

SDG&E 2010-2011 Residential Program Process Evaluation

Final Report Appendix

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research/into/action^{inc}

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Appendices

Appendix A: Research Plan and Evaluability Assessment

Appendix B: Phone Survey Instruments

Appendix C: Interview Guides

Appendix D: Maps

Appendix A - Research Plan and Evaluability Assessment

This appendix includes:

1. Final Research Plan
2. Evaluability Assessment

SDG&E Final Research Plan



Residential Process Evaluation- Final Research Plan

SDG&E 2010-2012 Efficiency Programs

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1. Introduction

This research plan covers all the 2010-2012 SDG&E residential energy efficiency programs for, as listed in the original RFP. Table 1 lists the specific programs along with the program budgets for the 2010-12 program cycle.

Table 1: SDG&E and Residential Programs and Budgets

SDG&E	Total 2010-2012 Program Cycle Budget	Total Administrative Cost	Total Marketing and Outreach	Total Direct Implementation
Residential Basic Lighting	\$12,678,175	\$410,091	\$203,059	\$12,065,024
Advanced Consumer Lighting	\$4,162,527	\$378,258	\$315,423	\$3,468,845
Business/Consumer Electronics/Plug Load	\$2,365,240	\$306,863	\$1,008,871	\$1,049,507
Prescriptive Whole House Retrofit	\$13,000,000	\$1,081,069	\$1,227,423	\$10,691,507
Local Whole House Performance	\$2,011,633	\$221,476	\$112,613	\$1,677,544
MultiFamily	\$5,131,751	\$496,224	\$190,832	\$4,444,694
Home Efficiency Rebates	\$8,323,916	\$224,914	\$342,423	\$7,756,578
Home Efficiency Surveys	\$2,049,080	\$257,104	\$607,613	\$1,184,363
Residential Energy Star Quality Install	\$83,481	\$13,255	\$11,363	\$58,863
Prescriptive Whole House Retrofit	\$13,000,000	\$1,081,069	\$1,227,423	\$10,691,507
Res HVAC Tuneup/Quality Installation	\$5,573,280	\$472,340	\$14,015	\$5,086,925
Comprehensive Mobile Home (SW)	\$4,754,001	\$169,154	\$28,030	\$4,556,817
K-12 Energy Efficiency Education (E3)	\$1,651,066	\$455,342	\$62,833	\$1,132,891
Appliance Recycling	\$8,200,000	\$822,400	\$0	\$7,377,600
Total SDG&E	\$82,984,149	\$6,389,559	\$5,351,921	\$71,242,665

Although the programs covered in this evaluation are diverse, the RFP lays out Research Objectives that are common to all programs. These objectives include:

- (1) Review the programs within the context of the residential market segment to determine if there are unnecessary overlaps between the programs, if significant parts of the market are being missed by the program designs, and/or if the targeted markets should be defined differently.
- (2) Document program goals, program logic models and underlying theories, program implementation processes, and implementation strategies.
- (3) Provide real-time feedback to program implementers with specific focus on improving program recruitment and delivery and identifying both implementation and program design problems for review and modification.
- (4) Assess the effectiveness of the programs and provide recommendations for improvement. Recommendations should include comparison to current industry best practices.
- (5) Evaluate areas of customer and trade ally satisfaction/dissatisfaction and provide recommendations for improvement as well as recommendations for developing an ongoing system for tracking customer feedback.
- (6) Identify barriers and obstacles to meeting program goals and provide recommendations for overcoming those barriers.

(7) Specify which Program Performance Metrics will be addressed and which won't as approved in Resolution E-4385 by the CPUC on December 2, 2010
http://docs.cpuc.ca.gov/word_pdf/FINAL_RESOLUTION/127632.pdf

In the Evaluation Framework, the documentation of program activities as the program is actually implemented is emphasized as it is recognized that the actual implementation of programs will sometimes deviate from the initial program plans as new information is obtained about the market and program delivery logistics. In recognition of this, our research plan is designed to look at the current programs, compare them with best practices, and assess how the existing operations can be improved.

2. Researchable Issues and Evaluation Priority

Based on our initial interviews with program managers and staff and our review of the program background materials, we have identified the following researchable issues for each program covered by this evaluation. In addition, based on a combination of these issues, the program stage of development, and the importance of the program to the overall program portfolio based on budget and expected savings, we have assigned an evaluation priority to each program.

The overarching researchable issues are presented first as these apply to all programs. Additional research issues are listed as needed for the individual programs.

Overarching Research Issues

The original researchable issues from the RFP include the following:

- **Understanding.** General understanding and past experience with the Residential Programs
- **Communication/Awareness.** How customers first learned about the program and the best channels to use to reach these customers.
- **Point of Entry.** Ease of application process, barriers to participation, suggestions to make participation easier.
- **Participation Experience.** Satisfaction with services received, participation drivers, timeliness, suggestions for improvement, customer preferences for online tracking and other potential program features.
- **Impact / Effectiveness.** Satisfaction with program outcome, savings, other benefits customer perceive from participation
- **Additional Offerings.** Suggestions for other programs or services to help meet customer energy management needs.

Additional researchable issues that apply to all the Residential Programs include the following:

- Is there a consistent and recognized branding across programs?
- Are there programs or program elements that are working at cross-purposes with each other?
- Are there significant overlaps across programs?
- Are the programs reaching all customer types, and what might be needed to reach them?
- Are there elements of programs that can become more standardized?
- Where are the growth areas within the residential market and residential efficiency potential, and how can the programs address these areas?
- What information should be routinely tracked in order to measure progress relative to the Program Performance Metrics (PPMs) established for these programs?

- What are the characteristics of the participants in terms of geography and demographics (GIS analysis)?
- How do participation patterns compare with areas and customer groups outside the program (GIS analysis)?
- Are important segments of the residential population not participating in any program?
- Currently SDG&E uses two different savings values (based on different versions of DEER) for internal management and external reporting. How much is this affecting the day-to-day operations of the program?
- How are the programs performing as determined by their PPMs? What information should be routinely tracked to measure performance relative to the PPMs?

Program-Specific Research Issues

In addition to these over-arching research issues, program-specific research issues are identified below by program.

Basic and Advanced Lighting

- Do customers notice any of the marketing done in-store for lighting products?
- Is the training provided by SDG&E to the lighting retailers adequate given the turnover in retailer and buyer staff?
- What are the implications for the lighting programs if CFLs are no longer being rebated beginning in 2014 (as currently expected)?

Business / Consumer Electronics

- Do marketing materials displayed at participating retail locations meet the guidelines and goals for marketing activities?
- Are retail staff equipped to identify and sell qualifying units?
- Are retailers changing their stocking practices as a result of the program?
- Does the program influence the manufacturing of energy efficient electronics?
- Is the program tracking data effective in supporting the program objectives?

Local Whole House Performance and Prescriptive Whole House Retrofit

Program Delivery/Implementation

- Are contractors presenting the basic option or only advanced path? Why?
- How are participants becoming aware of the whole house product?
- What are the characteristics of EUC participants?
- Document the work of other stakeholders (contributions of money, training, credibility, being supplied by BBP grantees, training programs, or city/county staff).
- Does training adequately train contractors to use Energy Pro? What are contractors seeking/expecting from their training experience with CCSE or ICF?
- What are the costs associated with EUC-qualified projects by measure?

- Are general contractors able to find sub-contractors trained to do whole house contracting? Where, if at all, is more training needed in professional or geographic areas?
- What are contractors or participants doing to document baseline conditions or current home features prior to upgrades (levels of insulation, model and type of HVAC equipment, hot water age/model/type)?

Customer Response

- What are participant expectations for their whole house upgrades? Are the upgrades meeting these expectations? Were participants satisfied with the contractor(s), as well as the work performed?
- Are customers satisfied with the upgrades? Do customers believe they got a good value for their upgrade?
- Why did customers pursue an upgrade?

Multi-Family Program

- How are current programs perceived by building owners and managers and tenants? What do they like and dislike? Is equipment working and staying in place and for how long?
- How are programs overlapping? Is there any cross-pollination of leads, do buildings get more than one element? How well are low-income served?
- What is potential savings that can be found in MF, and how much of that is now captured? Do programs make mining of the rest of potential harder or easier?
- What is the receptivity of participant and non-participant building owners and managers for alternative programs?
- What is the availability, capability and receptivity of participant and non-participant contractors to delivering other programs?

Home Energy Efficiency Rebates

- Are retailers equipped to provide information about currently available rebates to customers, and do customers report learning about rebates from retail staff?
- Do marketing materials displayed at participating retail locations meet the guidelines and goals for marketing activities?
- Has the discontinuation of ARRA-funded appliance rebates contributed to a decline in program participation?
- Is the program tracking data effective in supporting the program objectives?

Home Energy Efficiency Surveys (HEES)

- Are customers that take the HEES subsequently participating in other programs? Does SDG&E have the capability to track this easily?

Energy Star Quality Install

- Are customers receptive to participation in the new program?
- Are contractors receptive to participation in the new program?
- How will data for the new program be tracked and verified?

HVAC Tune-Up / Quality Install

- How is quality tune-up work ensured/verified?
- Are HVAC contractors changing their practices for tune-up and installation as a result of education received through the program?
- How has the change in roles for VSPs affected program implementation?
- Is the program tracking data effective in supporting the program objectives?

Comprehensive Mobile Home Program

- How could program marketing and outreach be improved?
- How could the program reach more mobile home residents or more parks? Are there opportunities to leverage local government partnerships?
- Are there additional measures that could be included, or opportunities to get even more comprehensive savings from these residences?
- How does Synergy manage the overlap with CARE and mobile home program? Are there opportunities to improve the process around referrals to other programs?
- What are participant expectations for their upgrades? Are the upgrades meeting these expectations?
- Were participants satisfied with Synergy staff, as well as the work performed?
- Are customers satisfied with the upgrades? Do customers believe they got a good value for their upgrade?
- Why did customers agree to participate? Did they have any concerns? How did Synergy persuade them to participate?

K-12 Energy Efficiency Education

- What were the teachers' experiences with the curriculum regarding accessibility, usability, relevance, and supporting equipment?
- Do teachers intend to deliver curriculum again? How many times have they delivered it before? To how many students?
- Do the teachers have any recommendations to improve the curriculum?

Appliance Recycling

- What are the reasons that customers cancel their participation in the program?
- Does the higher incentive level contribute to an increased likelihood of program participation?

- Does offering same-day pick-up service contribute to an increased likelihood of program participation?
- Do customers view the confirmation letter as beneficial or unnecessary?
- Is the program tracking data effective in supporting the program objectives?

Contractor Response

- What business models do the general contractors in the program have? Is there a difference between active and less active trade allies?
- Are there indicators that contractors are converting their business model to Home Performance, or are equipped to up-sell?

Evaluation Priority

Based on the research issues, the evaluability assessment, and the relative size of programs in terms of budget and expected savings, the evaluation team developed the evaluation priority for each program, as shown in Table 2. This prioritization helped inform the evaluation approach and data collection activities discussed in the remainder of this Research Plan.

Table 2: Evaluation Priority

SDG&E Program	Priority
Home Efficiency Rebates	High
Residential Basic Lighting	High
Advanced Consumer Lighting	High
Prescriptive Whole House Retrofit	High
Local Whole House Performance	High
Appliance Recycling	High
Multi-Family	Medium
Comprehensive Mobile Home (SW)	Medium
Business/Consumer Electronics/Plug Load	Medium / Low
K-12 Energy Efficiency Education (E3)	Medium / Low
Home Efficiency Surveys	Low
Residential Energy Star Quality Install	Low
Res HVAC Tune-up/Quality Installation	Low

Given these research issues and evaluation prioritization, our evaluation approach and scope of work by task are discussed below.

3. Evaluation Approach

Our general evaluation approach is discussed below and focuses on the major analysis and data collection tasks and how they are integrated.

Program Performance Metrics / Best Practices

One of the key objectives of this overarching research effort is to collect data that will be used to track progress against several residential sector program performance metrics. The California utilities collaborated with the Energy Division staff for a period of several months to develop a set of PPMs that parties agreed would be useful indicators of progress towards the California Energy Efficiency Strategic Plan. The effort concluded at the end of 2010 with an approved set of PPMs along with the intention to integrate the PPMs with future evaluation efforts. This Sempra residential process evaluation provides an opportunity to collect data from residential sector program participants, program tracking databases and trade allies that will support tracking of progress against the residential sector PPMs.

Table 3 shows the PPMs assigned to the statewide Sempra programs, along with the reporting frequency and our proposed strategy for obtaining data to track each metric. As shown, we plan to track and report on all of the residential sector PPMs using the research and analysis proposed for this process evaluation. In some cases, we will report on PPMs at the end of the program cycle and in other cases on an annual basis, in accordance with the direction provided by the Energy Division. This exercise will provide useful feedback to Sempra, the other California IOUs and the Energy Division regarding the residential sector's progress towards key goals in the California Energy Efficiency Strategic Plan. Our process evaluation final report will incorporate these findings and offer conclusions and recommendations on how Sempra's residential sector programs can continue to make meaningful progress towards the goals and milestones outlined in the California Energy Efficiency Strategic Plan. We will also coordinate with the Energy Division's overarching residential process evaluation and residential sector impact evaluation data collection efforts and identify ways to streamline tracking of PPMs.

Table 3: Sempra Program PPMs and Data Collection Methods

Statewide Program	Program Performance Metric	Reporting	Proposed PPM Data Source
Residential Sector	1. By targeted populations (businessmen, women, property owners/managers), percent increase in the level of: (a) EE awareness (b) EE knowledge (c) EE attitude... ("AKA")	End of Program Cycle	General population survey
Home Energy Efficiency Survey (HEES)	1. Percentage of HEES participants that enroll in (a) whole house and (b) other resource programs	End of Program Cycle	Review of HEES and program participation tracking data
Home Energy Efficiency Rebate	1. Percentage of program rebates made through the point-of-sale mode relative to all rebates	Annually	Review of program tracking data
	2. Percentage of participating stores located in hard-to-reach (HTR) zip codes relative to all program participating stores	Annually	Program tracking data combined with GIS analysis
Multi-Family Energy Efficiency Rebate (MFEER)	1. Percentage of non-lighting measure savings as compared to the total EE measures adopted in the MFEER program. (BWh for single-commodity RCU and BTU for mixed-commodity RCU.)	Annually	Review of program tracking data
Business Consumer Electronics (BCE)	(a. Number of participating retailers, and number of retail store locations by retailer, and other metrics receiving training. b. Number of participating retailers receiving detailing.	Annually	Review of program tracking data
	2. The number and names of specific types of market actors (retailers, buying groups, manufacturers, and distributors) participating in the program and the approximate percent of all potential market actors that this represents	End of Program Cycle	Review of program participation data combined with analysis of secondary source data (e.g., D&B) on market actors within program territory. GB may be used here as well.
Advanced Lighting	1. Percent kW/kWh/Quantity of incandescent products under the Advanced Lighting program as compared to the Basic Lighting program, by product type.	Annually	Review of Advanced and Basic Lighting program tracking databases
	2. Percent of products incandescent under the Advanced Lighting Program by distribution channel and by hard-to-reach (HTR) zip codes.	Annually	Review of Advanced Lighting program tracking database
Basic CFL	1. During 2010-2012, implement marketing efforts and / or campaign to encourage prompt installation of CFLs as required in D.09-09-027 (T1/T2)	End of Program Cycle	Program staff interviews and marketing material review
	2. Percent of products incandescent under the Basic Lighting Program by distribution channel ² and by hard-to-reach (HTR) zip codes.	Annually	Review of Basic Lighting program tracking database
	3. Percent kW/kWh/Quantity of incandescent products under the Basic CFL program as compared to the Advanced Lighting program	End of Program Cycle	Review of Advanced and Basic Lighting program tracking databases
Appliance Recycling	1. Level of program participants' AKA ("Awareness, Knowledge, Attitude") toward the appliance recycling subprogram.	End of Program Cycle	Participant survey data
	2. Number of program appliance units by year, appliance type, model # (as available), age (estimated), and size.	Annually	Analysis of program tracking data
Whole House Retrofit	1. Number of homes treated in the program for 2010-2012. (Report by prescriptive and performance program.)	Annually	Analysis of program tracking data
	2. Number of enrolled contracting firms participating in the program	Annually	
	3. Average in-situ savings per home as reported (average kWh, therms, Btu) for both performance and prescriptive programs by climate zone	Annually	
	4. Average and range of estimated energy savings per home (prescriptive and performance programs)	End of Program Cycle	
	5. Number and percentage of homes not passing Quality Assurance/Quality Control review, by RCU	Annually	

A key component of our previous evaluation was the comparison of the residential programs to industry best practices. This allowed the evaluation findings to be presented in context with the industry ideals and provided a broader sense of how well the programs were doing. We understand that this component of our evaluation was particularly helpful to program and staff and are making it a priority for the current study.

In addition to our experience with the California Best Practices study, the Evergreen team was also very involved with the CPUC impact evaluations of the 2006-08 IOU programs and will draw on the lessons learned from that experience and apply them to the current evaluation.

Geographic Information Analysis

The GIS analysis will supply Sempra with detailed information that will be helpful in assessing program achievement and in developing targeted market of its programs. Dr. Robert Wirtshafter is the leading practitioner of the use of GIS for energy efficiency program evaluation. He has done several projects for Sempra using GIS including the Hard-to-Reach analysis done in 2005. Since that time new data and new software have enabled him to advance the practice to one that is far more robust and accessible to program managers and evaluators.

The GIS system that we envision will collect and locate all program activity over whatever time period Sempra can provide data. This mapping will give Sempra a clear picture of where individual programs have and have not penetrated. We expect to overlay two types of other data to enrich this database, and to provide Sempra with a level of market intelligence not previously available. We will use Census data, particularly the latest American Community Survey to add background information at the block-group level to the participation data. When we overlay participant data with census information, we obtain a representation of the characteristics of the participants that was previously unavailable.

The second enhancement to our approach will be to build a similar summary of customer characteristics from the CIS data. We will take summary statistics about each customer including annual consumption, annual bill amount, rate class, average arrearage, and any markers such as low-income, multi-family, heating fuel and add those to the assessment. This will give us more detail about each block group that will provide significantly more useful marketing information.

The analysis that we will do for this project will provide an assessment of areas of program coverage. With the additional intelligence gained from merging the census and CIS data, we will be able to isolate areas to match program achievement to program potential. This will allow us to identify underserved areas of the service territory where the program offerings match the housing and demographic populations. There is no sense in promoting a multi-family program in areas of single-family housing, for example. The program will also allow us to look at specific barriers such that we can map specific languages spoken and see both where those households are found and how effective the programs have been in reaching them.

4. Data Collection

The general data collection tasks are discussed below, with additional detail on each provided in the Scope of Work by Task.

Phone Surveys

A major data collection task will be phone surveys of Residential Program participants. We anticipate that these surveys will be 15 minutes long and will be fielded by CIC Research.

Table 4 shows the first part of our plan for conducting surveys for those programs where we can utilize either participant tracking data or commercially available data sources to obtain contact information for the target population.

Table 4: Program-Specific Surveys

SDG&E Program	Target Group	Survey Type	Sample Size
Upstream Lighting Programs	Retail Stores	Phone	100
Multi-Family Rebate	Building Owners (participants)	Phone	50
	Building Owners (non-participants)	Phone	50
Home Energy Efficiency Rebates	Participants	Phone	350
Prescriptive Whole House Retrofit	Participants	Phone	30
	Contractors	Phone	15
Comprehensive Mobile Home	Mobile park managers (participants)	Phone	15
	Mobile park managers (non-participants)	Phone	15
Appliance Recycling	Participants and drop-outs	Phone	200
Comprehensive Mobile Home	Mobile Home Owner (participants, if contact data available)	Phone	100
Total Surveys			925

In addition to the surveys shown in Table 4, we will also field a general population survey to identify participants in other programs for which there is no specific tracking data available. This includes some of the rebate programs where the contact information for purchasers is not tracked at the point of sale. Once identified in the survey, these customers will then be asked additional questions regarding their experience and perceptions of the efficiency measures they purchased. The general population survey will also be used to collect information on nonparticipant attitudes and program awareness.

The sample quotas planned for the general population survey are shown in Table 5. Note that the same general population survey will also be fielded for the SoCal Gas process evaluation, and some sample points from that survey will be used for the SDG&E evaluation (in addition to the sample points shown below) as appropriate.

Table 5: General Population Survey

SDG&E Program	Screen	Sample Size
Basic and Advanced Lighting	CFL purchasers (participants and non-participants); Advanced Lighting purchasers	400
Multi-Family Rebate	Multi-Family tenants	75
Home Energy Efficiency Rebate	Appliance purchasers (participants and non-participants)	100
General Awareness	Non-participants	200
Total Surveys		775

In-Depth Interviews

To familiarize ourselves with the Residential Programs, we conducted a series of staff interviews and data gathering tasks to learn firsthand how these programs are being implemented. In addition to the program familiarization activities, we will also be interviewing trade allies from each of the Residential Programs. This will include a mix of suppliers, distributors, contractors, retailers, and customers involved with the various Residential Programs. Most interviews will be conducted by phone and are expected to last 30-60 minutes.

Table 6 shows the number of interviews and other tasks we propose doing for the SDG&E programs. As shown in the table, up to 158 in-depth interviews are planned across a range of program staff, contractors, and other market actors.

Table 6: Program Familiarization / In-depth Interview Samples

SDG&E Program	Program Staff Interviews	Contractor Interviews	Other Interviews	Ride Alongs (days)	Shopping Visits (days)
Basic and Advanced Lighting	2		Lighting Suppliers (10)		2
Business / Consumers Electronics / Plug Load	2		Retailers (10), Manufacturers (10)		
Local Whole House Performance	3	10			
Multi-Family Rebates	2		Property Owners (15)	1	
Home Energy Efficiency Rebates	2	15	Retailers (10)		
Home Energy Efficiency Surveys	2				
Residential Energy Star Quality Install	1				
HVAC Tune-up / Quality Installation	2	15 Parts, 15 Nonparts			
Comprehensive Mobile Home	1	1		1	
K-12 EE Education	2		Teachers (15)		
Appliance Recycling	4		Retailers (5)		
Totals	23	56	75	2	2

5. Portfolio Analysis

As discussed above, evaluating the Residential Program simultaneously provides the opportunity to assess the effectiveness of these programs as a portfolio in addition to conducting the individual process evaluations at the program level. The relationship of individual energy efficiency programs to California's overall energy efficiency program portfolio has become an increasingly important issue for evaluation. This issue is particularly relevant for the Residential Programs, as these programs encompass a range of different markets, measures, and end uses. The relationship of the Residential Programs to other efficiency programs and determining the relative influence of each program is also becoming increasingly important (and harder to disentangle) as programs mature.

The portfolio analysis task will complete the analysis designed as part of the portfolio strategy discussed above. This will include comparisons of important program metrics such as customer satisfaction, program administration costs, and overall program cost effectiveness. These comparisons will be made across the Residential Programs as well as with other similar programs implemented by other administrators. Where possible, key performance metrics will be compared with benchmarks established in the California Best Practices Study and in other secondary sources. Additionally, the GIS analysis provides us with a powerful tool for assessing the portfolio of programs and their distribution across the service territory. We will look at the coverage of the programs and identify geographic areas and customer characteristics that are currently being underserved. Because individual programs are designed to meet targeted audiences, the portfolio level is the proper level at which to discuss overall program coverage. The gaps identified will suggest new efforts in marketing or targeted program initiatives.

6. Analysis, Reporting, and Synthesis

As the preceding discussion demonstrates, this evaluation entails numerous data collection efforts, the fielding and analysis of which will be going on simultaneously for many of the programs. A key challenge in this process, in addition to managing this project on budget and on time, will be to ensure that the reporting requirements do not overwhelm the ability of the evaluation team to synthesize and highlight those findings that are most significant and, perhaps most importantly, those that span across multiple programs. This is where our research prioritization efforts, conducted early in the project, will play a key role in defining and focusing the scope of the analysis.

Careful attention will also be paid, early in the process, to the design and structure of these data collection efforts so that they support a relatively streamlined analysis and reporting process. To this end, core data that are being collected across multiple programs (e.g., customer satisfaction) will be structured in parallel formats that will ensure that we are able to leverage synergies during the analysis process, and simplify the overall reporting and comparison across programs. All of this will enable our team to stay focused on the overall objective of this process evaluation research, that being to provide objective and useful feedback that will help to ensure the long-term success and viability of these program investments.

7. Scope of Work by Task

The *Scope of Work* provides additional detail on the various evaluation tasks and how they will be implemented to address the research issues discussed above in our *Project Approach*.

Task 1: Conduct Project Initiation Meeting

A project initiation meeting was held in May at SDG&E's offices in San Diego, where our proposed work plan for this evaluation was presented. Key activities at this meeting included:

- Presentation of study objectives and scope of work
- Submittal of a data request for participation data
- Discussion of issues related to the research methods and data requirements
- Discussion of project timeline and deliverables
- Discussion data sources and outline data requests
- Interviews with program managers and other staff.

A key goal of the project initiation meeting was to ensure that the Evergreen team has sufficient understanding of project goals, information about the programs, and access to or strategies for acquiring data needed to prepare the Research Plan. The results of the project initiation meeting were summarized in a memo provided to SDG&E after the meeting.

Task 1 Deliverables

1. Data request memo: One week prior to project initiation meeting.
2. Draft meeting agenda: Three business days prior to project initiation meeting.
3. PI Meeting memorandum: Five business days after project initiation meeting.

Task 2: Conduct an Evaluability Assessment

To familiarize ourselves more with the Residential Programs, part of Task 2 will be devoted to a review of the program materials. This will include reviewing all available promotional materials, training and educational materials, and audit reports. We will evaluate the effectiveness of these materials and provide our findings to SDG&E in a memo as soon as possible after our review is complete. Suggestions for improving these materials will be included in the memo as needed based on our team's experience reviewing similar promotional materials for other residential programs. In addition to reviewing program materials, we will also document the existing implementation and program theory and discuss these with the Residential Program managers to verify their accuracy and applicability to the current programs.

Finally, this task will also include a review of the new SG&E program tracking database. As outlined in the RFP, this review will include an assessment of the tracking systems' capability for collecting information necessary for effect program operations, tracking progress toward program goals, and providing the data required for evaluation and reporting. We will also

assess the ability of the tracking systems to assist with the specific information needed to address the PPMs established by the CPUC.

Task 2 Deliverables

1. Memo on Evaluability Assessment.

Task 3: Develop a Final Research Plan

The formal research plan is developed as part of this task and will serve as the road map for the remaining evaluation activities. The Research Plan provides a detailed description of all the activities, data sources, methods, analyses, reporting and project management required to meet the objectives of the study. The Research Plan also includes details on the final deliverables and will follow the same general structure provided in the RFP.

Upon receiving comments and suggestions from reviewers and approval by the SDG&E Project Manager, we will incorporate the suggestions and changes and produce the Final Research Plan.

Task 3 Deliverables

1. Draft Research Plan
2. Final Research Plan

Task 4: Data Collection and Analysis

For management and budget purposes, the Data Collection and Analysis has been divided into several sub-tasks and discussed below.

Task 4A: Data Collection Instrument Development

As discussed above, these surveys will be designed to address the research issues presented above. In developing these surveys to address these issues, we will use identical question batteries across programs so that comparisons can be made on key evaluation metrics. Each survey will also have a design flexible enough to address the differences across programs in terms of target markets, measures, and implementation approach.

Drafts of all survey instruments and interview guides will be provided to the SDG&E Project Manager for review. We will incorporate comments and suggestions approved by the SDG&E Project Manager into the final instruments prior to fielding any surveys. Please note that with the tight evaluation schedule, this review process must be done very quickly (1-2 day review period per survey) if we are to remain on schedule. To keep the evaluation on schedule, we will commit to revising each survey within 2 days of receiving comments on any drafts.

Task 4a Deliverables

1. Draft and Final Survey Instruments and Interview Guides
2. Final Sampling Plans and Analysis Plans

Task 4B: Data Collection

The data collection will begin as soon as possible after the survey instruments and interview guides are finalized. The data collection task will follow the sample design and methods described above in our *Project Approach*.

