18.4%
No	25.6%	.0%	.0%	10.8%	10.7%	.0%	13.2%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question m10.

Interest in using an online tool that shows current monthly energy costs to date and bill estimation (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	98.2%	.0%	.0%	94.9%	97.9%
*Already using it/something like it	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, respondent dropped out of survey	.0%	.0%	1.8%	.0%	.0%	5.1%	2.1%
Not interested at all	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not very interested	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Somewhat interested	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Very interested	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempre Non-residential Process Evaluation Survey (Participant), Question m12.

Difficulty for respondent's business to shift energy use from 11:00-6:00 (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	98.2%	.0%	.0%	94.9%	97.9%
*Already using it/something like it	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, respondent dropped out of survey	.0%	.0%	1.8%	.0%	.0%	5.1%	2.1%
Very difficult	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Somewhat difficult	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not very difficult	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not at all difficult	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question m13.

Difficulty for respondent's business to shift energy use from 11:00-6:00 with one day notice (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	98.2%	.0%	.0%	94.9%	97.9%
*Already using it/something like it	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, respondent dropped out of survey	.0%	.0%	1.8%	.0%	.0%	5.1%	2.1%
Very difficult	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Somewhat difficult	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not very difficult	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not at all difficult	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=167	n=0	n=0	n=39	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question m14.

Level of agreement that respondent's business has control over energy use (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Level of agreement that the business has control over the amount of electricity it uses	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question m15.

Agreement that energy efficiency is an important consideration when respondent purchases equipment (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Level of agreement that energy efficiency is an important consideration when business buys devices that use energy	9.4	.	.	9.4	9.4	.	9.4
	n=19	n=0	n=0	n=50	n=8	n=0	n=77

Sempra Non-residential Process Evaluation Survey (Participant), Question m16.

Agreement that energy efficiency is an important consideration when respondent purchases equipment (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
7	5.3%	.0%	.0%	6.0%	.0%	.0%	5.2%
8	21.1%	.0%	.0%	16.0%	12.5%	.0%	16.9%
9	5.3%	.0%	.0%	6.0%	37.5%	.0%	9.1%
10	68.4%	.0%	.0%	72.0%	50.0%	.0%	68.8%
Total	n=19	n=0	n=0	n=50	n=8	n=0	n=77

Sempra Non-residential Process Evaluation Survey (Participant), Question m16.

Level of interest in Energy Savings BID program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Interest level of the Energy Savings BID program	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question m17a.



Level of interest in On Bill financing program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Interest level of the On Bill Financing program	5.9	.	.	5.5	6.0	.	5.6
	n=33	n=0	n=0	n=159	n=25	n=0	n=217

Sempra Non-residential Process Evaluation Survey (Participant), Question m17b.

Level of interest in On Bill financing program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	21.2%	.0%	.0%	28.9%	24.0%	.0%	27.2%
2	3.0%	.0%	.0%	3.1%	4.0%	.0%	3.2%
3	.0%	.0%	.0%	4.4%	.0%	.0%	3.2%
4	3.0%	.0%	.0%	2.5%	.0%	.0%	2.3%
5	24.2%	.0%	.0%	11.9%	16.0%	.0%	14.3%
6	.0%	.0%	.0%	2.5%	12.0%	.0%	3.2%
7	6.1%	.0%	.0%	10.1%	4.0%	.0%	8.8%
8	15.2%	.0%	.0%	7.5%	8.0%	.0%	8.8%
9	3.0%	.0%	.0%	1.9%	.0%	.0%	1.8%
10	24.2%	.0%	.0%	27.0%	32.0%	.0%	27.2%
Total	n=33	n=0	n=0	n=159	n=25	n=0	n=217

Sempra Non-residential Process Evaluation Survey (Participant), Question m17b.

Are you planning any repairs or replacements to your equipment in the next 2 years, aside from routine preventative maintenance? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	5.1%	.0%	.0%	4.8%	10.7%	.0%	5.6%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, respondent dropped out of survey	5.1%	.0%	.0%	1.8%	.0%	.0%	2.1%
Yes	56.4%	.0%	.0%	47.9%	57.1%	.0%	50.4%
No	33.3%	.0%	.0%	45.5%	32.1%	.0%	41.9%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question m18.

Do you plan to participate in a utility program for these purchases? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	2.6%	.0%	.0%	4.2%	3.6%	.0%	3.8%
Program skip	38.5%	.0%	.0%	50.3%	42.9%	.0%	47.4%
Not asked, respondent dropped out of survey	5.1%	.0%	.0%	1.8%	.0%	.0%	2.1%
Yes	51.3%	.0%	.0%	38.3%	50.0%	.0%	41.9%
No	2.6%	.0%	.0%	5.4%	3.6%	.0%	4.7%
Total	n=39	n=0	n=0	n=167	n=28	n=0	n=234

Sempra Non-residential Process Evaluation Survey (Participant), Question m20.

## SoCalGas Non-Participant Survey Responses - Frequencies by Question

This file provides non-participant responses for the SoCalGas Nonresidential Process Evaluation. This survey was conducted October 2011 - November 2011 by Tetra Tech, Inc., and the overall study was led by the Heschong Mahone Group, Inc.

Data collection resources, including the survey code books, survey and sampling methodologies, and sample dispositions, are provided in Attachment 3A. **Readers are strongly encouraged to review the survey code book in conjunction with review of the frequency tables to understand the full questions and survey skip logic.** Analysis of the customer surveys are included in the final report volumes, including Main Report, Attachment 1 - Portfolio-level Evaluations, and Attachment 2 - Program Specific Evaluations. Customer survey frequency tables for select 3P programs are provided separately.

Note that some for some questions, respondents could provide more than one response. Consequently, the total number of responses may exceed the n value, and the total percentages of responses may exceed 100%, for some questions.

Main business activity	
Industrial process/manufacturing/assembly	23.2%
Other	18.3%
Restaurant	15.9%
*Agriculture	12.2%
Laundry/cleaner	7.3%
Grocery store	4.9%
Condo/apartment	3.7%
Hotel or motel	3.7%
Office	3.7%
Greenhouse	2.4%
Retail (non-food)	2.4%
Construction	1.2%
Health Care (other than Hospital	1.2%
Community service/church/temple/municipal	.0%
Warehouse	.0%
Hospital	.0%
School	.0%
College/university	.0%
Programmed skip	.0%
Don't know	.0%
Refused	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1.

Type of retail business facility	
Programmed skip	97.6%
Something else	1.2%
Stand alone building	1.2%
Strip mall	.0%
Enclosed mall	.0%
Don't know	.0%
Refused	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1a.

Mean number of students that can be seated in all classrooms of education facilities	
Number of students in all classrooms	.
	n=0

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1b.

Type of health care facility	
Programmed skip	98.8%
Outpatient	1.2%
Both	.0%
Inpatient	.0%
Don't know	.0%
Refused	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1c.



Type of hospital facility	
Programmed skip	100.0%
Both	.0%
Outpatient	.0%
Inpatient	.0%
Don't know	.0%
Refused	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1d.

Mean number of occupant rooms in hotel/motel facility	
Number of guest rooms	47.3
	n=3

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1e.

Number of occupant rooms in hotel/motel facility	
19	33.3%
23	33.3%
100	33.3%
Total	n=3

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1e.

Mean total seating capacity of communal/worship areas	
Total seating capacity	.
	n=0

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1f.

Has your facility applied for or participated in a utility program?	
Refused	.0%
Don't know	3.7%
Programmed skip	.0%
Yes	2.4%
No	93.9%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a4.

Time period participated in utility program	
Programmed skip	97.6%
Before 2010	1.2%
Don't know	1.2%
2010 or later	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a4a.

Did your facility complete its participation in the program?	
Refused	.0%
Don't know	.0%
Programmed skip	100.0%
Yes	.0%
No	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a5.

Type of equipment that uses the most electricity at facility	
Programmed skip	100.0%
Other	.0%
Laundry equipment	.0%
Food service equipment	.0%
HVAC	.0%
Lighting	.0%
Drives	.0%
Motors and pumps	.0%
Don't know	.0%
Refused	.0%
Total	n=82

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question b1a.

Confident in answer? Type of equipment that uses the most electricity at facility	
Refused	.0%
Don't know	.0%
Programmed skip	100.0%
Yes	.0%
No	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b1aconf.



Type of equipment that uses the second most electricity at facility	
Programmed skip	100.0%
Other	.0%
Laundry equipment	.0%
Food service equipment	.0%
HVAC	.0%
Lighting	.0%
Drives	.0%
Motors and pumps	.0%
Don't know	.0%
Refused	.0%
Total	n=82

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question b1b.

Confident in answer? Type of equipment that uses the second most electricity at facility	
Refused	.0%
Don't know	.0%
Programmed skip	100.0%
Yes	.0%
No	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b1bconf.

Type of equipment that uses the most natural gas at facility	
Food service equipment	25.6%
Other	24.4%
HVAC and furnaces	12.2%
Boilers	11.0%
Water heater	9.8%
Pumps	7.3%
Laundry equipment	6.1%
Don't know	2.4%
Doesn't use natural gas	1.2%
Programmed skip	.0%
Refused	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b2a.

Confident in answer? Type of equipment that uses the most natural gas at facility	
Refused	.0%
Don't know	.0%
Programmed skip	3.7%
Yes	93.9%
No	2.4%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b2aconf.

Type of equipment that uses the second most natural gas at facility	
Doesn't use natural gas	42.7%
Water heater	25.6%
HVAC and furnaces	8.5%
Other	4.9%
Boilers	4.9%
Programmed skip	3.7%
Don't know	3.7%
Laundry equipment	2.4%
Food service equipment	2.4%
Refused	1.2%
Pumps	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b2b.

Confident in answer? Type of equipment that uses the second most natural gas at facility	
Refused	.0%
Don't know	.0%
Programmed skip	51.2%
Yes	39.0%
No	9.8%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b2bconf.

Has your organization developed a specific policy for the selection of energy-efficient equipment?	
Refused	.0%
Don't know	6.1%
Programmed skip	.0%
Yes	13.4%
No	76.8%
Other	3.7%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b3.

Decision-maker for utility purchases or upgrades	
Person who makes decisions on equipment - proprietor/owner	77.8%
Person who makes decisions on equipment - other	19.8%
Person who makes decisions on equipment - general manager	7.4%
Person who makes decisions on equipment - other financial/administrative position	4.9%
Person who makes decisions on equipment - facilities manager	3.7%
Person who makes decisions on equipment - president/CEO	3.7%
Person who makes decisions on equipment - building manager	1.2%
Person who makes decisions on equipment - other facilities management/maintenance	1.2%
Person who makes decisions on equipment - board of directors	1.2%
Person who makes decisions on equipment - energy manager	.0%
Person who makes decisions on equipment - CFO	.0%
Total	n=81

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b5.



Difficulties with purchasing/installing energy efficiency upgrades through utility programs	
Difficulties with purchasing/installing an EE upgrade - no difficulties	71.4%
Difficulties with purchasing/installing an EE upgrade - other	18.2%
Difficulties with purchasing/installing an EE upgrade - have not done any upgrades	5.2%
Difficulties with purchasing/installing an EE upgrade - lack of funds available for investments	3.9%
Difficulties with purchasing/installing an EE upgrade - lack of financing	2.6%
Difficulties with purchasing/installing an EE upgrade - other priorities for capital spending	.0%
Difficulties with purchasing/installing an EE upgrade - amount of mgmt time	.0%
Difficulties with purchasing/installing an EE upgrade - incremental cost	.0%
Difficulties with purchasing/installing an EE upgrade - rebate amount not high enough	.0%
Difficulties with purchasing/installing an EE upgrade - hesitant to replace existing equipment	.0%
Difficulties with purchasing/installing an EE upgrade - mgmt doesn't see benefit	.0%
Difficulties with purchasing/installing an EE upgrade - lease space	.0%
Difficulties with purchasing/installing an EE upgrade - contractors not familiar with program	.0%
Difficulties with purchasing/installing an EE upgrade - rebate application process demanding	.0%
Difficulties with purchasing/installing an EE upgrade - economy	.0%
Total	n=77

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b6.

Were you aware that your utility offers programs to help you increase the energy efficiency of your organization?	
Refused	.0%
Don't know	1.2%
Programmed skip	.0%
Partial	.0%
Yes	26.8%
No	72.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question c1a.

Did you know that your facility was eligible for any of these programs in the past, but chose not to participate?	
Don't know	3.7%
Programmed skip	73.2%
Partial	.0%
Yes-I was aware that the facility was eligible, but chose not to participate	7.3%
No-I was not aware that the facility was eligible, or the facility was not eligible for programs	15.9%
Other-including if was past participant	.0%
Total	n=82

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question c1c.

Reason for not participating in the past	
Equipment installed w/o program - none	42.1%
Equipment installed w/o program - boilers	26.3%
Equipment installed w/o program - water heaters	21.1%
Equipment installed w/o program - other	15.8%
Equipment installed w/o program - motors and pumps	10.5%
Equipment installed w/o program - lighting	10.5%
Equipment installed w/o program - HVAC and furnaces	5.3%
Equipment installed w/o program - food service equipment	5.3%
Equipment installed w/o program - drivers	.0%
Equipment installed w/o program - laundry equipment	.0%
Total	n=19

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question c1f.

How respondent first heard about the program	
Programmed skip	73.2%
Other	6.1%
IOU mailing (hard copy)	6.1%
IOU utility bill insert	4.9%
Contractor/retailer	3.7%
Colleague/peer	1.2%
Conference/trade show	1.2%
IOU call center	1.2%
Other IOU staff	1.2%
Partial	1.2%
Radio ad	.0%
Print media ad	.0%
Television ad	.0%
From participation in another IOU program	.0%
IOU web site	.0%
IOU utility email message	.0%
IOU account exec	.0%
Don't know	.0%
Refused	.0%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question c1.

How respondent prefers to receive information and updates regarding energy efficiency programs	
Prefer to hear about programs - IOU mailing (hard copy)	64.1%
Prefer to hear about programs - IOU utility email message	26.9%
Prefer to hear about programs - other	7.7%
Prefer to hear about programs - other IOU staff	6.4%
Prefer to hear about programs - IOU utility bill insert	6.4%
Prefer to hear about programs - IOU account exec	3.8%
Prefer to hear about programs - IOU call center	2.6%
Prefer to hear about programs - IOU web site	.0%
Prefer to hear about programs - participation in another IOU program	.0%
Prefer to hear about programs - contractor/retailer	.0%
Prefer to hear about programs - conference/trade show	.0%
Prefer to hear about programs - colleague/peer	.0%
Prefer to hear about programs - television ad	.0%
Prefer to hear about programs - print media ad	.0%
Prefer to hear about programs - radio ad	.0%
Total	n=78

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question c2.

Have you visited the program's website for more information?	
Refused	.0%
Don't know	.0%
Programmed skip	.0%
Partial	2.4%
Yes	7.3%
No	90.2%
Total	n=82

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question c3.

Mean response: Level of interest in audit type program	
Program interest - audit program	5.5
	N=77

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1a.

Level of interest in audit type program	
Not at all interested	20.8%
2	2.6%
3	9.1%
4	2.6%
5	20.8%
6	2.6%
7	6.5%
8	13.0%
9	3.9%
Extremely interested	13.0%
Not applicable	5.2%
Total	n=77

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1a.



Mean response: Level of interest in HVAC Retrocommissioning program	
Program interest - HVAC retrocommissioning program	6.2
	n=77

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1b.

Level of interest in HVAC Retrocommissioning program	
Not at all interested	26.0%
2	3.9%
3	1.3%
4	2.6%
5	13.0%
6	1.3%
7	7.8%
8	7.8%
9	2.6%
Extremely interested	15.6%
Not applicable	18.2%
Total	n=77

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1b.

**Mean response: Level of interest in a program to provide premium tune-ups and maintenance of HVAC equipment**

Program interest - HVAC tune-up & maintenance program	.
	n=0

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question d1c.

Mean response: Level of interest in Direct Install program	
Program interest - direct install program	6.3
	n=76

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1d.

Level of interest in Direct Install program	
Not at all interested	21.1%
2	1.3%
3	3.9%
4	2.6%
5	17.1%
6	1.3%
7	6.6%
8	13.2%
9	2.6%
Extremely interested	22.4%
Not applicable	7.9%
Total	n=76

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1d.

Mean response: Level of interest in rebate program	
Program interest - rebate program	7.2
	n=76

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1e.

Level of interest in rebate program	
Not at all interested	11.8%
2	1.3%
3	3.9%
4	2.6%
5	14.5%
6	3.9%
7	3.9%
8	6.6%
9	11.8%
Extremely interested	30.3%
Not applicable	9.2%
Total	n=76

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1e.

Mean response: Level of interest in incentive program, where the incentive amount is based on the predicted energy savings	
Program interest - incentive program	6.9
	n=74

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1f.

Level of interest in incentive program, where the incentive amount is based on the predicted energy savings	
Not at all interested	10.8%
2	1.4%
3	4.1%
4	2.7%
5	18.9%
6	5.4%
7	9.5%
8	6.8%
9	8.1%
Extremely interested	28.4%
Not applicable	4.1%
Total	n=74

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1f.

Mean response: Level of interest in a program offering 0% interest loans for energy efficiency upgrades	
Program interest - 0% interest loan program	6.3
	N=75

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question d1g.