CIC Research will be fielding the phone surveys with senior staff from the Evergreen team conducting the in-depth interviews of the various trade allies, contractors, and market actors associated with these programs.

Task 4b Deliverables

1. Final Survey Datasets
2. Sample dispositions and Response Rate Analysis
3. Completed In-depth Interviews
4. Achieved levels of confidence and precision

Task 4C: Data Analysis

The data analysis will be completed by program as soon as the survey and interview data become available. For each program, the data analysis will focus on addressing the various research issues identified above. In addition to analyzing key issues individually for each program, the analysis will be coordinated across programs whenever necessary to address cross-program and other over-arching evaluation issues identified during the portfolio strategy and research prioritization tasks.

The survey results will also be compared to the best practices established for similar efficiency programs, and our team's experience with California Best Practices study and our wide-ranging experience with residential programs throughout the country will provide a wealth of information from which to draw on. This task will also include the GIS analysis, which will help address the issue of program coverage and overlap within the residential sector. As part of this task, we will develop recommendations for developing an ongoing system for capturing customer feedback on the Residential Programs and tracking satisfaction (this may also have implications for reporting on these programs for the PPMs).

Important findings provided in real-time as memos to the SDG&E Project Manager to share with program staff as soon as findings become available. These memos will also serve as the starting point for the final evaluation report.

Task 4c Deliverables

1. Interim Results Memos (with comparison to Best Practices)

2. Recommendations for ongoing measurement system for tracking customer feedback and changes in customer satisfaction

Task 5: Prepare Reports and Database of Results

All of the evaluation methods and analysis results will be documented in a final written report. The Evergreen team will work with the SDG&E Project Manager to determine the exact format for the Interim Memos and Final Report. At a minimum, the Final Report will have the following sections:

1. **Executive Summary.** This will be written as a non-technical summary of all the major components of the study, including a description of the data collection and analysis methods and a summary of the study results and key recommendations.
2. **Introduction.** The introductory section will provide background for the study and discuss the evaluation objectives. A description of the program design, implementation processes, and the measures covered will also be included in this section for each of the Residential Programs.
3. **Evaluation Methodology.** This section will provide a detailed description of each of the major analysis components completed in this evaluation based on the Research Objectives. The logic model and program theory will also be included in this section to provide the overall context for the evaluation activities. This section will also discuss the sample design and survey methods used for the evaluation and in general the discussion will follow closely the methods described in the Final Research Plan.
4. **Results.** This section will contain all the analysis results and major evaluation findings. As directed in the RFP, this section will include:
 - a. Residential market assessment, including program gaps and overlaps and a schematic of the overall residential market with suggestions on the optimal areas for program interventions
 - b. Program theories and implementation strategies
 - c. Assessment of overall program effectiveness and a history of the evolution of the current programs
 - d. Results from the review of the program tracking database, program promotional materials, and other program documentation
 - e. Findings from the surveys, in-depth interviews, and observations from the training sessions, on-sites, and ride alongs.
 - f. Customer satisfaction and recommendations for on-going tracking of satisfaction
 - g. Findings related to issues identified from the logic model and portfolio strategy tasks.
 - h. Assessment of program performance relative to Best Practices
 - i. Assessment of Program Performance Metrics
 - j. Other key findings as needed.

5. **Conclusions and Recommendations.** This section will present evaluation conclusions and recommendations for the Residential Programs based on the findings presented in Section 4. Recommendations for both the program implementation and future evaluations will be provided.
6. **Appendices.** The appendices will contain all additional evaluation documentation and technical information (such as a bibliography, survey instruments, and survey result tabulations) that are not contained in the main body of the report.

Task 5 Deliverables

1. Interim Memos: TBD
2. Interim Report
3. Draft Final Report
4. Final Report

Task 6: Presentation of Results

A presentation of the evaluation results will be conducted at the conclusion of this project. The presentation will follow the basic outline of the final evaluation report and includes summaries of the evaluation methods, analysis results, conclusions, and recommendations for program refinements.

These presentations will be done in person by Evergreen project manager Steve Grover and other senior team members as needed. The date and location for these presentations will be determined near the end of the evaluation.

Task 6 Deliverables

1. Presentation of Evaluation Results

Task 7: Project Management and Progress Reporting

Evergreen has years of experience in project management and has developed internal procedures to manage project costs. As prime contractor for this project, Evergreen will track all costs on a monthly basis and closely monitor evaluation progress so that the evaluation proceeds as scheduled.

In addition to the evaluation reports and project meetings, we anticipate being in close contact with the SDG&E project team throughout the duration of this project. Steve Grover will have bi-weekly telephone conference calls to provide regular and timely updates on project activities – a method that we have found very successful in other projects. We will also provide written reports that assess evaluation progress on a monthly basis. These monthly progress reports will document project accomplishments from the prior month and discuss planned activities for the upcoming months. These progress reports will also summarize the

results of the bi-weekly conference calls and discuss any variances in the evaluation schedule and/or budget.

Task 7 Deliverables

1. Bi-weekly telephone updates: Ongoing.
2. Monthly status reports: Tenth working day of each month.

Task 8 (Optional): Additional Research

Evergreen team project manager Steve Grover is available to assist SDG&E with any regulatory issues that may arise with this evaluation or any additional analyses that may be required. Other team members will be enlisted as needed.

Task 8 Deliverables

1. Additional analysis and consultation: TBD.

Timeline By Task

Table 7 shows our timeline and staffing plan by the major evaluation tasks described in our *Work Plan*. The major deliverables and due dates are also shown for each task. Due to the number of programs involved and the tight timeline for the evaluation, there is some overlap between the start and end dates for some tasks.

Table 7: Timeline by Task

Task	Start	End	Deliverables
Task 1: Project Initiation Meeting	12-May-11	22-May-11	Meeting agenda, post meeting memo w/ action items
Task 2: Evaluability Assessment	22-May-11	7-Jul-11	Evaluability assessment memo
Task 3: Research Plan	22-May-11	14-Jul-11	Draft and Final Research Plan
Task 4a: Instrument Development	31-May-11	7-Aug-11	Draft and final survey instruments (All surveys)
Task 4b: Data Collection	7-Jul-11	14-Oct-11	Survey datasets, memo summary, sample dispositions
Task 4c: Data Analysis	31-Aug-11	30-Oct-11	Completed data analysis, interim memos
Task 5: Prepare Draft Report	14-Sep-11	1-Dec-11	Interim results (Sept), Draft Report (Nov)
Task 5: Prepare Final Report	15-Dec-11	31-Dec-11	Final Report, Databases
Task 6: Presentation	6-Jan-12	13-Jan-12	Final Presentation
Task 7: Project Management	1-May-11	30-Jan-12	Monthly status reports, bi-weekly phone calls
Task 8: Additional Analysis (Optional)	TBD	TBD	TBD

Evaluation Budget

Total evaluation budget is \$361,070 and covers all tasks described above.

SDG&E Evaluability Assessment



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MEMORANDUM

July 3, 2011

To: Rob Rubin, SDG&E

From: Steve Grover

Re: Evaluability Assessments of the SDG&E Residential Energy Efficiency Programs

This memo presents our evaluability assessment conducted as part of the process evaluation of SDG&E's 2010-12 Residential Energy Efficiency Programs. Included with this memo is a separate Excel file *SDGE Eval Assessment 070311* that provides additional detail on our assessment for each program. The purpose of this evaluability assessment is to determine if there are sufficient documentation and participant data available for each residential programs to allow for a thorough evaluation.

The following programs were addressed in this evaluability assessment:

- SW Residential Basic Lighting (SDGE3113)
- SW Advanced Consumer Lighting (SDGE3114)
- SW Business/Consumer Electronics/Plug Load (SDGE3115)
- SW Prescriptive Whole House Retrofit (SDGE3156)
- 3P Whole House Performance (SDGE3116)
- SW Multi-Family (SDGE3119)
- SW Home Efficiency Rebates (SDGE3121)
- SW Home Efficiency Surveys (SDGE3122)
- SW Residential ENERGY STAR Quality Install (SDGE3145)
- SW Appliance Recycling (SDGE3175)
- 3P Residential HVAC Tune-up/Quality Installation (SDGE3171)
- 3P Comprehensive Mobile Home (SDGE3172)
- 3P K-12 Energy Efficiency Education (SDGE3173)

To complete the evaluability assessment, the evaluation team conducted the following activities:



- Interviewed program managers, implementation contractors and other key staff involved with each program
- Reviewed the program implementation plans (PIPs) and other program documentation as available
- Reviewed participation data supplied by SDG&E to determine if key fields needed for the evaluation (e.g., contact names, measure details, etc.) are present and populated
- Reviewed program materials to confirm the presence of other items relevant to the evaluation, including the program theory and logic model (PT/LM), marketing plans, and procedures for measuring and tracking PPMs.

Note that this evaluability assessment is a preliminary step toward developing a more comprehensive evaluation research plan. The primary purpose of the evaluability assessment is to determine how well the program structure is documented and if the various elements are in place that will allow for a successful evaluation. We did not attempt to identify specific research issues at this stage, nor did we evaluate the program logic models to determine key linkages and/or possible logical flaws that should be addressed by the evaluation. These issues will be addressed in the coming weeks as we develop the research plan.

A summary of the evaluability assessment for each program is presented below. Overall, the SDG&E programs are generally well established and have the requisite items in place that will allow for a successful evaluation. The only possible exceptions are some of the newer programs (e.g., Whole House Performance, Residential Energy Star Quality Install) that have low expected participation and currently have little or no participation data available. Assuming that participation levels increase and participation data become available, we expect to conduct at least some level of evaluation for these programs.

A more detailed table indicating the various criteria that were used to develop this assessment are included in a separate Excel file *SDGE Eval Assessment 070311*.

SDG&E Residential Program Evaluability Assessment Summary

- **SW Residential Basic Lighting (SDGE3113).** This is an upstream program implemented together with the Advanced Consumer Lighting program. This is a mature program that has been implemented for many years. The PIP contains the PPMs and the PT/LM and data on participating retailers are tracked by SDG&E. Since this is an upstream program, there is no customer contact info for those participants receiving CFLs, so participants will be identified and surveyed through a general population survey (this method worked well in the previous process evaluation of this program). Level of evaluability is high.



- **SW Advanced Consumer Lighting (SDGE3114).** See discussion for the Residential Basic Lighting Program.
- **SW Business/Consumer Electronics/Plug Load (SDGE3115).** This program is an upstream program where rebates are point-of-sale and the participant is not made explicitly aware of receiving a rebate at the time of purchase. The PIP contains the PT/LM and PPM information, and SDG&E has tracking data for the participating retailers. As with the lighting programs, the end use participants will be identified and surveyed using a general population survey. Level of evaluability is high.
- **SW Prescriptive Whole House Retrofit (SDGE3156).** This program is implemented in tandem with the Local Whole House Performance program and therefore both programs will be evaluated together. The PIP contains the PT/LM and information on the PPMs. The two programs are in the early stages of implementation but there are some participants. The tracking database does not include any data for these programs yet, but the participant data should be available later from SDG&E. Participant surveys will be valuable, but there are potential market transformation indicators that might apply to this program. The level of training, certification, and experience of local contractors will be important to understand. Level of evaluability moderate as there is limited participation at this point.
- **3P Local Whole House Performance (SDGE3116).** See discussion for SW Prescriptive Whole House Retrofit.
- **SW Multi-Family (SDGE3119).** This program is a long established statewide program. The PIP contains the PT/LM and information on the PPMs. The tracking database is well populated and includes contact names for property owners. SDG&E does not track tenant information for multi-family complexes participating in the program, so any surveys of residents will need to be done through a general population survey. Level evaluability is high.
- **SW Home Efficiency Rebates (SDGE3121).** The program is implemented in coordination with retailers who track point-of-sale data. The PIP contains the PT/LM and information on the PPMs established for this program. At larger retailers the rebates are automatic and the customer data are not tracked. As with the lighting program, these participants will need to be identified through a general population survey. We have customer contact information for rebates from smaller retailers and a participant contest entry form. Level of evaluability is high.
- **SW Home Efficiency Surveys (SDGE3122).** The program is well established and has been implemented for a number of years and participant data are tracked by implementation contractor. The PIP contains the PT/LM and information on PPMs. However, the Home Efficiency Survey instrument is being replaced with an improved version at the end of 2011 and the existing survey



will no longer be used after that time. Level of evaluability is high, although the priority placed on this program for evaluation is low given that the new survey will be implemented next year.

- **SW Residential Energy Star Quality Install (SDGE3145).** This is a new program that has not yet been implemented. The PT/LM have been completed and the PPMs are discussed in the PIP. The evaluability for this program is moderate at the moment given that it has not started yet and therefore we cannot assess the availability of participant data.
- **3P Res HVAC Tune-up/Quality Installation (SDGE3171).** This is an established 3rd party program but has not reached the maturation level of some of the other programs. The PIP contains information on the program theory and logic, but this is provided as text rather than a logic model diagram. Since this is a 3rd party program, there are no established PPMs but there are performance metrics included in the contract with the implementation contractor. There are also data available for both participants and non-participants. Level of evaluability is high for this program.
- **3P Comprehensive Mobile Home (SDGE3172).** This program is an established statewide program implemented by a 3rd party contractor. The tracking database is well populated and includes contact information for mobile park managers. The PIP contains information on the PT/LM but no PPMs. The evaluation team will be able to conduct interviews with mobile home park contacts and contact information on park residences may also be available from the implementation contractor. Evaluability of this program is high.
- **3P K-12 Energy Efficiency Educations (SDGE3173).** The PIP contains information on the PT/LM but does not include PPMs as it is a 3rd party program. The evaluation team lacks participant data for students receiving the education. In absence of the data, we do not know how good the information will be from the San Diego County Office of Education. Access to students and parents is difficult, at best. In addition, the evaluation period does not coincide with the semester the program is implemented. It is possible we can find some families in the general population survey, but the 2000 US Census reports that fewer than 30% of households in San Diego County have children under 18. The evaluation will probably focus on teachers' perceptions of the new curriculum and their likelihood to use it. The evaluation will also assess how well the program is tracking use of the kits and whether they collect information that will be useful for the impact evaluation. Evaluability for this program is moderate to low given the difficulty in reaching students that received energy education through this program.
- **SW Appliance Recycling (SDGE3175).** This program is a mature statewide program. The PIP includes the PT/LM and a discussion of the PPMs for the program. Tracking data are loaded into SMART, but there are lags as the SMART system is often down. Participant data are available for both participants and



drop-outs and contact information is well populated. Evaluability for this program is high.

Assessment Criteria	SW Residential Basic Lighting (SDGE3113)	SW Advanced Consumer Lighting (SDGE3114)	SW Business/Consumer Electronics/Plug Load (SDGE3115)
1 Identify primary users of the evaluation and their needs	Program managers, management	Program managers, management	Program managers, management
2 Identify key gatekeepers to information (which staff member is in charge of data? - customer data, savings data - may be more than one person)	Mark Jensen (former PM) and Alton Kwok (new PM)	Mark Jensen (former PM) and Alton Kwok (new PM)	Paola Rosselli (PM), QDI (retailer relationships), Energy Solutions (sales data)
3 Is there a description of the staff that will operate the program? Is the staff internal or contracted staff?	Yes Internal	Yes Internal	Yes Contracted
How many staff and where are they located?	At least 2, in San Diego	At least 1, in San Diego	2 contractors: IL and CA
4 Program logic model complete; includes:	Yes	Yes	Yes
Set up: Need for the program or service, Mission documented, goals and obj's -- short term, midterm, longterm, context,	Yes	Yes	Yes
planned activities described	Yes	Yes	Yes
expected effects documented	Yes	Yes	Yes
5 Is there a marketing plan?	Yes--focuses on households, not retailers	Yes--focuses on households, not retailers	DK
How will potential participants be recruited once identified?	TV, bill inserts, other advertising	TV, bill inserts, other advertising	Implementer recruits retailers/mfrs to participate.
Is there a way to track participants?	Participating retailers are tracked, end use consumers are not.	Participating retailers are tracked, end use consumers are not.	Yes, although no customer data. Participants = 4 retailers.
Is there a way to track nonparticipants?	No	No	DK
6 Application forms available	NA	NA	NA
7 Does this program have training activities? Is there a way to track training participants	Some training for retailers NA	Some training for retailers NA	Yes DK
8 Program savings data available	Yes-based on deemed values and number bulbs sold	Yes-based on deemed values and number bulbs sold	Yes
9 Are PPMs measured?	PPMs are outlined in the PIP	PPMs are outlined in the PIP	PPMs are outlined in the PIP
10 Are PPMs tracked (e.g., entered in shared database)?	PPM related to equip tracked	PPM related to equip tracked	PPM related to equip tracked
11 Additional metrics for monitoring progress towards goals	DK	DK	Quantitative Program Targets in the PIP
12 Stage of development (just launched, medium mature, etc)	Mature	Mature	Mid
13 How are data describing program being tracked?	Participants = Retailers. Retailer sales data are tracked. No customer data are tracked.	Participants = Retailers. Retailer sales data are tracked. No customer data are tracked.	Participants = Retailers. Retailer sales data are tracked. No customer data are tracked.
14 Evaluability Rating	High	High	High
Comment			For TVs, evaluation cannot distinguish effects of program from other market effects (TV market is national). Could still look at computer monitors, desktop computers, & power strips.

Assessment Criteria	Whole House Performance (SW and Local) (SDGE3116, SDGE3156)	SW Multi-Family (SDGE3119)	SW Home Efficiency Rebates (SDGE3121)
1 Identify primary users of the evaluation and their needs	Program managers, management	Program managers, management	Program managers, management
2 Identify key gatekeepers to information (which staff member is in charge of data? - customer data, savings data - may be more than one person)	Nathan Bruner (PM); contractor training info may reside at CCSE	Paola Rosselli (temporary PM)	Mark Jensen (PM), WSA (3rd party does retailer management)
3 Is there a description of the staff that will operate the program? Is the staff internal or contracted staff?	Yes Internal plus contractors for contractor training and QA/QC	Yes Internal	DK Internal (rebate processing), Contracted (retailer management)
How many staff and where are they located?	SDG&E PM only	1 plus rebate processing and QA/QC	1 WSA staff in CA
4 Program logic model complete; includes:	No	Yes	Yes
Set up: Need for the program or service, Mission documented, goals and obj's -- short term, midterm, longterm, context,	Partly described in PIP, not LM	Yes	Yes
planned activities described	Yes	Yes	Yes
expected effects documented	Unclear	Yes	Yes
5 Is there a marketing plan?	Yes. Sarah Hill at SDG&E; internal marketing effort, BBP, contractors	Yes	DK
How will potential participants be recruited once identified?	Through qualified contractors	Contractors do recruiting, or building manager/owner might contact SDG&E	SDG&E reached out to all known appliance and home improvement retailers. Customers are recruited via print media and in-store.
Is there a way to track participants?	Yes	Yes (n=145)	Yes (n=43,236)
Is there a way to track nonparticipants?	No (unless you count HEES parts that were referred but didn't participate. Else we'd have to request bid info from HP contractors)	Hard to identify contacts especially smaller ones	DK
6 Application forms available	Yes	Yes	Yes
7 Does this program have training activities? Is there a way to track training participants	Yes Yes	No No	Some training for retailers DK
8 Program savings data available	Yes: modeled	Yes	Yes-based on deemed value
9 Are PPMs measured?	Yes	Yes	PPMs are outlined in the PIP
10 Are PPMs tracked (e.g., entered in shared database)?	Yes	PPM related to equip tracked	PPM related to equip tracked
11 Additional metrics for monitoring progress towards goals	Nathan keeps track of program data and monitors progress/activity - DK which metrics he focuses on	DK	DK
12 Stage of development (just launched, medium mature, etc)	Early, but there are participants	Mature	Mid
13 How are data describing program being tracked?	Database in development that will allow a dashboard	Rebates are tracked	CRM. Applications are entered by SDG&E staff. POS sales data are tracked by the Mfrs and Retailers. There is less customer data for POS -- smaller retailers track it but large big box do not. There is also a small amount of POS customer contact data obtained through a participant contest entry form.
14 Evaluability Rating	Moderate	High	High
Comment	Participant surveys will be valuable, but there are potential MT indicators that might apply to this program. The level of training, certification and experience of local contractors will be important to understand. We also heard about some problems training contractors to use the modeling software. There will likely be an impact focus on the actual vs. modeled savings of these (somewhat expensive) projects. Also, there is a regional "Retrofit Advisory Committee" lots of stakeholders. Consider interviewing them.	This program is evaluable. Long established program--statewide	

Assessment Criteria	SW Home Efficiency Surveys (SDGE3122)	SW Residential Energy Star Quality Install (SDGE3145)	3P Res HVAC Tune-up/Quality Installation (SDGE3171)
1 Identify primary users of the evaluation and their needs	Program managers, management	Program managers, management	Program managers, management
2 Identify key gatekeepers to information (which staff member is in charge of data? - customer data, savings data - may be more than one person)	Lupe Chacon (current PM), Jean Giesen (former PM)	Jeremy Reeve (PM)	JoJo Unverferth (PM), KEMA
3 Is there a description of the staff that will operate the program? Is the staff internal or contracted staff?	Yes Internal (management), Contractor (mail-in audit)	No NA	Yes Contracted
How many staff and where are they located?	At least 2, in San Diego, plus Kema	NA	3 KEMA staff
4 Program logic model complete; includes:	Yes	Yes	Yes
Set up: Need for the program or service, Mission documented, goals and obj's -- short term, midterm, longterm, context,	Yes	Yes	Yes
planned activities described	Yes	Yes	Yes
expected effects documented	Yes	Yes	Yes
5 Is there a marketing plan?	Yes, but will be developed statewide	No, but they plan to use similar design/strategy as SCE	Incomplete
How will potential participants be recruited once identified?	Through survey interface	HVAC contractors will be recruited and obligated to attend training. Contractors and SDG&E will recruit customers.	Implementer recruits contractors; contractors recruit customers
Is there a way to track participants?	Yes, tracked by implementation contractor	NA	Yes (n = 593)
Is there a way to track nonparticipants?	No	NA	Yes, both NP contractors and NP customers
6 Application forms available	NA	No	Yes, Customer Agreement Forms - but we do not have a copy
7 Does this program have training activities? Is there a way to track training participants	No NA	Yes, but have not begun yet NA	Yes Yes, at Contractor level and Technician level
8 Program savings data available	No	NA	Yes
9 Are PPMs measured?	PPMs are outlined in the PIP	PPMs are outlined in the PIP	NA (third party)
10 Are PPMs tracked (e.g., entered in shared database)?	DK	PPMs are outlined in the PIP	NA (third party)
11 Additional metrics for monitoring progress towards goals	Yes- number of surveys completed	Not yet	KPIs are tracked and outlined in the contract with KEMA
12 Stage of development (just launched, medium mature, or mature)	Mature--Completely revamped survey coming out at end of 2011.	Design	Mid
13 How are data describing program being tracked?	DK	NA - Program has not begun	SMART
14 Evaluability Rating	High	Moderate	High
Comment	Program staff and responsibilities are clearly defined, but existing survey is being replaced with an improved version at the end of 2011.	No program to evaluate yet, but perhaps we could do some research to help with planning - determine customer acceptance and contractor acceptance.	

Assessment Criteria	3P Comprehensive Mobile Home (SW) (SDGE3172)	3P K-12 Energy Efficiency Education (SDGE3173)	SW Appliance Recycling (SDGE3175)
1 Identify primary users of the evaluation and their needs	Program managers, management, Synergy	Program manager, management, SD County Office of Education	Program managers, management
2 Identify key gatekeepers to information (which staff member is in charge of data? - customer data, savings data - may be more than one person)	Jo Jo Unverferth (PM), Doug at Synergy	Paola Rosselli (PM), Kim Bess at SDCOE	Alton Kwok (PM), Victoria Czupryna (ARCA)
3 Is there a description of the staff that will operate the program? Is the staff internal or contracted staff?	Yes Contracted	Yes Contracted	DK - Need ARCA SOW Contracted
How many staff and where are they located?	8 key staff, plus two or three crews	One staff at SDCOE and teachers throughout SD county	3 key ARCA staff
4 Program logic model complete; includes:	Logic discussed in PIP, no diagram	Yes	Yes
Set up: Need for the program or service, Mission documented, goals and obj's -- short term, midterm, longterm, context,	Yes	Yes	Yes
planned activities described	Yes	Yes	Yes
expected effects documented	Yes	Yes	Yes
5 Is there a marketing plan?	Yes	No - but use website and one-on-one with school districts	Yes
How will potential participants be recruited once identified?	DK	Participants are teachers who influence students Goal is 2100 teachers, 25,4000 students 2100 kits distributed	TV, bill inserts, other print materials
Is there a way to track participants?	Yes - Synergy has a new database	Yes, but have not received any data	Yes (n = 3,471)
Is there a way to track nonparticipants?	Yes for the parks overall, not really for end-users	No	Yes
6 Application forms available	None needed	NA	NA
7 Does this program have training activities? Is there a way to track training participants	Yes, they train their own staff Yes	Yes - 10 on site, 250 online Yes - trained = 2100 teachers	DK DK
8 Program savings data available	SMART uploads	upload to SMART - but do not know how that has worked	Yes
9 Are PPMs measured?	NA KPIs	NA KPIs	PPMs are outlined in the PIP
10 Are PPMs tracked (e.g., entered in shared database)?	NA	NA	PPM related to equip tracked
11 Additional metrics for monitoring progress towards goals	KPIs are in the contract, we do not have the contract	KPIs are in contract, have not seen contract	Quantitative Program Targets in the PIP
12 Stage of development (just launched, medium mature, or mature)	Mature	Early - the curriculum was just revised so this will be a new approach	Mature
13 How are data describing program being tracked?	Synergy has a new database they feel is working very well.	Have not seen data fields	Data should be in SMART, but there have been issues with using the system effectively
14 Evaluability Rating	High	Moderate / low	High
Comment	This program is evaluable - the program staff are clearly defined as well as responsibilities. Synergy has a database of mobile home park contacts as well as of end user participants. They say this year they will provide this information. Synergy was fairly cooperative in the 06-08 period, they still consider the main challenge to be marketing and identifying new opportunities.	We don't know how good the information will be from SDCOE and access to students and parents is difficult. Many teachers use these materials after testing, which means the end of semesters which will not coincide with the evaluation period. The curriculum is pretty new so we may not find many teachers who have experience with the new curriculum. It is possible we can find some families in the general population survey, but < 30% of households in San Diego County have children under 18 (2000 Census)	

Appendix B – Phone Survey Instruments

This appendix includes all phone survey instruments in the order listed below:

1. Appliance Recycling: Participants & Drop-outs
2. General Population Survey
3. Home Energy Efficiency Rebates: Participants (non-point of sale & point of sale)
4. Upstream Lighting Program Survey
5. Mobile Homes: Mobile Home Owner Participants
6. Multi-Family: Building Owners Participants
7. Multi-Family: Building Owners Non-participants

SDG&E Appliance Recycling Program: Participants and Drop-Outs

SDG&E Appliance Recycling Program Survey Instrument (Participants and Drop-Outs)

(Programmer: Please insert actual type of appliance from sample (e.g., refrigerator) whenever "appliance" is referred to in the script.)

Hello, my name is _____ and I am calling on behalf of San Diego Gas & Electric. Is this the _____ residence?

[STRATA 1, 2 & 3 - PARTICIPANTS] We are conducting a survey for the Appliance Recycling Program. Our records show that your household recently participated in SDG&E's Appliance Recycling Program, where someone comes to your house to pick up and recycle an old appliance such as a refrigerator, freezer, or air conditioner and SDG&E pays you a cash incentive. Are you the best person in your household to talk to about your experience with this program?

1. yes (CONTINUE)
2. no (ASK TO SPEAK TO THAT PERSON, REPEAT INTRO, THEN CONTINUE)

The survey takes about 10 minutes to complete. Is now a good time? (CONTINUE WITH Q1)

[STRATA 4 - NONPARTICIPANTS] We are interviewing customers who scheduled the removal of a refrigerator, freezer, or air conditioner through the SDG&E Appliance Recycling program, but did not have the appliance removed. We are conducting a study to evaluate the program, including why some people drop out and would like to include your opinions. Are you the best person in your household to talk to about your experience with this program?