Level of interest in a program offering 0% interest loans for energy efficiency upgrades	
Not at all interested	28.0%
3	1.3%
4	1.3%
5	10.7%
6	1.3%
7	9.3%
8	8.0%
9	6.7%
Extremely interested	29.3%
Not applicable	4.0%
Total	n=75

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question d1g.

Potential motivating factors for participating in program	
Reason to participate in program - saving money on energy bills	57.1%
Reason to participate in program - other	37.1%
Reason to participate in program - obtaining a rebate	12.9%
Reason to participate in program - upgrading or replacing equipment	10.0%
Reason to participate in program - protecting environment	4.3%
Reason to participate in program - corporate policies	1.4%
Reason to participate in program - technical assistance	.0%
Reason to participate in program - gov't/non-profit policy	.0%
Total	n=70

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question d2.

Reasons for not participating	
Reason not to participate in program - other	65.7%
Reason not to participate in program - application takes too much time	11.9%
Reason not to participate in program - money issues	11.9%
Reason not to participate in program - don't have enough program info	10.4%
Reason not to participate in program - up-front costs	10.4%
Reason not to participate in program - don't believe energy savings claims	7.5%
Reason not to participate in program - rebate not high enough	3.0%
Total	n=67

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d3a.



Interest in using an online tool that shows current monthly energy costs to date and bill estimation	
Refused	.0%
Don't know	.0%
Programmed skip	100.0%
Partial	.0%
Not interested at all	.0%
Not very interested	.0%
Somewhat interested	.0%
Very interested	.0%
Total	n=82

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question m12.

Difficulty for respondent's business to shift energy use from 11:00-6:00	
Refused	.0%
Don't know	.0%
Programmed skip	100.0%
Partial	.0%
Very difficult to make	.0%
Somewhat difficult to make	.0%
Not very difficult to make	.0%
Not at all difficult to make	.0%
Total	n=82

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question m13.

Difficulty for respondent's business to shift energy use from 11:00-6:00 with one day notice	
Refused	.0%
Don't know	.0%
Programmed skip	100.0%
Partial	.0%
Very difficult	.0%
Somewhat difficult	.0%
Not very difficult	.0%
Not at all difficult	.0%
Total	n=82

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question m14.

Mean response: Level of agreement that respondent's business has control over energy use	
Business has control over the amount of electricity it uses	.
	n=0

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m15.

Mean response: Agreement that energy efficiency is an important consideration when respondent purchases equipment	
Energy efficiency is an important consideration when buying new equipment	.
	n=0

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m16.

Planning any repairs or replacements to your equipment in the next 2 years, aside from routine preventative maintenance?	
Refused	.0%
Don't know	3.7%
Programmed skip	.0%
Partial	8.5%
Yes	28.0%
No	59.8%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m18.

Do you plan to participate in a utility program for these purchases?	
Refused	.0%
Don't know	8.5%
Programmed skip	63.4%
Partial	8.5%
Yes	15.9%
No	3.7%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m20.

Do you have any other comments you would like to make?	
Programmed skip	.0%
Partial	8.5%
Yes, record verbatim comments	12.2%
No	79.3%
Total	n=82

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m21.



## **ATTACHMENT 3B – THIRD PARTY PROGRAM DATA COLLECTION RESOURCES**

---

This attachment is part of the HMG team Nonresidential Process Evaluation. This attachment presents data collection resources for the following third party programs: SaveGas, and PREPS. It includes interview guides for the program staff (e.g., program manager) and the implementation contractor, customer survey questions, and vendor interview guides. All data collection activities for these programs (including customer surveys) were conducted by Research into Action.

Data collection resources for all other nonresidential programs are presented in Attachment 3A.

Customer survey responses are provided in a separate file.

## 1.1 Effectiveness of Third Party Implementation (SoCal Gas)

### 1.1.1 Description of Methodology

Effectiveness of 3P implementation was a high-level synthesis of data gathered from various sources; consisting of a review of evaluated 3P program report drafts, 3P program staff and implementer interview summaries, AE focus group summaries, and marketing staff interviews.

We reviewed staff interview and implementer summaries, and participant data for the PREPS and SaveGas programs.

## 1.1 SaveGas

### 1.1.1 Description of Methodology

The major research activities consisted of review of program documentation, in-depth interviews with implementation staff, focus groups with AEs, and surveys with participants.

Document review consisted of review of the Program Implementation Plan (PIP) and the EDC's SaveGas website<sup>1</sup>.

We conducted in-depth interviews with implementation staff in September/October of 2011 to understand program processes and issues of concern to utility and implementer staff:

- ♦ SoCal Gas program manager
- ♦ Implementer staff (EDC president and vice-president)

These interviews followed up kick-off interviews with program managers and were used to design the survey instruments.

### *Populations*

We conducted surveys with program participants, partial participants, and nonparticipants in the SaveGas program during October/November of 2011. Interviewees included general managers, facilities managers, and engineering staff members at hotels and motels. The sample included:

- ♦ Hotels and motels that are utility customers
- ♦ Range of sizes, in terms of number of rooms
- ♦ Focused on chains

---

<sup>1</sup> [www.savegas.com](http://www.savegas.com)

## *Participants*

All contacts in the participant population were targeted for this evaluation. Participants, consisting of hotels with installed units, were selected from call lists provided by the utility. Some contacts were removed from the sample due to AE requests or overlap with other surveys.

## *Non-Participants*

Non-participants are utility customers who have not participated in the SaveGas program. About one third of non-participant contacts were supplied by EDC as potential customers who declined participation (did not install monitoring units). Two thirds of non-participant contacts were derived from NAICS coded lists focusing on hotels and motels. We focused on chains to ensure a larger number of rooms, but we also spoke with some smaller hotels to provide breadth.

## *Sampling*

At the initiation of the evaluation, only two program participants had enrolled in the SaveGas program. Because of the low number of participants for each utility, we estimated a total of five completes for program participants per utility. A total of 17 program participants had enrolled by the roll-out time for SoCal Gas and 11 for SDG&E. Six program participants were surveyed for SoCal Gas and 6 were surveyed for SDG&E.

To better understand why the enrollment was so low for the SaveGas program an estimated 30 completes for non-participants was proposed in the workplan. We were given a short list of EDC-contacted non-participants by EDC and used those to contact and survey a total of 14 for SoCal Gas and 5 for SDG&E. Additionally, we surveyed non-participants who had not been contacted by EDC. We surveyed a total of 34 non-participants, these include both SoCal Gas and SDG&E clients.

## *Analysis*

While this report is specific to SoCal Gas, the experiences with the technology and implementer (EDC) are the same for customers of both SoCal Gas and SDG&E. Examination of the customer data did not reveal any differences between utility datasets. Therefore, we took advantage of the greater reliability provided by combining the customer data from the two utilities. Of the 12 participants, six were from the SoCal Gas territory and six were from the SDG&E territory. Of the 48 non-participants, 36 were from the SoCal Gas territory and 12 were from the SDG&E territory.

### **1.1.2 Program Staff Interview Guide**

Sempra Portfolio Evaluation

*SaveGas Program Manager Interview Guide (SoCal Gas)*

September, 2011

INTERVIEWEE NAME:

INTERVIEW DATE:

COHORT:

INTERVIEWER:

#### WORK BREAK-DOWN

1. Generally, how do you spend your time when working on the SaveGas program? [If needed] How much time do you typically spend on these activities?

#### EFFICIENT USE OF RESOURCES

2. Do you feel that the program offerings for customers are redundant? [If needed] For example, do multiple programs offer one kind of customer the same or very similar services or equipment?
3. Do you think there is redundancy in staffing, for example, more than 1 person doing the same thing?
4. Which positions or roles?
5. Do you have any ideas about what could be done to fix these issues?

#### INTERNAL PROGRAM COORDINATION

6. Is coordinating with other Sempra program staff a challenge for you or the SaveGas program?
7. In what way is coordinating with other Sempra program staff a challenge?
8. Do you have any challenges managing the SaveGas program due to the needs or requests of other programs or staff? [Probe for details, examples]

#### CLARRIFICATION OF ROLES AND RESPONSIBILITIES

9. Does your program coordinate with account executives?
10. Is this critical to the success of the SaveGas program?
11. Do you feel like the account executive's goals are aligned with the goals of the SaveGas program?
12. What do you think could be done to align account executives' goal with program goals?

#### GENERAL MARKETING QUESTIONS

13. Who is most responsible for marketing the program to potential participants?
14. How effective has this lead person /group been in conducting program outreach?
15. What outreach methods have each of [the above groups] used in reaching customers?
16. How effective have each of these methods been?
17. What additional outreach methods are needed to reach the target population?
18. Is the outreach budget sufficient to support the programs, and in particular, the SaveGas program?
19. In what areas is it lacking?

#### IT and Data Tracking Questions

20. How is the program currently tracking participant application data?
21. Does your current participant database meet the SaveGas program reporting needs?
22. Are customer leads currently being tracked?
23. What type of database user training does program staff receive?
24. Do you have any recommendation on improving EE program database applications?

#### Third Party Integration

25. How often do you communicate with 3P staff and by what method?
26. Do you feel he lets you know about important information?
27. Do any customer issues come up in these conversations? (How are these issues resolved)

28. How satisfied are you with the way 3P staff manage project data?
29. Do you feel the 3P firm has allocated sufficient resources to the SaveGas program to ensure it performs as expected?
30. Do you believe the 3P firm has sufficient market knowledge and connections to adequately promote the SaveGas program?
31. How regularly does your 3P firm follow Sempra's guidelines concerning the use of Sempra and your utility's logos?
32. Is the 3P firm using appropriate QA?

### Benchmarking

33. What has been your experience with benchmarking for the SaveGas program?
34. Why do some customers decline benchmarking?
35. To what extent does the benchmarking requirement impede or delay participation in IOU programs?
36. Is the benchmarking tool easy to use?
37. Are benchmarking results easy to interpret?
38. Are benchmarking results useful?
39. How could the benchmarking process and results be more useful to customers?

### Regulatory

40. How would you characterize the relationship between the IOU program staff and the CPUC Energy Division? Who at the Energy Division do they routinely interact with?
41. What issues is the CPUC ED most concerned with regarding this particular program?
42. What are the major regulatory requirements that program staff spend their time on [or confirm from notes] (Probe for each response item below: What are its objectives / intended outcomes? How high is the priority 1) for the State, 2) for the IOU >High / Medium / Low : Why?)
43. How much effort does it take the IOUs to track, follow and address this requirement?
44. Do you believe this is an appropriate level of effort?
45. Do you have suggestions for getting more value out of this requirement and/or reducing its required level of effort?
46. Are the objectives of this requirement being met?
47. Would you say that the IOU Program Managers are meeting the regulatory requirements in general?

### Program Specific

48. Do you feel the SaveGas program has secured enough savings to date to meet its goals?
49. Have any changes been made to increase participation?
50. Are these changes working and will you consider other changes?
51. What do you think are the barriers to getting more prospective clients? (open-ended response) [Probe for specifics]

## 1.1.3 Implementer Interview Guide

Sempra Portfolio Evaluation  
*3P Implementer Interview Guide*  
 September 2011

INTERVIEWEE NAME:

INTERVIEW DATE:

COHORT:

INTERVIEWER:

#### RESPONDENT BACKGROUND

1. What activities do you perform for the SaveGas program?

#### PROMOTION

2. What kinds of marketing materials/guidelines has SEMPRA given you?
3. How do you market the SaveGas program to potential program participants?
4. Trade show
5. Bill insert
6. Brochure
7. Word of mouth
8. Phone call
9. Door-to-door
10. Other
11. How do you make the first contact with prospective participants?
12. Are there any challenges to making these first contacts?
13. When discussing the program with prospective participants, what do you do to sell the program?

#### PARTICIPATION DECISION

14. How many prospects have you contacted about the SaveGas program? (Get #)
15. Generally, how many web presentations do you conduct?
16. And, how many audits do you conduct?
17. And, about how many test units have you put in?
18. What percent of those prospects declined to participate in the SaveGas program? (%)
19. At what stage do prospects typically decline? [Probe for % and % decline at each stage]
20. Initial contact
21. Web presentation
22. Audit, Test unit
23. Primary installation
24. What reasons did they give you for not participating in the program?
25. Typically, how do you address these concerns?
26. Do you think that the test unit helps convince prospects to participate?

#### WEB PRESENTATION

27. Please describe how you give a web presentation to customers? Is there a presenter or is it user driven?
28. What are the key points of the presentation?
29. What parts of the web presentation are helpful to prospects?
30. What parts, do you think could use improving?
31. Can we view the web presentation at some point?

#### COORDINATION/INTERACTION

32. Whom at SCG and SDG&E do you primarily work with? [Get name and role]
33. Are there any additional tools or support that SCG or SDG&E could give you to help market the SaveGas program?
34. If Yes: What could they provide?
35. What is the program process flow (probe for role of technicians)?
36. Do you have a diagram?
37. If they have technicians, can you give us the contact information for one of your technicians?

- 38. What is the typical timeline for installation?
- 39. How do you coordinate installation with technicians?
- 40. Once you've installed a system, what are your processes for maintaining the system?
- 41. How are things working with the technicians that conduct audits or perform installations?

#### INSTALLATION/MONITORING

- 42. What data do you collect from the systems? When do you collect data? How are these data collected?
- 43. Are you familiar with any data quality issues?
- 44. If yes, do you know the cause of these issues?
- 45. What formal training do you provide participants for the online monitoring system?
- 46. What have you heard from clients about their experiences with the online monitoring system?
- 47. Have you faced issues commissioning the system? Please describe?

#### BARRIERS

- 48. What, do you think are the barriers to participation?
- 49. What would increase program participation?
- 50. Does your physical location in Northern California negatively affect your day-to-day sales work in Southern California?
- 51. Do you think the economy has influenced your sales rate? How so?

#### CLOSING

- 52. What would you like to learn from this evaluation?

#### DATA TO ASK FOR

- 53. List of non-participants who have been contacted by EDC

## 1.1.4 Customer Survey Guides

### *Participating Customer Survey Guide*

#### Q1 IOU

- ☐ SDG&E
- ☐ SoCal Gas

#### Q2 Interview Information

Name of Interviewee  
Date of Interview  
Interviewer Name

Q3 Hello, my name is [Name] from Research Into Action, calling on behalf of SoCal Gas. We are working with SoCal Gas to evaluate the services and offerings they provide to their customers. I'm calling specifically to find out about your experience with the SaveGas program, administered by EDC tech. The Save Gas program provides technical assistance, training, and cost sharing on water heating measures. Are you familiar with EDC's SaveGas program? Are you the correct person to speak with? Please be assured that this isn't a sales call and that all responses are confidential .Is this a good time to talk? If not, when might I speak with you for 20 minutes?(If NO, take down contact information and end survey)

- ☐ Yes: Take survey
- ☐ No: Collect contact data

Q4 If not correct person, ask who is

Name of new contact  
Title  
Phone number  
Best time to reach them

Q5 If Q3=No Then End of survey

Q6 What is the main business activity at this facility?

- ☐ Hotel or Motel
- ☐ Other \_\_\_\_\_

Q7 How many guest rooms or occupant rooms are there?

Q8 What are your responsibilities?

Q11 What types of equipment uses the most natural gas at your facility?

- ☐ Boilers
- ☐ HVAC and Furnaces
- ☐ Food Service Equipment
- ☐ Laundry Equipment
- ☐ Pumps
- ☐ Other \_\_\_\_\_
- ☐ Don't Know
- ☐ Refused



Q12 What types of equipment uses the second most natural gas at your facility?

- ☐ Boilers
- ☐ HVAC and Furnaces
- ☐ Food Service Equipment
- ☐ Laundry Equipment
- ☐ Pumps
- ☐ Other \_\_\_\_\_
- ☐ Don't Know
- ☐ Refused

Q13 Has your organization developed a specific policy for the selection of energy efficient equipment? [For example: A requirement that all new fluorescent lighting systems use electronic ballasts, or that all boilers have a minimum thermal efficiency.]

- ☐ Yes - Please describe those policies. \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't Know \_\_\_\_\_
- ☐ Refused

Q14 Who makes decisions on equipment purchases or upgrades? (Mark all that apply - don't read answer choices)

- ☐ Facilities Manager
- ☐ Building Manager
- ☐ Energy Manager
- ☐ Other facilities management/ maintenance position
- ☐ Chief Financial Officer
- ☐ Other financial/ administration position
- ☐ Proprietor/ Owner
- ☐ President/ CEO
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q15 What difficulties have you had, either inside or outside your company, with purchasing and installing an energy efficiency upgrade through this or any SoCal Gas program? (Mark all that apply - don't read answer choices)

- ☐ No difficulties
- ☐ Other priorities for capital spending
- ☐ Lack of funds available for investment
- ☐ Lack of financing
- ☐ Amount of management time to oversee projects
- ☐ Incremental cost for more efficient equipment too high/ Payback period too long
- ☐ Rebate amount not high enough
- ☐ Business hesitant to replace existing working equipment
- ☐ Upper management doesn't see the benefit of energy efficient equipment
- ☐ We lease the space
- ☐ Contractors weren't familiar with program
- ☐ Rebate application process was demanding
- ☐ Economy
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q16 Now I'm going to ask you some questions about your facility's participation in the SaveGas program. Program Description: The Save Gas program provides technical assistance, training, and cost sharing on water heating measures

Q17 How did you first hear about the program? (Mark all that apply - don't read answer choices)

- ☐ SoCal Gas account executive
- ☐ Other SoCal Gas staff
- ☐ SoCal Gas call center
- ☐ SoCal Gas utility bill insert
- ☐ SoCal Gas mailing (hard copy)
- ☐ SoCal Gas utility email message
- ☐ SoCal Gas website
- ☐ From participation in another SoCal Gas program (Enter in program name) \_\_\_\_\_
- ☐ Contractor/ retailer
- ☐ Conference/ trade show
- ☐ Colleague/ Peer
- ☐ Television ad
- ☐ Print media ad
- ☐ Radio ad
- ☐ Other \_\_\_\_\_
- ☐ Don't Know
- ☐ Refused
- ☐ 3P Implementer



Q18 How would you prefer to receive information and updates about SoCal Gas energy efficiency programs? (Mark all that apply - don't read answer choices)

- ☐ SoCal Gas account executive
- ☐ Other SoCal Gas staff
- ☐ SoCal Gas call center
- ☐ SoCal Gas utility bill insert
- ☐ SoCal Gas mailing (hard copy)
- ☐ SoCal Gas utility email message
- ☐ SoCal Gas website
- ☐ Contractor/ retailer
- ☐ Conference/ trade show
- ☐ Colleague/ Peer
- ☐ Television ad
- ☐ Print media ad
- ☐ Radio ad
- ☐ Other \_\_\_\_\_
- ☐ Don't Know
- ☐ Refused
- ☐ 3P Implementer

Q19 Why did you participate in this program? (Mark all that apply - don't read answer choices)

- ☐ To save money
- ☐ The equipment failed/worked poorly and I needed to replace it
- ☐ Contractor/ engineer/ technical assistant recommended we participate
- ☐ Account executive recommended we participate
- ☐ Corporate practice
- ☐ Availability of the SoCal Gas rebate
- ☐ Past participation with SoCal Gas program
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q20 Did you complete an audit for your system?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q21 Did the audit reveal any new information to you?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q22 Did you view the web demonstration for the SaveGas program?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q23 What aspects of the web demonstration were helpful to you?

Q24 What aspects of the web demonstration could be improved?

Q25 Did you pencil out the savings you'd get from the SaveGas program?

- ☐ Yes - What was the minimum break-even point? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ EDC did this as a way to sell the program \_\_\_\_\_
- ☐ Refused

Q26 What was influential in your decision to participate? (Choose all that apply)

- ☐ Saving money on utility bills
- ☐ Desire to be current on technology
- ☐ Company policies favoring sustainability
- ☐ Program covered retrofit costs
- ☐ Being alerted to maintenance issues
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q27 Did you have any concerns about the... If Yes: [PROBE: What are your concerns?]

	Yes	No (put X if NO)
Monitoring		
Consistent heating		
Dependable performance		

Q28 Did you raise these concerns with program staff?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q29 Did program staff address your concerns?

- ☐ Yes - How? \_\_\_\_\_
- ☐ No - What didn't they address? \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q30 Overall, how has the system worked for you?

Q31 How much energy/money do you think you're saving because of this program?

Q32 Have there been any difficulties with the monitoring or boiler system?

Q33 Do you have problems understanding the online monitoring system?

- ☐ Yes - What are the problems? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused



Q34 As part of the program, did someone from SoCal Gas come to inspect the energy efficient equipment?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q35 How could the inspection process be improved?

Q36 On a scale of 1 to 5, where 1 means "not at all helpful" and 5 means "extremely helpful", how helpful were the following to you in understanding the program?

	1 - Not at all helpful	2	3	4	5 - Extremely helpful	Don't know	Refused
Program Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Web Presentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing Materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program Website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q37 On a scale of 1 to 5, where 1 means "not at all satisfied" and 5 means "extremely satisfied", how satisfied were you with the following:

	1 - Not at all satisfied	2	3	4	5 - Extremely satisfied	Don't know	Refused
Inspection/audit process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scheduling process to install the system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Installation as a whole	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance of the online monitoring system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SaveGas Technician	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q38 Overall, how satisfied were you with the program? Again, please rate on a 5 point scale, where 1 is not at all satisfied and 5 is extremely satisfied.

- ☐ 1 - Not at all satisfied
- ☐ 2 - Not satisfied
- ☐ 3 - Somewhat satisfied
- ☐ 4 - Satisfied
- ☐ 5 - Extremely Satisfied
- ☐ Don't know
- ☐ Refused

Q39 Can you explain?

Q40 On a scale of 1 to 5, how interested would you be in participating in this program again? Where 1 is not at all interested, and 5 is extremely interested in participating.

- ☐ 1 - Not at all interested
- ☐ 2 - Not interested
- ☐ 3 - Somewhat interested
- ☐ 4 - Interested
- ☐ 5 - Extremely interested
- ☐ Don't know
- ☐ Refused

Q41 Please explain?

Q42 Besides this program, are you aware of other assistance you could receive from SoCal Gas to promote energy efficiency for businesses like yours?

- ☐ Yes - What types of programs? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't Know \_\_\_\_\_
- ☐ Refused

Q43 Has your organization participated in any of the programs you mentioned?

- ☐ Yes - Which ones? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q44 Are you planning any repairs or replacements to your equipment in the next two years?

- ☐ Yes - What types are you considering? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q45 Do you plan to participate in a SoCal Gas program for these purchases?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q46 I know your time is valuable but I've got a couple more questions if you have the time for them.

Q55 Who was responsible for getting the application completed and submitted? (Mark all that apply - don't read answer choices)

- ☐ Internal staff in organization
- ☐ Vendor or contractor
- ☐ SoCal Gas Account Executive
- ☐ Other SoCal Gas staff
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused
- ☐ Respondent

Q56 How likely were you to apply for the rebate on your own, if the [Q55 Choice] was unable or unwilling to do so on your behalf? Please rate on a 1 to 5 scale, where 1 is "not at all likely" and 5 is "extremely likely".

- ☐ 1 - Not at all likely
- ☐ 2 - Not likely
- ☐ 3 - Somewhat Likely
- ☐ 4 - Likely
- ☐ 5 - Extremely likely
- ☐ Don't know
- ☐ Refused

Q57 Was it very difficult, difficult, somewhat difficult, somewhat easy, or very easy to submit the application

- ☐ 1 - Very Difficult
- ☐ 2 - Somewhat Difficult
- ☐ 3 - Neutral
- ☐ 4 - Somewhat Easy
- ☐ 5 - Very Easy
- ☐ Don't know
- ☐ Refused

Q58 Did you have any problems with the application process?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q59 What were they and how were they resolved? (try to postcode - e.g., finding model number, finding serial number, providing manufacturer specs, not sure about eligibility, etc.)

Q60 Did you receive a rebate in the SaveGas program?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q61 Were you satisfied with the amount of time it took to receive the rebate?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't Know \_\_\_\_\_
- ☐ Refused

Q62 Was the rebate or incentive amount you received more, about the same, or less than you expected?

- ☐ More \_\_\_\_\_
- ☐ About the same \_\_\_\_\_
- ☐ Less \_\_\_\_\_
- ☐ Don't Know \_\_\_\_\_

Q63 Those are all the questions we have for you. Do you have any other comments you would like to make?

Q64 Thank you for your time!

### *Non-Participating Customer Survey Guide*

Q1 IOU

- ☐ SDG&E
- ☐ SoCal Gas

Q2 Hello, my name is \_\_\_\_\_ and I'm calling on behalf of SDG&E. We are conducting research on behalf of SDG&E to assess the services they provide to their customers. I'm calling specifically to find out about your experience with the SaveGas program, administered by EDC tech. I would like to speak to you for approximately 10-15 minutes with you? Is this a good time? Please be assured that this isn't a sales call and that all responses will be treated confidentially.

[Description:] The Save Gas program provides technical assistance, training, and cost sharing on water heating measures.

[IF NOT RESPONDENT, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

Q3 Participant Info

Name of Interviewee  
Date  
Name of Interviewer

Q4 How would you characterize your business?[Read categories if needed]

- ☐ Hotel or Motel
- ☐ Laundry / Cleaners
- ☐ Other \_\_\_\_\_
- ☐ Refused
- ☐ Don't know

Q5 How many guest rooms or occupant rooms are there?

Q6 What are your responsibilities?

Q7 Has your facility applied or participated in an SoCal Gas program? For example, has your facility received a rebate, audit, incentive, or education?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q8 If so, what was the program, and did your facility complete its participation in the program?

Q9 Are you familiar with the SaveGas program

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q10 How did you first hear about the SaveGas program?

- ☐ EDC Staff (SaveGas people)
- ☐ SoCal Gas account executive
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q11 Initially, why did you consider the SaveGas program?[Probe: What did you hope to get out of the program?]

Q12 Did you have concerns about the program?

- ☐ Yes - What were they? \_\_\_\_\_
- ☐ No
- ☐ Don't know
- ☐ Refused

Q13 Did program staff address your concerns?

- ☐ Yes - How? \_\_\_\_\_
- ☐ No - Why not? \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q14 What would have been your "break-even" point to decide to participate? [Probe: ROI?]

Q15 Did you view the web demonstration for the SaveGas program?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q16 What aspects of the web demonstration were helpful to you?

Q17 What aspects of the web demonstration could be improved?

Q18 On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful were the following?

	1 - Not at all helpful	2	3	4	5 - Very helpful	N/A	Don't know	Refused
Program staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Web presentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q19 Why did you choose not to participate in the SaveGas program?

Q20 How could your experience have been improved?

Q21 Do you plan to replace or repair any gas-using equipment in the next 2 years?

- ☐ Yes \_\_\_\_\_  
☐ No \_\_\_\_\_  
☐ Don't know \_\_\_\_\_  
☐ Refused

Q22 Which equipment?

- ☐ Boilers  
☐ Furnaces  
☐ Food Service Equipment  
☐ Laundry Equipment  
☐ Pumps  
☐ Other \_\_\_\_\_  
☐ Don't know  
☐ Refused



Q23 Do you plan to replace or repair any electricity -using equipment in the next 2 years?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q24 Which equipment?

- ☐ Motors and pumps
- ☐ Drives
- ☐ Lighting
- ☐ HVAC
- ☐ Food Service Equipment
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q25 How likely are you to consider energy-efficiency when installing or replacing energy-using products for your organization? Please give me a rating from 0 to 10, (where 10 means you're EXTREMELY likely to consider energy-efficient products, and 0 means you're NOT AT ALL LIKELY to consider energy efficient products.

- ☐ 0 - Not at all likely
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 9
- ☐ 10 - Extremely likely
- ☐ Don't know
- ☐ Refused

Q26 Why is this?

Q27 Has your organization developed a specific policy for the selection of energy-efficient equipment?[e.g. Requirement that all new fluorescent lighting systems use electronic ballasts, or that all new motors be premium efficiency.]

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q28 Please describe those policies?

Q29 Who makes decisions on equipment purchases or upgrades?

- ☐ Facilities manager
- ☐ Building manager
- ☐ Energy manager
- ☐ Other facilities management / maintenance position
- ☐ Chief Financial Officer (CFO)
- ☐ Other financial / administrative position
- ☐ Proprietor / Owner
- ☐ President / CEO
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q30 Have you had any challenges with purchasing or installing energy efficiency equipment?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q31 If so, What were these challenges? (Do not read, mark all that apply)

- ☐ No difficulties
- ☐ Other priorities for capital spending
- ☐ Lack of funds available for investment
- ☐ Lack of financing
- ☐ Amount of management time to oversee projects
- ☐ Incremental cost for more efficient equipment too high / payback period too long
- ☐ Business hesitant to replace existing working equipment
- ☐ Upper management doesn't see the benefit of energy efficiency equipment
- ☐ Not sure which equipment to choose
- ☐ Desired equipment not available \_\_\_\_\_
- ☐ We lease space
- ☐ Economy
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q32 Before this call, were you aware that SoCal Gas offers programs to help you increase the energy efficiency of your organization? Aside from the SaveGas program?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q33 Which programs were you aware of?(Gather description of program and, if known, program name)

Q34 Did you know that your facility was eligible for any of these programs, and chose not to participate?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q35 If so, please describe the program?(Prompt with list of program type descriptions if needed)

Q36 Why did you choose not to participate in the program?

Q37 What type of equipment did you install without assistance from the program, that you believe would have been eligible?

- ☐ Motors and pumps
- ☐ Drives
- ☐ Lighting
- ☐ HVAC and furnaces
- ☐ Boilers
- ☐ Food service equipment
- ☐ Laundry equipment
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q38 How did you first hear about the program?

- ☐ SoCal Gas account executive
- ☐ Other SoCal Gas staff
- ☐ SoCal Gas call center
- ☐ SoCal Gas utility bill insert
- ☐ SoCal Gas mailing
- ☐ SoCal Gas utility email message
- ☐ SoCal Gas web site
- ☐ From participation in another SoCal Gas program \_\_\_\_\_
- ☐ Contractor / Retailer
- ☐ Conference / Trade show
- ☐ Colleague
- ☐ Television ad
- ☐ Print media ad
- ☐ Radio ad
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q39 How would you prefer to receive information and updates about SoCal Gas energy efficiency programs?

- ☐ SoCal Gas account executive
- ☐ Other SoCal Gas staff
- ☐ SoCal Gas call center
- ☐ SoCal Gas utility bill insert
- ☐ SoCal Gas mailing
- ☐ SoCal Gas utility email message
- ☐ SoCal Gas web site
- ☐ From participation in another SoCal Gas program \_\_\_\_\_
- ☐ Contractor / Retailer
- ☐ Conference / Trade show
- ☐ Colleague
- ☐ Television ad
- ☐ Print media ad
- ☐ Radio ad
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q40 I would like to describe a few types of SoCal Gas programs for which your facility may be eligible for participating. For each, please describe your interest in participating on a 1-5 scale, where 1 is not at all interested, and 5 is extremely interested, and N/A if you don't think the program applies to your facility.

	1 - Not at all interested	2	3	4	5 - Extremely interested	N/A	Don't Know
An audit type program, providing a site walk through and recommendations on energy efficiency upgrades for your facility. [SCG= Audit, SDG&E= Comprehensive Industrial Energy Efficiency]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An HVAC Retro-commissioning program, to tune up your HVAC equipment to make it run more efficiently.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A program to provide premium tune-ups and maintenance of HVAC equipment, and incentives for HVAC equipment and controls [Premium Cooling Efficiency]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A direct install program, providing free installation of low-cost energy efficiency measures at small to medium sized businesses (demand < 100kW)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A rebate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

program, where the rebate amounts are based on the equipment installed [Deemed]							
An incentive program, where the incentive amount is calculated based on the predicted energy savings [Calculated / BID]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A program offering 0% interest loans for energy efficiency upgrades [OBF]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A program that provides technical assistance, training, and cost sharing on water heating measures. [SaveGas]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#### Q41 Comments

Q42 For the program types for which you are interested, what would motivate your organization to participate?(Do not read unless customer needs prompt)

- ☐ Upgrading or replacing equipment
- ☐ Saving money on energy bills
- ☐ Obtaining a rebate
- ☐ Technical assistance
- ☐ Protecting environment
- ☐ Corporate policies
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q43 Why might you NOT participate in a program?(Do not read)

- ☐ Application takes too much time
- ☐ Rebate not high enough
- ☐ Don't have enough program information
- ☐ Don't believe energy savings claims
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q44 Those are all the questions I have for you. Do you have any other comments you would like to make?

Q45 Thank you for your time!

## 1.1 PREPS

### 1.1.1 Description of Methodology

The research team conducted the evaluation of the PREPs program. The major research activities included:

- ♦ Review of program documentation
- ♦ In-depth interviews with implementation staff (2 interviews)
- ♦ Survey of participants, partial-participants and non-participants (see Table with numbers)

Review of program documentation consisted of review of the Program Implementation Plan, including the logic model, implementer website<sup>2</sup>, application and marketing materials, and the measure catalog.

We conducted in-depth interviews with the SEMPRA interim program manager and the project manager at Resource Solutions Group (RSG), the implementer. The in-depth interviews followed up on kick-off interviews focusing on the program processes, issues of concern to program management, and status of the program. This information was used to design the survey instruments.

### *Populations*

We conducted surveys with program participants, partial participants, and nonparticipants in the PREPS program. Interviewees included principals, facilities managers, engineering staff, and sustainability managers at private schools, colleges and universities. The sample included:

- ♦ Private schools, colleges and universities that were utility customers

---

<sup>2</sup> The URL for the program website is [www.prepsprogram.com](http://www.prepsprogram.com).



- ♦ Range of sizes, in terms of enrollment
- ♦ Focused on schools with 150 students or more

### *Participants*

All samples in the participant population have been contacted by the program for participation. Participants, consisting of schools with installed units, were selected from call lists provided by the utility. Partial participants are schools that were contacted by RSG but either declined, didn't qualify, or have not yet enrolled in the program

### *Non Participants*

Non-participants are utility customers with no known contact with the program We surveyed private schools, colleges and universities not contacted by the program to assess market interest in the program. (focused on k-12 private schools with 150 students or more to target larger gas usage). There were also a small number of "other" schools, including gymnastics, Montessori or martial arts schools to provide breadth.

### *Sampling*

At the initiation of the evaluation, there was a single program participant who had enrolled in the PREPS program. The implementer provided a list of partial participants who had been contacted by the implementer but had not taken advantage of the program at that point. To better understand the interest for a program like PREPS we accessed a list of NAICS coded private schools in the SCG territory. To gain more accurate contact data, we downloaded a full list of registered private schools in California and searched for schools within the SoCal Gas territory.