1. yes (CONTINUE)
2. no (ASK TO SPEAK TO THAT PERSON, REPEAT INTRO, THEN CONTINUE)

The survey takes less than 10 minutes to complete. Is now a good time? [SKIP TO Q2]

Q: SCREENING QUESTIONS

Q1. Our records show that you had [IF STRATA 1: one or more refrigerators / IF STRATA 2: one or more freezers / IF STRATA 3: one or more air conditioners] picked up for recycling . Is this correct?

1. Yes, correct (SKIP TO A1-INTRO)
2. No, it was not picked up (SKIP TO NP1)
3. Yes, it was picked up, but it was not a [IF STRATA 1: REFRIGERATOR; IF STRATA 2: FREEZER; IF STRATA 3: AIR CONDITIONER], it was A [RECORD RESPONSE]_____ (SKIP TO A1-INTRO)
88. Not sure / Don't Know [ASK:] Is there someone else who would know that I can talk to? (IF YES, REPEAT INTRO BEFORE CONTINUING WITH Q1; IF NO, THANK & TERMINATE)
99. Refused (THANK & TERMINATE)

Q2. Our records show that you had an appliance such as a refrigerator or freezer scheduled for pick-up for recycling earlier this year. Is this correct?

1. Yes (SKIP TO QUESTION Q4)
2. No
88. Not sure / Don't Know [ASK:] Is there someone else who would know that I can talk to? (IF YES, REPEAT INTRO THEN CONTINUE WITH Q1; IF NO, THANK & TERMINATE)
99. Refused (TERMINATE)

Q3. Can you think of any reason why our records mistakenly show that you scheduled an appliance for pickup and recycling earlier this year?

1. [RECORD OPEN END] _____ (NOW THANK & TERMINATE)

Q4. Our records seem to indicate that the appliance was not picked up under SDG&E's appliance recycling program. Is this correct?

1. Correct, never picked up (SKIP TO NP1)
2. Incorrect, an appliance was picked up
88. Not sure / Don't Know [ASK:] Is there someone else who would know that I can talk to? (IF YES, REPEAT INTRO, THEN CONTINUE WITH Q1; IF NO, THANK & TERMINATE)
99. Refused (TERMINATE)

Q5. Do you happen to recall if your appliance was picked up under SDG&E's appliance recycling program? [IF PICKED UP BY SUB-CONTRACTOR, ASK:] Do you remember the name of the sub-contractor?]

1. San Diego Gas & Electric (SDG&E)
2. Subcontractor [SPECIFY:] _____
3. Other (SPECIFY) _____
88. Not sure / Don't Know (THANK & TERMINATE)
99. Refused (THANK & TERMINATE)

Q6. Can you think of any reason our records mistakenly show that the appliance was NOT picked up, for example, did you reschedule for any reason?

1. [RECORD OPEN END] _____ (NOW THANK & TERMINATE)
2. No, can't think of any reason (THANK & TERMINATE)
88. Not sure / Don't Know (THANK & TERMINATE)
99. Refused (THANK & TERMINATE)

A: APPLIANCE CHARACTERISTICS (PARTICIPANTS ONLY)

[A1-INTRO:] I'm going to ask you some specific questions about the appliance that you had picked up.

A1. About how old was the appliance when it was picked up from your home? [DO NOT READ RESPONSE LIST]

0. Less than 1 year
1. [NUMERIC OPEN END; RECORD IN YEARS]
88. Not sure / Don't Know
99. Refused

A2. Now I'll read a list of reasons why people recycle their appliances. Please tell me which one best describes why you got rid of the appliance you recycled. Was it broken, no longer used, a secondary unit that was only used occasionally, a unit that you were replacing, or something else?

1. Broken (ASK A3)
2. No longer used
3. Secondary unit that was used occasionally
4. Unit that you were replacing
5. Something else [SPECIFY]: _____
88. Not sure / Don't Know
99. Refused

A3. [ASK IF A2 = 1; ELSE SKIP TO A4] In what way was the appliance broken? [RECORD ONLY ONE RESPONSE]

1. [RECORD OPEN END] _____
88. Not sure / Don't Know
99. Refused

A4. Where in your home was the appliance while it was in use? [DO NOT READ LIST; ONE ANSWER ONLY]

1. Kitchen
2. Garage
3. Porch/patio
4. Basement
5. Bedroom
6. Living room
7. Other [SPECIFY]: _____
88. Not sure / Don't Know
99. Refused

P: PROGRAM AWARENESS (PARTICIPANTS ONLY)

Next I have some questions about your experiences with the SDG&E Appliance Recycling Program.

P1. I'm going to read a list of places where some people have mentioned hearing about the recycling program. As I read each one, please tell me if YOU remember ever hearing about the recycling program from this source. (READ LIST; MULTIPLES OK. IF RESPONDENT VOLUNTEERS THEY HEARD FROM ONLY ONE SOURCE AND INSISTS ON PASSING ON THIS QUESTION, RECORD THAT ANSWER AND THEN SKIP TO P3.)

		Yes	No	Not sure / DK	Ref
1	TV ad for the program	1	2	8	9
2	TV news story about the program	1	2	8	9
3.	An insert with your electric or cable bill	1	2	8	9
4	A friend, relative, neighbor or word-of-mouth	1	2	8	9
5	From an SDG&E representative	1	2	8	9
6	The SDG&E website	1	2	8	9
7	From a store sales associate	1	2	8	9
8	Store postings advertising the program	1	2	8	9
9	Mailed postcard	1	2	8	9
10	A radio ad for the program	1	2	8	9
11	Any other way?[SPECIFY] _____	1	2	8	9

P2. (IF MORE THAN 1 ANSWER GIVEN IN P1, ASK:) How did you first learn about SDG&E's Appliance Recycling Program? [PROGRAMMER: SHOW ANSWERS SELECTED IN P1] [INTERVIEWER: READ ANSWERS GIVEN IN P1 IF NECESSARY; RECORD ONLY ONE RESPONSE]

1. TV Ad
2. TV news story
3. Bill insert
4. Friend/relative/neighbor (i.e. Word-of-mouth)
5. SDG&E representative
6. SDG&E website
7. Store sales associate
8. Store postings
9. Mailed postcard
10. Radio
77. Other [SPECIFY]: _____
88. Not sure / Don't Know
99. Refused

M: MOTIVATION FOR PARTICIPATING IN PROGRAM (PARTICIPANTS ONLY)

M1. I am going to read a list of other ways that you might have disposed of this appliance if the SDG&E program hadn't been available. Please tell me which one you would have most likely used. Would you have... [READ ENTIRE RESPONSE LIST BEFORE GETTING AN ANSWER; RANDOMIZE RESPONSES 1 THROUGH 7 AND READ RESPONSE 8 LAST; RECORD ONE ANSWER ONLY]

1. Had it taken to a dump or landfill
2. Kept it as a spare or backup
3. Given it to a friend, family member or neighbor
4. Donated it to a charity
5. Sold it
6. Had it taken to another recycler
7. Had it removed by the retailer where you purchased a new appliance
8. Or would you have done something else with the appliance?

[SPECIFY]: _____

88. Not sure / Don't Know
99. Refused

M2. On a scale of 1 to 5 where 1 is not at all important and 5 is very important, how important was the cash incentive from SDG&E in your decision to recycle your appliance with SDG&E?

<u>Not at all important</u>					<u>Very important</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9	

M3. How important was the convenience of the pick-up of the appliance in your decision to recycle your appliance with SDG&E? [REPEAT SCALE IF NECESSARY]

<u>Not at all important</u>					<u>Very important</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9	

M4. And how important were environmental reasons (in your decision)? [REPEAT SCALE IF NECESSARY]

<u>Not at all important</u>					<u>Very important</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9	

M5. How important was the lack of other options to recycle your appliance? [REPEAT SCALE IF NECESSARY]

<u>Not at all important</u>					<u>Very important</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9	

M6. What was the main reason you chose to recycle your appliance with SDG&E? Was it for the cash incentive, for the convenience of their program, for the environmental benefits, because you had no other options, or for some other reason? (ONE ANSWER ONLY)

1. Cash incentive
2. Convenience of pick-up
3. Environmental reasons
4. Had no other options to get rid of appliance
5. Other **[SPECIFY]:** _____

88. Not sure / Don't Know
99. Refused

M7. [ASK IF P1 response 7 = 1 OR P2 = 7; ELSE SKIP TO S1] You said that you heard about the program from a store sales associate. How influential was the salesperson in your decision to

recycle your appliance through SDG&E's Appliance Recycling Program? Please use our 1 to 5 scale where 1 was not at all influential and 5 was very influential.

<u>Not at all influential</u>				<u>Very influential</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

S: SATISFACTION (PARTICIPANTS ONLY)

S1. Who scheduled your appliance pickup, you, someone else in your household, a retailer, or someone else?

1. Me
2. Someone else in my household
3. Retailer scheduled pickup (SKIP TO S3)
4. Other [SPECIFY] _____
88. Not sure / Don't Know (SKIP TO S3)
99. Refused

S2. Did you sign up for the pickup online or over the phone?

1. Telephone
2. Online
3. Other [SPECIFY] _____
88. Not sure / Don't Know
99. Refused

S3. How convenient was the pickup time for you? Please use our same 1 to 5 scale (where 1 was not at all convenient and 5 was very convenient).

<u>Not at all convenient</u>				<u>Very convenient</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

S4. Do you recall your household receiving a letter in the mail confirming your scheduled pick-up day?

1. Yes
2. No (SKIP TO S7)
88. Not sure / Don't Know (SKIP TO S7)
99. Refused (SKIP TO S7)

S5. How useful was the confirmation letter? Please use our 1 to 5 scale (where 1 was not at all useful and 5 was very useful).

<u>Not at all useful</u>				<u>Very useful</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

(IF RATED 1, 2 or 3, CONTINUE, ELSE SKIP TO S7)

S6. What would have made the letter more useful? [PROBE TO CLARIFY]

1. [RECORD OPEN END] _____
88. Not sure / Don't Know
99. Refused

S7. About how many days was it from when you scheduled the appointment to when your appliance(s) was/were picked up? [NOTE TO INTERVIEWER: IF RESPONDENT SAYS "ABOUT A WEEK", RECORD AS 1 WEEK, ETC.]

1. Same day pickup
2. [ENTER DAYS]
88. Not sure / Don't Know

99. Refused

S8. Using our same 1 to 5 scale, how satisfied are you with the time it took between when you scheduled the appliance pickup and when it was actually picked up?

<u>Not at all satisfied</u>				<u>Very satisfied</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

S9. Overall, how satisfied or dissatisfied were you with your overall experience signing up, scheduling and arranging for the pickup of your appliance? Please use the same 1 to 5 scale.

<u>Not at all satisfied</u>				<u>Very satisfied</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

(IF RATED 1, 2 OR 3, CONTINUE, ELSE SKIP TO S11)

S10. What would have improved the experience? [PROBE TO CLARIFY]

1. [RECORD OPEN END] _____
88. Not sure / Don't Know
99. Refused

S11. [ASK IF S7 = 1; ELSE SKIP TO S13] If same-day pickup had not been available, do you think you still would have participated in the Appliance Recycling Program offered by SDG&E?

1. Yes
2. No (SKIP TO S13)
88. Not sure / Don't Know
99. Refused

S12. How many days do you think would be too long for you to wait for your appliance to be picked up for recycling.

- No. of Days: _____ or No. of weeks: _____
88. Not sure / Don't Know
 99. Refused

S13. [ASK IF S7 ≠ 1; IF S7 = 1, SKIP TO S14] Do you recall your household receiving a call to confirm the appointment the day before the pick-up took place?

1. Yes
2. No
88. Not sure / Don't Know
99. Refused

S14. Do you recall your household receiving a call to confirm the appointment the day of the pick-up?

1. Yes
2. No
88. Not sure / Don't Know
99. Refused

S15. Did the collection team arrive on time?

1. Yes
2. No
88. Not sure / Don't Know
99. Refused

S16. How satisfied are you with the collection team that picked up your appliance(s)? Please use our same 1 to 5 scale.

<u>Not at all satisfied</u>				<u>Very satisfied</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

(IF RATED 1, 2 OR 3, CONTINUE, ELSE SKIP TO S18)

S17. What could the collection team have done better?

1. [RECORD OPEN END] _____
 88. Not sure / Don't Know
 99. Refused

S18. How much was the cash incentive you received from SDG&E for recycling your [IF STRATA 1: Refrigerator; IF STRATA 2: Freezer; IF STRATA 3: Air conditioner]? [DO NOT READ CHOICES.]

1. \$25
 2. \$50
 7. Other [SPECIFY] _____ (ASK S19, THEN SKIP TO S21)
 88. Not sure / Don't Know (SKIP TO S21)
 99. Refused (SKIP TO S21)

S19. How satisfied are you with the size of the cash incentive you received? Please use our same 1 to 5 scale (where 1 is not at all satisfied and 5 is extremely satisfied).

<u>Not at all satisfied</u>				<u>Very satisfied</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

S20. How likely would you have been to participate in the SDG&E Program if the cash incentive was only [IF APPLIANCE = FREEZER OR REFRIGERATOR: \$25; IF APPLIANCE = A/C: \$10]? Please use our same 1 to 5 scale (where 1 is not at all likely and 5 is very likely).

<u>Not at all likely</u>				<u>Very likely</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

S21. How likely would you have been to participate in the SDG&E Appliance Recycling Program if there had been no cash incentive but they still offered free pick-up and recycling of your appliance?

<u>Not at all likely</u>				<u>Very likely</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

About how many weeks did it take to get your check after your APPLIANCE was picked up? Your best guess is fine.

S22. About how many weeks did it take to get the check after your [APPLIANCE] was picked up? Your best guess is fine. [DO NOT READ LIST; ONE ANSWER ONLY]

- No. of Weeks: _____
 1. Have not received my check yet (SKIP TO S24)
 88. Not sure / Don't Know
 99. Refused [SKIP TO S2524A]

S23. How satisfied are you with the amount of time it took to receive your payment from SDG&E? Please use our same 1 to 5 scale (where 1 is not at all satisfied and 5 is very satisfied).

<u>Not at all satisfied</u>				<u>Very satisfied</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

(IF RATED 1, 2 OR 3, CONTINUE, ELSE SKIP TO S24a)

S24. What would be a (more) reasonable time to receive the payment? [PROBE TO CLARIFY]

1. [RECORD OPEN END] _____
88. Not sure / Don't Know
99. Refused

S24a. Did you like receiving your payment as a check, or would you have preferred a credit to your electricity bill?

1. Prefer check
2. Prefer bill credit
88. Not sure / Don't Know
99. Refused

S25. Have you noticed a reduction in the amount of your electric bill since your appliance(s) was/were removed?

1. Yes
2. No
88. Not sure / Don't Know
99. Refused

S26. Thinking about your entire experience with the SDG&E Appliance Recycling Program, overall, how satisfied are you with the service? Please use our same 1 to 5 scale (where 1 is not at all satisfied and 5 is extremely satisfied).

<u>Not at all satisfied</u>					<u>Very satisfied</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9	

S27. What aspects of the program did you particularly like, if any? [DO NOT READ LIST; ALLOW MULTIPLE RESPONSES] [PROBE:] Any others?

1. None
2. The pick-up team
3. Got rid of appliance for me
4. Short wait / quick
5. It was free
6. The \$25 or \$50 payment
7. Helps the environment
8. Other [SPECIFY] _____
88. Not sure / Don't Know
99. Refused

S28. What aspects of the program did you particularly dislike, if any? [DO NOT READ LIST; ALLOW MULTIPLE RESPONSES]

1. None
2. Pick up team not on time
3. Other comment about pick-up team
4. Wait too long for appointment
5. Other comment about scheduling appointment
6. Someone had to be home for pick-up
7. Cash incentive lower than expected
8. Took too long to receive payment
9. Haven't received payment yet
10. Other [SPECIFY] _____
88. Not sure / Don't Know
99. Refused

S29. What suggestions would you make to improve the Appliance Recycling Program?

1. [RECORD OPEN-END] _____ [SKIP TO E1]
88. NOT SURE / DON'T KNOW [SKIP TO E1]
99. REFUSED [SKIP TO E1]

NP: APPLIANCE NEVER PICKED UP (NON-PARTICIPANTS ONLY)

[ASK NP1 IF QUESTION Q4 = 1; ELSE SKIP TO E1]

NP1. On a scale of 1 to 5 where 1 is very important and 5 is not at all important, how important was the cash incentive from SDG&E in your initial decision to recycle your appliance with SDG&E?

<u>Not at all important</u>				<u>Very important</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

NP2. How important was the convenience of the pick-up in your initial decision to recycle your appliance through SDG&E recycling program? Please use our same 1 to 5 scale where 1 means not at all important and 5 means very important.

<u>Not at all important</u>				<u>Very important</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

NP3. And how important were environmental reasons, using our 1 to 5 scale? (where 1 is not at all important and 5 is very important.)

<u>Not at all important</u>				<u>Very important</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

NP4. How important was the lack of other option to recycle your appliance? (Please use our 1 to 5 scale where 1 is not at all important and 5 is very important.)

<u>Not at all important</u>				<u>Very important</u>	<u>DK</u>	<u>Ref</u>
1	2	3	4	5	8	9

NP5. What was the primary reason you initially chose to recycle your appliance through SDG&E recycling program? Was it for the cash incentive, for the convenience of their program, for the environmental benefits, because you had no other options, or for some other reason?

1. Cash incentive
2. Convenience of pick-up
3. Environmental reasons
4. Had no other options to get rid of appliance
5. Other [SPECIFY]: _____
88. Not sure / Don't Know
99. Refused

NP6. Could you tell me why the appliance was not picked up?

1. Collection team cancelled appointment

2. Collection team did not show up
3. Customer could not be home for the appointment (customer cancelled)
4. Customer forgot about appointment
5. Appliance did not qualify for pickup [SKIP TO NP11]
6. Customer decided to keep using the appliance [SKIP TO NP11]
7. Customer decided to sell/give away the appliance [SKIP TO NP11]
8. Other [SPECIFY]: _____
88. Not sure / Don't Know
99. Refused

NP7. Did you attempt to reschedule the appointment?

1. Yes
2. No [SKIP TO NP9]
88. Not sure / Don't know [SKIP TO NP10]
99. Refused [SKIP TO NP10]

NP8. What was the outcome of the phone call?

1. _____ [RECORD OPEN-END; SKIP TO NP10]
88. Not sure / Don't know (SKIP TO NP10)
99. Refused (SKIP TO NP10)

NP9. Could you share with us why you were unable to to reschedule the appointment?

1. [RECORD OPEN-END] _____
88. Not sure / Don't Know
99. Refused

NP10. Did someone ever contact you to try and reschedule the appointment?

1. Yes
2. No
88. Not sure / Don't Know
99. Refused

NP11. And what happened to the appliance? Do you still have it?

1. Yes (SKIP TO NP13)
2. No
88. Not sure / Don't Know
99. Refused

NP12. Did you give it away, sell it, take it to a dump, take it to a recycling center, did a retailer take it away or something else?

1. Gave it away [SKIP TO NP14]
2. Sold it [SKIP TO NP14]
3. Took it to a dump
4. Took it to a recycling center [SKIP TO NP14]
5. An appliance retailer (e.g., Sears, Best Buy) picked it up [SKIP TO NP14]
6. Something ELSE [SPECIFY]
88. Not sure / Don't know [SKIP TO NP14]
99. Refused [SKIP TO NP14]

NP13. Do you plan to: [READ RESPONSE LIST; RANDOMIZE RESPONSES 1 THROUGH 4 AND READ RESPONSE 5 LAST; ONE ANSWER ONLY]

1. Schedule another appointment for the appliance to be picked up by SDG&E [SKIP TO NP16]

2. Sell it
3. Give it away
4. Continue using it
5. Or do something else with the appliance? [SPECIFY] _____
88. Not sure / Don't Know
99. Refused

NP14. Why did you decide not to participate in the SDG&E Appliance Recycling Program?

1. [RECORD OPEN-END] _____
88. Not sure / Don't Know
99. Refused

NP15. What, if anything, would make you more likely to recycle this appliance through SDG&E's program instead?

1. [RECORD OPEN-END] _____
88. Not sure / Don't Know
99. Refused

NP16. What suggestions would you make to improve SDG&E's Appliance Recycling Program?

1. [RECORD OPEN-END] _____
88. Not sure / Don't Know
99. Refused

NP17. Is there anything else you'd like to tell us about your experience with the Appliance Recycling program?

1. [RECORD OPEN-END] _____
88. Not sure / Don't Know
99. Refused

E: EXPERIENCE WITH OTHER ENERGY EFFICIENCY PROGRAMS

(ALL)

E1. Now I'd like to ask you about other energy efficiency programs and products offered by SDG&E to help you save energy. First please tell me if you have ever heard of any of these, and if so, if you participated in them. Let's start with... [READ 1-8; ALLOW MULTIPLE RESPONSES]

Program	Heard of Program			Participated in Program		
	Yes	No	DK	Yes	No	DK
1. Lighting exchange, which allows you to get a free new Compact Fluorescent Lightbulb or CFL when you bring in an old incandescent bulb	1	2	8	1	2	8
2. Online Home Energy Efficiency Survey, which asks you to fill out information about all of your home energy use through the SDG&E website, and then provides you with a report showing ways that you might be able to save energy	1	2	8	1	2	8
3. High Efficiency Lighting, which offers discounts provided by SDG&E for CFL light bulbs purchased at various retail stores	1	2	8	1	2	8
4. Home Energy Efficiency Rebate Program, which offers rebates for energy efficient appliances, insulation and pool pumps	1	2	8	1	2	8
5. A/C Tune, which provides air conditioner tune-ups	1	2	8	1	2	8
6. Summer Saver Program, which allows SDG&E to cycle your central A/C unit on and off on hot summer days	1	2	8	1	2	8
7. Any others? [SPECIFY:] _____	1	2	8	1	2	8

O: OTHER POTENTIAL PROGRAMS/SERVICES (ALL)

O1. Do you have any other suggestions for how SDG&E could help you and households like yours manage energy use better?

[OPEN-END] _____

88. Not sure / Don't Know

99. Refused

D: DEMOGRAPHICS & HOME CHARACTERISTICS (ALL)

D1 Intro. Now I have just a few questions about the property where the appliance was installed to help us improve our program.

D1. Do you currently live at the property where the appliance was/could be picked up?

1. Yes (**SKIP TO D3**)

2. No

88. Not sure / Don't know (**SKIP TO D3**)

99. Refused (**SKIP TO D3**)

D2. You indicated that you do not live at the residence, why did you consider recycling the appliance for that property? (DO NOT READ CHOICES)

1. It is a rental (**SKIP TO D4**)

2. Family lives at the residence

3. Other [SPECIFY] _____

88. Not sure / Don't Know

99. Refused

D3. Do you own or rent it?

1. Own

2. Rent

3. Other [SPECIFY] _____

88. Not sure / Don't Know

99. Refused

D4. What type of home is the property? Is it a . . . (READ CHOICES)

1. Single-family detached home

2. Condo

3. Townhouse

4. Mobile home / manufactured home

5. Duplex

6. Apartment

7. Other [SPECIFY]: _____

88. Not sure / Don't Know

99. Refused

D5. Including all adults AND children, how many people are in the household where the appliance was/is?

[No. of people]: _____

888. Don't Know

999. Refused

D6. In what year was the home originally built?

[YEAR BUILT]: _____ (SKIP TO D7)

888. Don't Know (ASK D6a)
999. Refused (SKIP TO D8)

D6a. Do you think it was built in . . . (READ CHOICES)

1. In the 1930's or earlier
2. In the 40's
3. The 50's
4. The 60's
5. The 70s
6. The 80's
7. The 90's
8. Or after 2000?
88. Not sure/ Don't Know
99. Refused

D7. Approximately how many square feet is that home? (GET BEST GUESS ON SQUARE FOOTAGE)

[No. of Square feet]: _____ (NOW SKIP TO D8)

888. DK (ASK D7a)
999. Refused (SKIP TO D8)

D7a. Would you guess it's . . . (READ CHOICES)

1. less than 1,400 square feet
2. 1,400 to 2,500 square feet
3. 2,500 to 3,500 square feet or
4. more than 3,500 square feet
8. Don't Know
9. Refused

And now I have just a few last questions to help us group your answers with those of others.

D8. First, which of these groups includes your age? Are you . . . (READ CHOICES)

1. Under 25
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75 and over
888. DK
999. Refused

D9. What is the highest level of education you have completed? Is it . . . ?(READ CHOICES)

1. High school diploma or less
2. Some college
3. Associates degree
4. Bachelors degree
5. Graduate or professional degree
88. Not sure / Don't Know
99. Refused

D10. Please stop me when I read the group that includes your household's annual income. Is it . . .

[READ LIST]:

1. Less than \$20,000
2. \$20,000 to \$40,000

- 3. \$40,000 to \$60,000
- 4. \$60,000 to \$80,000
- 5. \$80,000 to \$100,000
- 6. \$100,000 to \$150,000
- 7. More than \$150,000
- 88. Not sure / Don't Know
- 99. Refused

D11. And last question. What is your ethnicity/race? [READ LIST IF NEEDED; MULTIPLE RESPONSES ACCEPTED]

- 1. White or caucasian
- 2. Hispanic/Latino/a
- 3. Black or African American
- 4. Asian
- 5. Native Hawaiian or Pacific Islander
- 6. American Indian or Alaskan Native
- 7. Other [SPECIFY] _____
- 88. Not sure / Don't Know
- 99. Refused

Thank you very much for your time and cooperation. We really appreciate your help. Have a good day/evening.

SDG&E General Population Survey

SDG&E GENERAL POPULATION SURVEY INSTRUMENT

Hello. Is this the _____ residence? (IF NOT CORRECT NAME AND/OR ADDRESS, THANK & TERMINATE)

Hello, my name is _____ and I am calling on behalf of SDG&E. We are conducting a survey to learn more about residential energy use and your household was randomly chosen from SDG&E's customers.

SDG&E and other companies have programs to help households keep their energy costs down and reduce the amount of energy they use. We would like to ask you about your awareness of these programs, and any experience you might have had with them.

A. Are you the person who is most knowledgeable about energy use and energy savings practices in your household?

1. Yes (CONTINUE)
2. No (ASK TO SPEAK TO THAT PERSON; REPEAT INTRO BEFORE CONTINUING)
99. Refusal (SKIP TO TERM1)

The survey takes about 10 minutes. This interview may be monitored or recorded for quality control purposes.

B3. Since January 2010 have you purchased any of the following: [READ; RECORD "YES" OR "NO" FOR EACH OPTION]

1. Clothes Washer
2. Dishwasher
3. Furnace
4. Insulation
5. Low-Flow Showerhead
6. Refrigerator
7. Room Air CONDITIONER
8. Water Heater (Regular Storage Type)
9. Whole House Fan
10. CFL light bulbs (IF ONLY CFLS, SKIP TO Q1; IF CFLS AND OTHER ITEMS, CONTINUE.
88. NOT SURE/DON'T KNOW
99. REFUSED

[PROGRAMMER: DISPLAY AT TOP OF SCREEN:] CFLs are small fluorescent bulbs that fit in regular light bulb sockets. CFLs look different from standard bulbs. They are often made out of thin tubes of glass bent into spirals, or they could be globe shaped, or look like a floodlight.]

(FOR B3 RESPONSES 1 THRU 9 ASK B4 FOR EACH PRODUCT PURCHASED.)

B4. Did you receive an instant rebate at the cash register for the [product] you bought? This instant rebate would have been provided by SDG&E through a reduction in the price of the product because it was an energy efficient model. The program providing these rebates is called the Home Energy Efficiency Rebate program.