## **1.1.2 Program Staff Interview Guide**

Sempra Portfolio Evaluation

*Program Manager Interview Guide*

September 2011

INTERVIEWEE NAME: [Name]

INTERVIEW DATE:

COHORT: SEMPRA PM

INTERVIEWER:

As you know we are conducting a portfolio evaluation for SEMPRA non residential energy programs. First I have some general questions about the PREPS program (Program for Resource Efficiency in Private Schools). Then I have a longer set of more detailed questions that also cut across programs. Please let me know if you don't understand a question. You should also feel free to say you don't know or don't want to answer a particular question.

### **PROGRAM SPECIFIC**

1. I would like to confirm your name and title. Please tell me how to pronounce your name.
2. How long have you been with PREPs? What is your role? Do you manage other programs?
3. In our initial interview with PM, she noted that the program was still in its early stages. Can you give me an update on the status of the program?
4. What has the response been so far?
5. Have any changes been made to increase participation?
6. Are these changes working and will you consider other changes?
7. What do you think are the barriers to getting more prospective clients? [Probe for specifics]
8. Are the program's staff resources adequate to meet the demands of the program? What additional resources do you need?
9. Do you expect to meet your performance objectives? If not, why not?
10. What kind of program data have? Clarify rebates??? List of AEs?
11. Anything else you would like to add about PREPS?

### **EFFICIENT USE OF RESOURCES**

12. Do you feel that the program offerings for customers are redundant? [If needed] For example, do multiple programs offer one kind of customer the same or very similar services or equipment?
13. Do you think there is redundancy in staffing, for example, more than 1 person doing the same thing?
14. Which positions or roles?
15. Do you have any ideas about what could be done to fix these issues?

### **INTERNAL PROGRAM COORDINATION**

16. Is coordinating with other Sempra program staff a challenge for you or your program?
17. In what way is coordinating with other Sempra program staff a challenge?
18. Do you have any challenges managing your program due to the needs or requests of other programs or staff?  
[Probe for details, examples]

### **CLARRIFICATION OF ROLES AND RESPONSIBILITIES**

19. Does your program coordinate with account executives?
20. Is this critical to the success of your program?
21. Do you feel like the AE's goals are aligned with the goals of your program?
22. What do you think could be done to align AEs' goal with program goals?

### **GENERAL MARKETING QUESTIONS**

23. Who is most responsible for marketing the program to potential participants?
24. How effective has this lead person /group been in conducting program outreach?
25. What outreach methods have each of the above groups utilized in reaching customers?
26. How effective have each of these methods been?
27. What additional outreach methods are needed to reach the target population?
28. Is the outreach budget sufficient to support the programs?
29. In what areas is it lacking?

### **IT AND DATA TRACKING QUESTIONS**

30. How is the program currently tracking participant application data?
31. Does your current participant database meet your program reporting needs?
32. Are customer leads currently being tracked?

- 33. What type of database user training does program staff receive?
- 34. Do you have any recommendation on improving EE program database applications?

### **35. THIRD PARTY INTEGRATION**

- 36. How satisfied are you with the way 3P staff manage project data?
- 37. Do you feel the 3P firm has allocated sufficient resources to your program to ensure your program performs as expected?
- 38. Has this discussed this with the 3P firm—what was the result?
- 39. Why hasn't the 3P firm allocated enough resources to your program?
- 40. Do you believe the 3P firm has sufficient market knowledge and connections to adequately promote your program?
- 41. Do you feel there are other 3P firms who have stronger relationships and market place knowledge?
- 42. How regularly does your 3P firm follow Sempra's guidelines concerning the use of Sempra and your utility's logos?
- 43. Is the 3P firm using appropriate QA?

### **BENCHMARKING**

- 44. What has been your experience with benchmarking for your program?
- 45. Why do some customers decline benchmarking?
- 46. To what extent does the benchmarking requirement impede or delay participation in IOU programs?
- 47. Is the benchmarking tool easy to use?
- 48. Are benchmarking results easy to interpret?
- 49. Are benchmarking results useful?
- 50. How could the benchmarking process and results be more useful to customers?

### **REGULATORY**

- 51. How would you characterize the relationship between the IOU program staff and the CPUC Energy Division (ED)? Who at the ED do they routinely interact with?
- 52. What issues is the CPUC ED most concerned with regarding this particular program?
- 53. What are the major regulatory requirements that program staff spend their time on [or confirm from notes]
- 54. How much effort does it take the IOUs to track, follow and address this requirement?
- 55. Do you believe this is an appropriate level of effort?
- 56. Do you have suggestions for getting more value out of this requirement and/or reducing its required level of effort?
- 57. Are the objectives of this requirement being met?
- 58. Would you say that the IOU Program Managers are meeting the regulatory requirements in general?
- 59. That's all I have. Thank you for your time. Anything you want to add?

## **1.1.3 Implementer Interview Guide**

Sempra Portfolio Evaluation

*Implementer Interview Guide*

September 2011

INTERVIEWEE NAME:

DATE:

COHORT:

INTERVIEWER:

As you know we are conducting a portfolio evaluation for SEMPA's nonresidential energy efficiency programs. Your input on the PREPS program will help us craft a more complete and useful report.

I will START WITH PROGRAM SPECIFIC THEN have some general CROSS CUTTING questions. Please let me know if you don't understand a question. You should also feel free to say you don't know or don't want to answer a particular question.

## **PROGRAM SPECIFIC**

PREPS=Program for Resource Efficiency in Private Schools.

### **Overview Questions**

I'd like to start by getting an overview of the PREPS program....

1. Can you briefly describe your role in the PREPS program?
2. Who else at RSG works with you on this program?
3. What is the current status of the program?
4. What are your key performance indicators?
5. What has the response been from schools been so far?
6. Are there any types or subsets of schools that you have focused marketing/promotion of PREPs to?
7. Why is that? [Probe: Preschool, K-12, Trade and technical, Post-secondary, 2-year, 4-year, Graduate, Parochial, Other]
8. How many schools are participating in the program? (For each of the types or subsets above, if relevant.)
9. How far along are they in the process of implementing energy efficiency measures?
10. What changes have you made since the original plan?
11. How well do SCG resources support your ability to implement the program? [Probe: Other resources that they would like to have.]

### **Program Progress**

PREPS offers a variety of services and energy measures to participants....

12. Can you describe what a typical sequence of activities and services might look like for a participating school? Describe the preps process
13. After a school has enrolled in the program, what do you do next?
14. How long do you expect it will take for a school to complete the process you describe?
15. How many schools have gotten to each stage so far? (Probe: marketing and outreach, customer screening, initial assessment/feasibility, onsite energy/audit, bid preparation, installation, incentive processing, educational activities, other)
16. How many schools do you expect to take advantage of the bonus for early installation?

### **Communication**

I'd like to discuss communication with PREPS program management and other utility staff and with schools....

17. How often do you communicate with the Program Manager and by what method? [Probe: meetings, emails/memos, phone calls?]
18. Do you feel that she/he lets you know about important information?
19. Are you able reach SCG program staff when you need to, to discuss PREPS topics and issues?

20. What customer issues, if any, have come up in these conversations?
21. How were these issues resolved?
22. How often do you communicate with SCG Account Executives and by what methods? [Probe: meetings, emails/memos, phone calls?]
23. In what way do you work with Account Executives to identify prospective participants? (e.g., what guidance, information, data)
24. I'd like to learn what schools are saying about the PREPS program... What are the most common questions schools have when they are considering participation in PREPS?

### **Marketing/Promotion**

Let's talk now about specific marketing and promotion activities...

25. What kinds of marketing materials/guidelines does SCG give you?
26. What promotion activities of yours have been most successful at enrolling schools in PREPS? (e.g., Education Association, Trade show/Conference, Bill insert, Brochure, Word of mouth, Phone call, Door-to-door, Other) [Probe for National Association of Independent Colleges and Universities (NAICU) and the California Association of Private School Organizations (CAPSO)]
27. KG: Asked about educational activities, please explain.
28. Monitoring
29. What kind of information do you track on the schools that are participating or have participated to a certain stage?
30. What other kinds of program data do you collect?

### **Educational Activities**

31. How does the program deliver energy efficiency education to participating schools? [Probe: What do they actually teach them?]
32. Which end-users do you target with these activities? [Probe: facilities managers, administrators, faculty, students]
33. How do you determine whether these activities are successful?

### **Close**

Finally, just a few questions in closing...

34. What would you say are PREPS strongest points?
35. What are its weakest points?
36. Other than what we've discussed above, what would you change about the program?
37. What would you like to learn from the final report? Any questions for us?
38. Respondent background
39. What is your position title? (open-ended response)
40. What are your position responsibilities? (open-ended response)
41. Which sector do you serve (choose all that apply – Ag, Ind, Comm)
42. What products do you primarily sell or what services do you offer? (list – e.g., lighting, HVAC equipment, etc.)

### **Marketing / outreach**

43. Does your company specialize in the specification of energy efficient technologies? (open-ended response)
44. Which programs have you heard of (list)?
45. What EE programs do you recommend to your customers? (list) At what point in the process do you recommend the programs? (open-ended response)
46. Are there EE programs that you are aware of, that you don't recommend? If so, why not? (open-ended response)
47. For the programs that you participate in, how did you first hear of them? (open ended)
48. What barriers do your customers face when deciding whether to upgrade to EE equipment? (open ended)

49. What barriers do your customers face when deciding whether to participate in an [IOU] program? (open ended)
50. Please describe any prior experience in participating in energy efficiency projects and/or programs. (open-ended response)
51. Who at [IOU] do you primarily work with - name and role (open-ended)
52. Are there any additional tools or support that [IOU] could provide to you in order to better market energy efficiency equipment / services? What could they provide? (open-ended)
53. How would you prefer to receive information and updates about [IOU] programs? (list)
54. I understand that you have worked with facilities to serve the [PROGRAM]. Is this correct? (Y/N)
55. What value did the program bring to the customers you serve? (open ended)
56. Last question: Anything for us? What would you like to learn from the evaluation?

## 1.1.4 Customer Survey Guides

### *Participating Customer Survey Guide*

#### Q1 Interview Information

Name of Interviewee  
 Date of Interview  
 Interviewer Name

Q2 Hello, my name is [Name] with Research Into Action, and I'm calling on behalf of SoCal Gas. We are conducting research to assess services and offerings they provide to their customers. I'm calling specifically to find out about your experience with the PREPS program. PREPS provides rebates and incentives for private pre-k, k-12, colleges, universities, trade schools and other private institutions of learning to offset the cost of upgrading to more energy efficient equipment. Are you the correct person to speak with? Please be assured that this isn't a sales call and that all responses are confidential. Is this a good time to talk? If not, when might I speak with you for 20 minutes?(If NO, take down contact information and end survey)

- ☐ Yes: Take survey
- ☐ No: Collect contact data

#### Q3 If not correct person, ask who is

Name of new contact  
 Title  
 Phone number  
 Best time to reach them

#### Q4 End of survey

Q5 What is the main business activity at this facility?

- ☐ Office \_\_\_\_\_
- ☐ College/University \_\_\_\_\_
- ☐ School \_\_\_\_\_
- ☐ Community Service/Church/Temple/Municipal \_\_\_\_\_
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q6 What is the total seating capacity of the communal areas (e.g. worship areas) in this building? If needed use:  
DK=Don't know Ref=Refused

Q7 How many students can be seated in all of the classrooms in this building at one time? If needed use: DK=Don't know Ref=Refused

Q8 What are your responsibilities?

Q9 What type of equipment uses the most natural gas at your facility?

- ☐ Boilers
- ☐ HVAC and Furnaces
- ☐ Food Service Equipment
- ☐ Laundry Equipment
- ☐ Pumps
- ☐ Other \_\_\_\_\_
- ☐ Don't Know
- ☐ Refused

Q10 What type of equipment uses the second most natural gas at your facility?

- ☐ Boilers
- ☐ HVAC and Furnaces
- ☐ Food Service Equipment
- ☐ Laundry Equipment
- ☐ Pumps
- ☐ Other \_\_\_\_\_
- ☐ Don't Know
- ☐ Refused

Q11 Has your organization developed a specific policy for the selection of energy efficient equipment? [For example: A requirement that all new fluorescent lighting systems use electronic ballasts, or that all boilers have a minimum thermal efficiency.]

- ☐ Yes - Please describe those policies. \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't Know \_\_\_\_\_
- ☐ Refused \_\_\_\_\_

Q12 Who makes decisions on equipment purchases or upgrades? (Mark all that apply - don't read answer choices)

- ☐ Facilities Manager
- ☐ Building Manager
- ☐ Energy Manager
- ☐ Other facilities management/ maintenance position
- ☐ Chief Financial Officer
- ☐ Other financial/ administration position
- ☐ Proprietor/ Owner
- ☐ President/ CEO
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused



Q13 What difficulties have you had, either inside or outside your institution, with purchasing and installing an energy efficiency upgrade through this or any SoCal Gas program? (Mark all that apply - don't read answer choices)

- ☐ No difficulties
- ☐ Other priorities for capital spending
- ☐ Lack of funds available for investment
- ☐ Lack of financing
- ☐ Amount of management time to oversee projects
- ☐ Incremental cost for more efficient equipment too high/ Payback period too long
- ☐ Rebate amount not high enough
- ☐ Business hesitant to replace existing working equipment
- ☐ Upper management doesn't see the benefit of energy efficient equipment
- ☐ We lease the space
- ☐ Contractors weren't familiar with program
- ☐ Rebate application process was demanding
- ☐ Economy
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q14 Notes

Q15 Now I'm going to ask you some questions about your facility's participation in the PREPS program. Program Description: PREPS provides rebates and incentives for private pre-k, k-12, colleges, universities, trade schools and other private institutions of learning to offset the cost of upgrading to more energy efficient equipment

Q16 How did you first hear about the program? (Mark all that apply - don't read answer choices)

- ☐ SoCal Gas account executive
- ☐ 3P Implementer
- ☐ SoCal Gas staff
- ☐ SoCal Gas call center
- ☐ SoCal Gas utility bill insert
- ☐ SoCal Gas mailing (hard copy)
- ☐ SoCal Gas utility email message
- ☐ SoCal Gas website
- ☐ From participation in another SoCal Gas program (Enter in program name) \_\_\_\_\_
- ☐ Contractor/ retailer
- ☐ Conference/ trade show
- ☐ Colleague/ Peer
- ☐ Television ad
- ☐ Print media ad
- ☐ Radio ad
- ☐ Other \_\_\_\_\_
- ☐ Don't Know
- ☐ Refused

Q17 Notes:

Q18 How would you prefer to receive information and updates about SoCal Gas energy efficiency programs? (Mark all that apply - don't read answer choices)

- ☐ SoCal Gas account executive
- ☐ 3P Implementer
- ☐ Other SoCal Gas staff
- ☐ SoCal Gas call center
- ☐ SoCal Gas utility bill insert
- ☐ SoCal Gas mailing (hard copy)
- ☐ SoCal Gas utility email message
- ☐ SoCal Gas website
- ☐ Contractor/ retailer
- ☐ Conference/ trade show
- ☐ Colleague/ Peer
- ☐ Television ad
- ☐ Print media ad
- ☐ Radio ad
- ☐ Other \_\_\_\_\_
- ☐ Don't Know
- ☐ Refused

Q19 Did you visit the program's website for more information?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q20 Why did you participate in this program? (Mark all that apply - don't read answer choices)

- ☐ To save money
- ☐ The equipment failed/worked poorly and I needed to replace it
- ☐ Contractor/ engineer/ technical assistant recommended we participate
- ☐ Account executive recommended we participate
- ☐ Corporate practice
- ☐ Availability of the SoCal Gas rebate
- ☐ Past participation with SoCal Gas program
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q21 Did you understand the connection between program implementer (Resource Solutions Group) and SoCal Gas?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't Know \_\_\_\_\_
- ☐ Refused

Q22 If the PREPS program hadn't contacted you, how likely is it that would you have gone directly to the utility to apply for a rebate? Where 1 is not at all likely and 5 is extremely likely.

- ☐ 1 - Not at all likely
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5 - Extremely likely
- ☐ Don't know
- ☐ Refused

Q23 Did you sign a Program Participation Agreement (PPA)

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q24 Did you have any problems with the application process?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q25 Notes:

Q26 What were they and how were they resolved? (try to postcode - e.g., finding model number, finding serial number, providing manufacturer specs, not sure about eligibility, etc.)

Q27 Did you receive a rebate or incentive as part of your participation in the PREPS program?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't Know \_\_\_\_\_
- ☐ Refused
- ☐ Not Applicable \_\_\_\_\_

Q28 Was the rebate or incentive amount you received more, about the same, or less than you expected?

- ☐ More \_\_\_\_\_
- ☐ About the same \_\_\_\_\_
- ☐ Less \_\_\_\_\_
- ☐ Don't Know \_\_\_\_\_
- ☐ Refused
- ☐ Not Applicable \_\_\_\_\_

Q29 Notes

Q30 Confirm: Which of the following categories apply to your institution? (Choose all that apply)

- ☐ Preschool
- ☐ K-12
- ☐ Post-secondary
- ☐ Trade and Technical
- ☐ 2-year
- ☐ 4-year
- ☐ Graduate
- ☐ Parochial
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q31 How many students do you have at your institution? [Probe: Other measures of size or potential energy savings.]