1. Yes
2. No
88. DK
99. REF

[CREATE NEW CODE: RANDOMLY ASSIGN ONE OF THE ITEMS THAT RESPONDENT INDICATES IN 1 THROUGH 9 IN B3 FOR WHICH B4 ALSO=1 TO "PRODUCT1." FOR USE IN SECTIONS A, I, S & CL]

IF "Yes" TO CFL IN B3, THEN CFL = 1
 IF "Yes" TO ANYTHING IN B4, THEN HEER=1
 If "No" TO ALL IN B3 or B4, THEN GP = 1
If GP = 1, skip to Q12
If CFL = 1, skip to Q1
If HEER = 1, go to A1
If CFL & HEER = 1, go to A1, THEN Q1

A1. Now I'd like to ask you a few questions about the purchase of your [PRODUCT1]. How did you first become aware of the [PRODUCT 1] rebate available through the Home Energy Efficiency Rebate Program? [DO NOT READ LIST; ONE ANSWER ONLY]

1. Contractor
2. Salesperson
3. Friend / Family
4. From other energy conservation program
5. Seminar
6. Ad/Display in store
7. Ad in the newspaper
8. Ad on Radio
9. Ad on TV
10. Ad on the Web
11. Other (SPECIFY) _____
88. NOT SURE/DON'T KNOW
99. REFUSED

A2. Had you already decided on purchasing an energy-efficient [PRODUCT1] before becoming aware of the HOME ENERGY EFFICIENCY REBATE PROGRAM?

1. Yes
2. No
88. NOT SURE / DON'T KNOW
99. REFUSED

A3. What store did you buy your [PRODUCT1] at? [DO NOT READ LIST]

1. B&B Appliance
2. Costco
3. Home Depot
4. Howard's
5. Humphrey Appliance
6. La Mesa Appliance
7. Lowes

- 8. MCAS Miramar Home Center
- 9. Navy Exchange 32ND Street
- 10. Phillips Maytag
- 11. Sears
- 12. Yingst Appliance
- 13. Other [SPECIFY]: _____
- 14. Bought on-line (ASK A3a & A3b, THEN SKIP TO I1-INTRO)
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

(IF A3≠14, SKIP TO A4)

A3a. What was the name of the website where you purchased your [EQUIP1]?

- [OPEN-END] _____
- 88. Not Sure / Don't Know
 - 99. Refused

A3b. What made you decide to go with the energy efficient model for your [EQUIP1]?

- [OPEN-END] _____ (SKIP TO I1-INTRO)
- 88. Not Sure / Don't Know (SKIP TO I1-INTRO)
 - 99. Refused (SKIP TO I1-INTRO)

A4. (IF A1 = 2, SAY:) You said a salesperson at the store told you about the rebate program. Is that correct?

(if A1 ≠ 2, SAY:) Did a salesperson at the store tell you about the HOME ENERGY EFFICIENCY REBATE PROGRAM?

- 1. Yes
- 2. No (**SKIP TO A7**)
- 88. NOT SURE / DON'T KNOW (**SKIP TO A7**)
- 99. REFUSED (**SKIP TO A7**)

A5. How influential was the salesperson in your decision to buy the energy efficient [PRODUCT1]? Would you say...?

- 4. Very influential
- 3. Somewhat influential
- 2. Not very influential
- 1. Not at all influential
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

A6. Had you already decided on purchasing an energy-efficient [PRODUCT1] before talking with the salesperson?

- 1. Yes
- 2. No
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

A7. Did you notice any energy efficiency promotional materials or information on display at the store?

- 1. Yes
- 2. No **(SKIP TO A10)**
- 88. NOT SURE / DON'T KNOW **(SKIP TO A10)**
- 99. REFUSED**(SKIP TO A10)**

A8. How influential were the promotional materials in your decision to buy the energy efficient [PRODUCT1]? Would you say...?

- 4. Very influential
- 3. Somewhat influential
- 2. Not very influential
- 1. Not at all influential
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

A9. Had you already decided to purchase an energy-efficient [PRODUCT1] prior to seeing the energy efficiency information display at the store?

- 1. Yes **(SKIP TO I1-INTRO)**
- 2. No
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

[ASK IF A2 OR A6 OR A9 = NO; ELSE SKIP TO I1-INTRO]

A10. What changed your mind to go with the energy efficient option for your [PRODUCT1]?

- [OPEN-END]_____
- 88. NOT SURE / DON'T KNOW
 - 99. REFUSED

I1-INTRO. Now I'd like you to think about your decision to purchase an energy efficient [PRODUCT1] when you bought [ALL PRODUCTS EXCEPT INSULATION: a] new [PRODUCT1].

I'll read a list of factors. For each, please tell me if the factor was very important, somewhat important, not very important, or not at all important to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [PRODUCT1]? How about . .

I1. (ASK IF YES TO A4) Information or recommendations from the salesperson. Was this very important, somewhat important, not very important or not at all important to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [PRODUCT1]?

- 4. Very important
- 3. Somewhat important
- 2. Not very important
- 1. Not at all important
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

- I2. The cash rebate. Was this very important, somewhat important, not very important or not at all important to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [PRODUCT1]?**
- 4. Very important
 - 3. Somewhat important
 - 2. Not very important
 - 1. Not at all important
 - 88. NOT SURE / DON'T KNOW
 - 99. REFUSED
- I3. The money you would save from lower energy bills. Was this very important, somewhat important, not very important or not at all important to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [PRODUCT1]?**
- 4. Very important
 - 3. Somewhat important
 - 2. Not very important
 - 1. Not at all important
 - 88. NOT SURE / DON'T KNOW
 - 99. REFUSED
- I4. The feeling that you were doing something good for the environment. Was this very important, somewhat important, not very important or not at all important to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [PRODUCT1]?**
- 1. Very important
 - 2. Somewhat important
 - 3. Not very important
 - 4. Not at all important
 - 88. NOT SURE / DON'T KNOW
 - 99. REFUSED
- I5. What was the MOST important factor in your decision to purchase (ALL MEASURES EXCEPT INSULATION: an) energy efficient [PRODUCT1]? [ONE ANSWER ONLY; DO NOT READ LIST]**
- 1. Information/encouragement from salesperson/contractor
 - 2. Cash rebate
 - 3. Lower energy bills
 - 4. Doing good for the environment
 - 5. Non Energy Factors such as color, style
 - 6. OTHER: Please specify:
-
- 88. NOT SURE / DON'T KNOW
 - 99. REFUSED

Next, I'd like to talk about your satisfaction with various aspects of the rebate program. For each item I read, please tell me if you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied.

- S1. How satisfied were you with the process of receiving your instant discount at the store register for the [PRODUCT1] you purchased? (READ CHOICES AGAIN IF NECESSARY)**
- 4. Very satisfied (**SKIP TO S3**)
 - 3. Somewhat satisfied
 - 2. Not very satisfied
 - 1. Not at all satisfied
 - 1. Doesn't apply/rebate went to contractor (**SKIP TO S3**)
 - 88. NOT SURE / DON'T KNOW (**SKIP TO S3**)
 - 99. REFUSED (**SKIP TO S3**)
- S2. What would have improved your satisfaction with the process of receiving your instant discount?**
- [OPEN-END]_____
- 88. NOT SURE / DON'T KNOW
 - 99. REFUSED
- S3. How satisfied were you with the rebate amount for the [PRODUCT1]? Would you say you were ...?**
- 4. Very satisfied (**SKIP TO S5**)
 - 3. Somewhat satisfied
 - 2. Not very satisfied
 - 1. Not at all satisfied
 - 88. NOT SURE / DON'T KNOW (**SKIP TO S5**)
 - 99. REFUSED → **SKIP TO S5**
- S4. What would have been a more satisfactory amount for your rebate?**
- [OPEN-END]_____
- 88. NOT SURE / DON'T KNOW
 - 99. REFUSED
- S5. How satisfied were with the performance of the [PRODUCT1]. Would you say you were ...?**
- 4. Very satisfied (**SKIP TO S7**)
 - 3. Somewhat satisfied
 - 2. Not very satisfied
 - 1. Not at all satisfied
 - 88. NOT SURE / DON'T KNOW (**SKIP TO S7**)
 - 99. REFUSED (**SKIP TO S7**)
- S6. What would have improved your satisfaction with the performance of the [PRODUCT1] you installed?**
- [OPEN-END]_____
- 88. NOT SURE / DON'T KNOW
 - 99. REFUSED
- S7. Have you noticed a reduction in the amount of your utility bill since you began using the [PRODUCT1]?**

- 1. Yes
- 2. No
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

S8. How satisfied were you with the energy savings from the [PRODUCT1] you installed? Would you say you were...?

- 4. Very satisfied
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

S9. Did an SDG&E representative come to your home to inspect the [PRODUCT1] you bought as part of the Home Energy Efficiency Rebate Program?

- 1. Yes
- 2. No (**SKIP TO S12**)
- 88. NOT SURE / DON'T KNOW (**SKIP TO S12**)
- 99. REFUSED (**SKIP TO S12**)

S10. How satisfied were you with the courteousness and professionalism of the inspector who came to your home? Would you say you were ...

- 4. Very satisfied (**SKIP TO S12**)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. NOT SURE / DON'T KNOW (**SKIP TO S12**)
- 99. REFUSED (**SKIP TO S12**)

S11. What would have increased your satisfaction with the inspection process?

- [OPEN-END]_____
- 88. NOT SURE / DON'T KNOW
 - 99. REFUSED

S12. Overall, how satisfied were you with the rebate program for buying energy efficient products? Would you say you were...?

- 4. Very satisfied (**SKIP TO S14**)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. NOT SURE / DON'T KNOW (**SKIP TO S14**)
- 99. REFUSED (**SKIP TO S14**)

S13. What would have improved your overall satisfaction?

- [OPEN-END]_____
- 88. NOT SURE / DON'T KNOW
 - 99. REFUSED

S14. Have you ever suggested this rebate program to someone outside of your household?

- 1. Yes
- 2. No (**SKIP TO S16**)
- 88. NOT SURE / DON'T KNOW (**SKIP TO S16**)
- 99. REFUSED (**SKIP TO S16**)

S15. What did you tell them about the program?

[OPEN-END]_____

- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

S16. What suggestions do you have to improve the HOME ENERGY EFFICIENCY REBATE PROGRAM?

[OPEN-END]_____

- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

CL-INTRO. Next we would like to know how well SDG&E accomplished its goal of getting clear information to you on the rebate program. For each of following, please tell me if the information you reviewed was extremely clear, pretty clear, not very clear or not at all clear.

CL1. How clear was the information you received on which makes and models qualify for rebates? Would you say ...

- 4. Extremely clear
- 3. Pretty clear
- 2. Not very clear
- 1. Not at all clear
- 5. Did not receive (DO NOT READ)
- 6. Does not apply (DO NOT READ)
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

CL2. How clear was the information you received on how to get the discount? Would you say...?

- 4. Extremely clear
- 3. Pretty clear
- 2. Not very clear
- 1. Not at all clear
- 5. Did not receive (DO NOT READ)
- 6. Does not apply (DO NOT READ)
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

CL3. How clear was the information you received on the energy savings you might expect from the equipment or measures you installed? Would you say ...

- 4. Extremely clear
- 3. Pretty clear
- 2. Not very clear
- 1. Not at all clear
- 5. Did not receive (DO NOT READ)
- 6. Does not apply (DO NOT READ)
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

If CFL = 1 continue to Q1.

If HEER = 1 or GP = 1 Skip to Q12

Q1. Now I'd like to ask about the compact fluorescent lights, or CFLs, you purchased since January 2010. Did you purchase your CFLs in California?

- 1. Yes
- 2. No
- 88. DK
- 99. REF

Q2. Did the CFLs you purchased show on the label that they had a discounted or promotional price from SDG&E or another California utility?

- 1. Yes
- 2. No
- 88. DK
- 99. REF

Q3. In what store did you purchase your CFLs? (DO NOT READ CHOICES)

- 1. Albertsons
- 2. CostCo
- 3. Home Depot
- 4. Lowes
- 5. Ralph's
- 6. Sam's Club
- 7. Target
- 8. True Value Hardware
- 9. Vons
- 10. Wal-Mart
- 11. Received for free
- 12. Other (SPECIFY) _____
- 88. DK
- 98. REF

Q4. Do you remember any display information in the store advertising the CFLs?

- 1. Yes
- 2. No (SKIP TO Q6)
- 88. DK (SKIP TO Q6)
- 99. REF (SKIP TO Q6)

Q5. What do you remember about the display? (DO NOT READ LIST, ACCEPT MULTIPLES)

1. End-cap display
2. Lighting display with working lights
3. Sign explaining energy savings of CFLs
4. Other: _____

Q6. What sizes of CFLs did you purchase? [READ; CHECK ALL THAT APPLY]

1. a 13-watt CFL which is the equivalent of a regular 40-watt bulb
2. a 15-watt CFL which is like a regular 60-watt bulb, etc.
3. a 20-23-watt CFL which is like a regular 75-watt bulb, etc.
4. a 25-29-watt CFL which is like a regular 100-watt bulb, etc.
5. a 38-42-watt CFL which is like a regular 150-watt bulb, etc.
6. a 55-watt CFL which is like a regular 200-300-watt bulb, etc.
88. DK/Don't remember

Q7. Why did you purchase CFLs instead of standard incandescent bulbs? (PROBE:) Any other reasons? [DO NOT READ! CHECK ALL THAT APPLY]

1. Because of the discount or rebate
2. To save energy
3. Longer bulb life
4. To save money on my utility bill
5. To lessen my impact on the environment
6. Because of global warming
7. Other (SPECIFY _____)
88. DK/Don't remember

Q8. Did you buy singly-packaged CFLs or CFLs in multi-packs or both?

1. Single (**SKIP TO Q10?**)
2. Multi-Packs
3. Both
88. DK/Don't remember (**SKIP TO Q10?**)

Q9. How many bulbs were in the multi-packs? (CHECK ALL THAT APPLY)

1. Two
2. Four
3. Eight
4. Other (SPECIFY _____)
88. DK/Don't remember

Q10. Did you install all of the CFLs you purchased?

1. Yes (**SKIP TO Q11a?**)
2. No
88. DK (**SKIP TO Q11a?**)
99. REF (**SKIP TO Q11a?**)

Q11. How many bulbs did you put into storage?

Enter number ____

Q11a. Overall, how satisfied were you with the CFLs you purchased? Are you very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied?

- 4. Very satisfied (**SKIP TO Q12**)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. NOT SURE / DON'T KNOW (**SKIP TO Q12**)
- 99. REFUSED (**SKIP TO Q12**)

Q11b. What would have improved your satisfaction with your CFLs?

[OPEN-END] _____
 88. NOT SURE / DON'T KNOW
 99. REFUSED

(ASK ALL RESPONDENTS FROM Q12 ON, UNLESS NOTED OTHERWISE)

Q12. Now I'd like to ask you about any/any other energy efficiency programs you might have participated in. Have you ever had a home energy audit, where someone comes to your home and identifies areas where you can reduce your energy use? These energy audits can also be done by mail or online. Have you ever had one of these energy audits for your home?

- 1. Yes, in-person home audit
- 2. Yes, audit by mail
- 3. Yes, audit online
- 4. No/Not sure/DK/refused (**SKIP TO Q14**)

Q13. Since having this home audit, have you had the chance to implement any of the audit's recommendations?

- 1. Yes
- 2. No (**SKIP TO Q14**)
- 88. DK/don't remember (**SKIP TO Q14**)

Q13a. What changes did you implement?

Enter verbatim _____

Q14. (DO NOT ASK IF Q12=3) How likely would you be to complete a free home energy audit on the Internet if sponsored by SDG&E? Would you say... (READ CHOICES)

- 4. Very likely (**SKIP TO Q15**)
- 3. Somewhat likely (**SKIP TO Q15**)
- 2. Somewhat unlikely
- 1. Very unlikely
- 88. DK (**SKIP TO Q15?**)

Q14a. (DO NOT ASK IF Q12=3) Why would you be unlikely to complete it on the Internet?

Enter verbatim _____

Q15. In the last year, do you recall receiving any communication from SDG&E/ on energy efficiency programs?

- 1. Yes
- 2. No
- 88. DK/don't remember

Q16. Do you recall hearing any TV ads regarding any of the energy efficiency programs?

- 1. Yes
- 2. No (**SKIP TO Q18**)
- 88. DK/don't remember (**SKIP TO Q18**)

Q17. What was the message of that TV ad?

Enter verbatim_____

Q18. Do you recall ever visiting the SDG&E website for information?

- 1. Yes
- 2. No (**SKIP TO Q22**)
- 88. DK/Don't remember (**SKIP TO Q22**)

Q19. What information were you looking for? [DO NOT READ – CHECK ALL THAT APPLY]

- 1. List of specific energy efficiency programs
- 2. Program application forms
- 3. Contractors
- 4. General information on energy efficiency measures
- 5. Other billing/service information
- 6. Other (specify)_____

Q20. Overall, how satisfied were you with the SDG&E website, would you say you were...

- 4. Very satisfied (**SKIP TO Q22**)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. NOT SURE / DON'T KNOW (**SKIP TO Q22**)

Q21. What would have improved your satisfaction with the SDG&E website?

Enter verbatim_____

Q22. What other programs or offerings could SDG&E provide to help you manage your energy use better?

Enter verbatim_____

Q23. How many Compact Fluorescent Lightbulbs, or CFLs, do you have installed in your home?

[PROGRAMMER: DISPLAY AT TOP OF SCREEN:] CFLs are small fluorescent bulbs that fit in regular light sockets. CFLs look different than standard bulbs. They are often made out of thin tubes of glass bent into spirals, or they could be globe shaped, or look like a floodlight.

Enter number_____

88. DK/REF

Q24. How many lights do you still have in your home that use standard incandescent bulbs, and that are on more than 2 hours per day?

Enter number _____

88. DK/REF

If Q24 <1 skip to Q26

Q25. What is the reason that you have not replaced these incandescent lamps with the Compact Fluorescent Lamps? (PROBE:) Any other reasons? (DO NOT READ/CHECK ALL THAT APPLY)

1. Don't fit
2. Lamps cost too much
3. Poor light quality
4. Not enough light
5. Keep burning out
6. Lamps are on dimmer
7. Never occurred to me
8. No special reason/DK

Q26. Do you have any refrigerators or freezers in your home that are more than 10 years old?

1. Yes-Refrigerator
2. Yes- Freezer
3. Yes-Refrigerator and Freezer
4. No
8. DK

If HEER = 1 then skip to AKA2

IF CFL=1 OR GP =1, GO TO AKA1.

AKA1. I'm going to list several energy-efficient product labels or energy efficiency programs. For each, please tell me if you have heard of it. [RANDOMIZE LABELS/NAMES OF PROGRAMS EXCEPT "ENERGY STAR Most Efficient" SHOULD ALWAYS IMMEDIATELY FOLLOW "ENERGY STAR"]

- | | | | | |
|--------------------------------|-------|------|------|-----------|
| (a) ENERGY STAR | (Yes) | (No) | (DK) | (Refused) |
| (b) ENERGY STAR Most Efficient | (Yes) | (No) | (DK) | (Refused) |
| (c) Consumer Elect | (Yes) | (No) | (DK) | (Refused) |
| (d) Engage 360 | (Yes) | (No) | (DK) | (Refused) |
| (e) Top Ten | (Yes) | (No) | (DK) | (Refused) |
| (f) Energy Upgrade California | (Yes) | (No) | (DK) | (Refused) |

AKA2. How much had you thought about how energy use affects the environment before today? Would you say . . . [READ CHOICES except DK and REF]

1. Not at all
2. A little
3. Some, or
4. A lot
8. Don't Know

9. Refused

AKA3. How much had you thought about global warming before today? [READ CHOICES except DK or REF]

1. Not at all
2. A little
3. Some, or
4. A lot
8. Don't Know
9. Refused

AKA4. How worried are you about global warming? Are you . . . [READ CHOICES except DK or REF]

1. Not at all worried
2. A little worried
3. Somewhat worried
4. Very worried, or
5. Extremely worried
8. Don't Know
- 9/ Refused

AKA5. Now, I'm going to read a few statements. Using a scale of 0 to 10 where 0 means *Not at all agree*, and 10 means *Completely agree*, please tell me how much you agree with each statement. [RANDOMIZE "a" - "n"]

	Not at all Agree	0	1	2	3	4	5	6	7	8	9	10	Completely Agree	DK	Ref
a. I sometimes worry whether there is enough money to pay my energy bill.		0	1	2	3	4	5	6	7	8	9	10		DK	Ref
b. I often worry that the cost of energy for my home will increase.		0	1	2	3	4	5	6	7	8	9	10		DK	Ref
c. I am very concerned about how energy use affects the environment.		0	1	2	3	4	5	6	7	8	9	10		DK	Ref
d. It is my responsibility to use as little energy as possible to help the environment		0	1	2	3	4	5	6	7	8	9	10		DK	Ref
e. I feel guilty if I use too much energy.		0	1	2	3	4	5	6	7	8	9	10		DK	Ref
f. I intend to conserve on gas or electricity consumption in my home this winter		0	1	2	3	4	5	6	7	8	9	10		DK	Ref
g. I intend to conserve on electricity consumption in my home this summer.		0	1	2	3	4	5	6	7	8	9	10		DK	Ref
h. If my utility bill goes up, I feel like I must do something to reduce it.		0	1	2	3	4	5	6	7	8	9	10		DK	Ref
i. I have to take the lead in my household if we're going to keep our utility bills down.		0	1	2	3	4	5	6	7	8	9	10		DK	Ref

- j. If others in my household can't or won't change their behavior to lower our utility bills, I feel I should do even more to control our energy costs. 0 1 2 3 4 5 6 7 8 9 10 DK Ref
- k. Household electricity use has an impact on the environment. 0 1 2 3 4 5 6 7 8 9 10 DK Ref
- l. I believe that household energy use has an impact on global warming and climate change. 0 1 2 3 4 5 6 7 8 9 10 DK Ref
- m. Conserving electricity will help reduce global warming. 0 1 2 3 4 5 6 7 8 9 10 DK Ref

D1-INTRO. [IF HEER or CFL=1, SAY=1:] Now I have just a few questions about the property where the item(s) was/were installed to help us improve our program. [IF GP, SAY:] We're almost done with the survey. I just have a few final questions about your home and the members of your household.

D1. [ASK IF HEER OR CFL=1, ELSE SKIP TO D3] Do you currently live at the property where the (PRODUCT/CFLs) is (are) installed?

1. Yes (SKIP TO D3)
2. No
88. NOT SURE/DON'T KNOW (SKIP TO D3)
99. REFUSED (SKIP TO D3)

D2. Why did you purchase the item for that property?

1. It is a rental (SKIP TO D4)
2. Family lives at the residence
3. Other [SPECIFY] _____
88. NOT SURE / DON'T KNOW
99. REFUSED

D3. [IF GP OR IF D1=1, ASK:] Do you rent or own your home?

[IF D1=2, 88 or 99, ASK:] Do you rent or own the property where the item was installed?

1. Own
2. Rent
3. Other (SPECIFY) _____
88. NOT SURE / DON'T KNOW
99. REFUSED

D4. [IF GP OR IF D1=1, ASK:] What type of home do you live in? Is it a: [IF D1=2, 88 or 99, ASK:] What type of home is the property where the item was installed? Is it a:

1. Single family detached home
2. Condo
3. Townhouse
4. Mobile home / manufactured home

5. Duplex
6. Apartment building with 2-4 units
7. Apartment building with 5 or more units
8. Other [SPECIFY]: _____
88. NOT SURE / DON'T KNOW
99. REFUSED

D5. [IF GP OR IF D1=1, ASK:] Including all adults AND children, how many people are in your household?

[IF D1=2, 88 or 99, ASK:] Including all adults AND children, how many people are in the household where the item was installed”?

[ENTER RESPONSE]: _____

888. DK

999. REFUSED

D6. In what year was the home originally built?

[YEAR BUILT]: _____ (SKIP TO D7)

888. Don't Know (ASK D6a)

999. Refused (SKIP TO D7)

D6a. Do you think it was built in . . . (READ CHOICES)

1. In the 1930's or earlier

2. In the 40's

3. The 50's

4. The 60's

5. The 70s

6. The 80's

7. The 90's

8. Or after 2000?

88. Not sure/ Don't Know

99. Refused

D7. Approximately how many square feet is that home? (GET BEST GUESS ON SQUARE FOOTAGE)

[No. of Square feet]: _____ (NOW SKIP TO D8)

888. DK (ASK D7a)

999. Refused (SKIP TO D8)

D7a. Would you guess it's . . . (READ CHOICES)

1. less than 1,400 square feet

2. 1,400 to 2,500 square feet

3. 2,500 to 3,500 square feet or

4. more than 3,500 square feet

8. Don't Know

9. Refused

And now I have just a few last questions to help us group your answers with those of others.

D8. Which of these groups includes your age? Are you . . . (READ CHOICES)

1. Under 25
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75 and over
88. DK
99. Refused

D9. What is the highest level of education you have completed? High school diploma or less, some college, associates degree, bachelor's degree, or a graduate or professional degree?

1. High school diploma or less
2. Some college
3. Associates degree
4. Bachelor's degree
5. Graduate or professional degree
88. NOT SURE / DON'T KNOW
99. REFUSED

D10. Please stop me when I read you household's annual income [READ LIST]:

1. Less than \$20,000
2. \$20,000 to \$40,000
3. \$40,000 to \$60,000
4. \$60,000 to \$80,000
5. \$80,000 to \$100,000
6. \$100,000 to \$150,000
7. More than \$150,000
88. NOT SURE / DON'T KNOW
99. REFUSED

D11. What is your ethnicity/race [READ LIST IF NEEDED; MULTIPLE RESPONSES ACCEPTED]?

1. White or Caucasian
2. Hispanic/Latino/a
3. Black or African American
4. Asian
5. Native Hawaiian or Pacific Islander
6. American Indian or Alaskan Native
7. Other [SPECIFY] _____
88. NOT SURE / DON'T KNOW
99. REFUSED

Thank you very much for your time and cooperation. We really appreciate getting your opinions.

**SDG&E Home Energy Efficiency Rebate (HEER)
Participant Survey**

SDG&E Home Energy Efficiency Rebate (HEER) Program Participant Survey Instrument

Hello. My name is _____ and I'm calling on behalf of San Diego Gas & Electric. *Have I reached the (LAST NAME) household?* (IF NOT SPEAKING TO AN ADULT, ASK:] May I speak to the man or woman of the house?

[POS:] Records show you may have participated in SDG&E's Rebate Program, which gives instant rebates for buying energy efficient products. It looks like you might have received an instant rebate from SDG&E when you purchased an energy-efficient product at Home Depot around [DATE].

QA. Do you recall purchasing an energy efficient product at Home Depot about that time?

1. yes (CONTINUE)
2. no (SKIP TO Q1)

QB. What was that product(s)? (DO NOT READ; MULTIPLES OKAY)

1. Clothes washer
2. Dishwasher
3. Furnace
4. Insulation
5. Low-Flow Showerhead
6. Refrigerator
7. Room air conditioner
8. Water heater
9. Whole house fan
88. Not Sure / Don't Know
99. Refused

QC. Did you receive an instant rebate at the cash register for (each of) the product(s) you bought? This instant rebate would have been provided by SDG&E through a reduction in the price of the product if it was an energy efficient model. (ASK QB FOR EACH ITEM ANSWERED IN QB)

1. Yes to any items (GO TO A1)
2. No to all (GO TO Q1)

Q1. Since January 2010, have you purchased any of the following: [Record yes or no for each option]

1. CLOTHES WASHER
2. DISHWASHER
3. FURNACE
4. INSULATION
5. LOW-FLOW SHOWERHEAD
6. REFRIGERATOR
7. ROOM AIR CONDITIONER
8. WATER HEATER
9. WHOLE HOUSE FAN
88. Not Sure / Don't Know

99. Refused

For Q1 responses 1 through 9, ask Q2 for each product purchased:

Q2. Did you receive an instant rebate at the cash register for the product(s) you bought? This instant rebate would have been provided by SDG&E through a reduction in the price of the product if it was an energy efficient model.

- 1. Yes
- 2. No
- 88. DK
- 99. REF

[CREATE NEW CODE: RANDOMLY ASSIGN ONE OF THE ITEMS THAT RESPONDENT INDICATES IN 1 THROUGH 9 FOR Q1 FOR WHICH Q2 ALSO = 1 TO "PRODUCT1." FOR ALL REMAINING QUESTIONS, USE "PRODUCT1" INSTEAD OF "EQUIP1."]

IF "No" or "DK" or "REF" TO ALL IN Q2, THEN THANK AND TERMINATE
If "Yes" TO ANYTHING IN Q2, THEN SKIP TO A1.