Q32 Do you have multiple campuses?

- ☐ Yes - How many students do you have in Southern California? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q33 Do you budget for energy efficiency upgrades? [Probe: Percentage of total budget]

Q34 What is your budget cycle for facilities, equipment, and maintenance?

Q35 Which PREPS services have you taken advantage of? (Mark all that apply - Probe for specifics)

- ☐ Initial assessment/ feasibility study
- ☐ Onsite energy audit
- ☐ Bid support
- ☐ Installation support
- ☐ Incentive processing
- ☐ Educational activities
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused
- ☐ None \_\_\_\_\_

Q36 Notes for previous question:

Q37 Which of these services do you plan to take advantage of in the future? (Mark all that apply - don't read answer choices)

- ☐ Initial assessment/ feasibility study
- ☐ Onsite energy audit
- ☐ Bid support
- ☐ Installation support
- ☐ Incentive processing
- ☐ Educational activities
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused
- ☐ None \_\_\_\_\_

Q38 Notes:

Q39 Based on the PREPS analysis and/or audit, what were the recommended energy efficiency measures for your institution?

Q40 Have you adopted any of these measures?

- ☐ Yes - Which measures? \_\_\_\_\_
- ☐ No - Why not? \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q41 Do you plan additional upgrades in the future?

- ☐ Yes - Which measures and when? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q42 Did your institutions have the financial and technical resources it needed to complete the upgrades?

- ☐ Yes \_\_\_\_\_
- ☐ No - Please explain \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q43 If PREPS were not offered, would your institution have continued with its energy efficiency projects?[Probe:  
How important was the bonus? Role of AE?]

- ☐ Would have continued with the project anyway
- ☐ Would not have continued with the project
- ☐ Not sure
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q44 Notes:

Q45 Which of the PREPS educational activities have you participated in? [Probe: Who participated? Feedback? Attitudes?]

Q46 Would you say the PREPS program has influenced awareness about energy efficiency at your institution?

- ☐ Yes- Please explain (changes - technical, behavioral etc. from PREPS) \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q47 Have you had any questions about the program?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q48 Notes

Q49 Did you get the information you needed? [Probe: Did you know who to ask? Whom did you ask?]

Q50 Thank you. I only have a few remaining questions

Q51 As part of the program, did someone come to inspect the energy efficient equipment?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused
- ☐ Not Applicable \_\_\_\_\_

Q52 How could the inspection process be improved?

Q53 How satisfied were you with the inspection process? Please use a 5-point scale, where 1 is not at all satisfied, and 5 is extremely satisfied.

- ☐ 1 - Not at all satisfied
- ☐ 2 - Not satisfied
- ☐ 3 - Neutral
- ☐ 4 - Satisfied
- ☐ 5 - Extremely satisfied
- ☐ Don't know
- ☐ Refused



Q54 Overall, how satisfied were you with the program? Please rate on a 5 point scale, where 1 is not at all satisfied and 5 is extremely satisfied.

- ☐ 1 - Not at all satisfied
- ☐ 2 - Not satisfied
- ☐ 3 - Neutral
- ☐ 4 - Satisfied
- ☐ 5 - Extremely Satisfied
- ☐ Don't know
- ☐ Refused
- ☐ Not Applicable

Q55 Notes:

Q56 Please explain.

Q57 Would you be interested in participating in this program again? Please rate on a 5 point scale, where 1 is not at all interested, and 5 is extremely interested in participating.

- ☐ 1 - Not at all interested
- ☐ 2 - Not interested
- ☐ 3 - Neutral
- ☐ 4 - Interested
- ☐ 5 - Extremely interested
- ☐ Don't know
- ☐ Refused

Q58 Notes:

Q59 Please explain.

Q60 Besides this program, are you aware of other SoCal Gas programs or resources to promote energy efficiency for institutions like yours?

- ☐ Yes - What types of programs? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't Know
- ☐ Refused

Q61 Has your organization participated in any of the programs you mentioned?

- ☐ Yes - Which ones? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q62 Are you planning any repairs or replacements to your equipment in the next two years?

- ☐ Yes - What types are you considering? \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q63 Do you plan to participate in an SoCal Gas program for these purchases?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q64 Those are all the questions we have for you. Do you have any other comments you would like to make?

Q65 Thank you for your time!

### *Non-Participating Customer Survey Guide*

Q1 Hello, my name is \_\_\_\_\_ and I'm calling on behalf of SoCal Gas. We are conducting research on behalf of SoCal Gas to assess services and offerings they provide to their customers. I would like to speak to you for approximately 15 minutes with the facility manager or someone else familiar with the energy use of your business. If not yourself, who would be the best person to speak with? [IF NOT RESPONDENT, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY] Please be assured that this isn't a sales call and that all responses will be treated confidentially. Is this a good time to talk? If not, when might I speak with you for about 15 minutes?

Q2 Notes

Q3 Interview Information

Name of Interviewee

Date

Name of Interviewer

Q4 How would you characterize your business?[Read categories if needed]

- ☐ College/University
- ☐ School
- ☐ Community Service / Church / Temple / Municipal
- ☐ Other \_\_\_\_\_
- ☐ Refused
- ☐ Don't know

Q5 Notes: School type

Q6 How many students can be seated in all of the classrooms in this building at one time?

Q7 What is the total seating capacity of the communal areas (e.g., worship areas) in this building?

Q8 What are your responsibilities?

Q9 What type of equipment uses the most natural gas at your facility?

- ☐ Boilers
- ☐ HVAC and Furnaces
- ☐ Food Service Equipment
- ☐ Pumps
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q10 What type of equipment uses the second most natural gas at your facility?

- ☐ Boilers
- ☐ HVAC and Furnaces
- ☐ Food Service Equipment
- ☐ Pumps
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q11 Do you plan to replace or repair any gas-using equipment in the next 2 years?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q12 Which equipment?

- ☐ Boilers
- ☐ Furnaces
- ☐ Food Service Equipment
- ☐ Laundry Equipment
- ☐ Pumps
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q13 What is your budget cycle for facilities, equipment, and maintenance?

Q14 Has your facility applied or participated in a SoCal Gas program? For example, has your facility received a rebate, audit, incentive, or education?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q15 If so, what was the program, and did your facility complete its participation in the program?

Q16 How likely are you to consider energy-efficiency when installing or replacing energy-using products for your organization? Please give me a rating from 0 to 10, (where 10 means you're EXTREMELY likely to consider energy-efficient products, and 0 means you're NOT AT ALL LIKELY to consider energy efficient products.

- ☐ 0 - Not at all likely
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 9
- ☐ 10 - Extremely likely
- ☐ Don't know
- ☐ Refused

Q17 Why is this?

Q18 Has your organization developed a specific policy for the selection of energy-efficient equipment? [e.g. Requirement that all new fluorescent lighting systems use electronic ballasts, or that all new motors be premium efficiency.]

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q19 Please describe those policies?

Q20 Who makes decisions on equipment purchases or upgrades?

- ☐ Facilities manager
- ☐ Building manager
- ☐ Energy manager
- ☐ Other facilities management / maintenance position
- ☐ Chief Financial Officer (CFO)
- ☐ Other financial / administrative position
- ☐ Proprietor / Owner
- ☐ President / CEO
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q21 Have you had any challenges with purchasing or installing energy efficiency equipment?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q22 If so, What were these challenges?(Do not read, mark all that apply)

- ☐ No difficulties
- ☐ Other priorities for capital spending
- ☐ Lack of funds available for investment
- ☐ Lack of financing
- ☐ Amount of management time to oversee projects
- ☐ Incremental cost for more efficient equipment too high / payback period too long
- ☐ Business hesitant to replace existing working equipment
- ☐ Upper management doesn't see the benefit of energy efficiency equipment
- ☐ Not sure which equipment to choose
- ☐ Desired equipment not available \_\_\_\_\_
- ☐ We lease space
- ☐ Economy
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q23 Before this call, were you aware that SoCal Gas offers programs to help you increase the energy efficiency of your organization?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q24 Which programs were you aware of? (Gather description of program and, if known, program name)

Q25 Did you know that your facility was eligible for any of these programs, and chose not to participate?

- ☐ Yes \_\_\_\_\_
- ☐ No \_\_\_\_\_
- ☐ Don't know \_\_\_\_\_
- ☐ Refused

Q26 If so, please describe the program?(Prompt with list of program type descriptions if needed)

Q27 Why did you choose not to participate in the program?

Q28 What type of equipment did you install without assistance from the program, that you believe would have been eligible?

- ☐ Motors and pumps
- ☐ Drives
- ☐ Lighting
- ☐ HVAC and furnaces
- ☐ Boilers
- ☐ Food service equipment
- ☐ Laundry equipment
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q29 How did you first hear about the program?

- ☐ SoCal Gas account executive
- ☐ Other SoCal Gas staff
- ☐ SoCal Gas call center
- ☐ SoCal Gas utility bill insert
- ☐ SoCal Gas mailing
- ☐ SoCal Gas utility email message
- ☐ SoCal Gas web site
- ☐ From participation in another SoCal Gas program \_\_\_\_\_
- ☐ Contractor / Retailer
- ☐ Conference / Trade show
- ☐ Colleague
- ☐ Television ad
- ☐ Print media ad
- ☐ Radio ad
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q30 How would you prefer to receive information and updates about SoCal Gas energy efficiency programs?

- ☐ SoCal Gas account executive
- ☐ Other SoCal Gas staff
- ☐ SoCal Gas call center
- ☐ SoCal Gas utility bill insert
- ☐ SoCal Gas mailing
- ☐ SoCal Gas utility email message
- ☐ SoCal Gas web site
- ☐ From participation in another SoCal Gas program \_\_\_\_\_
- ☐ Contractor / Retailer
- ☐ Conference / Trade show
- ☐ Colleague
- ☐ Television ad
- ☐ Print media ad
- ☐ Radio ad
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused



Q31 I would like to describe a few types of SoCal Gas programs for which your facility may be eligible for participating. For each, please describe your interest in participating on a 1-5 scale, where 1 is not at all interested, and 5 is extremely interested, and N/A if you don't think the program applies to your facility.

	1 - Not at all interested	2	3	4	5 - Extremely interested	N/A	Don't Know
An audit type program, providing a site walk through and recommendations on energy efficiency upgrades for your facility. [SCG= Audit]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An HVAC Retro-commissioning program, to tune up your HVAC equipment to make it run more efficiently.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A direct install program, providing free installation of low-cost energy efficiency measures at small to medium sized businesses (demand < 100kW)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A rebate program, where the rebate amounts are based on the equipment installed [Deemed]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An incentive program, where the incentive amount is calculated based on the predicted	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

energy savings [Calculated / BID]							
A program offering 0% interest loans for energy efficiency upgrades [OBF]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A program that provides technical assistance and financial incentives to schools to develop energy efficiency strategies and install equipment upgrades. The program also provides assistance with obtaining financing and identifying and selecting contractors. [PREPS]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#### Q32 Comment

Q33 For the program types for which you are interested, what would motivate your organization to participate?(Do not read unless customer needs prompt)

- ☐ Upgrading or replacing equipment
- ☐ Saving money on energy bills
- ☐ Obtaining a rebate
- ☐ Technical assistance
- ☐ Protecting environment
- ☐ Corporate policies
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q34 Why might you NOT participate in a program?(Do not read)

- ☐ Application takes too much time
- ☐ Rebate not high enough
- ☐ Don't have enough program information
- ☐ Don't believe energy savings claims
- ☐ Other \_\_\_\_\_
- ☐ Don't know
- ☐ Refused

Q35 Those are all the questions I have for you. Do you have any other comments you would like to make?

Q36 Thank you for your time!

A1. Our records indicate that your organization received a loan from [IOU NAME] to pay for energy-efficiency improvements. We were informed that the best person to speak with regarding the loan program, also called on-bill financing program, is \_\_\_\_\_. Is this accurate and is he/she available?

- 1. Yes [GO TO Q0]
- 2. No [ASK TO SPEAK TO THE PERSON IN THE ORGANIZATION WHO KNOWS THE MOST ABOUT THE PROGRAM. IF THE PERSON TELLS YOU IT IS NOT A CONVENIENT TIME GO TO QA1A]
- 98. Don't know [GO TO QA2]
- 99. Refused [THANK AND TERMINATE]

A1a. Is there a more convenient time that I could call back? [EMPHASIZE THAT "IT IS IMPORTANT FOR [UTILITY] TO INCLUDE YOUR OPINIONS IN THIS STUDY TO BETTER SERVE YOUR NEEDS."]

A2. The purpose of this call is to obtain advice from participating organizations on how [IOU NAME]'s loan program can be improved to help businesses make energy conservation investments. As a decision maker at a participating organization, your opinions are very important. Would you like to answer some questions about your experience with the on-bill financing program? All answers will be kept confidential.

- 1. Yes [IF RESPONDENT ASKS HOW LONG, SAY "20 TO 30 MINUTES."]
- 2. Not a good time [THANK AND ASK FOR A BETTER TIME]
- 3. Not interested [THANK AND TERMINATE]

A3. Are you customer of [UTILITY]?

- 4. Yes
- 5. No [THANK AND TERMINATE]
- 98. Don't know [THANK AND TERMINATE]

- A4. Did your organization finance an investment in an energy conservation project using a loan from [IOU NAME]?
1. Yes
  2. No [THANK AND TERMINATE]
- 98. Don't know [THANKS AND TERMINATE]
- 99. Refused [THANK AND TERMINATE]

### Source of Program Information

First, I'd like to ask you some questions about your decision to participate in the loan, or OBF, program and the equipment you installed.

[IF ASKED: THE PROGRAM OFFERS ZERO PERCENT FINANCING TO NONRESIDENTIAL CUSTOMERS WHO MAKE QUALIFYING ENERGY CONSERVATION INVESTMENTS AT THEIR PLACE OF BUSINESS. THE LOAN IS THEN REPAID THROUGH A LINE ITEM ON THE UTILITY BILL.]

- B1. How did you find out about [IOU NAME]'s OBF program? [DO NOT READ, PROMPT IF NECESSARY. CHECK ALL THAT APPLY OR RECORD VERBATIM.]
1. Contractor/installer
  2. (Newspaper/magazine/print media)
  3. ([UTILITY] account manager or program staff)
  4. ([UTILITY] physical mail)
  5. ([UTILITY] Web site)
  6. Word-of-mouth
  7. (Other [SPECIFY] \_\_\_\_\_.)
- 98. (Don't know)
- 99. (Refused)

### Decision Making Process

- C1. What types of equipment were financed through the OBF program? [OPEN ENDED]
- C2. Why did you decide to install and finance that equipment through [IOU NAME]'s OBF program? (Multiple responses possible)
1. Old/failing equipment
  2. Expansion
  3. Manage energy costs
  4. Project ROI/payback
  5. Availability of incentives
  6. Availability of up front financing
  7. Availability of 0% financing

8. Convenient application process
  9. Other \_\_\_\_\_
  10. Don't know
  11. Refused
- C3. If OBF was not available, would your organization have continued with its energy conservation investment?
1. Yes
  2. No [SKIP C4]
  3. Don't know
- C4. Did the availability of OBF influence you to do any of the following: (yes/no/don't know)
- C1. Conduct the project sooner?
  - C2. Increase the amount of equipment purchased?
  - C3. Purchase higher quality/more efficient equipment?
  - C4. Did not result in any changes to planned project?
- C4a. How would you have paid for the energy efficiency investment if the OBF program were not available?
1. With cash
  2. Unsecured loan from bank
  3. Secured loan
  4. Issue a bond / sell stock
  4. Other \_\_\_\_\_
  - 98. Don't know
  - 99. Refused
- C5. Why did you decide to use the OBF program instead of other financing sources? (Multiple responses possible)
1. Convenience
  2. Better rates
  3. Better terms
  4. Other financing options not available
  5. Didn't look for other financing sources
  6. Other \_\_\_\_\_
- C6. Did the OBF loan cover all equipment and installation costs?
1. Yes
  2. No ([SPECIFY WHAT WASN'T COVERED] \_\_\_\_\_)
  - 98. Don't know

- 99. Refused
- C7 Which of the following best describes how the loan payback period figured into your organization's decision to participate in the OBF? [read options]
  - 1 Was not concerned with the payback period
  - 2 Payback period was adequate
  - 3 Would have liked a longer payback period (ASK: How long?)
  - 4 Would have liked a shorter payback period (ASK: How long?)
  - 5 Don't know
  - 6 Other \_\_\_\_\_
- C8 Which of the following best describes how the loan maximum/minimum value figured into your organization's decision to participate in the OBF? [read options]
  - 1 Was not concerned with the amount, Amount was adequate,
  - 2 Would have liked a larger amount (ASK: How much?)
  - 3 Would have liked a smaller amount (ASK: How much?)
  - 4 Don't know
  - 5 Other \_\_\_\_\_
- C9 While considering the OBF program, did you have any questions about program requirements (Yes/ No) Who did you ask?
  - 1 Representative of the efficiency staff
  - 2 SDG&E account executive
  - 3 Contractor/vendor
  - 4 OBF staff
  - 5 Other: \_\_\_\_\_
- C10 Did you get the assistance you needed? (Yes/No)
- C11 If C10 = NO ASK: What additional assistance did you need?
- C12 How clearly did the OBF contract language explain what your organization needed to do to achieve financing?
  - 1 Completely clear
  - 2 Somewhat clear (What was not clear?)
  - 3 Not clear/had issues (What was not clear?)

## **Loan Repayment Process**

- D1. Have you received a utility bill that included your OBF payment?
1. Yes
  2. No [SKIP TO D2]
  - 98. Don't know
  - 99. Refused
- D1a. Was the payment consistent with your expectations?
1. Yes
  2. No [PROBE: HOW SO?] \_\_\_\_\_)
  - 98. Don't know
  - 99. Refused
- D2. Have you experienced any difficulties with your OBF payment on your utility bill?
1. Yes [PROBE: WHAT KIND?] \_\_\_\_\_)
  2. No
  - 98. Don't know
  - 99. Refused
- D3. With OBF, you have the ability to repay the loan through your utility bill instead of dealing with a separate bill, and you can see changes in energy consumption as a result of the energy conservation project being financed. Do you find this to be a valuable feature of the program? [SCALE 1-4, 1 = NOT VALUABLE, 4 = VERY VALUABLE]
- D3a. [IF 2 OR LOWER] Why low value?
- D4. Is the property where the utility financed energy-improvements were made owner occupied or tenant occupied?
1. Owner Occupied
  2. Tenant Occupied

### **Participation Under Alternate Loan Terms and Incentive Structures**

- E1. Let's talk for a minute about the offer you received from the utility, and what you liked about it. Which was more important in your decision to make energy-efficiency improvements: the rebates, or the availability of upfront financing through a 0% interest loan?
1. Rebates
  2. 0% Financing
- E1a. Why do you say that? [open ended]

- E2. Assuming the rebates stayed the same, but the loan carried a low interest rate between 3-5%, would you still have used the utility loan and made the energy-efficiency improvements?
1. Yes
  2. No, would not have used the loan but would have installed the energy –efficiency improvements
  3. No, would not have made any energy-efficiency improvements
- E3. Now suppose that the interest rate stayed at 0%, but the rebates were reduced 20-30%. Would you still have used the utility loan and made the energy-efficiency improvements?
1. Yes
  2. No, would not have used the loan but would have installed the energy –efficiency improvements
  3. No, would not have made any energy-efficiency improvements
- E4. Suppose there was a small loan origination fee, perhaps 2% of the loan amount. Would you still have used the utility loan and made the energy-efficiency improvements?
1. Yes
  2. No, would not have used the loan but would have installed the energy –efficiency improvements
  3. No, would not have made any energy-efficiency improvements
- E5. Did you have any concerns about taking on this debt to finance energy-efficiency improvements? (probe: future difficulty obtaining credit, debt service ability)
1. Yes
  2. No
- E5a. What were your concerns? [open ended]
- E6. How important was it that the estimated savings would completely cover the loan payments? For example, if the savings only covered 90% of the loan payment would that have been acceptable, so long as the net ROI on the project was positive?
1. Acceptable
  2. Not acceptable

## **Customer Satisfaction**



"I am now going to ask you about how satisfied you were with the program overall, the billing process, and the equipment or services you received. For each of my questions, I'd like you to tell me your level of satisfaction using a scale from 1 to 5, with 1 being very dissatisfied, 2 being somewhat dissatisfied, 4 being somewhat satisfied and 5 being very satisfied for each question."

- F1. How satisfied are you with the clarity and accuracy of the information you received on the OBF program? [SCALE 1-5, -98 = Don't know, -99 = Refused]
- F1a. [FOR F1 =1-2] You indicated you were dissatisfied with the information you received on the OBF program. Why did you say that? [OPEN END]
- F2. How satisfied are you with the loan application process? [SCALE 1-5, -98 = Don't know, -99 = Refused]
- F2a. [FOR F2 =1-2] You indicated you were dissatisfied with the loan application process. Why did you say that? [OPEN END]
- F3. Are there other types of equipment that you wanted to purchase using OBF that you were not able to due to program requirements?
1. Yes [PROBE: WHAT KIND AND WHY WAS IT NOT QUALIFIED?]  
\_\_\_\_\_)
  2. No
- 98. Don't know  
-99. Refused
- F4. Are there any features of the [IOU NAME]'s OBF program as a whole you would change? [DO NOT READ LIST; INDICATE ALL THAT APPLY]
1. Loan term (shorter, longer better?)
  2. Loan amounts (smaller, larger better?)
  3. Processing Time
  4. (Wouldn't change anything/keep program as is)
  5. (Would have liked clearer program information) [SPECIFY]\_\_\_\_\_)
  6. (Would have liked more or better access to program information) [SPECIFY]\_\_\_\_\_)
  7. (Other [SPECIFY]\_\_\_\_\_)
- 98. (Don't know)  
-99. (Refused)
- F5. As a result of your involvement with the [UTILITY] OBF Program, would you say you are more satisfied, just as satisfied, or less satisfied with [UTILITY] as your energy provider?
1. More satisfied
  2. Equally satisfied

- 3. Less satisfied
- 98. Don't know
- 99. Refused

### **Customer Demographics**

"Now I have just a few final questions."

G1. What is the best way to promote this program to businesses like yours? [DO NOT READ, PROMPT IF NECESSARY. CHECK ALL THAT APPLY OR RECORD VERBATIM.]

- 1. Trade shows
- 2. Word of mouth
- 3. Contractors
- 4. Trade associations
- 5. (Other [SPECIFY]\_\_\_\_\_)

G2. What % of your organization's operating budget does the gas and electric bill represent? [PERCENTAGE] \_\_\_\_\_)

[THANK & TERMINATE]

## CUSTOMER SURVEY RESPONSES FOR SELECT 3P PROGRAMS

---

This file provides customer survey responses for the following select third party (3P) programs in the Southern California Gas (SoCalGas) Nonresidential Process Evaluation: SaveGas, Program for Resource Efficiency in Private Schools (PREPS). This survey was conducted October 2011 - November 2011 by Research into Action, and the overall study was led by the Heschong Mahone Group, Inc.

Data collection resources, including the survey code books, survey and sampling methodologies, and sample dispositions, are provided in Attachment 3B. Analysis of the customer surveys are included in the final report volumes, including Main Report, Attachment 1 - Portfolio-level Evaluations, and Attachment 2 - Program Specific Evaluations. Customer survey frequency tables for all other programs in the evaluation are provided separately.

## 1.1 SaveGas (Conducted Concurrently at SDG&E and SoCalGas)

### *Participating Customer Summary Data*

#### **Q6\_ - What is the main business activity at this facility?**

	Frequency	Percent
Hotel or Motel	11	91.7
Other	1	8.3
Total	12	100.0

#### **Q7 - How many guest rooms or occupant rooms are there?**

	Frequency	Percent
64	1	8.3
73	1	8.3
182	1	8.3
211	1	8.3
216	1	8.3
227	1	8.3
296	1	8.3
300	1	8.3
304	1	8.3
380	1	8.3
384	1	8.3
415	1	8.3
Total	12	100.0

#### **Q10 - What types of equipment uses the second most electricity at your facility?**

	Frequency	Percent
Laundry Equipment	1	8.3
Other	1	8.3
Total	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

#### **Q11 - What types of equipment uses the most natural gas at your facility?**

	Frequency	Percent
Boilers	5	41.7
Food Service Equipment	1	8.3
Laundry Equipment	1	8.3
Other	3	25.0
Total	10	83.3
Not Selected	2	16.7
Grand Total	12	100.0

**Q12 - What types of equipment uses the second most natural gas at your facility?**

	Frequency	Percent
Boilers	2	16.7
Food Service Equipment	1	8.3
Laundry Equipment	4	33.3
Other	2	16.7
Don't Know	1	8.3
Total	10	83.3
Not Selected	2	16.7
Grand Total	12	100.0

**Q13 - Has your organization developed a specific policy for the selection of energy efficient equipment?...**

	Frequency	Percent
Yes - Please describe those policies.	5	41.7
No	6	50.0
Don't Know	1	8.3
Total	12	100.0

**Q14\_1 - Who makes decisions on equipment purchases or upgrades? -Facilities Manager**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q14\_4 - Who makes decisions on equipment purchases or upgrades? -Other facilities management/ maintenance position**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q14\_7 - Who makes decisions on equipment purchases or upgrades? -Proprietor/ Owner**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q14\_9 - Who makes decisions on equipment purchases or upgrades? -Other**

	Frequency	Percent
Selected	10	83.3
Not Selected	2	16.7
Grand Total	12	100.0

**Q15\_1 - What difficulties have you had -No difficulties**

	Frequency	Percent
Selected	8	66.7
Not Selected	4	33.3
Grand Total	12	100.0

**Q15\_12 - What difficulties have you had -Rebate application process was demanding**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q15\_14 - What difficulties have you had -Other**

	Frequency	Percent
Selected	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

**Q17 - How did you first hear about the program?**

	Frequency	Percent
Account Execute	3	25.0
Email from IOU	1	8.3
Colleague	1	8.3
Hotel association meeting	1	8.3
Corporate gave info	3	25.0

3P Implementer	2	16.7
Don't know	1	8.3
Total	12	100.0

---

**Q18 - How would you prefer to receive information and updates?**

---

	Frequency	Percent
Email from IOU	12	100.0

---



---

**Q19\_1 - Why did you participate in this program? -To save money**

---

	Frequency	Percent
Selected	6	50.0
Not Selected	6	50.0
Grand Total	12	100.0

---



---

**Q19\_6 - Why did you participate in this program? -Availability of the IOU rebate**

---

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

---



---

**Q19\_8 - Why did you participate in this program? -Other**

---

	Frequency	Percent
Selected	8	66.7
Not Selected	4	33.3
Grand Total	12	100.0

---



---

**Q20 - Did you complete an audit for your system?**

---

	Frequency	Percent
Yes	9	75.0
Don't know	3	25.0
Total	12	100.0

---



---

**Q21 - Did the audit reveal any new information to you?**

---

	Frequency	Percent
No	8	66.7
Don't know	1	8.3
Total	9	75.0
Not Selected	3	25.0

Grand Total	12	100.0
-------------	----	-------

**Q22 - Did you view the web demonstration for the SaveGas program?**

	Frequency	Percent
Yes	8	66.7
No	3	25.0
Don't know	1	8.3
Total	12	100.0

**Q25\_1 - Did you pencil out the savings you'd get from the SaveGas program?-Yes -  
What was the minimum break-even point?**

	Frequency	Percent
Selected	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

**Q25\_3 - Did you pencil out the savings you'd get from the SaveGas program?-No**

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

**Q25\_4 - Did you pencil out the savings you'd get from the SaveGas program?-No-  
TEXT**

	Frequency	Percent
	11	91.7
just started	1	8.3
Total	12	100.0

**Q25\_5 - Did you pencil out the savings you'd get from the SaveGas program?-Don't  
know**

	Frequency	Percent
Selected	3	25.0
Not Selected	9	75.0
Grand Total	12	100.0

**Q25\_7 - Did you pencil out the savings you'd get from the SaveGas program?-EDC  
did this as a way to sell the program**

	Frequency	Percent
Selected	3	25.0
Not Selected	9	75.0



Grand Total	12	100.0
-------------	----	-------

**Q25\_9 - Did you pencil out the savings you'd get from the SaveGas program?**

	Frequency	Percent
Yes	4	33.3
3P Implementer did this	3	25.0
Don't know	5	41.7
Total	12	100.0

**Q26\_1 - What was influential in your decision to participate? -Saving money on utility bills**

	Frequency	Percent
Selected	7	58.3
Not Selected	5	41.7
Grand Total	12	100.0

**Q26\_2 - What was influential in your decision to participate? -Desire to be current on technology**

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

**Q26\_3 - What was influential in your decision to participate? -Company policies favoring sustainability**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q26\_4 - What was influential in your decision to participate? -Program covered retrofit costs**

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

**Q26\_5 - What was influential in your decision to participate? -Being alerted to maintenance issues**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7

Grand Total	12	100.0
-------------	----	-------

**Q26\_6 - What was influential in your decision to participate? -Other**

	Frequency	Percent
Selected	8	66.7
Not Selected	4	33.3
Grand Total	12	100.0

**Q26\_8 - What was influential in your decision to participate? -Don't know**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q28 - Did you raise these concerns with program staff?**

	Frequency	Percent
Yes	6	50.0
No	1	8.3
Total	7	58.3
Not Selected	5	41.7
Grand Total	12	100.0

**Q29 - Did program staff address your concerns?**

	Frequency	Percent
Yes - How?	6	50.0
Not Selected	6	50.0
Grand Total	12	100.0

**Q33 - Do you have problems understanding the online monitoring system?**

	Frequency	Percent
Yes - What are the problems?	1	8.3
No	9	75.0
Don't know	2	16.7
Total	12	100.0

**Q34\_ - As part of the program, did someone from IOU come to inspect th...**

	Frequency	Percent
Yes	9	75.0

No	1	8.3
Don't know	2	16.7
Total	12	100.0

**Q36\_1 - On a scale of 1 to 5, How helpful were the following in understanding the program?.-Program Staff**

	Frequency	Percent
3	2	16.7
4	3	25.0
5 - Extremely helpful	6	50.0
Don't know	1	8.3
Total	12	100.0

**Q36\_2 - On a scale of 1 to 5, How helpful were the following in understanding the program?.-Web Presentation**

	Frequency	Percent
2	1	8.3
3	1	8.3
4	2	16.7
5 - Extremely helpful	6	50.0
Don't know	2	16.7
Total	12	100.0

**Q36\_3 - On a scale of 1 to 5, How helpful were the following in understanding the program?.-Marketing Materials**

	Frequency	Percent
3	1	8.3
4	2	16.7
5 - Extremely helpful	1	8.3
Don't know	8	66.7
Total	12	100.0

**Q36\_4 - On a scale of 1 to 5, How helpful were the following in understanding the program?.-Program Website**

	Frequency	Percent
4	4	33.3
5 - Extremely helpful	4	33.3
Don't know	4	33.3
Total	12	100.0

**Q37\_1 - On a scale of 1 to 5, How satisfied were you with the following?.-  
Inspection/audit process**

	Frequency	Percent
3	1	8.3
4	5	41.7
5 - Extremely satisfied	3	25.0
Don't know	3	25.0
Total	12	100.0

**Q37\_2 - On a scale of 1 to 5, How satisfied were you with the following?.-Scheduling  
process to install the system**

	Frequency	Percent
4	2	16.7
5 - Extremely satisfied	9	75.0
Don't know	1	8.3
Total	12	100.0

**Q37\_3 - On a scale of 1 to 5, How satisfied were you with the following?.-Installation  
as a whole**

	Frequency	Percent
3	1	8.3
4	1	8.3
5 - Extremely satisfied	9	75.0
Don't know	1	8.3
Total	12	100.0

**Q37\_4 - On a scale of 1 to 5, How satisfied were you with the following?.-  
Performance of the online monitoring system**

	Frequency	Percent
3	1	8.3
4	4	33.3
5 - Extremely satisfied	5	41.7
Don't know	2	16.7
Total	12	100.0

**Q37\_5 - On a scale of 1 to 5, How satisfied were you with the following?.-SaveGas  
Technician**

	Frequency	Percent
4	2	16.7
5 - Extremely satisfied	7	58.3

Don't know	3	25.0
Total	12	100.0

---

**Q38 - Overall, how satisfied were you with the program?**

---

	Frequency	Percent
3	1	8.3
4	4	33.3
5 - Extremely Satisfied	4	33.3
Don't know	2	16.7
Total	11	91.7
Not Selected	1	8.3
Grand Total	12	100.0

---

**Q40 - On a scale of 1 to 5, how interested would you be in participating in this program again?**

---

	Frequency	Percent
4	3	25.0
5 - Extremely interested	7	58.3
Don't know	2	16.7
Total	12	100.0

---

**Q42 - Besides this program, are you aware of other assistance you could receive from IOU**

---

	Frequency	Percent
Yes - What types of programs?	7	58.3
No	3	25.0
Total	10	83.3
Not Selected	2	16.7
Grand Total	12	100.0

---

**Q43 - Has your organization participated in any of the programs you mentioned?**

---

	Frequency	Percent
Yes - Which ones?	4	33.3
No	2	16.7
Total	6	50.0
Not Selected	6	50.0
Grand Total	12	100.0

---

**Q44 - Are you planning any repairs or replacements to your equipment in the next two years?**

---

	Frequency	Percent
--	-----------	---------

Yes - What types are you considering?	5	41.7
No	7	58.3
Total	12	100.0

**Q45 - Do you plan to participate in a IOU program for these purchases...**

	Frequency	Percent
Yes	5	41.7
Not Selected	7	58.3
Grand Total	12	100.0

**Q46 - I know your time is valuable but I've got a couple more questions if you have the time for them.**

	Frequency	Percent
Selected	11	91.7
Not Selected	1	8.3
Grand Total	12	100.0

**Q47 - How interested would you be in using an online tool from SDG E that shows your business's current en...**

	Frequency	Percent
Somewhat interested	1	8.3
Very interested	3	25.0
Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

**Q48 - SDG E "Reduce your use" days (also known as "event days") are days when there is unusually high dema...**

	Frequency	Percent
Very difficult to make	2	16.7
Somewhat difficult to make	1	8.3
Not at all difficult to make	1	8.3
Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

**Q49 - How difficult would it be for you to shift or make adjustments to your business's electricity usage...**

	Frequency	Percent
Not very difficult	1	8.3
Not at all difficult	1	8.3
Total	2	16.7