[ALL MEASURES EXCEPT INSULATION AND WATER SAVINGS KIT:] Records show you participated in SDG&E's Appliance Rebate Program which gives rebates for buying energy efficient products. It looks like you received a rebate from SDG&E when you purchased a [EQUIP1] in [MONTH] of [YEAR].

[IF EQUIP1 = INSULATION]: Records show you participated in SDG&E's Energy Efficiency Rebate Program which gives rebates for buying energy efficient products. It looks like you received rebates from SDG&E when you purchased attic or wall insulation in [MONTH] of [YEAR].

[IF EQUIP1 = WATER SAVINGS KIT:] Records show you participated in an SDG&E program which gives away free water savings kits. It looks like you received a free water savings kit containing faucet aerators and a low-flow showerhead from SDG&E in [MONTH] of [YEAR].

Q3. Is that correct?

- 1. Yes (IF EQUIP1 = WATER SAVINGS KIT, SKIP TO W1. ELSE CONTINUE TO A1)
- 2. No, not aware of participating [ASK:] Is there someone else in the household who might be aware of your household's participation in that program in [MONTH] of [YEAR]?
- 3. No, participated in program but item is incorrect (THANK & TERMINATE)
- 8. Not sure / Don't Know [ASK:] Is there someone else in the household who might be aware of your household's participation in that program in [MONTH] of [YEAR]?
- 9. Refused (THANK & TERMINATE)

The survey takes about 10 minutes and will be used to improve future programs . This call may be monitored or recorded for quality. Do you have a few minutes to give me your opinions?

A: AWARENESS

A1. How did you find out about the rebates that are available from SDG&E for qualified energy efficient appliances and equipment? [DO NOT READ LIST; ACCEPT MULTIPLE RESPONSES] [PROBE:] Did you hear about the rebates anywhere else?

1. This phone call / I was not aware (THANK & TERMINATE)
2. Contractor
3. Salesperson
4. Friend / Family
5. From other energy conservation program
6. Seminar
7. Ad/display in store
8. Ad in the newspaper
9. Ad on radio
10. Ad on TV
11. Ad on Web
12. Other(SPECIFY) _____
88. Not Sure / Don't Know
99. Refused

[IF EQUIP1 = INSULATION, SKIP TO A3]

A2. [ALL STRATA EXCEPT POOL PUMP:] We would like to know if the Rebate Program influenced your decision on what sort of [EQUIP1] to buy. Had you already decided to buy (a)-n [EQUIP1] that was ENERGY STAR rated before hearing about the REBATE PROGRAM or not?

[POOL PUMP STRATA:] We would like to know if the Rebate Program influenced your decision on what sort of [EQUIP1] to buy. Had you already decided to buy an energy efficient model before hearing about the REBATE PROGRAM or not?

1. Yes
2. No
88. Not Sure / Don't Know
99. Refused

A3. [If POS, DO NOT ASK AND SKIP TO R3] Think back to when you purchased your new [EQUIP1], did you purchase it through a contractor that did work at your home, or did you buy it yourself directly from the store or online?

1. Through contractor/pool maintenance person (SKIP TO C1)
2. Bought myself at a store (SKIP TO R1)
3. Bought myself online
88. Not sure / don't know (TERMINATE)
99. Refused (TERMINATE)

A4. What was the name of the website where you purchased your [EQUIP1]?

[OPEN-END] _____
88. Not Sure / Don't Know
99. Refused

A5. What made you decide to go with the energy efficient model for your [EQUIP1]?

[OPEN-END] _____ (SKIP TO I1-INTRO)
88. Not Sure / Don't Know (SKIP TO I1-INTRO)
99. Refused (SKIP TO I1-INTRO)

C: CONTRACTOR QUESTIONS

C1. Did your contractor tell you about potential rebates from SDG&E for qualifying energy efficient appliances and equipment?

- 1. Yes
- 2. No
- 88. Not Sure / Don't Know
- 99. Refused

C2. [ALL STRATA EXCEPT POOL PUMP:] Did your contractor suggest buying (a) [EQUIP1] that was ENERGY-STAR rated?

[POOL PUMP STRATA:] Did your contractor suggest buying (a) [EQUIP1] that was energy efficient?

- 1. Yes
- 2. No
- 88. Not Sure / Don't Know
- 99. Refused

C3. [ALL STRATA EXCEPT POOL PUMP:] How influential was the contractor in your decision to buy (ALL MEASURES EXCEPT INSULATION: an) ENERGY STAR [EQUIP1]? Would you say ...?

[POOL PUMP STRATA:] How influential was the contractor in your decision to buy an energy-efficient [EQUIP1]? Would you say ...?

- 4. Very influential
- 3. Somewhat influential
- 2. Not very influential
- 1. Not at all influential
- 88. Not Sure / Don't Know
- 99. Refused

C4. [ALL STRATA EXCEPT POOL PUMP:] Had you already decided on purchasing (ALL MEASURES EXCEPT INSULATION: a) [EQUIP1] that was ENERGY-STAR rated before talking with your contractor?

[POOL PUMP STRATA:] Had you already decided on purchasing a [EQUIP1] that was energy efficient before talking with your contractor?

- 1. Yes
- 2. No
- 88. Not Sure / Don't Know
- 99. Refused

[IF NO to A2 OR C4, ASK C5; ELSE SKIP TO C6]

C5. [ALL STRATA EXCEPT POOL PUMP:] What changed your mind to go with the [EQUIP1] that was ENERGY STAR rated?

[POOL PUMP STRATA:] What changed your mind to go with the energy efficient model for your [EQUIP1]?

[OPEN-END]_____

- 88. Not Sure / Don't Know
- 99. Refused

C6. In the process of having your [EQUIP1] installed through your contractor, were you required to certify that the necessary permits were filed and that a licensed contractor was used?

1. Yes
2. No (SKIP TO I1-INTRO)
88. Not sure / Don't know (SKIP TO I1-INTRO)
99. Refused (SKIP TO I1-INTRO)

C7. Did you have any concerns about this requirement? (where you were asked to certify that the permits were filed and that a licensed contractor was used)?

1. Yes
2. No (SKIP TO I1-INTRO)
88. Not sure / Don't know (SKIP TO I1-INTRO)
99. Refused (SKIP TO I1-INTRO)

C8. What were you concerned about?

- [OPEN-END]_____ (SKIP TO I1-INTRO)
88. Not sure / Don't know (SKIP TO I1-INTRO)
 99. Refused (SKIP TO I1-INTRO)

R: RETAIL STORE PURCHASE QUESTIONS

R1. How did you receive your rebate, did you receive it directly at the store when you purchased your equipment, or by mailing in a rebate form?

1. At Store (POS)
2. Mail-in
3. Online
88. Not Sure / Don't Know
99. Refused

R2. What store did you buy your [EQUIP1] at? [DO NOT READ LIST]

1. B&B Appliance
2. Costco
3. Home Depot
4. Howard's
5. Humphrey Appliance
6. La Mesa Appliance
7. Lowes
8. MCAS Miramar Home Center
9. Navy Exchange 32ND Street
10. Phillips Maytag
11. Sears
12. Yingst Appliance
13. Contractor purchased it for me (SKIP TO C1)
14. Other [SPECIFY]: _____
88. Not Sure / Don't Know
99. Refused

R3. Did a salesperson at the store ever talk to you about the SDG&E REBATE PROGRAM?

1. Yes
2. No (SKIP TO R6)
88. Not sure / Don't know (KIP TO R6)
99. Refused (SKIP TO R6)

- R4. [ALL STRATA EXCEPT POOL PUMP:] How influential was the salesperson in your decision to buy (ALL MEASURES EXCEPT INSULATION: an) ENERGY STAR [EQUIP1]? Would you say...?**
[POOL PUMP STRATA:] How influential was the salesperson in your decision to buy an energy efficient [EQUIP1]? Would you say...?
- 4. Very influential
 - 3. Somewhat influential
 - 2. Not very influential
 - 1. Not at all influential
 - 88. Not Sure / Don't Know
 - 99. Refused
- R5. [ALL STRATA EXCEPT POOL PUMP:] Had you already decided on purchasing (ALL MEASURES EXCEPT INSULATION: a) [EQUIP1] with an ENERGY STAR rating before talking with the salesperson?**
[POOL PUMP STRATA:] Had you already decided on purchasing a [EQUIP1] that was energy efficient before talking with the salesperson?
- 1. Yes
 - 2. No
 - 88. Not Sure / Don't Know
 - 99. Refused
- R6. Do you remember seeing any SDG&E energy efficiency promotional materials or informational displays at the store?**
- 1. Yes
 - 2. No (SKIP TO R9)
 - 88. Not sure / Don't know (SKIP TO R9)
 - 99. Refused (SKIP TO R9)
- R7. [ALL STRATA EXCEPT POOL PUMP:] How influential were the promotional materials in your decision to buy (ALL MEASURES EXCEPT INSULATION: an) ENERGY STAR [EQUIP1]? Would you say...?**
[POOL PUMP STRATA:] How influential were the promotional materials in your decision to buy an energy efficient [EQUIP1]? Would you say...?
- 4. Very influential
 - 3. Somewhat influential
 - 2. Not very influential
 - 1. Not at all influential
 - 88. Not Sure / Don't Know
 - 99. Refused
- R8. [ALL STRATA EXCEPT POOL PUMP:] Had you already decided on purchasing (ALL MEASURES EXCEPT INSULATION: a) [EQUIP1] that was ENERGY-STAR rated prior to seeing the energy efficiency information display at the store?**
[POOL PUMP STRATA:] Had you already decided on purchasing a [EQUIP1] that was energy efficient prior to seeing the energy efficiency information display at the store?
- 1. Yes (SKIP TO I1-INTRO)
 - 2. No
 - 88. Not Sure / Don't Know
 - 99. Refused

[ASK IF A2 OR R5 OR R8 = NO; ELSE SKIP TO I1-INTRO]

R9. What changed your mind to go with the energy efficient model for your [EQUIP1]?

[OPEN-END] _____

88. Not Sure / Don't Know

99. Refused

I: INFLUENCES ON PARTICIPATION

I1-INTRO. Now I'd like you to think about other factors that may have influenced your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient (EQUIP1) when you bought a new [EQUIP1].

I'll read a list of factors. For each, please tell me if the factor was very influential, somewhat influential, not very influential, or not at all influential to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [EQUIP1]? Let's start with . . . (READ ITEMS; ROTATE)

I1. The cash rebate. Was this very influential, somewhat influential, not very influential or not at all influential to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [EQUIP1]?

4. Very influential

3. Somewhat influential

2. Not very influential

1. Not at all influential

88. Not Sure / Don't Know

99. Refused

I2. [SKIP IF STRATA = POOL PUMP] The ENERGY STAR label. Was this very influential, somewhat influential, not very influential or not at all influential to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [EQUIP1]?

4. Very influential

3. Somewhat influential

2. Not very influential

1. Not at all influential

88. Not Sure / Don't Know

99. Refused

I3. The money you would save from lower energy bills. Was this very influential, somewhat influential, not very influential or not at all influential to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [EQUIP1]?

4. Very influential

3. Somewhat influential

2. Not very influential

1. Not at all influential

88. Not Sure / Don't Know

99. Refused

I4. The feeling that you were doing something good for the environment. Was this very influential, somewhat influential, not very influential or not at all influential to your decision to select (ALL MEASURES EXCEPT INSULATION: an) energy efficient [EQUIP1]?

4. Very influential

3. Somewhat influential

- 2. Not very influential
- 1. Not at all influential
- 88. Not Sure / Don't Know
- 99. Refused

I5. What was the most influential factor in your decision to purchase (ALL MEASURES EXCEPT INSULATION: an) energy efficient [EQUIP1]? [DO NOT READ LIST]

- 1. Information/encouragement from salesperson/contractor
- 2. Cash Rebate
- 3. Lower energy bills
- 4. Doing good for the environment
- 5. Energy star label
- 6. Non-energy factors such as color or style
- 7. Other (SPECIFY) _____
- 88. Not Sure / Don't Know
- 99. Refused

S: SATISFACTION

S1-INTRO.

[IF R1 = 1, or IF POS, SKIP TO S7]

S1. Did you or a contractor have to fill out an application form to receive your rebate?

- 1. Yes, I filled out the form
- 2. Yes, a contractor filled out the form for me (SKIP TO S4)
- 3. No (SKIP TO S5)
- 88. Not sure / Don't know (SKIP TO S5)
- 99. Refused (SKIP TO S5)

S2. Next, I'd like you to rate your satisfaction with various aspects of the program. How satisfied were you with the application process? Were you extremely satisfied, very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied?

- 5. Extremely satisfied (SKIP TO S4)
- 4. Very satisfied (SKIP TO S4)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Not sure / Don't know (SKIP TO S4)
- 99. Refused (SKIP TO S4)

S3. What would have improved the application process?

- [OPEN-END] _____
- 88. Not Sure / Don't Know
 - 99. Refused

S4. Once the rebate application was submitted, about how many weeks did it take for you to receive your rebate? [DO NOT READ RESPONSE LIST; RECORD ONLY ONE RESPONSE]

- 1. [SPECIFY NUMBER OF WEEKS] _____
- 2. Doesn't apply/rebate went to contractor (SKIP TO S7)
- 88. Not sure / Don't know (SKIP TO S7)
- 99. Refused (SKIP TO S7)

S5. How satisfied or dissatisfied were you with the speed with which you received your rebate. Would you say you were...

- 5. Extremely satisfied (SKIP TO S7)
- 4. Very satisfied (SKIP TO S7)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 6. Doesn't apply / rebate went to contractor (SKIP TO S7)
- 88. Not sure / Don't know (SKIP TO S7)
- 99. Refused (SKIP TO S7)

S6. What would have been an appropriate turn around time for your rebate?

- [OPEN-END]_____
- 88. Not Sure / Don't Know
 - 99. Refused

S7. How satisfied or dissatisfied were you with the rebate amount for the [EQUIP1]? Would you say you were ...?

- 5. Extremely satisfied (SKIP TO S9)
- 4. Very satisfied (SKIP TO S9)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Not sure / Don't know (SKIP TO S9)
- 99. Refused (SKIP TO S9)

S8. What would have been an appropriate amount for your rebate?

- [OPEN-END]_____
- 88. Not Sure / Don't Know
 - 99. Refused

S9. How satisfied are you with the performance of the [EQUIP1]. Would you say you are ...?

- 5. Extremely satisfied (SKIP TO S11)
- 4. Very satisfied (SKIP TO S11)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Not Sure / Don't Know (SKIP TO S11)
- 99. Refused (SKIP TO S11)

S10. What would improve your satisfaction with the performance of the [EQUIP1] you installed?

- [OPEN-END]_____
- 88. Not Sure / Don't Know
 - 99. Refused

S11. Have you noticed any reduction in the amount of your utility bill since the [EQUIP1] was installed?

- 1. Yes
- 2. No

- 88. Not Sure / Don't Know
- 99. Refused

S12. Did a SDG&E representative come to your home to inspect the equipment you bought as part of the Home Energy Efficiency Rebate Program?

- 1. Yes
- 2. No (SKIP TO S15)
- 88. Not Sure / Don't Know (SKIP TO S15)
- 99. Refused (SKIP TO S15)

S13. How satisfied or dissatisfied were you with the courteousness and professionalism of the inspector who came to your home? Would you say you were ...

- 5. Extremely satisfied (SKIP TO S15)
- 4. Very satisfied (SKIP TO S15)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Not Sure / Don't Know (SKIP TO S15)
- 99. Refused (SKIP TO S15)

S14. What would have made the inspection process better?

- [OPEN-END]_____
- 88. Not Sure / Don't Know
 - 99. Refused

S15. Overall, how satisfied were you with the SDG&E rebate program for buying energy efficient appliances and products? Would you say you were...?

- 5. Extremely satisfied (SKIP TO S17)
- 4. Very satisfied (SKIP TO S17)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Not Sure / Don't Know (SKIP TO S17)
- 99. Refused (SKIP TO S17)

S16. What would have improved your overall satisfaction?

- [OPEN-END]_____
- 88. Not Sure / Don't Know
 - 99. Refused

S17. Have you ever suggested this rebate program to someone outside of your household?

- 1. Yes
- 2. No (SKIP TO S19)
- 88. Not Sure / Don't Know (SKIP TO S19)
- 99. Refused (SKIP TO S19)

S18. What did you tell them about the program?

- [OPEN-END]_____
- 88. Not Sure / Don't Know
 - 99. Refused

S19. What suggestions would you make to improve the SDG&E rebate program?

[OPEN-END]_____

88. Not Sure / Don't Know

99. Refused

CL: CLARITY OF PROGRAM INFORMATION

CL-INTRO. Next we would like to know how well SDG&E accomplished its goal of getting clear information to you on the rebate program. For each of following, please tell me if the information you reviewed was extremely clear, very clear, somewhat clear, not very clear or not at all clear.

CL1. How clear was the information you received on which makes and models qualify for rebates? Would you say...

5. Extremely clear

4. Very clear

3. Somewhat clear

2. Not very clear

1. Not at all clear

6. Did not receive (DO NOT READ)

7. Does not apply (DO NOT READ)

88. Not sure / Don't Know

99. Refused

CL2. How clear was the information you received on how to apply for the rebate? Would you ...?

5. Extremely clear

4. Very clear

3. Somewhat clear

2. Not very clear

1. Not at all clear

6. Did not receive

7. Does not apply

88. Not sure / Don't Know

99. Refused

CL3. How clear was the information you received on the potential energy savings you might expect from the equipment or measures you installed? Would you say ...

5. Extremely clear

4. Very clear

3. Somewhat clear

2. Not very clear

1. Not at all clear

6. Did not receive

7. Does not apply

88. Not sure / Don't Know

99. Refused

CL4. Do you recall ever visiting SDG&E's website for information about this program or any other topic?

1. Yes

2. No (SKIP TO E1-INTRO)

88. Not Sure / Don't Know (SKIP TO E1-INTRO)

99. Refused (SKIP TO E1-INTRO)

CL5. What information were you looking for?

1. List of specific energy efficiency programs
2. Program application forms
3. Contractors
4. General information on energy efficiency measures
5. Other billing/service information
6. Other [SPECIFY:] _____
88. Not sure / Don't know
99. Refused

CL6. Overall, how satisfied were you with the SDG&E website? Would you say you were ... (READ CHOICES)

5. Extremely satisfied (SKIP TO E1-INTRO)
4. Very satisfied (SKIP TO E1-INTRO)
3. Somewhat satisfied
2. Not very satisfied
1. Not at all satisfied
88. Not sure / Don't know (SKIP TO E1-INTRO)
99. Refused (SKIP TO E1-INTRO)

CL7. What would you suggest to improve the SDG&E website?

- [OPEN-END]_____ (SKIP TO E1-INTRO)
88. Not Sure / Don't Know (SKIP TO E1-INTRO)
 99. Refused (SKIP TO E1-INTRO)

W: WATER SAVINGS KIT

W1. [ASK ONLY IF EQUIP1 = WATER SAVINGS KIT; ELSE SKIP TO E1-INTRO] How did you find out about the free water saving kit offered by [UTILITY]? [DO NOT READ LIST; ACCEPT MULTIPLE RESPONSES] [PROMPT FOR ADDITIONAL RESPONSES:] Did you hear about the free water saving kit anywhere else?

1. Lighting exchange event
2. Other SDG&E community event
3. Friend / family
4. Home energy efficiency survey (Online Energy Audit)
5. Ad/Display in store
6. Ad in the newspaper
7. Ad on radio
8. Ad on TV
9. SDG&E Bill insert
10. SDG&E Website
11. Other (SPECIFY) _____
88. Not Sure / Don't Know
99. Refused

W2. How did you receive your water savings kit – was it in the mail or did you pick it up in-person?

1. Mail (SKIP TO W4)
2. In person
88. Not Sure / Don't Know (SKIP TO W4)
99. Refused (SKIP TO W4)

W3. Where did you pick up your kit? Was it . . . (READ CHOICES)

1. Lighting exchange event
2. Other SDG&E community event
3. At a retail store
4. Other (SPECIFY) _____
88. Not sure / Don't know
99. Refused

W4. Your free WATER SAVINGS KIT included a Low-Flow Showerhead. Did you install the showerhead in your home?

1. Yes (SKIP TO W5)
2. No (ASK 4A)
88. Not sure / Don't know (SKIP TO W8)
99. Refused (SKIP TO W8)

W4A. Why didn't you install it?

(Open-ended, record verbatim) _____

(NOW SKIP TO W8)

W5. Is the showerhead still installed in your home?

1. Yes
2. No
88. Not sure / Don't know
99. Refused

W6. How satisfied were you with the performance of the Low-Flow Showerhead? Would you say you were ...?

5. Extremely satisfied (SKIP TO W8)
4. Very satisfied (SKIP TO W8))
3. Somewhat satisfied
2. Not very satisfied
1. Not at all satisfied
88. Not sure / Don't know (SKIP TO W8)
99. Refused (SKIP TO W8)

W7. What would have improved your satisfaction with the performance of the Low-Flow Showerhead?

[OPEN-END] _____

88. Not sure / Don't know

99. Refused

W8. Your free WATER SAVINGS KIT also included three Faucet Aerators. How many of the Faucet Aerators did you install in your home?

1. 1
2. 2
3. 3
4. NONE (ASK W8A)
88. Not sure / Don't know (SKIP TO W13)
99. Refused (SKIP TO W13)

W8a. Why didn't you install any of the faucet aerators?

(Open-ended, record verbatim:) _____

(NOW SKIP TO W13)

W9. Is/are the Faucet Aerator(s) still installed in your home or have you removed some?

- 1. All are still installed (SKIP TO W11)
- 2. Some or all have been removed
- 88. Not sure / Don't know (SKIP TO W11)
- 99. Refused (SKIP TO W11)

W10. How many of the Faucet Aerators you received in the water savings kit do you now have installed in your home?

- 1. 1
- 2. 2
- 3. None
- 88. Not sure / Don't know
- 99. Refused

W11. How satisfied were you with the performance of the Faucet Aerators? Would you say you were ...?

- 5. Extremely satisfied (SKIP TO W13)
- 4. Very satisfied (SKIP TO W13)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Not sure / Don't know (SKIP TO W13)
- 99. Refused (SKIP TO W13)

W12. What would have improved your satisfaction with the performance of the Faucet Aerators?

[OPEN-END] _____

- 88. Not sure / Don't know
- 99. Refused

W13. [ASK IF W4 = 1 OR W8 = 1 OR W8 = 2 OR W8 = 3; ELSE SKIP TO W15] How satisfied were you with the energy savings from the items you installed from the WATER SAVINGS KIT? Would you say you were...?

- 5. Extremely satisfied
- 4. Very satisfied
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Not sure / Don't know
- 99. Refused

W14. Have you noticed a reduction in the amount of your utility bill since the items from the WATER SAVINGS KIT were installed?

- 1. Yes
- 2. No

- 3. Other (SPECIFY) _____
- 88. Not sure / Don't know
- 99. Refused

W15. Overall, how satisfied were you with the Water Savings Kit Program? Would you say you were...?

- 5. Extremely satisfied (SKIP TO E1-INTRO)
- 4. Very satisfied (SKIP TO E1-INTRO)
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Not sure / Don't know (SKIP TO E1-INTRO)
- 99. Refused (SKIP TO E1-INTRO)

W16. What would have improved your overall satisfaction with the Water Savings Kit Program?

- [OPEN-END] _____
- 88. Not sure / Don't know
- 99. Refused

E: EXPERIENCE WITH OTHER ENERGY EFFICIENCY PROGRAMS

E1-INTRO. Now I'd like to ask you about other energy efficiency programs you might have participated in.

E1. First we'd like to know if you ever completed an on-line home energy survey. You would have entered information about all of your home energy use through the SDG&E website, and you would have been provided with a report showing ways that you might be able to save energy. Have you ever completed an on-line home energy survey for your home?

- 1. Yes
- 2. No (SKIP TO E4)
- 88. Not sure / Don't know (SKIP TO E4)
- 99. Refused (SKIP TO E4)

E1A. What year did you fill out the on-line home energy survey? A rough estimate is fine.

- 1. [RECORD YEAR] _____
- 88. Not sure / Don't know
- 99. Refused

E2. Since completing the on-line home energy survey, have you had the chance to implement any of the recommendations?

- 1. Yes
- 2. No (SKIP TO E4)
- 88. Not sure / Don't know (SKIP TO E4)
- 99. Refused (SKIP TO E4)

E3. What recommendations did you implement?

- [OPEN-END] _____
- 88. Not sure / Don't know
- 99. Refused

- E4. Please tell me if you have ever heard of any of the following SDG&E programs that are available for residential customers looking for ways to reduce their energy use and become more energy efficient. Have you ever heard of... [READ ITEMS; FOR EACH PROGRAM HEARD OF, ASK:] Have you ever participated in that program?**

Program	Heard of Program			Participated in Program		
	Yes	No	DK	Yes	No	DK
a. The lighting exchange program, which allows you to trade in your incandescent light bulbs for free, new, energy-efficient compact fluorescent light bulbs?	1 →	2	9	1	2	9
b. High Efficiency Lighting, which offers discounts provided by SDG&E for CFL light bulbs purchased at various retail stores	1 →	2	9	1	2	9
c. The appliance recycling program, which provides a rebate when you recycle your old working refrigerator, freezer, or room air conditioner?	1 →	2	9	1	2	9
d. The A/C time program, which provides a rebate for having a central air conditioner tune-up?	1 →	2	9	1	2	9
e. Summer Saver Program, which allows SDG&E to turn your central A/C unit on and off on hot summer days?	1 →	2	9	1	2	9
f. Any other SDG&E programs? (SPECIFY:) Program #1 _____	1 →	2	9	1	2	9
g. Any other SDG&E programs? (SPECIFY:) Program #2 _____	1 →	2	9	1	2	9

- E7. In the last year, have you participated in any other energy efficiency programs where you received a rebate for purchasing an energy efficient item?**

1. Yes
2. No (SKIP TO O1)
88. Not sure / Don't know (SKIP TO O1)
99. Refused (SKIP TO O1)

- E8. What type of equipment did you purchase?**

[OPEN-END] _____

88. Not sure / Don't know
99. Refused

OTHER POTENTIAL PROGRAMS/SERVICES

- O1. Do you have any other suggestions for how SDG&E could help you and households like you manage energy use better?**

[OPEN-END] _____

88. Not sure / Don't know
99. Refused

DEMOGRAPHICS

D1-INTRO. Lastly I have just a few questions about the property where the equipment was installed to help us improve our program.

- D1. Do you currently live at this property?**

1. Yes (SKIP TO D3)

- 2. No
- 88. Not sure / Don't know (SKIP TO D3)
- 99. Refused (SKIP TO D3)

D2. You indicated that you do not live at the residence, why did you purchase the equipment for that property?

- 1. It is a rental (SKIP TO D4)
- 2. Family lives at the residence
- 3. Other [SPECIFY] _____
- 88. Not sure / Don't know
- 99. Refused

D3. Do you own or rent it?

- 1. Own
- 2. Rent
- 3. Other [SPECIFY] _____
- 88. Not sure / Don't know
- 99. Refused

D4. What type of home is the property where the equipment was installed? Is it a:

- 1. Single-family detached home
- 2. Condo
- 3. Townhouse
- 4. Mobile home / manufactured home
- 5. Duplex
- 6. Apartment
- 7. Other [SPECIFY]: _____
- 88. Not sure / Don't know
- 99. Refused

D5. Including all adults AND children, how many people are in the household where the equipment was installed?

- [ENTER RESPONSE]: _____
- 888. Not sure / Don't know
 - 999. Refused

D6. In what year was the home originally built?

- [YEAR BUILT]: _____ (SKIP TO D7)
- 888. Don't Know (ASK D6a)
 - 999. Refused (SKIP TO D7)

D6a. Do you think it was built in . . . (READ CHOICES)

- 1. In the 1930's or earlier
- 2. In the 40's
- 3. The 50's
- 4. The 60's
- 5. The 70s
- 6. The 80's
- 7. The 90's
- 8. Or after 2000?
- 88. Not sure/ Don't Know
- 99. Refused

D7. Approximately how many square feet is the home where the equipment was installed? (GET BEST GUESS ON SQUARE FOOTAGE)

[No. of Square feet]: _____ (NOW SKIP TO D8)

888. DK (ASK D7A)

999. Refused (SKIP TO D8)

D7a. Would you guess it's . . . (READ CHOICES)

1. less than 1,400 square feet
2. 1,400 to 2,500 square feet
3. 2,500 to 3,500 square feet or
4. more than 3,500 square feet
8. Don't Know
9. Refused

And now I have just a few last questions to help us group your answers with those of others.