Not Selected	10	83.3
Grand Total	12	100.0

**Q50 - How much do you agree that your business has control over the amount of electricity it uses?**

	Frequency	Percent
3	1	8.3
6	3	25.0
Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

**Q51 - How much do you agree that energy efficiency is an important consideration when your business buys a...**

	Frequency	Percent
7	1	8.3
10 - Strongly agree	3	25.0
Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

**Q52 - I want to describe 2 other programs from which your facility may be eligible. For each, please tell...**

	Frequency	Percent
Selected	6	50.0
Not Selected	6	50.0
Grand Total	12	100.0

**Q53 - The Energy Savings BID program, which provides incentives for a large energy efficiency project, or...**

	Frequency	Percent
1 - Not at all interested	2	16.7
8	1	8.3
Total	3	25.0
Not Selected	9	75.0
Grand Total	12	100.0

**Q54 - An On Bill Financing program, which provides a zero percent interest rate loan to large energy effic...**

	Frequency	Percent
Don't know	1	8.3
8	1	8.3
10 - Extremely interested	2	16.7

Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

**Q55\_1 - Who was responsible for getting the application completed and submitted?**  
**-Internal staff in organization**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q55\_2 - Who was responsible for getting the application completed and submitted?**  
**-Vendor or contractor**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q55\_5 - Who was responsible for getting the application completed and submitted?**  
**-Other**

	Frequency	Percent
Selected	7	58.3
Not Selected	5	41.7
Grand Total	12	100.0

**Q55\_7 - Who was responsible for getting the application completed and submitted?**  
**-Don't know**

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

**Q55\_9 - Who was responsible for getting the application completed and submitted?**  
**-Respondent**

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

**Q56 - How likely were you to apply for the rebate on your own, if the**  
**\${q://QID36/ChoiceGroup/SelectedChoi...**

	Frequency	Percent
3 - Somewhat Likely	1	8.3



Not Selected	11	91.7
Grand Total	12	100.0

**Q57 - Was it very difficult, difficult, somewhat difficult, somewhat easy, or very easy to submit the appl...**

	Frequency	Percent
2	1	8.3
4	3	25.0
5 - Very Easy	1	8.3
Don't know	6	50.0
Total	11	91.7
Not Selected	1	8.3
Grand Total	12	100.0

**Q58 - Did you have any problems with the application process?**

	Frequency	Percent
No	5	41.7
Not Selected	7	58.3
Grand Total	12	100.0

*Non-Participating Customer Summary Data*

**How would you characterize your business?[Read categories if needed]**

	Frequency	Percent
Hotel or Motel	48	100.0

**Has your facility applied or participated in an IOU program? Fo...**

	Frequency	Percent
Yes	16	33.3
No	24	50.0
Don't know	8	16.7
Total	48	100.0

**Are you familiar with the SaveGas program**

	Frequency	Percent
Yes	7	14.6
No	40	83.3
Don't know	1	2.1

Total	48	100.0
-------	----	-------

**How did you first hear about the SaveGas program?**

	Frequency	Percent
EDC Staff (SaveGas people)	1	2.1
Other	5	10.4
Don't know	1	2.1
Total	7	14.6
Not Selected	41	85.4
Grand Total	48	100.0

**Did you have concerns about the program?**

	Frequency	Percent
Yes - What were they?	3	6.3
No	3	6.3
Don't know	1	2.1
Total	7	14.6
Not Selected	41	85.4
Grand Total	48	100.0

**Did program staff address your concerns?**

	Frequency	Percent
Yes - How?	1	2.1
No - Why not?	2	4.2
Total	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

**Did you view the web demonstration for the SaveGas program?**

	Frequency	Percent
Yes	3	6.3
No	2	4.2
Don't know	1	2.1
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

**On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful were...-Program staff**

	Frequency	Percent
--	-----------	---------

4	2	4.2
5 - Very helpful	2	4.2
N/A	1	2.1
Don't know	1	2.1
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

**On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful wer...-Web presentation**

	Frequency	Percent
3	1	2.1
4	1	2.1
5 - Very helpful	2	4.2
N/A	1	2.1
Don't know	1	2.1
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

**On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful wer...-Marketing materials**

	Frequency	Percent
4	1	2.1
5 - Very helpful	2	4.2
N/A	2	4.2
Don't know	1	2.1
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

**On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful wer...-Program website**

	Frequency	Percent
4	1	2.1
5 - Very helpful	2	4.2
N/A	1	2.1
Don't know	2	4.2
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

**Do you plan to replace or repair any gas-using equipment in the next 2 years?**

	Frequency	Percent
Yes	22	45.8
No	23	47.9
Don't know	3	6.3
Total	48	100.0

#### Which equipment?-Boilers

	Frequency	Percent
Selected	15	31.3
Not Selected	33	68.8
Grand Total	48	100.0

#### Which equipment?-Food Service Equipment

	Frequency	Percent
Selected	10	20.8
Not Selected	38	79.2
Grand Total	48	100.0

#### Which equipment?-Laundry Equipment

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

#### Which equipment?-Pumps

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

#### Which equipment?-Other

	Frequency	Percent
Selected	8	16.7
Not Selected	40	83.3
Grand Total	48	100.0

#### Repair/replace if breaks down

	Frequency	Percent
--	-----------	---------

Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

#### Up to Corporate

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

#### Do you plan to replace or repair any electricity -using equipment in the next 2 years?

	Frequency	Percent
Yes	6	12.5
No	5	10.4
Total	11	22.9
Not Selected	37	77.1
Grand Total	48	100.0

#### Which equipment?-Motors and pumps

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

#### Which equipment?-HVAC

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

#### Which equipment?-Other

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

#### How likely are you to consider energy-efficiency when installing or replacing energy-using products...

	Frequency	Percent
--	-----------	---------

6	5	10.4
7	1	2.1
8	8	16.7
9	4	8.3
10 - Extremely likely	29	60.4
Don't know	1	2.1
Total	48	100.0

---

**Has your organization developed a specific policy for the selection of energy-efficient equipment? [...]**

---

	Frequency	Percent
Yes	15	31.3
No	31	64.6
Don't know	2	4.2
Total	48	100.0

---



---

**Who makes decisions on equipment purchases or upgrades?-Facilities manager**

---

	Frequency	Percent
Selected	5	10.4
Not Selected	43	89.6
Grand Total	48	100.0

---



---

**Who makes decisions on equipment purchases or upgrades?-Building manager**

---

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

---



---

**Who makes decisions on equipment purchases or upgrades?-Other facilities management / maintenance position**

---

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

---



---

**Who makes decisions on equipment purchases or upgrades?-Proprietor / Owner**

---

	Frequency	Percent
Selected	26	54.2
Not Selected	22	45.8

Grand Total	48	100.0
-------------	----	-------

**Who makes decisions on equipment purchases or upgrades?-Engineer**

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

**Who makes decisions on equipment purchases or upgrades?-GM**

	Frequency	Percent
Selected	12	25.0
Not Selected	36	75.0
Grand Total	48	100.0

**Who makes decisions on equipment purchases or upgrades?-Corporate**

	Frequency	Percent
Selected	4	8.3
Not Selected	44	91.7
Grand Total	48	100.0

**Who makes decisions on equipment purchases or upgrades?-Other**

	Frequency	Percent
Selected	24	50.0
Not Selected	24	50.0
Grand Total	48	100.0

**Have you had any challenges with purchasing or installing energy efficiency equipment?**

	Frequency	Percent
Yes	3	6.3
No	40	83.3
Don't know	2	4.2
Total	45	93.8
Not Selected	3	6.3
Grand Total	48	100.0

**If so, What were these challenges?-Other**

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9

Grand Total	48	100.0
-------------	----	-------

**Before this call, were you aware that IOU offers programs to he...**

	Frequency	Percent
Yes	19	39.6
No	28	58.3
Don't know	1	2.1
Total	48	100.0

**Did you know that your facility was eligible for any of these programs, and chose not to participate...**

	Frequency	Percent
Yes	3	6.3
No	11	22.9
Don't know	3	6.3
Total	17	35.4
Not Selected	31	64.6
Grand Total	48	100.0

**What type of equipment did you install without assistance from the program, that you believe would h...-Lighting**

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

**What type of equipment did you install without assistance from the program, that you believe would h...-Boilers**

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

**What type of equipment did you install without assistance from the program, that you believe would h...-Other**

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

**How did you first hear about the program?**



	Frequency	Percent
IOU account executive	4	8.3
IOU staff	1	2.1
IOU call center	1	2.1
IOU mailing	2	4.2
IOU utility email message	2	4.2
Contractor / Retailer	1	2.1
Other	5	10.4
Don't know	1	2.1
Total	17	35.4
Not Selected	31	64.6
Grand Total	48	100.0

**How would you prefer to receive information and updates about IOU**

	Frequency	Percent
IOU account executive	7	14.6
IOU mailing	17	35.4
IOU utility email message	21	43.8
IOU web site	1	2.1
Other	2	4.2
Total	48	100.0

**I would like to describe a few types of IOU programs for which...-An audit type program, providing a site walk through and recommendations on energy efficiency upgrades for your facility. [SCG= Audit, SDG&E= Comprehensive Industrial Energy Efficiency]**

	Frequency	Percent
1 - Not at all interested	3	6.3
2	3	6.3
3	6	12.5
4	4	8.3
5 - Extremely interested	25	52.1
N/A	3	6.3
Don't Know	3	6.3
Total	47	97.9
Not Selected	1	2.1
Grand Total	48	100.0

**I would like to describe a few types of IOU programs for which...-An HVAC Retro-commissioning program, to tune up your HVAC equipment to make it run more efficiently.**

	Frequency	Percent
1 - Not at all interested	5	10.4

2	1	2.1
3	4	8.3
4	4	8.3
5 - Extremely interested	24	50.0
N/A	7	14.6
Don't Know	3	6.3
Total	48	100.0

**I would like to describe a few types of IOU programs for which...-A program to provide premium tune-ups and maintenance of HVAC equipment, and incentives for HVAC equipment and controls [Premium Cooling Efficiency]**

	Frequency	Percent
1 - Not at all interested	2	4.2
2	1	2.1
3	2	4.2
4	1	2.1
5 - Extremely interested	3	6.3
Don't Know	1	2.1
Total	10	20.8
Not Selected	38	79.2
Grand Total	48	100.0

**I would like to describe a few types of IOU programs for which...-A direct install program, providing free installation of low-cost energy efficiency measures at small to medium sized businesses (demand < 100kW)**

	Frequency	Percent
2	2	4.2
3	1	2.1
4	6	12.5
5 - Extremely interested	30	62.5
N/A	3	6.3
Don't Know	4	8.3
Total	46	95.8
Not Selected	2	4.2
Grand Total	48	100.0

**I would like to describe a few types of IOU programs for which...-A rebate program, where the rebate amounts are based on the equipment installed [Deemed]**

	Frequency	Percent
3	4	8.3
4	4	8.3
5 - Extremely interested	33	68.8
N/A	1	2.1

Don't Know	4	8.3
Total	46	95.8
Not Selected	2	4.2
Grand Total	48	100.0

**I would like to describe a few types of IOU programs for which....An incentive program, where the incentive amount is calculated based on the predicted energy savings [Calculated / BID]**

	Frequency	Percent
3	5	10.4
4	5	10.4
5 - Extremely interested	31	64.6
Don't Know	4	8.3
Total	45	93.8
Not Selected	3	6.3
Grand Total	48	100.0

**I would like to describe a few types of IOU programs for which....A program offering 0% interest loans for energy efficiency upgrades [OBF]**

	Frequency	Percent
1 - Not at all interested	6	12.5
3	7	14.6
4	5	10.4
5 - Extremely interested	18	37.5
N/A	1	2.1
Don't Know	9	18.8
Total	46	95.8
Not Selected	2	4.2
Grand Total	48	100.0

**I would like to describe a few types of IOU programs for which....A program that provides technical assistance, training, and cost sharing on water heating measures. [SaveGas]**

	Frequency	Percent
1 - Not at all interested	1	2.1
3	3	6.3
4	4	8.3
5 - Extremely interested	12	25.0
N/A	1	2.1
Don't Know	4	8.3
Total	25	52.1
Not Selected	23	47.9
Grand Total	48	100.0

**For the program types for which you are interested, what would motivate your organization to partici...-Upgrading or replacing equipment**

	Frequency	Percent
Selected	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

**For the program types for which you are interested, what would motivate your organization to partici...-Saving money on energy bills**

	Frequency	Percent
Selected	27	56.3
Not Selected	21	43.8
Grand Total	48	100.0

**For the program types for which you are interested, what would motivate your organization to partici...-Obtaining a rebate**

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

**For the program types for which you are interested, what would motivate your organization to partici...-Protecting environment**

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

**For the program types for which you are interested, what would motivate your organization to partici...-Other**

	Frequency	Percent
Selected	16	33.3
Not Selected	32	66.7
Grand Total	48	100.0

**Why might you NOT participate in a program?-Application takes too much time**

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

**Why might you NOT participate in a program?-Rebate not high enough**

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

#### Why might you NOT participate in a program?-Don't believe energy savings claims

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

#### Why might you NOT participate in a program?-Other

	Frequency	Percent
Selected	28	58.3
Not Selected	20	41.7
Grand Total	48	100.0

#### Why might you NOT participate in a program?-Don't know

	Frequency	Percent
Selected	8	16.7
Not Selected	40	83.3
Grand Total	48	100.0

#### Why might you NOT participate in a program?-Refused

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

## 1.2 PREPS

### *Participating Customer Summary Data*

#### What is the main business activity at this facility?

	Frequency	Percent
College/University	4	66.7
School	2	33.3
Total	6	100.0

**How many students can be seated in all of the classrooms in this building at one time? If needed use...**

	Frequency	Percent
568	1	16.7
600	1	16.7
969	1	16.7
2102	1	16.7
2707	1	16.7
6250	1	16.7
Total	6	100.0

**What type of equipment uses the most natural gas at your facility?**

	Frequency	Percent
Boilers	3	50.0
HVAC and Furnaces	1	16.7
Other	2	33.3
Total	6	100.0

**What type of equipment uses the second most natural gas at your facility?**

	Frequency	Percent
Food Service Equipment	1	16.7
Other	4	66.7
Don't Know	1	16.7
Total	6	100.0

**Has your organization developed a specific policy for the selection of energy efficient equipment?...**

	Frequency	Percent
Yes - Please describe those policies.	2	33.3
No	4	66.7
Total	6	100.0

**Who makes decisions on equipment purchases or upgrades? -Facilities Manager**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7
Grand Total	6	100.0

**Who makes decisions on equipment purchases or upgrades? -Energy Manager**

	Frequency	Percent
Selected	1	16.7
Not Selected	5	83.3
Grand Total	6	100.0

**Who makes decisions on equipment purchases or upgrades? -Other**

	Frequency	Percent
Selected	4	66.7
Not Selected	2	33.3
Grand Total	6	100.0

**What difficulties have you had, either inside or outside your institution, with purchasing and insta...-No difficulties**

	Frequency	Percent
Selected	3	50.0
Not Selected	3	50.0
Grand Total	6	100.0

**What difficulties have you had, either inside or outside your institution, with purchasing and insta...-Other**

	Frequency	Percent
Selected	4	66.7
Not Selected	2	33.3
Grand Total	6	100.0

**What difficulties have you had, either inside or outside your institution, with purchasing and insta...-Don't know**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7
Grand Total	6	100.0

**How did you first hear about the program? -SoCalGas account executive**

	Frequency	Percent
Selected	3	50.0
Not Selected	3	50.0

Grand Total	6	100.0
-------------	---	-------

**How did you first hear about the program? -Contractor/ retailer**

	Frequency	Percent
Selected	1	16.7
Not Selected	5	83.3
Grand Total	6	100.0

**How did you first hear about the program? -Other**

	Frequency	Percent
Selected	3	50.0
Not Selected	3	50.0
Grand Total	6	100.0

**How would you prefer to receive information and updates about SoCalGas energy efficiency programs?...-SoCalGas mailing (hard copy)**

	Frequency	Percent
Selected	1	16.7
Not Selected	5	83.3
Grand Total	6	100.0

**How would you prefer to receive information and updates about SoCalGas energy efficiency programs?...-SoCalGas utility email message**

	Frequency	Percent
Selected	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

**How would you prefer to receive information and updates about SoCalGas energy efficiency programs?...-Other**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7
Grand Total	6	100.0

**Did you visit the program's website for more information?**

	Frequency	Percent
Yes	1	16.7



No	4	66.7
Total	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

---

**Why did you participate in this program? -To save money**

---

	Frequency	Percent
Selected	1	16.7
Not Selected	5	83.3
Grand Total	6	100.0

---

**Why did you participate in this program? -Other**

---

	Frequency	Percent
Selected	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

---

**Did you understand the connection between program implementer (Resource Solutions Group) and SoCal G...**

---

	Frequency	Percent
Yes	2	33.3
No	2	33.3
Don't Know	1	16.7
Total	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

---

**If the PREPS program hadn't contacted you, how likely is it that would you have gone directly to the...**

---

	Frequency	Percent
1 - Not at all likely	1	16.7
4	1	16.7
5 - Extremely likely	2	33.3
Don't know	1	16.7
Total	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

**Did you sign a Program Participation Agreement (PPA)**

	Frequency	Percent
Yes	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

**Did you have any problems with the application process?**

	Frequency	Percent
No	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

**Did you receive a rebate or incentive as part of your participation in the PREPS program?**

	Frequency	Percent
No	2	33.3
Don't Know	1	16.7
Not Applicable	2	33.3
Total	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