D8. Which of the following groups includes your age? Is it . . . (READ CHOICES)

1. Under 25
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75 and over
8. DK
9. Refused

D9. What is the highest level of education you have completed so far? Is . . . (READ CHOICES)

1. High school diploma or less
2. Some college
3. Associates degree
4. Bachelors degree
5. Graduate or professional degree
88. Not sure / Don't know
99. Refused

D10. Please stop me when I read you household's annual income [READ LIST]:

1. Less than \$20,000
2. \$20,000 to \$40,000
3. \$40,000 to \$60,000
4. \$60,000 to \$80,000
5. \$80,000 to \$100,000
6. \$100,000 to \$150,000
7. More than \$150,000
88. Not sure / Don't know
99. Refused

D11. What is your ethnicity/race [READ LIST IF NEEDED; MULTIPLE RESPONSES ACCEPTED]?

1. White or Caucasian

2. Hispanic/Latino/a
3. Black or African American
4. Asian
5. Native Hawaiian or Pacific Islander
6. American Indian or Alaskan Native
7. Other [SPECIFY] _____
88. Not sure / Don't know
99. Refused

Those are all my questions. Thank you very much for your time and cooperation.

D12. [INTERVIEWER: Record gender of respondent]

1. Male
2. Female
88. Not sure / Don't know

SDG&E Upstream Lighting Program Survey Instrument

SDG&E Upstream Lighting Program Survey Instrument

Hello, my name is _____ and I am calling on behalf of San Diego Gas and Electric.
May I speak to the person at your store responsible for deciding which energy-efficient lighting products to stock? (IF NECESSARY, ADD:) (This is not a sales call. We're just conducting a short survey for SDG&E.)

(WHEN THE APPROPRIATE PERSON COMES ON THE PHONE, SAY:)

My name is _____ and I'm calling on behalf of SDG&E. We're conducting an evaluation of SDG&E's Upstream Lighting Program (or Energy Efficient Lighting Discount Program) that your store participates in with lighting manufacturers, sometimes called the "lightbulbs buydown program." (It's a program that provides discounts to retailers who purchase qualifying energy efficiency lighting products such as CFLs and fluorescent lighting fixtures from participating manufacturers.) We would like to talk to you about your experience with this program. This survey is for research purposes only and will be used to improve future programs.

The survey takes about 10 minutes to complete. Is now a good time?
(If yes, continue survey)(IF NO, ARRANGE CB TIME)

Q1. Are you familiar with that program?

1. Yes (GO TO Q3)
2. No

Q2. Is there someone else in the store that might be familiar with this program?

1. Yes (RESTART INTRODUCTION AND BEGIN INTERVIEW AT Q3)
2. No

Q3. What year did your store begin participating in SDG&E's Upstream Lighting program?

1. [RECORD YEAR] _____
8888. Don't Know
9999. Refused

Q4. Did you first learn of this program from a manufacturer, from SDG&E or from some other source?

1. Manufacturer (ASK:) **What is the name of the manufacturer?**

2. SDG&E
3. Respondent took over existing program from different staff member
4. Some other source, specify: _____
88. Don't know

We would like to know the reasons your store participates in this lighting program. For each of the following reasons, please tell me if that reason is very important, somewhat important, a little important, or not important in your participation in the program.

	NOT AT ALL IMPORTANT	NOT VERY IMPORTANT	SOMEWHAT IMPORTANT	VERY IMPORTANT	EXTREMELY IMPORTANT	DK
Q6. To increase the sales of	1	2	3	4	5	88

energy efficient bulbs

Q7. To promote energy efficiency	1	2	3	4	5	88
Q8. To sell energy efficient bulbs at a lower cost	1	2	3	4	5	88
Q9. To increase overall store traffic	1	2	3	4	5	88

Q10. Are there any other reasons for your store's participation in this program?

[RECORD VERBATIM]_____

Next I'd like to ask you about which types of energy efficient bulbs you offer as part of this program, and how satisfied you are with the sales of each type. First, do you carry...?

Do you carry...				How satisfied are you with the sales of the program's energy efficiency bulbs? Would you say [READ ALL]						Why?	
YES	NO Ask why not	DK		Not at all Satisfied	Not very Satisfied	Somewhat Satisfied	Very Satisfied	Extremely Satisfied	DK		
Q11	<u>SPIRAL</u>	1→	2	8	1→	2→	3→	4	5	88	
	Why don't you carry this bulb?										
Q12	<u>THREE-WAY</u>	1→	2	8	1→	2→	3→	4	5	88	
	Why don't you carry this bulb?										
Q13	<u>REFLECTOR</u>	1→	2	8	1→	2→	3→	4	5	88	
	Why don't you carry this bulb?										
Q14	<u>DIMMABLE</u>	1→	2	8	1→	2→	3→	4	5	88	
	Why don't you carry this bulb?										
Q15	<u>A-LAMP</u>	1→	2	8	1→	2→	3→	4	5	88	
	Why don't you carry this bulb?										
Q16	<u>CANDELABRA</u>	1→	2	8	1→	2→	3→	4	5	88	
	Why don't you carry this bulb?										
Q17	<u>GLOBE</u>	1→	2	8	1→	2→	3→	4	5	88	
	Why don't you carry this bulb?										
Q18	<u>LEDS</u>	1→	2	8	1→	2→	3→	4	5	88	
	Why don't you carry this bulb?										

Q19	<u>OTHER</u>	1→	2	8	1→	2→	3→	4	5	88	
-----	--------------	----	---	---	----	----	----	---	---	----	--

Q20. Are there any other lighting products you would like to see included in this program?

- 1. Yes
- 2. No (GO TO Q21)
- 88. DK (GO TO Q21)

Q20A. What products?

[RECORD VERBATIM] _____
88. DK (SKIP TO Q21)

Q20B. Why would you like to include [NAMED PRODUCT(S)]?

[RECORD VERBATIM] _____

Q21. Are there any lighting products you would like to see excluded from this program?

- 1. Yes
- 2. No (SKIP TO Q22)
- 88. DK (SKIP TO Q22)

Q21A. What products? [RECORD VERBATIM] _____

Q21B. Why? [RECORD VERBATIM] _____

Q22. Approximately what percentage of all your light bulb shelf space in the last 12 months has been devoted to CFLs? Your best estimate is fine

[RECORD %] _____

Q23. And approximately what percentage of all your light bulb sales in the last 12 months has been for CFLs? Your best estimate is fine.

[RECORD %] _____

Q24. Where are the packages of CFL light bulbs from the SDG&E program located in your store? (READ ALL; CHECK ALL THAT APPLY)

- 1. Lighting aisle
- 2. End-cap
- 3. Special display
- 4. Front of store / Near register
- 5. Other, specify: _____
- 88. DK (DO NOT READ)

Q25. Have you carried CFLs that were packaged with multiple bulbs in a single package through this program?

- 1. Yes
- 2. No (GO TO Q28)
- 88. DK (GO TO Q28)

Q25A. How many bulbs per package? [CHECK ALL THAT APPLY]

- 1. Two
- 2. Four
- 3. Eight
- 4. Other, specify: _____
- 88. DK

Q26. Approximately what percentage of your CFL sales are sales of the rebated multi-packs?

[RECORD %]_____

Q27. How satisfied are you with the sales of the rebated multi-packs you have carried? [READ OPTIONS]

1. Not at all satisfied
2. Not very satisfied
3. Somewhat satisfied
4. Very satisfied (SKIP TO Q28) or
5. Extremely satisfied (SKIP TO Q28)
88. Don't Know (DO NOT READ)

[Ask Q27A if Q27 = 3, 4 or 5, otherwise skip to Q28]

Q27A. Why do you think the multi-packs didn't sell as well as you would have liked in your store?

[RECORD VERBATIM]_____

Adequacy of Supply

Q28. Did you ever have difficulty obtaining adequate stock of any of the rebated bulbs you have carried through this program?

1. Yes
2. No (GO TO Q29)
88. DK (GO TO Q29)

Q28A. Which ones? (DO NOT READ/CHECK ALL THAT APPLY)

1. Spiral
2. Three-way
3. Reflector
4. Dimmable
5. A-lamp
6. Candelabra
7. Globe
8. LEDs
9. Other, specify _____
88. DK

Q29. Were you ever overstocked with rebated bulbs you have carried through the program?

1. Yes
2. No (GO TO Q30)
88. DK (GO TO Q30)

Q29A. Which ones? (DO NOT READ/CHECK ALL THAT APPLY)

1. Spiral
2. Three-way
3. Reflector
4. Dimmable
5. A-lamp
6. Candelabra
7. Globe
8. LEDs

9. Other, specify _____
88. DK

Q29B. Why were you overstocked with bulbs through the program?

[RECORD VERBATIM]_____

Q29C. How did overstocking of bulbs impact your normal business operations?

[RECORD VERBATIM]_____

Promotional Materials & Marketing

Q30. Next I'll ask about promotional materials. Are you currently using any product promotional materials provided by manufacturers?

- 1. Yes (GO TO Q31)
- 2. No
- 88. DK (SKIP TO Q34)

Q30A. Why aren't you using those promotional materials? (SKIP TO Q34)

[RECORD VERBATIM]_____

Q31. Did any of the manufacturers place the signage for the energy efficient lighting products in your store?

- 1. Yes
- 2. No
- 88. DK

Q32. Overall, how effective are the promotional materials provided by the manufacturers? Would you say not at all effective, not very effective, somewhat effective, very effective or extremely effective?

- 1. Not at all effective
- 2. Not very effective
- 3. Somewhat effective
- 4. Very effective (GO TO Q34)
- 5. Extremely effective (GO TO Q34)
- 88. Don't know

Q33. What do you think would make these materials more effective?

[RECORD VERBATIM]_____

Q34. Are you currently using any product promotional materials provided by SDG&E?

- 1. Yes (GO TO Q35)
- 2. No
- 88. DK (SKIP TO Q37)

Q34A. Why aren't you using those promotional materials? (SKIP TO Q37)

[RECORD VERBATIM]_____

Q35. Overall, how effective are the promotional materials provided SDG&E? Would you say not at all effective, not very effective, somewhat effective, very effective or extremely effective?

1. Not at all effective
2. Not very effective
3. Somewhat effective
4. Very effective (GO TO Q37)
5. Extremely effective (GO TO Q37)
88. Don't know

Q36. What do you think would make these materials more effective?

[RECORD VERBATIM]_____

Q37. Did your store create any of its own materials to promote the program's energy efficient lighting products?

1. Yes
2. No
88. DK

Q38. Have you heard or seen any other marketing or publicity that promotes sales of energy efficient lighting products in California?

1. Yes
2. No (GO TO Q41)
88. DK (GO TO Q41)

Q38A. What organization or agencies have you noticed with promotional efforts?

[RECORD VERBATIM]_____

Q38B. What kind of promotional efforts have you seen? (DO NOT READ/RECORD ALL MENTIONS)

1. TV ads
2. Radio ads
3. Newspaper ads
4. Internet ads
5. Other [RECORD VERBATIM]_____
88. Don't know

Q39. How effective do you think these other marketing efforts are to get California consumers to purchase energy efficient lighting products? Would you say they are ...

1. Not at all effective
2. Not very effective
3. Somewhat effective
4. Very effective (GO TO Q41)
5. Extremely effective (GO TO Q41)
88. Don't know

Q40. What do you think would make those efforts more effective?

[RECORD VERBATIM]_____

Q41. What feedback, if any, have you gotten from customers about the products you're selling for the SDG&E lighting program? (DO NOT READ/RECORD ALL MENTIONS)?

1. None

- 2. Bulbs don't last as long as claimed
- 3. Bulb light quality is poor
- 4. Bulb didn't work in existing fixtures
- 5. Satisfaction with the bulbs
- 4. Other [RECORD VERBATIM]_____
- 88. Don't know

Q42. Do you think you, in your role at the store, receive enough information from SDG&E regarding the lighting program?

- 1. Yes (GO TO Q43)
- 2. No
- 88. DK (GO TO Q43)

Q42A. How could SDG&E improve its communications with your store?

[RECORD VERBATIM]_____

Q43. Thinking about the whole SDG&E upstream lighting program, overall, how satisfied are you? Would you say you are...

- 1. Not at all satisfied
- 2. Not very satisfied
- 3. Somewhat satisfied
- 4. Very satisfied (SKIP TO Q44) or
- 5. Extremely satisfied (SKIP TO Q44)
- 88. Don't Know (DO NOT READ)

Q43A. How could SDG&E improve its lighting program as a whole?

[RECORD VERBATIM]_____

Q44. What would you say are the best aspects of this program?

[RECORD VERBATIM]_____

Q45. What would you say are the biggest problems with this program?

[RECORD VERBATIM]_____

Firmographics

Q46. Lastly a few questions about your worksite. First, can you estimate the total INDOOR square footage of your facility at this location? Is it...? (READ CHOICES)

- 1. Less than 2,500 square feet
- 2. Between 2,500 AND 5,000 square feet
- 3. Between 5,000 AND 10,000 square feet
- 4. Between 10,000 AND 20,000 square feet
- 5. Between 20,000 AND 50,000 square feet
- 6. Between 50,000 AND 100,000 square feet
- 7. Over 100,000 square feet
- 88. Don't Know
- 99. Refused

Q47. About how many full and part time employees currently work at this location? (READ CHOICES)

- 1. 1 to 5

- 2. 6 to 10
- 3. 11 to 20
- 4. 21 to 50
- 5. 51 to 100
- 6. Over 100
- 88. Don't know
- 99. Refused

Those are all my questions. Thank you for your time.

Name & title of person talked to: _____

Other comments made by respondent: _____

**SDG&E Mobile Home Residents Energy Efficiency
Program Participant Survey Instrument**

SDG&E Mobile Home Residents Energy Efficiency Program Participant Survey Instrument

Hi my name is _____, and I'm calling on behalf of (SDG&E/SCG). I am not selling anything. I'm conducting a survey to help (SDG&E/SCG) better serve its customers. Our records indicate that within the last few years your household received [MEASURE(S) FROM SAMPLE] as part of an (SDG&E/SCG) energy efficiency effort for residents of manufactured or mobile homes.

S1. Do you recall receiving these measures within the last few years?

1. yes (CONTINUE)
2. no (THANK & TERMINATE)

(SCG ONLY: IF RESPONDENT VOLUNTEERED RECEIVING ANY OTHER MEASURES, RECORD HERE)

Now that you've had a chance to live with the improvements, we'd like to ask a few questions about how this service worked for you. The survey takes about 10 minutes and will help us improve services for future participants. Is this a good time?

First, I have a few questions about your initial contact with the program providing these improvements...

Q1. How did you first hear about these services being available to you from SDG&E?
(OPEN-ENDED; PROBE WELL)

Q1a. When you first heard about the services available, did you have any concerns about whether the program was legitimate?

1. yes (ASK Q1b)
2. no (ASK Q1b)
88. Not sure / Don't Know (ASK Q1b)
99. Refused (SKIP TO Q2)

Q1b. What convinced you that the opportunity was legitimate? (PROBE WELL)

Q2. Do you have Internet access?

1. yes (ASK Q2a)
2. no (SKIP TO Q4)
9. DK (SKIP TO Q4)

Q2a. Did you go online to find specific information about the Mobile Home program?

1. Yes
2. No (SKIP TO Q4)
1. DK (SKIP TO Q4)

Q3. Were you able to find program information on-line?

Yes
No
DK

Q4. People participate in programs like this for a variety of reasons. I'm going to list several things that might have motivated you to participate. For each one, please tell me if it was very important, somewhat important, or not at all important in your decision to participate. Let's start with (ITEM). . . How important was that as a reason for you to participate? (READ LIST; RANDOMIZE)

	<u>Very Important</u>	<u>Somewhat Important</u>	<u>Not at all Important</u>	<u>DK</u>
a. Increase the value of your home	3	2	1	9
b. Decrease noise in your home	3	2	1	9
c. Save energy	3	2	1	9
d. Lower your utility bills	3	2	1	9
e. Address health concerns	3	2	1	9
f. Keep your home warmer in the winter	3	2	1	9
g. Keep your home cooler in the summer	3	2	1	9

Q5. Sometimes there are specific features of a program that make it attractive to participants, or that discourage people from participating... How important was it to you that...

	<u>Very Important</u>	<u>Somewhat Important</u>	<u>Not at all Important</u>	<u>DK</u>
a. You could participate for free. Would you say it was not important, somewhat important, or a very important reason behind your participation?	3	2	1	9
b. The program was sponsored by (SDG&E/SCG)?	3	2	1	9
c. It seemed simple to participate	3	2	1	9

Now I have a few questions about your experience with the installer.

Q6. When the installer came to your home to do the work, were you at home?

1. Yes, I was (CONTINUE)
2. No, someone else was (SKIP TO Q11)
3. No, no one was home (SKIP TO Q11)
4. Don't know (SKIP TO Q11)

Q7. Thinking about the installation process, please tell me If you strongly agree, somewhat agree, neither agree or disagree, somewhat disagree, or strongly disagree with the following statements. First... (READ STATEMENTS, RANDOMIZE)

	<u>Strongly agree</u>	<u>somewhat agree</u>	<u>Neither Agree nor disagree</u>	<u>somewhat disagree</u>	<u>strongly disagree</u>	<u>DK</u>
a) It was simple to schedule the installation.	5	4	3	2	1	9
b) The time required for the work was reasonable.	5	4	3	2	1	9
c) I learned valuable things about my home						

from the installer.	5	4	3	2	1	9
d) My installer told me what items would be installed and what work would be conducted	5	4	3	2	1	9

Q8. Did you allow the installer to complete all of improvements that were recommended for your home?

- 1. Yes (SKIP TO Q9)
- 2. No (ASK Q8A & 8B)
- 99. DK (SKIP TO Q9)

Q8a. What did you decide not to do? [DO NOT READ CHOICES]

- 1. AC Testing
- 2. Duct Testing & Sealing
- 3. Water Heater Pipe Wrap
- 4. Outdoor Light Fixtures
- 5. Indoor Light Fixtures
- 6. Outdoor CFLs
- 7. Indoor CFLs
- 8. Faucet Aerator
- 9. Showerhead or Shower Start
- 10. Other (SPECIFY) _____

Q8b. Why did you decide not to do that/those? (PROBE WELL) _____

Q9. Did the installer complete the work as proposed?

- 1. Yes (SKIP TO Q10)
- 2. No
- 99. DK (SKIP TO Q10)

Q9A. What happened? (PROBE WELL) _____

- 88. Not sure / Don't Know
- 99. Refused

Q10. Were there any surprises—anything the installer found that was unexpected?

- 1. Yes
- 2. No (SKIP TO Q11)
- 88. Not sure / Don't Know (SKIP TO Q11)
- 99. Refused (SKIP TO Q11)

Q10A. What happened? (PROBE WELL) _____

Q10B. How was it resolved? (PROBE WELL) _____

Q11. Did you have to fill out any forms or program paperwork?

- 1. Yes
- 2. No (SKIP TO Q14)
- 88. Not sure / Don't Know (SKIP TO Q14)
- 99. Refused (SKIP TO Q14)

Q12. Were any of the forms difficult to complete?

- 1. Yes

- 2. No (SKIP TO Q14)
- 88. Not sure / Don't Know (SKIP TO Q14)
- 99. Refused (SKIP TO Q14)

Q13. Which ones? What was difficult about them? (PROBE WELL; BE SPECIFIC)

Satisfaction

Now I have a few questions about your overall satisfaction with the program and the services you received.

Q14. First, how satisfied or dissatisfied were you with the time between signing up for the program and when the installer came out? Would you say you were...

- 1. Extremely satisfied (SKIP TO Q16)
- 2. Very satisfied (SKIP TO Q16)
- 3. Somewhat satisfied
- 4. Not very satisfied
- 5. Not at all satisfied
- 88. Not sure/Don't Know (SKIP TO Q16)
- 99. Refused (SKIP TO Q16)

Q15. What would have been an appropriate length of time (between signing up for the program and the installer coming out)? [OPEN-END]_____

- 88. Not sure / Don't Know
- 99. Refused

(IF LIGHTING MEASURE NOT INDICATED IN SAMPLE, SKIP TO Q18)

Q16. How satisfied have you been with the performance of the energy efficient lighting installed in your home by the installer? Would you say you are ...?

- 1. Extremely satisfied (SKIP TO Q18)
- 2. Very satisfied (SKIP TO Q18)
- 3. Somewhat satisfied
- 4. Not very satisfied
- 5. Not at all satisfied
- 88. Not sure / Don't Know (SKIP TO Q18)
- 99. Refused (SKIP TO Q18)

Q17. What would have improved your satisfaction with the performance of the lighting installed? [OPEN-END]_____

- 88. Not sure / Don't Know
- 99. Refused

(IF NO A/C MEASURE INDICATED IN SAMPLE, SKIP TO Q20)

Q18. How satisfied have you been with the performance of the air conditioning or heating equipment since it was tuned up through the program? Would you say you are ...?

- 1. Extremely satisfied (SKIP TO Q20)
- 2. Very satisfied (SKIP TO Q20)
- 3. Somewhat satisfied
- 4. Not very satisfied
- 5. Not at all satisfied

- 88. Not sure / Don't Know (SKIP TO Q20)
- 99. Refused (SKIP TO Q20)

Q19. What would have improved your satisfaction with the performance of the air conditioning or heating equipment that was tuned up through the program?

- [OPEN-END]_____
- 88. Not sure / Don't Know
 - 99. Refused

Q20. How satisfied have you been with the performance of your ductwork after it was checked by the program? Would you say you are . . . ? (READ)

- 1. Extremely satisfied (SKIP TO Q22)
- 2. Very satisfied (SKIP TO Q22)
- 3. Somewhat satisfied
- 4. Not very satisfied
- 5. Not at all satisfied
- 88. Not sure / Don't Know (SKIP TO Q22)
- 99. Refused (SKIP TO Q22)

Q21. What would have improved your satisfaction with the performance of the ductwork?

- [OPEN-END]_____
- 88. Not sure / Don't Know
 - 99. Refused

Q22. How satisfied are you with the overall comfort of your home since participating in the program? Would you say you are ...?

- 1. Extremely satisfied (SKIP TO Q24)
- 2. Very satisfied (SKIP TO Q24)
- 3. Somewhat satisfied
- 4. Not very satisfied
- 5. Not at all satisfied
- 88. Not sure / Don't Know (SKIP TO Q24)
- 99. Refused (SKIP TO Q24)

Q23. What would improve your satisfaction with the comfort of your home?

- [OPEN-END]_____
- 88. Not sure / Don't Know
 - 99. Refused

Q24. How satisfied are you with the quality of the work performed in your home? Would you say you are ...?

- 1. Extremely satisfied (SKIP TO Q26)
- 2. Very satisfied (SKIP TO Q26)
- 3. Somewhat satisfied
- 4. Not very satisfied
- 5. Not at all satisfied
- 88. Not sure / Don't know (SKIP TO Q26)
- 99. Refused (SKIP TO Q26)

Q25. What would have improved your satisfaction with the quality of the work performed in your home?

[OPEN-END]_____

88. Not sure / Don't Know

99. Refused

Q26. (How satisfied were you with) your interactions with program representatives? Would you say you were ...?

1. Extremely satisfied (SKIP TO Q28)

2. Very satisfied (SKIP TO Q28)

3. Somewhat satisfied

4. Not very satisfied

5. Not at all satisfied

88. Not sure / Don't know (SKIP TO Q28)

99. Refused (SKIP TO Q28)

Q27. What would have improved your satisfaction with your interactions with program representatives? (PROBE WELL)

[OPEN-END]_____

88. Not sure / Don't Know

99. Refused

(IF NO A/C MEASURE IN SAMPLE, SKIP TO Q29)

Q28. Is your utility bill lower since the air conditioning or heating equipment was tuned up through the program?

1. Yes

2. No

88. Not sure / Don't Know

99. Refused

Q29. Overall, how satisfied were you with the services provided by this program? Would you say you were...?

1. Extremely satisfied (SKIP TO Q31)

2. Very satisfied (SKIP TO Q31)

3. Somewhat satisfied

4. Not very satisfied

5. Not at all satisfied

88. Not sure / Don't Know (SKIP TO Q31)

99. Refused (SKIP TO Q31)

Q30. What would have improved your overall satisfaction?

[OPEN-END]_____

88. Not sure / Don't Know

99. Refused

Q31. Have you ever suggested this program to someone outside of your household?

1. Yes

2. No (SKIP TO Q33)

88. Not sure / Don't Know (SKIP TO Q33)

99. Refused (SKIP TO Q33)

Q32. What did you tell them about the program? (PROBE WELL)

[OPEN-END] _____

88. Not sure / Don't Know

99. Refused

Q33. What was the best part of the program in your opinion? _____

Q34. Was there anything about the program that didn't work well for you?

1. yes (ASK Q34A)

2. no (SKIP TO Q 35)

88. Not sure / Don't Know

99. Refused

Q34a. What did not work well? (PROBE WELL) _____

88. Not sure / Don't Know

99. Refused

Other Outreach

Q35. Did the installer ask if you know anyone who might be interested in this program?

1. yes

2. no (SKIP TO Q35c)

3. I did not speak with an installer (SKIP TO Q35c)

88. Not sure / Don't Know (SKIP TO Q35c)

99. Refused (SKIP TO Q35c)

Q35a. Did you provide the installer with a name and contact information?

1. yes (SKIP TO Q35c)

2. no (ASK Q35b)

88. Not sure / Don't Know (SKIP TO Q35c)

99. Refused (SKIP TO Q35c)

Q35b. [IF NO] Why not? (PROBE WELL) _____

Q35c. Do you know anyone who considered participating in the program but decided not to?

1. yes

2. no (SKIP TO Q36)

88. Not sure / Don't know (SKIP TO Q36)

99. Refused (SKIP TO Q36)

Q35d. What was the reason they did not participate? _____

88. Not sure / Don't know

99. Refused

Q36. Have you ever tried to contact (SDG&E/SCG) or its representatives about ways to reduce your energy bill or about the energy efficiency services that SDG&E/SCG offers?

1. yes

2. no (SKIP TO Q38)

88. Not sure / Don't Know (SKIP TO Q38)

99. Refused (SKIP TO Q38)

Q37. Thinking about when you tried to contact them, to what extent do you agree with the following 2 statements?

a) It was easy of find the right person to speak with? Do you . . .? (READ CHOICES)

- 1. agree strongly
- 2. agree somewhat
- 3. neither agree nor disagree
- 4. disagree somewhat or
- 5. disagree strongly
- 88. Not sure / Don't Know
- 99. Refused

b) The information provided by (SDG&E/SCG) helped me understand what else I could do in my home. Do you ...? (READ CHOICES)

- 1. agree strongly
- 2. agree somewhat
- 3. neither agree nor disagree
- 4. disagree somewhat or
- 5. disagree strongly
- 88. Not sure / Don't Know
- 99. Refused

Q38. Would you say you are very likely, somewhat likely or not at all likely to use (SDG&E/SCG's) efficiency programs in the future, should the opportunity arise?

- 1. Very likely
- 2. Somewhat likely
- 3. Not at all likely
- 88. Not sure / Don't Know
- 99. Refused

Demographics

We're almost done. I just have a few final questions to help us group your answers with those of others.

Q39. Including yourself, how many children and adults normally live in your household on a full-time basis? Please do not include anyone who is just visiting or children who may be away at college or in the military. Include all members of your household whether or not they are related to you.

Total number of people in the household: _____

39a. How many of those are children under 5 years of age? _____

39b. How many of those are children between 5 and 18? _____

39c. How many of those are adults 70 or older? _____

Q40. How large is your home, in square feet? Just give us your best estimate.

No. of Square Feet: _____ **OR** other description: _____

88. Not sure / Don't Know

99. Refused

Q41. When was your home built? Just give us your best estimate.

Year home was built: _____[ENTER 4-digit YEAR] (NOW SKIP TO Q42)

99. Don't Know (ASK Q41a)

88. Refused (SKIP TO Q42)

Q41a. Do you think it was built in . . . (READ CHOICES)

1. In the 1930's or earlier

2. In the 40's

3. The 50's

4. The 60's

5. The 70s

6. The 80's

7. The 90's

8. Or after 2000?

88. Not sure/ Don't Know

99. Refused

Q42. What is the highest level of education you have completed so far? [READ CHOICES]

1. Less than 9th grade

2. 9th to 12th grade, with no diploma

3. High school graduate or GED

4. Some college, with no degree

5. Associates degree

6. Bachelor's degree

7. Graduate or professional degree

88. Not sure / Don't Know (DO NOT READ)

99. Refused (DO NOT READ)

Q43. What is your ethnicity? [READ IF NEEDED; UP TO 5 RESPONSES ALLOWED]

1. White

2. Black or African American

3. American Indian or Alaska Native

4. Asian

5. Pacific Islander

6. Other, Specify _____

88. Not sure / Don't Know

99. Refused

Q44. Are you of Hispanic or Latino descent?

1. Yes

2. No

88 Not sure / Don't Know

99. Refused

Q45. Which of the following categories includes the total combined income of all your household from all sources— wages, interest, alimony, Social Security, and so forth – before taxes and deductions. Is it . . . (READ CHOICES)

1. Less than \$20,000
2. \$20,000 to \$40,000
3. \$40,000 to \$60,000
4. \$60,000 to \$80,000
5. \$80,000 to \$100,000
6. \$100,000 to \$150,000
7. More than \$150,000
88. Not sure / Don't Know
99. Refused

Thank you very much for your time and cooperation. We really appreciate your help. Have a good day/evening.

INTERVIEWER, RECORD GENDER:]

1. Male
2. Female

**SDG&E Multi-family Rebate Program Participant
Survey Instrument**

SDG&E Multi-family Rebate Program Participant Survey Instrument

Data coming into survey includes:

[CONTACT]—Contact if known

[ADDRESS]—Property address

{Equipment_from_Program_{nu}}—Yes/No if equipment of that category was installed, 24 categories are listed in A2

[INTRO A: CONTACT NAME IS GIVEN]

Hello this is (INTERVIEWER NAME) calling from CIC Research on behalf of San Diego Gas & Electric. May I speak to [CONTACT]? (IF NO LONGER WITH COMPANY, GO TO INTRO B)
We're conducting an evaluation of the SDG&E multifamily rebate program. Your input will help SDG&E improve the program in the future. The survey takes about 10 minutes. Is now a good time? (ARRANGE CB IF NECESSARY)

[INTRO B: NO CONTACT NAME GIVEN]

Hello this is (INTERVIEWER NAME) calling from CIC Research on behalf of San Diego Gas & Electric. I would like to speak to the person who will be most familiar with the decisions over the past 2 years to install energy efficient equipment such as efficient lights, appliances, or heating and cooling equipment or controls, at [ADDRESS].

(WHEN RESPONDENT COMES TO THE PHONE, REPEAT INTRO B AND CONTINUE)

S1. Are you the right person to speak to?

- 1 Yes→ Go to S3
- 2 No

S2. Is there someone else that may be more familiar with decisions to install energy efficient equipment?

- 1 Yes→ S3 (GET NAME & REFERRAL OR CB INFO AND REPEAT INTRO B)
- 2 No→ Thank & Terminate

A1. Our questions today are going to focus on the property at [ADDRESS] in {CITY}. Is this property a co-op, condominium, rental property, or an owner-occupied rental property?

- 1 Co-op
- 2 Condominium
- 3 Rental property
- 4 Owner-occupied rental property
- 5 Other [SPECIFY]_____

A2. I'll read a list of energy efficiency measures. Please indicate if any of these measures that have been installed at this property in the past two years. [if needed: this includes both projects you did and ones with utility support or rebates]

- 01 Hardwired Fluorescent Fixtures
- 02 Hardwired Fluorescent porch/outdoor lights

- 03 Screw in Compact Fluorescent Lamps (CFLs)
- 04 High efficiency exit signs
- 05 LED lights other than exit signs
- 06 Photocell controls for exterior lighting
- 07 Occupancy sensors
- 08 Energy Star dishwashers
- 09 Energy Star clothes washers
- 10 Energy Star refrigerators
- 11 Attic or wall insulation
- 12 High performance dual-paned windows
- 13 Cool or green roofs
- 14 High efficiency water heaters
- 15 High efficiency air conditioners or heat pumps
- 16 Natural gas water heater or boiler controllers
- 17 High efficiency boilers
- 18 Energy Star programmable thermostats
- 19 Energy management system
- 20 Energy Star ceiling fans
- 21 Low flow showerheads or faucet aerators
- 22 Pool heaters
- 23 Solar photovoltaic (PV) panels
- 24 Solar water heating system
- 25 Other (SPECIFY) _____ (Others carry through)

A3. [IF Equipment_from_Program_{nu} IS YES AND A2_{NU} IS NOT YES]. **Our records indicate that [Equipment_from_Program_{nu}] was installed at this property. Are our records incorrect or do you remember that equipment being installed?** (ASK FOR EACH TYPE OF EQUIPMENT AND RECORD ANSWER SEPARATELY FOR EACH TYPE)

1. Your records are correct, equipment was installed [correct A2 to yes]
2. Your records are wrong, that equipment was not installed
8. I am not sure

(A2 = yes) & (A3 = yes) = Fixed_A2)

A4. [FOR EACH OF THE MEASURES IDENTIFIED IN Fixed_A2, ASK] **Please tell me if each of the items that you said were installed in past two years was (1) financed and installed wholly by your organization, or (2) was it part of a program sponsored by SDG&E or some other energy efficiency program or (3) was it a combination of internal and utility money?**

	Paid for & installed By my company	Part of SDG&E or other EE program	Combo of SDG&E & my co	Not Sure
	1	2	3	4
01. Hardwired Fluorescent Fixtures				
02. Hardwired Fluorescent porch/outdoor lights				
03. Screw in Compact Fluorescent Lamps (CFLs)				
04. High efficiency exit signs				
05. LED lights other than exit signs				
06. Photocell controls for exterior lighting				
07. Occupancy sensors				
08. Energy Star dishwashers				

09. Energy Star clothes washers
10. Energy Star refrigerators
11. Attic or wall insulation
12. High performance dual-paned windows
13. Cool or green roofs
14. High efficiency water heaters
15. High efficiency air conditioners or heat pumps
16. Natural gas water heater or boiler controllers
17. High efficiency boilers
18. Energy Star programmable thermostats
19. Energy management system
20. Energy Star ceiling fans
21. Low flow showerheads or faucet aerators
22. Pool heaters
23. Solar photovoltaic (PV) panels
24. Solar water heating system
25. Other (SPECIFY) _____

A5. [IF EQUIPMENT_FROM_PROGRAM_{NU} IS YES AND A4 IS NOT UTILITY OR BOTH ASK]. **Our records indicate that [Equipment_from_Program_{nu}] was installed as part of a program sponsored by SDG&E. Why did you not indicate that [Equipment_from_Program_{nu}] was part of a utility-sponsored program?**

- 1 I forgot its source was SDG&E [correct A4 to Utility]
- 2 I did not know that source was SDG&E [correct A4 to Utility]
- 3 Other (SPECIFY) _____

A6. [IF Equipment_from_Program_{nu} IS NO AND A4_{NU} IS UTILITY OR BOTH ASK]. **Our records do not show you receiving [Equipment_from_Program_{NU}] from one of the SDG&E programs in the last two years. Was this equipment installed only in low income units?**

- 1 Yes (SKIP TO A8)
- 2 No

A7. [FOR A6 = NO ASK] **Could this equipment have been installed more than two years ago?**

- 1 Yes
- 2 No

A8. [FOR A7 =NO] **Can you describe the program under which you received support for this equipment?**

Record Verbatim _____

A9. [READ ONLY THOSE IN Fixed_A4 THAT ARE UTILITY OR BOTH] **Now I'd like to go through the list of equipment again and ask about cost. For each item that was part of an SDG&E program, I'd like to know if the equipment and installation were free or if you had to pay for part of the costs. First, did you get the [Fixed_A4] for free or did you have to pay for part of the costs?**

- 1 Got for free
- 2 Had to pay for a portion of the costs

8 Don't know or remember

A10. [FOR A9 = 2 ASK,] About how much did you have to pay for each [Fixed_A4] that was installed?

Record verbatim _____

A11. [ASK FOR ITEMS MENTIONED IN Fixed_A2 ONLY, AND ONLY THOSE IN LIST BELOW] I'll read the list of measures you mentioned. I'd like you to tell me if they were installed in tenant spaces, common spaces (garage, laundry room, etc.) or both. (TENANT SPACE/COMMON AREAS /BOTH /NOT SURE for each)

	<u>Tenant spaces</u>	<u>Common areas</u>	<u>Both</u>	<u>DK</u>
01 Hardwired Fluorescent Fixtures	1	2	3	9
02 Hardwired Fluorescent porch/outdoor lights	1	2	3	9
03 Screw in Compact Fluorescent Lamps (CFLs)	1	2	3	9
05 LED lights other than exit signs	1	2	3	9
09 Energy Star clothes washers	1	2	3	9
11 Attic or wall insulation	1	2	3	9
12 High performance dual-paned windows	1	2	3	9
14 High efficiency water heaters	1	2	3	9
15 High efficiency air conditioners or heat pumps	1	2	3	9
20 Energy Star ceiling fans	1	2	3	9
24 Other (SPECIFY:) _____	1	2	3	9

A13. The program you participated in is called the Multifamily Rebate Program. Do you recall how you first learned about the SDGE program that you participated in? Did you...[READ LIST; CHOOSE ONLY ONE]

- 1 Received information about program from the utility brochure or bill stuffer?
- 2 Read about program on SDG&E Web page
- 3 Contacted by a contractor offering services
- 4 Read about program in the newspaper
- 5 Other (SPECIFY) _____

A14. Was an outside contractor involved in any part of the product selection or installation process?

- 1 Yes
- 2 No → GO TO B1

A15. Did you originally seek out a contractor or did a contractor approach you first?

- 1 I sought out a contractor
- 2 Contractor approached me first

A16. Did you get bids from more than one contractor?

- 1 Yes
- 2 No

A17. Overall, how satisfied are you with the work the contractor did?

- 1 Extremely satisfied

- 2 Very satisfied
- 3 Somewhat Satisfied
- 4 Not very satisfied
- 5 Not at all satisfied

A18. For the equipment that you had installed as part of the SDG&E Multifamily Rebate Program, did an outside contractor do a turnkey operation where they did all of the work from determining what equipment to install, choosing what models to use, and installing the equipment, or did you and your company do any of these roles?

- 1 Contractor did turnkey operation for all equipment→Go to B1
- 2 Contractor did turnkey operation for some of the equipment,
- 3 Contractor did not do turnkey but only some of the tasks →Go to A20

A19. For the following equipment that you had installed as part of the SDG&E Multifamily Rebate Program, please indicate which were turnkey operations done by contractors? Was [Equipment_from_Program_{nu} Fixed_A4?] done by contractors as a turnkey operation? (WAS TURNKEY/WAS NOT TURNKEY /NOT SURE for each)

- 01 Hardwired Fluorescent Fixtures
- 02 Hardwired Fluorescent porch/outdoor lights
- 03 Screw in Compact Fluorescent Lamps (CFLs)
- 04 High efficiency exit signs
- 05 LED lights other than exit signs
- 08 Energy Star dishwashers
- 09 Energy Star clothes washers
- 10 Energy Star refrigerators
- 11 Attic or wall insulation
- 12 High performance dual-paned windows
- 14 High efficiency water heaters
- 15 High efficiency air conditioners or heat pumps
- 16 Natural gas water heater or boiler controllers
- 18 Energy Star programmable thermostats
- 20 Energy Star ceiling fans
- 21 Low flow showerheads or faucet aerators
- 24 Other (SPECIFY) _____

(ASK A20-A24 FOR EACH ITEM MENTIONED AS BEING NON-TURNKEY IN A19 or Fixed_A4)

A20. Was the contractor involved in helping you pick out the [equipment FROM A19 or Fixed_A4) to install?

- 1 Yes
- 2 No→ GO TO NEXT ITEM or B1

A20a. Did the contractor offer you choices as to what [equipment] to install?

- 1 Yes
- 2 No→ GO TO NEXT ITEM or B1

A21. Did the choices involve [equipment] with different levels of efficiency?

- 1 Yes
- 2 No → GO TO A23

A22. Did you select the [equipment] with the highest, middle, or lowest efficiency?

- 1 Highest
- 2 Middle
- 3 Lowest

A23. Did the choices involve [equipment] with different levels of quality?

- 1 Yes →
- 2 No → GO TO B1

A24. Did you select the [equipment] with the highest, middle, or lowest quality?

- 1 Highest
- 2 Middle
- 3 Lowest

B1. Thinking in general about the new equipment you got as part of the rebate program, have you had any problems with it?

- 1 Yes
- 2 No → GO TO B9

B2. What was the problem?

Record verbatim _____

B3. Has the problem been resolved?

- 1 Yes
- 2 No → GO TO B5

B4. How was the problem resolved?

Record verbatim _____

B5. [IF A14=1 ASK, OTHERWISE SKIP TO B9] Did you have any problems with the contractors you used as part of the multifamily program?

- 1 Yes
- 2 No → GO TO B9?

B6. What was the problem?

Record verbatim _____

B7. Has the problem been resolved?

- 1 Yes
- 2 No → GO TO B9

B8. How was the problem resolved?

Record verbatim _____

B9. [ASK IF A12=YES] How would you rate your overall satisfaction with the SDG&E Multi Family Rebate Program? Would you say you are...?

- 1 Extremely Satisfied
- 2 Very Satisfied
- 3 Somewhat Satisfied
- 4 Not Very Satisfied, or
- 5 Not at All Satisfied
- 88 Don't Know

C1. To the best of your knowledge, does this property have units occupied by households that are low-income?

- 1 Yes
- 2 No → GO TO D1

C2. [SKIP TO D1 IF A11 HAD NO EQUIPMENT INSTALLED IN TENANT SPACES] When this property was served by the SDG&E program, did the providers identify units occupied by low income households, and treat those units differently than the other units?

- 1 Yes
- 2 No → GO TO D1

[IF C2 = YES ASK, OTHERWISE SKIP TO D1]

C3. Which of the following best describes how the low-income units were treated? Did they get all of the same equipment that other units got, more equipment than other households got, less equipment than other units got, or they did not get any equipment?

- 1 All of the same equipment that other units got, [ALL, SOME, NONE, NOT SURE]
- 2 More equipment than other households got,
- 3 Less equipment than other units got,
- 4 They did not get any equipment

C4. Were the low income occupied units treated at the same time as the other units or were they treated at a separate time?

- 1 Same time → GO TO D1
- 2 Later

C5. How much later in days did it take to provide the equipment to the low income units?

Record days _____

D1. Do you have any plans to make any energy efficiency improvements to this property in the next two to three years?

- 1 Yes
- 2 No → GO TO D5?

D2. What energy efficiency improvements do you plan to install in next two to three years? (DO NOT READ; ENTER ALL THAT APPLY)

- 01 Hardwired Fluorescent Fixtures
- 02 Hardwired Fluorescent porch/outdoor lights
- 03 Screw in Compact Fluorescent Lamps (CFLs)
- 04 High efficiency exit signs
- 05 LED lights other than exit signs
- 06 Photocell controls for exterior lighting
- 07 Occupancy sensors
- 08 Energy Star dishwashers
- 09 Energy Star clothes washers
- 10 Energy Star refrigerators
- 11 Attic or wall insulation
- 12 High performance dual-paned windows
- 13 Cool or green roofs
- 14 High efficiency water heaters
- 15 High efficiency air conditioners or heat pumps
- 16 Natural gas water heater or boiler controllers
- 17 High efficiency boilers
- 18 Energy Star programmable thermostats
- 19 Energy management system
- 20 Energy Star ceiling fans
- 21 Low flow showerheads or faucet aerators
- 22 Pool heaters
- 23 Solar photovoltaic (PV) panels
- 24 Solar water heating system
- 25 Other (SPECIFY) _____

D4 Does experience with the SDG&E multifamily program make it more likely or less likely that you will take these measures?

- 1 More likely
- 2 No effect
- 3 Less Likely

D5 Now I've got some questions about refrigerators for this property. Does the building owner supply all, some, or none of the refrigerators for tenants?

- 1 All of them
- 2 Some of them
- 3 None of them→ Skip to D8
- 8 Don't Know→ Skip to D8
- 9 Refused→ Skip to D8

D6 Of the refrigerators you provide tenants, approximately what percentage of these refrigerators would you estimate are more than 10 years old?

Record verbatim _____

D7. How interested would you be in rebate programs or some other kind of incentive program for replacing old refrigerators with new more energy efficient refrigerators?

- 5 Extremely interested
- 4 Very interested

- 3. Somewhat interested
- 2 Not very interested
- 1 Not at all interested

D8. If SDG&E were to offer you a \$300 rebate on new refrigerators to replace your old units and SDG&E would install the refrigerators and remove the old ones; how interested would the owner of this property in participating?

- 5 Extremely interested
- 4 Very interested
- 3 Somewhat interested
- 2 Not very interested
- 1 Not at all interested

D9. Does this property have coin operated clothes washers on site?

- 1 Yes
- 2 No→ Skip to D11?

D9a. Are the washing machines owned by the property or are they owned by an outside firm?

- 1. Owned by property
- 2. Owned by outside firm [Skip to instruction before D11]

D10. How interested would you be in incentive programs for replacing old washing machines with new more energy efficient washers?

- 5 Extremely interested
- 4 Very interested
- 3 Somewhat interested
- 2 Not very interested
- 1 Not at all interested

[IF A1 =3 OR 4 ASK, OTHERWISE SKIP TO D12]

D11. Do tenants pay for their own space heat, or is it included in the rent at this property?

- 1. Tenants pay for heat
- 2. Heat included in rent

[IF A1 =1 OR 2 ASK, OTHERWISE SKIP TO D13]

D12. Do condo/co-op occupants pay for their own heat, or is it included in the monthly maintenance fees?

- 1. Occupants pay for heat

D13. How are tenant spaces in the building heated, with a central heating system, with individual electric heat pumps or with electrical resistance wall units?

- 1 Central heating system
- 2 Individual electric heat pumps
- 3 Electric resistance wall units

4 Other (SPECIFY) _____

D14. How is the tenant spaces in the building cooled, with a central cooling system, with individual electric heat pumps, with ductless mini-splits or with window units?

- 1 Central cooling system (one system for whole building)
- 2 Central cooling systems (one system for each apartment)
- 3 Ductless mini-splits (thru wall individual units)
4. Window units
5. Evaporative coolers (swamp cooler)
- 6 No Cooling→ Skip to D17

[IF A1 =3 OR 4 ASK, OTHERWISE SKIP TO D16]

D15. Who pays for cooling of tenant spaces at this building? Do tenants pay for their own cooling, or is it included in the rent at this property?

1. Tenants pay for cooling
2. Cooling included in rent

[IF A1 =1 OR 2 ASK, OTHERWISE SKIP TO D17]

D16. Do condo/co-op occupants pay for their own cooling, or is it included in the monthly maintenance fees?

1. Occupants pay for cooling
2. Cooling included in fees

D17. How is hot water supplied to the tenant spaces in the building, with a central heating system, with individual electric water heaters, with individual gas water heaters or some other way?

- 1 Central water heating system,
- 2 Individual electric water heaters,
- 3 Individual gas water heaters or
- 4 Some other way (SPECIFY) _____

[IF A1 =3 OR 4 ASK, OTHERWISE SKIP TO D19]

D18. Who pays for water heating of tenant spaces at this building? Do tenants pay for their own water heating, or is it included in the rent at this property?

1. Tenants pay for water heating
2. Water heating included in rent

[IF A1 =1 OR 2 ASK, OTHERWISE SKIP TO D20]

D19. Do condo/co-op occupants pay for their own water heating, or is it included in the monthly maintenance fees?

1. Occupants pay for water heating
2. Water heating included in fees

[IF D17 =1 ASK, OTHERWISE SKIP TO E1]

D20. Have you looked into the feasibility of installing controls on your water heating that monitor return water temperature and adjust the boiler? Would you say . . . ? (READ CHOICES)

- 1 We have already installed this type of controller
- 2 We are considering this type of controller
- 3 We have looked at that type of controller but found it does not work for us
- 4 We have not looked into that type of controller

E1. How many individual units are located in the building or buildings at this property? (PROMPT IF NECESSARY:) That is, at (INSERT ADDRESS).

_____ (RECORD # UNITS)

88. Don't Know

E2. How many stories are there in the building or buildings at that address?

_____ (RECORD # STORIES)

88 Don't Know

E3. Are you the owner of this property, the manager, or both owner and manager? Do ... (READ LIST)?

- 1 Own AND manage this property?
- 2 Manage this property only?
- 3 Own this property but do not manage it?

E4. In total, how many multifamily residential properties in California do you, or your firm:

1. Own and manage? _____ (RECORD #)
2. Manage only? _____ (RECORD #)
3. Own, but do not manage? _____ (RECORD #)

E5. How many years have you been in your current position at this property?

_____ (RECORD # YEARS)

88 Don't Know

E6. How many years have you been in control of other complexes?

_____ (RECORD # YEARS)

88 Don't Know

[IF A1 =3 OR 4 ASK, OTHERWISE SKIP TO E15]

E12. If a 1 bedroom unit became available today, what would be the rental price per month?

Record \$ _____

E13. Does that price include any of the following?

- 1 Electricity [Yes/No]

- 2 Heat
- 3 Hot Water
- 4. None

E14. Approximately how big in square feet would the unit be for the rental price you just quoted?

Record square feet _____

[IF A1 =1 OR 2 ASK, OTHERWISE SKIP TO AKA1]

E15. If a one bedroom unit were for sale today, what would be the approximate sale price?

Record \$ _____

E16. Approximately how big in square feet would the unit be you just quoted?

Record square feet _____

AWARENESS/KNOWLEDGE/ATTITUDES

AKA1. I'm going to list several energy-efficient product labels or energy efficiency programs. For each, please tell me if you have heard of it. [RANDOMIZE LABELS/NAMES OF PROGRAMS EXCEPT "ENERGY STAR Most Efficient" SHOULD ALWAYS IMMEDIATELY FOLLOW "ENERGY STAR"]

- | | | | | |
|--------------------------------|-------|------|------|-----------|
| (a) ENERGY STAR | (Yes) | (No) | (DK) | (Refused) |
| (b) ENERGY STAR Most Efficient | (Yes) | (No) | (DK) | (Refused) |
| (c) Consumer Elect | (Yes) | (No) | (DK) | (Refused) |
| (d) Engage 360 | (Yes) | (No) | (DK) | (Refused) |
| (e) Top Ten | (Yes) | (No) | (DK) | (Refused) |
| (f) Energy Upgrade California | (Yes) | (No) | (DK) | (Refused) |

AKA2. How much had you thought about how energy use affects the environment before today? Would you say . . . [READ CHOICES except DK and REF]

- 1. Not at all
- 2. A little
- 3. Some, or
- 4. A lot
- 8. Don't Know
- 9. Refused

AKA3. How much had you thought about global warming before today? [READ CHOICES except DK or REF]

- 1. Not at all
- 2. A little
- 3. Some, or
- 4. A lot
- 8. Don't Know
- 9. Refused

AKA4. How worried are you about global warming? Are you . . . [READ CHOICES except DK or REF]

1. Not at all worried
2. A little worried
3. Somewhat worried
4. Very worried, or
5. Extremely worried
8. Don't Know
- 9/ Refused

AKA5. Now, I'm going to read a few statements. Using a scale of 0 to 10 where 0 means *Not at all agree*, and 10 means *Completely agree*, please tell me how much you agree with each statement. [RANDOMIZE "a" - "n"]

- | | Not at all
Agree | Completely
Agree | |
|--|------------------------|---------------------|--|
| a. I am very concerned about how energy use affects the environment. | 0 1 2 3 4 5 6 7 8 9 10 | DK Ref | |
| b. Household electricity use has an impact on the environment. | 0 1 2 3 4 5 6 7 8 9 10 | DK Ref | |
| c. I believe that household energy use has an impact on global warming and climate change. | 0 1 2 3 4 5 6 7 8 9 10 | DK Ref | |
| d. Conserving electricity will help reduce global warming. | 0 1 2 3 4 5 6 7 8 9 10 | DK Ref | |

Thank you very much for participating in this survey. Would you like to have SDG&E send you information about energy efficiency programs currently available to Multi-Family Property Managers? (CONFIRM NAME & MAILING ADDRESS)

**SDG&E Multi-family Rebate Program Non-
Participant Survey Instrument**

SDG&E Multi-family Rebate Program Non-Participant Survey Instrument

Hello I am _____ calling from CIC Research on behalf of San Diego Gas and Electric. May I speak with (name)? (IF THAT PERSON IS NO LONGER THERE, ASK FOR the property owner or manager FOR THAT ADDRESS)

We're conducting a survey to see how aware property managers are of programs that are offered by SDG&E to help multi-family properties save money on energy costs. Are you the person at this property who is most familiar with the decisions to install energy efficient equipment such as efficient lights, appliances, or heating and cooling equipment or controls?

S1. Are you the right person to speak to?

- 1 Yes→ Go to A1
- 2 No

S2. Is there someone else at property that may be more familiar with decisions to install energy efficient equipment at this property?

- 1 Yes→ S3
- 2 No→ Terminate

S3. Is that person available now to talk about the program?

- 1 Yes→ Go to S4
- 2 No→ Go to S5

S4. Repeat S1.

S5. Who is the person that may be more familiar with SDG&E program participation?

Get name, number, and convenient time to speak to person

A1. Is this property a coop, condominium, rental property, or an owner occupied rental property?

- 1 Co-op
- 2 Condominium
- 3 Rental property
- 4 Owner occupied rental property
- 5 Other [RECORD VERBATIM]

A2. I'll read a list of energy efficiency items. Please indicate if any of these items have been installed at this property in the past two years. ([If needed:] This includes both projects you did and ones with utility support or rebates.

- | | Yes | No | Not Sure |
|---|-----|----|----------|
| 01 Hardwired Fluorescent Fixtures | | | |
| 02 Hardwired Fluorescent porch/outdoor lights | | | |
| 03 Screw in Compact Fluorescent Lamps (CFLs) | | | |
| 04 High efficiency exit signs | | | |
| 05 LED lights other than exit signs | | | |

- 06 Photocell controls for exterior lighting
- 07 Occupancy sensors
- 08 Energy Star dishwashers
- 09 Energy Star clothes washers
- 10 Energy Star refrigerators
- 11 Attic or wall insulation
- 12 High performance dual-paned windows
- 13 Cool or green roofs
- 14 High efficiency water heaters
- 15 High efficiency air conditioners or heat pumps
- 16 Natural gas water heater or boiler controllers
- 17 High efficiency boilers
- 18 Energy Star programmable thermostats
- 19 Energy management system
- 20 Energy Star ceiling fans
- 21 Low flow showerheads or faucet aerators
- 22 Pool heaters
- 23 Solar photovoltaic (PV) panels
- 24 Solar water heating system
- 25 On demand intelligent pumps (these direct heated water to meet demand, saving from usual loss of heat in recirculation)
- 26 Other (SPECIFY) _____

A3. [ASK FOR ITEMS MENTIONED IN A2 ONLY, AND ONLY THOSE IN LIST BELOW]
Now I'll read the list of some of the items you just mentioned. For each one I'd like you to tell me if they were installed in tenant spaces, common spaces (that is, hallways, garages, laundry facilities, and so forth) or both. (TENANT SPACE/COMMON AREAS /BOTH /NOT SURE for each)

- 01 Hardwired Fluorescent Fixtures
- 02 Hardwired Fluorescent porch/outdoor lights
- 03 Screw in Compact Fluorescent Lamps (CFLs)
- 05 LED lights other than exit signs
- 09 Energy Star clothes washers
- 11 Attic or wall insulation
- 12 High performance dual-paned windows
- 14 High efficiency water heaters
- 15 High efficiency air conditioners or heat pumps
- 20 Energy Star ceiling fans
- 24 Other (SPECIFY) _____

B1. Have you heard of any of programs that are run by SDG&E, or an independent company supporting SDG&E, that offer energy efficiency to multifamily properties?