**Was the rebate or incentive amount you received more, about the same, or less than you expected?**

	Frequency	Percent
More	1	16.7
Don't Know	4	66.7
Not Applicable	1	16.7
Total	6	100.0

**Confirm: Which of the following categories apply to your institution? -K-12**

	Frequency	Percent
Selected	1	16.7
Not Selected	5	83.3
Grand Total	6	100.0

**Confirm: Which of the following categories apply to your institution? -4-year**

	Frequency	Percent
--	-----------	---------

Selected	3	50.0
Not Selected	3	50.0
Grand Total	6	100.0

**Confirm: Which of the following categories apply to your institution? -  
Graduate**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7
Grand Total	6	100.0

**Confirm: Which of the following categories apply to your institution? -Other**

	Frequency	Percent
Selected	1	16.7
Not Selected	5	83.3
Grand Total	6	100.0

**Confirm: Which of the following categories apply to your institution? -Other-  
TEXT**

	Frequency	Percent
	5	83.3
7-12	1	16.7
Total	6	100.0

**Which PREPS services have you taken advantage of? -Initial assessment/  
feasibility study**

	Frequency	Percent
Selected	1	16.7
Not Selected	5	83.3
Grand Total	6	100.0

**Which PREPS services have you taken advantage of? -Onsite energy audit**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7
Grand Total	6	100.0

**Which PREPS services have you taken advantage of? -Other**

	Frequency	Percent
Selected	4	66.7
Not Selected	2	33.3
Grand Total	6	100.0

**Which of these services do you plan to take advantage of in the future? -Initial assessment/ feasibility study**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7
Grand Total	6	100.0

**Which of these services do you plan to take advantage of in the future? - Onsite energy audit**

	Frequency	Percent
Selected	3	50.0
Not Selected	3	50.0
Grand Total	6	100.0

**Which of these services do you plan to take advantage of in the future? -Bid support**

	Frequency	Percent
Selected	1	16.7
Not Selected	5	83.3
Grand Total	6	100.0

**Which of these services do you plan to take advantage of in the future? - Installation support**

	Frequency	Percent
Selected	3	50.0
Not Selected	3	50.0
Grand Total	6	100.0

**Which of these services do you plan to take advantage of in the future? - Incentive processing**

	Frequency	Percent
Selected	3	50.0
Not Selected	3	50.0
Grand Total	6	100.0

**Which of these services do you plan to take advantage of in the future? -  
Educational activities**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7
Grand Total	6	100.0

**Which of these services do you plan to take advantage of in the future? -Other**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7
Grand Total	6	100.0

**Which of these services do you plan to take advantage of in the future? -Don't  
know**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7
Grand Total	6	100.0

**Have you adopted any of these measures?-No - Why not?**

	Frequency	Percent
Selected	3	50.0
Not Selected	3	50.0
Grand Total	6	100.0

**Do you plan additional upgrades in the future?-Yes - Which measures and  
when?**

	Frequency	Percent
Selected	3	50.0
Not Selected	3	50.0
Grand Total	6	100.0

**Do you plan additional upgrades in the future?-No**

	Frequency	Percent
Selected	2	33.3
Not Selected	4	66.7

Grand Total	6	100.0
-------------	---	-------

---

**Did your institutions have the financial and technical resources it needed to complete the upgrades?**

---

	Frequency	Percent
Yes	2	33.3
No - Please explain	1	16.7
Don't know	2	33.3
Total	5	83.3
Not Selected	1	16.7

Grand Total	6	100.0
-------------	---	-------

---



---

**If PREPS were not offered, would your institution have continued with its energy efficiency projects...**

---

	Frequency	Percent
Would have continued with the project anyway	3	50.0
Would not have continued with the project	2	33.3
Other	1	16.7
Total	6	100.0

---



---

**Would you say the PREPS program has influenced awareness about energy efficiency at your institution...**

---

	Frequency	Percent
Yes- Please explain (changes - technical, behavioral etc. from PREPS)	1	16.7
No	1	16.7
Don't know	2	33.3
Total	4	66.7
Not Selected	2	33.3

Grand Total	6	100.0
-------------	---	-------

---



---

**Have you had any questions about the program?**

---

	Frequency	Percent
Yes	1	16.7
No	3	50.0
Total	4	66.7
Not Selected	2	33.3

Grand Total	6	100.0
-------------	---	-------

---



---

**As part of the program, did someone come to inspect the energy efficient equipment?**

---

	Frequency	Percent
No	1	16.7
Not Applicable	3	50.0
Total	4	66.7
Not Selected	2	33.3
Grand Total	6	100.0

**Overall, how satisfied were you with the program? Please rate on a 5 point scale, where 1 is not at...**

	Frequency	Percent
3 - Neutral	2	33.3
4 - Satisfied	2	33.3
5 - Extremely Satisfied	1	16.7
Total	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

**Would you be interested in participating in this program again? Please rate on a 5 point scale, wher...**

	Frequency	Percent
4 - Interested	1	16.7
5 - Extremely interested	1	16.7
Don't know	2	33.3
Total	4	66.7
Not Selected	2	33.3
Grand Total	6	100.0

**Besides this program, are you aware of other SoCalGas programs or resources to promote energy effic...**

	Frequency	Percent
No	4	66.7
Don't Know	1	16.7
Total	5	83.3
Not Selected	1	16.7
Grand Total	6	100.0

**Are you planning any repairs or replacements to your equipment in the next two years?**

	Frequency	Percent
Yes - What types are you considering?	3	50.0

Don't know	1	16.7
Total	4	66.7
Not Selected	2	33.3
Grand Total	6	100.0

**Do you plan to participate in an SoCalGas program for these purchases?**

	Frequency	Percent
Yes	1	16.7
No	1	16.7
Don't know	1	16.7
Total	3	50.0
Not Selected	3	50.0
Grand Total	6	100.0

*Non-Participating Customer Summary Data*

**Type of school**

	Frequency	Percent
School	33	78.6
University	3	7.1
Other	1	2.4
Preschool	5	11.9
Total	42	100.0

**What type of equipment uses the most natural gas at your facility?**

	Frequency	Percent
Boilers	6	14.3
HVAC and Furnaces	8	19.0
Food Service Equipment	4	9.5
Other	9	21.4
Total	27	64.3
Not Selected	15	35.7
Grand Total	42	100.0

**What type of equipment uses the second most natural gas at your facility?**

	Frequency	Percent
HVAC and Furnaces	2	4.8
Food Service Equipment	11	26.2



Other	12	28.6
Total	25	59.5
Not Selected	17	40.5
Grand Total	42	100.0

**Do you plan to replace or repair any gas-using equipment in the next 2 years?**

	Frequency	Percent
Yes	11	26.2
No	27	64.3
Don't know	4	9.5
Total	42	100.0

**Which equipment?-Boilers**

	Frequency	Percent
Selected	2	4.8
Not Selected	40	95.2
Grand Total	42	100.0

**Which equipment?-Furnaces**

	Frequency	Percent
Selected	1	2.4
Not Selected	41	97.6
Grand Total	42	100.0

**Which equipment?-Food Service Equipment**

	Frequency	Percent
Selected	3	7.1
Not Selected	39	92.9
Grand Total	42	100.0

**Which equipment?-Other**

	Frequency	Percent
Selected	4	9.5
Not Selected	38	90.5
Grand Total	42	100.0

**Which equipment?-Don't know**

	Frequency	Percent
--	-----------	---------

Selected	1	2.4
Not Selected	41	97.6
Grand Total	42	100.0

**Has your facility applied or participated in a SoCalGas program? For example, has your facility rec...**

	Frequency	Percent
Yes	6	14.3
No	33	78.6
Don't know	2	4.8
Total	41	97.6
Not Selected	1	2.4
Grand Total	42	100.0

**How likely are you to consider energy-efficiency when installing or replacing energy-using products...**

	Frequency	Percent
5	1	2.4
6	1	2.4
8	7	16.7
9	8	19.0
10 - Extremely likely	22	52.4
Don't know	1	2.4
Total	40	95.2
Not Selected	2	4.8
Grand Total	42	100.0

**Are you familiar with the PREPS program?**

	Frequency	Percent
Yes	4	9.5
No	8	19.0
Not sure	1	2.4
Total	13	31.0
Not Selected	29	69.0
Grand Total	42	100.0

**Do you plan to apply?**

	Frequency	Percent
Yes - [Probe for timeline]	2	4.8
No - Why not?	1	2.4
Not sure	1	2.4
Total	4	9.5

Not Selected	38	90.5
Grand Total	42	100.0

---

**Has your organization developed a specific policy for the selection of energy-efficient equipment? [...]**

---

	Frequency	Percent
Yes	8	19.0
No	32	76.2
Don't know	2	4.8
Total	42	100.0

---



---

**Who makes decisions on equipment purchases or upgrades?-Facilities manager**

---

	Frequency	Percent
Selected	18	42.9
Not Selected	24	57.1
Grand Total	42	100.0

---



---

**Who makes decisions on equipment purchases or upgrades?-Chief Financial Officer (CFO)**

---

	Frequency	Percent
Selected	3	7.1
Not Selected	39	92.9
Grand Total	42	100.0

---



---

**Who makes decisions on equipment purchases or upgrades?-Other financial / administrative position**

---

	Frequency	Percent
Selected	2	4.8
Not Selected	40	95.2
Grand Total	42	100.0

---



---

**Who makes decisions on equipment purchases or upgrades?-Proprietor / Owner**

---

	Frequency	Percent
Selected	6	14.3
Not Selected	36	85.7
Grand Total	42	100.0

---



---

**Who makes decisions on equipment purchases or upgrades?-President / CEO**

---

	Frequency	Percent
Selected	1	2.4

---

Not Selected	41	97.6
Grand Total	42	100.0

**Who makes decisions on equipment purchases or upgrades?-Other**

	Frequency	Percent
Selected	22	52.4
Not Selected	20	47.6
Grand Total	42	100.0

**Who makes the decisions on equipment purchases or upgrades?**

	Frequency	Percent
Facilities Manager/Director	22	52.4
Principal/President/CEO/Owner	13	31.0
Other	6	14.3
Don't know	1	2.4
Total	42	100.0

**Have you had any challenges with purchasing or installing energy efficiency equipment?**

	Frequency	Percent
Yes	5	11.9
No	34	81.0
Total	39	92.9
Not Selected	3	7.1
Grand Total	42	100.0

**If so, What were these challenges? (Do not read, mark all that apply)-  
Incremental cost for more efficient equipment too high / payback period too long**

	Frequency	Percent
Selected	1	2.4
Not Selected	41	97.6
Grand Total	42	100.0

**If so, What were these challenges? (Do not read, mark all that apply)-Other**

	Frequency	Percent
Selected	5	11.9
Not Selected	37	88.1
Grand Total	42	100.0

**Before this call, were you aware that SoCalGas offers programs to help you increase the energy effi...**

	Frequency	Percent
Yes	16	38.1
No	24	57.1
Don't know	1	2.4
Total	41	97.6
Not Selected	1	2.4
Grand Total	42	100.0

**Did you know that your facility was eligible for any of these programs, and chose not to participate...**

	Frequency	Percent
Yes	3	7.1
No	11	26.2
Total	14	33.3
Not Selected	28	66.7
Grand Total	42	100.0

**What type of equipment did you install without assistance from the program, that you believe would h...-Other**

	Frequency	Percent
Selected	3	7.1
Not Selected	39	92.9
Grand Total	42	100.0

**How did you first hear about the program?**

	Frequency	Percent
SoCalGas utility bill insert	1	2.4
SoCalGas utility email message	1	2.4
SoCalGas web site	1	2.4
Contractor / Retailer	1	2.4
Other	10	23.8
Total	14	33.3
Not Selected	28	66.7
Grand Total	42	100.0

**How would you prefer to receive information and updates about SoCalGas energy efficiency programs?**

	Frequency	Percent
SoCalGas account executive	1	2.4
SoCalGas utility bill insert	2	4.8
SoCalGas mailing	9	21.4

SoCalGas utility email message	28	66.7
Other	1	2.4
Total	41	97.6
Not Selected	1	2.4
Grand Total	42	100.0

**I would like to describe a few types of SoCalGas programs for which your facility may be eligible f...-An audit type program, providing a site walk through and recommendations on energy efficiency upgrades for your facility. [SCG= Audit]**

	Frequency	Percent
1 - Not at all interested	4	9.5
2	2	4.8
3	4	9.5
4	10	23.8
5 - Extremely interested	19	45.2
N/A	2	4.8
Total	41	97.6
Not Selected	1	2.4
Grand Total	42	100.0

**I would like to describe a few types of SoCalGas programs for which your facility may be eligible f...-An HVAC Retro-commissioning program, to tune up your HVAC equipment to make it run more efficiently.**

	Frequency	Percent
1 - Not at all interested	10	23.8
2	1	2.4
3	4	9.5
4	6	14.3
5 - Extremely interested	17	40.5
N/A	3	7.1
Total	41	97.6
Not Selected	1	2.4
Grand Total	42	100.0

**I would like to describe a few types of SoCalGas programs for which your facility may be eligible f...-A direct install program, providing free installation of low-cost energy efficiency measures at small to medium sized businesses (demand < 100kW)**

	Frequency	Percent
1 - Not at all interested	4	9.5
2	1	2.4
3	3	7.1
4	6	14.3

5 - Extremely interested	22	52.4
N/A	3	7.1
Don't Know	2	4.8
Total	41	97.6
Not Selected	1	2.4
Grand Total	42	100.0

**I would like to describe a few types of SoCalGas programs for which your facility may be eligible f...-A rebate program, where the rebate amounts are based on the equipment installed [Deemed]**

	Frequency	Percent
1 - Not at all interested	1	2.4
2	2	4.8
3	6	14.3
4	4	9.5
5 - Extremely interested	21	50.0
N/A	3	7.1
Don't Know	3	7.1
Total	40	95.2
Not Selected	2	4.8
Grand Total	42	100.0

**I would like to describe a few types of SoCalGas programs for which your facility may be eligible f...-An incentive program, where the incentive amount is calculated based on the predicted energy savings [Calculated / BID]**

	Frequency	Percent
1 - Not at all interested	3	7.1
2	2	4.8
3	7	16.7
4	4	9.5
5 - Extremely interested	19	45.2
N/A	3	7.1
Don't Know	3	7.1
Total	41	97.6
Not Selected	1	2.4
Grand Total	42	100.0

**I would like to describe a few types of SoCalGas programs for which your facility may be eligible f...-A program offering 0% interest loans for energy efficiency upgrades [OBF]**

	Frequency	Percent
1 - Not at all interested	14	33.3
2	3	7.1
3	4	9.5

4	5	11.9
5 - Extremely interested	9	21.4
N/A	3	7.1
Don't Know	3	7.1
Total	41	97.6
Not Selected	1	2.4
Grand Total	42	100.0

**I would like to describe a few types of SoCalGas programs for which your facility may be eligible f...-A program that provides technical assistance and financial incentives to schools to develop energy efficiency strategies and install equipment upgrades. The program also provides assistance with obtaining financing and identifying and selecting contractors. [PREPS]**

	Frequency	Percent
1 - Not at all interested	3	7.1
2	3	7.1
3	4	9.5
4	8	19.0
5 - Extremely interested	17	40.5
N/A	2	4.8
Don't Know	5	11.9
Total	42	100.0

**For the program types for which you are interested, what would motivate your organization to partici...-Upgrading or replacing equipment**

	Frequency	Percent
Selected	1	2.4
Not Selected	41	97.6
Grand Total	42	100.0

**For the program types for which you are interested, what would motivate your organization to partici...-Saving money on energy bills**

	Frequency	Percent
Selected	27	64.3
Not Selected	15	35.7
Grand Total	42	100.0

**For the program types for which you are interested, what would motivate your organization to partici...-Protecting environment**

	Frequency	Percent
Selected	3	7.1
Not Selected	39	92.9



Grand Total	42	100.0
-------------	----	-------

---

**For the program types for which you are interested, what would motivate your organization to partici...-Other**

---

	Frequency	Percent
Selected	20	47.6
Not Selected	22	52.4
Grand Total	42	100.0

---



---

**For the program types for which you are interested, what would motivate your organization to partici...-Don't know**

---

	Frequency	Percent
Selected	3	7.1
Not Selected	39	92.9
Grand Total	42	100.0

---



---

**Why might you NOT participate in a program? (Do not read)-Application takes too much time**

---

	Frequency	Percent
Selected	3	7.1
Not Selected	39	92.9
Grand Total	42	100.0

---



---

**Why might you NOT participate in a program? (Do not read)-Don't have enough program information**

---

	Frequency	Percent
Selected	1	2.4
Not Selected	41	97.6
Grand Total	42	100.0

---



---

**Why might you NOT participate in a program? (Do not read)-Other**

---

	Frequency	Percent
Selected	31	73.8
Not Selected	11	26.2
Grand Total	42	100.0

---



---

**Why might you NOT participate in a program? (Do not read)-Don't know**

---

	Frequency	Percent
Selected	7	16.7
Not Selected	35	83.3
Grand Total	42	100.0

---

**Why might you NOT participate in a program? (Do not read)-Refused**

	Frequency	Percent
Selected	1	2.4
Not Selected	41	97.6
Grand Total	42	100.0