- 1 Yes
- 2 No (GO TO A4)

B2. What programs have you heard about? [DO NOT READ LIST; ACCEPT MULTIPLE ANSWERS]

- 1 Low Income Program--Representatives working for SDG&E provided free energy efficiency measures to one or more low-income occupants. These services included lights, water saving devices, refrigerators, and/or repairs or replacement of the unit's water heating, heating, and cooling systems.
- 2 MF Direct Therm and MF Home Tune UP--A contractor for SDG&E puts energy efficient showerheads and faucet aerators in all of the accessible units on the property

- 3 SF Rebate—rebates for energy efficient appliances at a store or from a contractor
- 4 Demand Control for Multifamily Central Domestic Hot Water--A contractor installs on-demand Intelligent pumps on your central domestic water heater
- 5 High Efficiency Hot Water Distribution Program--A contractor installs controller units on your boilers
- 6 MF Solar Pool Heater Program—Contractor installs solar pool heater
- 7 Other (SPECIFY) _____

A4. Over the years, SDG&E has offered energy efficiency assistance to multi-family buildings by giving away equipment, offering rebates, and providing other financial and technical support. I will describe the programs that SDG&E has offered its customers. As I describe each, please tell me if you remember if this is a program that this property has participated in?

	Participated in?		
	Yes	No	DK
4-1. How about a program where you worked with a contractor who installed hot water, or heating equipment in your common and/or tenant areas and you either got the equipment for free or paid just a portion of the costs? Has this property participated in this program?	1 →	2	8
4-2. How about a program where you installed hot water, or heating equipment, [not appliances] filled out an SDG&E form, and received a rebate. Has this property participated in this program?	1 →	2	8
4-3. Another program SDG&E offers to multi-family buildings is where representatives working for SDG&E provide free energy efficiency measures to one or more low-income occupants. These services include lights, water saving devices, refrigerators, and/or repairs or replacement of the unit's water heating, heating, and cooling systems. Has this property participated in this program?	1 →	2	8
4-4. Another program SDG&E offers is where a contractor to SDG&E puts energy efficient showerheads and faucet aerators in all of the accessible units on the property. Has this property participated in this program?	1 →	2	8
4-5. And another program SDG&E offers is where you purchase energy efficient appliances at a store or from a contractor and then receive a rebate from SDG&E. Has this property participated in this program?	1 →	2	8
4-6. Another SDG&E program is where a contractor installs on-demand Intelligent pumps on central domestic water heaters. Has this property participated in this program?	1 →	2	8
4-7. Another SDG&E program is where a contractor installs controller units on boilers in multi-family buildings. Has this property had than done?	1 →	2	8
4-8. The last SDG&E program is installing a solar pool heater. Have you done that at this property?	1 →	2	8

[IF A4-1 and/or A4-2, skip to A7]

A5. The SDG&E Multifamily Rebate Program is an energy efficiency program that offers rebates for multi-family property owners or managers who work with contractors to install energy-savings measures. This might be such things as high efficiency appliances, water heaters, boilers or other energy efficiency equipment. Do you recall hearing about this program?

- 1 Yes
- 2 No → GO TO A11

A6. Has this property ever participated in the Multifamily Rebate Program?

- 1 Yes
- 2 No → GO TO A11

A7. [If A4-1 or A4-2 = yes, say:] "You indicated that you participated in the Multifamily Rebate Program."

[Then everyone say:] Did this property participate in the program more than one time in the past?

- 1 Yes
- 2 No
- 3 Not sure

A8. [IF A7 =1 OR 3 SAY] When was the last time this property participated in the multifamily rebate program?

[IF A7 = 2 SAY] When did this property participate in the Multifamily Rebate Program?

- 1 Last year
- 2 Two years ago
- 3 Three to five years ago→ GO TO A11
- 4 Five to ten years ago→ GO TO A11
- 5 More than 10 years ago→ GO TO A11

A9. Our records don't show you participated in the multifamily program in the past two years. Could this equipment have been installed more than two years ago?

- 1 Yes→ GO TO A11
- 2 No
- 3 Not sure

A10. Can you describe the equipment that was installed and what kind of financial support you received?

Record Verbatim _____

[IF A4-3 = YES, ASK:]

A11. You indicated that this property participated in the Low Income Energy Efficiency program. Did this property participate in this Low Income program in the last two years?

- 1 Yes
- 2 No
- 8 Not sure

[IF A4-4 = YES, ASK:]

A12. You indicated that this property participated in the program to deliver aerators and showerheads to all units. Was that done in the last two years?

- 1 Yes
- 2 No
- 8 Not sure

[IF A4-5 = YES, ASK:]

A13. You said you received rebates for buying energy efficient appliances.. Were any of those energy-efficient appliance purchases made in the last two years?

- 1 Yes
- 2 No→ GO TO A16
- 8 Not sure→ GO TO A16

A14. How many energy efficient units of the following appliances did you purchase and receive rebates for in the last 2 years? (READ ITEM AND ASK FOR # PURCHASED & RECEIVED REBATES FOR) How about dishwashers? How many dishwashers did you purchase and receive rebates for the in last 2 years? (IF >0, ASK:) How many of those were for appliances in tenant spaces?

1. Dishwashers # rec'd rebates for: _____ # in tenant spaces: _____
 2. Washing machines # _____
 3. electric appliances such as refrigerators # _____
 4. Furnace # _____
 5. Water Heater # _____
 6. Boiler # _____

[IF A4-6 = YES, ASK;]

- A16. You indicated that this property installed on-demand Intelligent pumps on your central domestic water heater. Was that done in the last two years?
- 1 Yes
 - 2 No
 - 8 Not sure

[if A4-7 = YES, ASK;]

- A17. You indicated that this property participated installed controller units on your boilers. Was that done in the last two years?
- 1 Yes
 - 2 No
 - 8 Not sure

[IF A4.8 = YES ASK,]

- A18. You indicated that this property installed a solar pool heater. Was that done in the last two years?
- 1 Yes
 - 2 No
 - 8 Not sure

[IF A6=2 OR A8=4 OR 5 ASK,]

- A19. [If A6=2, say,=:] "You said this property has never participated in the Multifamily Rebate Program"

[If A8 = 4 or 5 say,] "You said this property has not participated in the Multifamily Rebate Program in the last five years"

What are the reasons this property has not participated? [DO NOT READ CHOICES; MULTIPLES OK]

- 1 Change of ownership
- 2 Lack of capital
- 3 Bad experience with previous programs
- 4 Don't trust contractors
- 5 Don't trust SDG&E
- 6 Don't like energy efficient products
- 7 We have done all of the energy efficiency we can
- 8 Cannot get bosses/owners to agree to expenditures
- 9 Lack of awareness of the program
- 10 Economy
- 11 Other (SPECIFY) _____

[IF A19.3 =YES, ASK, OTHERWISE SKIP TO A22]

- A20. Please describe your bad experience, what element(s) did not work as expected

Record verbatim _____

A21. What would have to change to get you to participate again?

Record verbatim _____

[IF A19.6 =YES, ASK, OTHERWISE SKIP TO A23]

A22. What is it that you do not like about energy efficient products?

Record verbatim _____

A23. Thinking back to all the energy efficiency measures you said you had done in the past two years, were any of those measures supported by a utility program?

- 1 All of my previous answers were utility funded measures (SKIP TO A25)
- 2 Some of my previous answers were utility funded measures
- 3 None of my previous answers were utility funded measures (SKIP TO A25)
- 9 Not Sure

A24. [FOR EACH OF THE MEASURES IDENTIFIED IN A2, ASK:] I'll read again the list of items that you said were done in the last two years. Please tell me which ones you recall receiving a rebate or incentive from SDG&E or any other energy efficiency program for?

- 01 Hardwired Fluorescent Fixtures
- 02 Hardwired Fluorescent porch/outdoor lights
- 03 Screw in Compact Fluorescent Lamps (CFLs)
- 04 High efficiency exit signs
- 05 LED lights other than exit signs
- 06 Photocell controls for exterior lighting
- 07 Occupancy sensors
- 08 Energy Star dishwashers
- 09 Energy Star clothes washers
- 10 Energy Star refrigerators
- 11 Attic or wall insulation
- 12 High performance dual-paned windows
- 13 Cool or green roofs
- 14 High efficiency water heaters
- 15 High efficiency air conditioners or heat pumps
- 16 Natural gas water heater or boiler controllers
- 17 High efficiency boilers
- 18 Energy Star programmable thermostats
- 19 Energy management system
- 20 Energy Star ceiling fans
- 21 Low flow showerheads or faucet aerators
- 22 Pool heaters
- 23 Solar photovoltaic (PV) panels
- 24 Solar water heating system
- 25 On demand intelligent pumps
- 26 Other (SPECIFY) _____

[IF A5 =1 OR A4-1 =YES OR A4-2 = YES, ASK:]

A25. Do you recall how you first learned about the Multifamily Rebate Program? [READ LIST; ONE ANSWER ONLY]

- 1 Did you Receive information about program from the utility brochure or bill stuffer?
- 2 Did you Read about the program on the SDG&E Web page
- 3 Were you Contacted by a contractor offering services
- 4 Did your Read about the program in the newspaper

5 Or did you hear about it in some other way? (SPECIFY) _____

A26. Now that you have heard a little more about the Multifamily Rebate Program, how likely is it that you will participate in the next 2 to 3 years?

- 4 Extremely likely
- 3 Very likely
- 2 Not very likely
- 1 Not at all likely

A27. If I told you that you could receive, among other things, a \$500 rebate? for central natural gas storage water heaters. How would that change the likelihood that you would participate in the next two to three years?

- 5 Make it extremely more likely
- 4 Make it somewhat more likely
- 3 Would not change the likelihood
- 2 Make it somewhat less likely
- 1 Make it extremely less likely

A28. [IF A4-1 or A4-2=YES] How would you rate your overall satisfaction with the SDG&E Multi Family Rebate Program? Would you say you are...?

- 5 Extremely Satisfied?
- 4 Very Satisfied?
- 3 Somewhat Satisfied?
- 2 Not Very Satisfied?
- 1 Not at All Satisfied?
- 88 Don't Know

D1. Do you have any plans to make any energy efficiency improvements to this property in the next two to three years?

- 1 Yes
- 2 No → GO TO D3

D2. What energy efficiency improvements do you plan to install in the next 2 to 3 years? (DO NOT READ; ENTER ALL THAT APPLY)

- 08 Energy Star dishwashers
- 09 Energy Star clothes washers
- 11 Attic or wall insulation
- 14 High efficiency water heaters
- 16 Natural gas water heater or boiler controllers
- 17 High efficiency boilers
- 18 Energy Star programmable thermostats
- 19 Energy management system
- 21 Low flow showerheads or faucet aerators
- 22 Pool heaters
- 24 Solar water heating system
- 25 On demand intelligent pumps
- 26 Other (SPECIFY)_____

D5. Now I've got some questions about refrigerators for this property. Does the building owner supply all, some, or none of the refrigerators for tenants?

- 1 All of them
- 2 Some of them
- 3 None of them → Skip to D8

- 4 Don't Know→ Skip to D8
- 5 Refused→ Skip to D8

D7. If SDG&E were to offer a \$300 rebate on new refrigerators to replace your old units and SDG&E would install the refrigerators and remove the old ones, how interested would the owner of this property be in participating?

- 1 Extremely interested
- 2 Very interested
- 3 Not very interested
- 4 Not at all interested

D8. Does this property have coin-operated clothes washers on site?

- 1 Yes
- 3 No→ Skip to D10

D8a. Are the washing machines owned by the property or are they owned by an outside firm?

- 1. owned by property
- 2. owned by outside firm

D9. How interested would you be in a rebate program or some other incentive program for replacing old washing machines with new more energy efficient washers?

- 1 Extremely interested
- 2 Very interested
- 3 Not very interested
- 4 Not at all interested

[IF A1 =3 OR 4 ASK, OTHERWISE SKIP TO D11]

D10. Do tenants pay for their own space heat, or is it included in the rent at this property?

- 1. Tenants pay for heat
- 2. Heat included in rent

[IF A1 =1 OR 2 ASK, OTHERWISE SKIP TO D12]

D11. Do condo/co-op occupants pay for their own heat, or is it included in the monthly maintenance fees?

- 1. Occupants pay for heat
- 2. Heat included in fees

D12. How are tenant spaces in the building heated, with a central heating system, with individual electric heat pumps, or with electrical resistance wall units?

- 1 Central heating system
- 2 Individual electric heat pumps
- 3 Electric resistance wall units
- 4 Other (SPECIFY) _____

D16. How is hot water supplied to the tenant spaces in the building, with a central heating system, with individual electric water heaters, with individual gas water heaters, or some other way?

- 1 Central water heating system
- 2 Individual electric water heaters
- 3 Individual gas water heaters, or

4 Some other way (SPECIFY) _____

[IF A1 =3 OR 4 ASK, OTHERWISE SKIP TO D18]

D17. Who pays for water heating of tenant spaces at this building? Do tenants pay for their own water heating, or is it included in the rent at this property?

1. Tenants pay for water heating
2. Water heating included in rent

[IF A1 =1 OR 2 ASK, OTHERWISE SKIP TO D19]

D18. Do condo/coop occupants pay for their own water heating, or is it included in the monthly maintenance fees?

1. Occupants pay for water heating
2. Water heating included in fees

[IF D16 =1 ASK, OTHERWISE SKIP TO E1]

D19. Have you looked into the feasibility of installing controls on your water heating that monitor return water temperature and adjust the boiler?

- 1 We have already installed this type of controller
- 2 We are considering this type of controller
- 3 We have looked at that type of controller but found it does not work for us
- 4 We have not looked into that type of controller

E1. How many individual units are located in the building or buildings at this property? (PROMPT IF NECESSARY:) That is, at (INSERT ADDRESS).

_____ (RECORD # UNITS)

88. Don't Know

E2. How many stories are there in the building or buildings at that address?

_____ (RECORD # STORIES)

88 Don't Know

E3. Do you ... (READ CHOICES)

- 1 Own AND manage this property
- 2 Manage this property only or
- 3 Own this property but do not manage it?

E4. I'd like to know how many multifamily residential properties in California your firm owns and manages, manages only and owns but does not manage? First, how many does it ... (READ EACH OPTION INDIVIDUALLY)

1. Own and manage? _____ (RECORD #)
2. Manage only? _____ (RECORD #)
3. Own, but do not manage? _____ (RECORD #)

E5. How many years have you been in your current position at this property?

_____ (RECORD # YEARS)

E6. How many years have you been in control of other complexes?

_____ (RECORD # YEARS)

[IF A1 =3 OR 4 ASK, OTHERWISE SKIP TO E15]

E12. If a 1 bedroom unit became available today, what would be the rental price per month?

Record \$ _____

E13. Does that price include any of the following? (READ LIST: CHECK ALL THAT APPLY)

- 1 Electricity
- 2 Heat
- 3 Hot Water

E14. Approximately how big in square feet would the unit be for the rental price you just quoted?

Record square feet _____

[IF A1 =1 OR 2 ASK, OTHERWISE SKIP TO END]

E15. If a one-bedroom unit were for sale today, what would be the approximate sale price?

Record \$ _____

E16. Approximately how big in square feet would that unit be?

Record square feet _____

AWARENESS/KNOWLEDGE/ATTITUDES

AKA1. I'm going to list several energy-efficient product labels or energy efficiency programs. For each, please tell me if you have heard of it. [RANDOMIZE LABELS/NAMES OF PROGRAMS EXCEPT "ENERGY STAR Most Efficient" SHOULD ALWAYS IMMEDIATELY FOLLOW "ENERGY STAR"]

- | | | | | |
|--------------------------------|-------|------|------|-----------|
| (a) ENERGY STAR | (Yes) | (No) | (DK) | (Refused) |
| (b) ENERGY STAR Most Efficient | (Yes) | (No) | (DK) | (Refused) |
| (c) Consumer Elect | (Yes) | (No) | (DK) | (Refused) |
| (d) Engage 360 | (Yes) | (No) | (DK) | (Refused) |
| (e) Top Ten | (Yes) | (No) | (DK) | (Refused) |
| (f) Energy Upgrade California | (Yes) | (No) | (DK) | (Refused) |

AKA2. How much had you thought about how energy use affects the environment before today? Would you say . . . [READ CHOICES except DK and REF]

- 1. Not at all
- 2. A little
- 3. Some, or
- 4. A lot
- 8. Don't Know
- 9. Refused

AKA3. How much had you thought about global warming before today? [READ CHOICES except DK or REF]

- 1. Not at all
- 2. A little
- 3. Some, or
- 4. A lot

- 8. Don't Know
- 9. Refused

AKA4. How worried are you about global warming? Are you . . . [READ CHOICES except DK or REF]

- 1. Not at all worried
- 2. A little worried
- 3. Somewhat worried
- 4. Very worried, or
- 5. Extremely worried
- 8. Don't Know
- 9/ Refused

AKA5. Now, I'm going to read a few statements. Using a scale of 0 to 10 where 0 means *Not at all agree*, and 10 means *Completely agree*, please tell me how much you agree with each statement. [RANDOMIZE "a" - "n"]

- | | Not at all
Agree | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Completely
Agree | DK | Ref |
|--|---------------------|---|---|---|---|---|---|---|---|---|---|----|---------------------|----|-----|
| a. I am very concerned about how energy use affects the environment. | | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | | DK | Ref |
| b. Household electricity use has an impact on the environment. | | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | | DK | Ref |
| c. I believe that household energy use has an impact on global warming and climate change. | | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | | DK | Ref |
| d. Conserving electricity will help reduce global warming. | | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | | DK | Ref |

Thank you very much for participating in this survey. Would you like to have SDG&E send you information about energy efficiency programs currently available to Multi-Family Property Managers? (CONFIRM NAME & MAILING ADDRESS)

Appendix C – Interview Guides

This appendix includes all in depth interview guides in the order listed below:

1. Lighting Programs Manufacturers
2. Home Energy Efficiency Rebates Contractors
3. Home Energy Efficiency Rebates Retailers
4. Multi-Family Rebate Program Contractors
5. Business and Consumer Electronics Retailers
6. Business and Consumer Electronics Manufacturers
7. Mobile Home Program Technicians / Implementers
8. K-12 Energy Efficiency Education Teachers
9. K-12 Energy Efficiency Education Staff
10. Local Whole House Performance Contractors
11. Local Whole House Performance Implementers
12. Local Whole House Performance Follow Up
13. HVAC Tune-up QI Participating Contractors
14. HVAC Tune-up QI Nonparticipating Contractors
15. Appliance Recycling Retailers

SDG&E Lighting Programs Manufacturers In-Depth Interview Guide

Lighting Manufacturer In-Depth Interview Guide

Introduction

Hello, my name is _____ and I am calling on behalf of San Diego Gas and Electric. May I speak to <Contact Name>?

[If not available] Is there another person at your company who would be knowledgeable about your company's participation in San Diego Gas and Electric rebate programs for energy efficient lighting? May I speak with them?

(IF NECESSARY, ADD:) (This is not a sales call. We're just conducting a short survey for SDG&E.)

Background

(WHEN THE APPROPRIATE PERSON COMES ON THE PHONE, SAY:)

We're conducting an evaluation of SDG&E's Upstream Lighting Program (or Energy Efficient Lighting Discount Program) that your company participates in with lighting retailers, sometimes called the "lightbulbs buydown program" (It's a program that provides per-unit incentives to manufacturers who provide retailers with qualifying energy efficiency lighting products such as CFLs and fluorescent lighting fixtures). We would like to talk to you about your experience with this program. We are working to understand manufacturers' perspectives, so that we can improve the program.

Participation Questions

- 1) What is your title and what are your responsibilities? (Ask for their name, if it is still unknown)
- 2) Why does your company participate in the program? (Probe: increase sales vs. promote energy efficiency?) Any other reasons?
- 3) How has the program helped or hindered your company's sales of energy efficient lighting? (Probe: approximate % increase/decrease in sales?)
- 4) What are the main reasons why customers are purchasing energy efficient lighting, in your opinion? Any others?

- 5) Thinking of the San Diego region only, approximately what percentage of your energy efficient lighting sales – CFLs and LEDs – is of units discounted through the program?
- 6) How, if at all, will your business be affected by the Energy Independence and Security Act (EISA) that will be phasing out 100 Watt incandescents this upcoming year, and will impose other efficacy restrictions in future years? (Probe for any differences in percent increase or decrease in San Diego area vs CA vs National)
- 7) Utilities in California are unlikely to provide incentives for basic CFLs in upcoming years. How, if at all, will this affect your business? (Probe for percent increase or decrease in CFL sales in San Diego area and CA as a whole) Is this going to happen in other regions where you sell CFLs through utility-sponsored programs?

Marketing Questions

- 8) Did SDG&E provide you with any marketing materials to use to promote energy efficient lighting? Did you provide any of the retailers that sell your discounted lighting products with marketing materials? Have these materials been effective? (Probe: have you seen an increase or decrease in sales as a result of the promotional materials?)
- 9) (If marketing materials provided) Could the marketing materials be more effective? How so?

Feedback/Issues Questions

- 10) Have you had any issues with the program? Like what?
- 11) What feedback, if any, have you gotten from customers about the discounted energy efficient lighting? Anything else?

Those are all my questions. Thank you for your time.

SDG&E Home Energy Efficiency Rebates Contractors In-Depth Interview Guide

SDG&E HEER - CONTRACTOR INTERVIEW GUIDE

FINAL - October 5, 2011

Interview Objectives:

1. Do these contractors participate in any other residential programs? If so, do these programs overlap?
2. Has participating in the HEER program helped improve their business?
3. Do contractors notice a difference in their business since the discontinuation of ARRA-funded rebates?
4. Are contractors receiving adequate training and promotional materials to successfully promote the program and recruit customers?
5. Is the program missing any major market sectors? If so, what is the best way to reach out to this group?
6. What suggestions do contractors have for increasing customer participation in the program?
7. Are contractors satisfied with their participation in the program?
8. What suggestions do contractors have for improving the program?

Interviewees:

- Fifteen contractors participating in the program by assisting customers with rebates for water heaters, furnaces, pool pumps, and/or insulation. These contacts will be taken from contact lists provided by Semptra.

RESPONDENT SCREENING

Hello, my name is _____ and I am calling from Energy Market Innovations. We are working with San Diego Gas & Electric to help evaluate the success of their Home Energy Efficiency Rebate, or HEER Program. We are speaking with contractors who have helped customers participate in this program to get feedback on your experiences. [Provide description of program if needed:]

This program offers rebates on the purchase and installation of qualifying equipment that improves the energy efficiency of your customer's home. Rebates are available for various appliances, as well as for insulation, water heaters, furnaces, and pool pumps.

Are you the best person to speak with about this program? Do you remember helping one or more of your customers participate in this program?

If not: Is there another person available who may be more familiar with this program? (record name) _____

Is this a good time to talk with you about the program? I have a set of questions that should take approximately 20 minutes, depending upon your experiences and involvement with the program. All information you provide is confidential.

If cannot talk now, schedule a call back: _____ (time / date)

1. INTRODUCTION

1.1. To begin, how would you characterize the types of services/products that you generally provide for your customers or clients?

- HVAC
- Plumbing/Water Heater Installation/Repair/Maintenance
- Pool Repair/Maintenance
- Other (specify)

2. INVOLVEMENT WITH PROGRAM

2.1. Would you please give a brief overview of how your business has been involved with the HEER Program?

- Approximately how many years has your firm been working with this program?
- How did you first learn about the program? (Advertisements, brochures, utility staff, etc.)

2.2. When you assist customers with applications for HEER rebates, what type of measure is it usually?

- [PROBE: water heaters, insulation, furnaces]

2.3. Do you participate in any other residential programs besides HEER?

- [If yes]: Which ones? Is there any overlap across programs or are they fairly distinct in their offerings?
- Would you recommend combining any of these programs? Why or why not?

3. IMPACT ON BUSINESS

3.1. Has the HEER Program impacted your business in any way?

- Would you say your business has increased, decreased, or remained the same since your company began participating in the program? Please explain.

- Does the program make it easier for you to sell your services or products? Please explain.
- Has your involvement in this program affected the types of equipment that you service/install? Please explain.

3.2. Did you notice a difference in your business when the statewide ARRA-funded “Cash for Appliances” rebates ended in December 2010? Please explain.

- [If yes]: By what percentage would you say sales of rebated appliances dropped when the “Cash for Appliances” program ended? [If yes]: Please describe how you have experienced the changes. (Examples)

4. MARKETING/OUTREACH

4.1. I am interested in learning how you market this program with your customers. Could you please describe this process for me?

4.2. Did you attend a free training class that reviewed the details of the program?

- [If yes:] Were you satisfied with the training? Did it provide you with all the information you needed to understand the program and promote it to your customers?
- How would you improve the training?

4.3. Have you received adequate promotional materials to successfully promote the program and recruit customers?

- What marketing strategies appear to the most effective?
- How can SDG&E help to improve the marketing of the program to customers?

4.4. Has marketing and outreach for the program been effective overall?

- [If not:] Please explain the nature of the challenges.

4.5. What suggestions do you have for increasing customer participation in the program?

4.6. Are there certain types of residential customers you think are not being reached by the HEER Program?

- [If yes]: What do you see as the best way to reach out to these customers?

5. PROGRAM STRENGTHS/AREAS FOR IMPROVEMENT

5.1. Overall, how satisfied are you with the program? Would you say you are...

Very satisfied,
Somewhat satisfied,
Neither satisfied nor dissatisfied,
Somewhat dissatisfied, or
Very dissatisfied?

- Please explain why you gave that rating.

5.2. What do you see as the greatest strengths of the program? What is working well?

5.3. What suggestions would you offer for improving the program? What would you most like to change?

6. END

6.1. For comparison purposes, about how many employees does your company have?

6.2. Do you have anything to add? Is there anything I've forgotten to ask you about?

Thank you very much for taking the time in assisting us with this evaluation. Your contribution is a very important part of the process. If I have any additional questions, do you mind if I give you a quick call?

SDG&E Home Energy Efficiency Rebates Retailers In-Depth Interview Guide

SDG&E HEER - RETAILER INTERVIEW GUIDE

October 5, 2011

Interview Objectives:

1. Are there efforts to ensure that in-store signage is current and accurately placed?
2. How effective are the in-store promotional materials at influencing sales of rebated appliances?
3. Are retailers receiving adequate training and promotional materials to successfully promote the program to customers?
4. To what extent are retailers promoting the program to customers?
5. Have retailers noticed a difference in their business since the discontinuation of ARRA-funded rebates?
6. Are retailers satisfied with their participation in the program?
7. What suggestions do retailers have for improving the program?

Interviewees:

- Ten retailers participating in the program. These contacts will be taken from contact lists provided by Sempra.

INTRODUCTION

Hello, my name is _____ and I am calling from Energy Market Innovations. We are working with San Diego Gas & Electric to help evaluate the success of their Home Energy Efficiency Rebate, or HEER Program. We are speaking with retailers that are participating in the program. [Provide description of program if needed:]

This program offers rebates to customers who purchase qualifying equipment that improves the energy efficiency of their home. Rebates are available for various appliances, such as refrigerators, clothes washers, and room air conditioners.

Is this a good time to talk with you about the program? I have a set of questions that should take approximately 20 minutes, depending upon your experiences and involvement with the program. All information you provide is confidential.

If cannot talk now, schedule a call back: _____ (time / date)

1. INVOLVEMENT WITH PROGRAM

1.1. Approximately how long has your company been participating in this program?

1.2. What types of appliances or products does [RETAILER] sell that qualify for rebates through the HEER Program?

1.3. Does your company participate through the POS system? Or do customers fill out and submit a rebate form to SDG&E?

2. MARKETING MATERIALS

2.1. Are you using promotional materials provided by SDG&E (or WSA)? What materials are you using? How are they displayed?

- How are the rebated appliances promoted in the store?
 - Signage, application forms next to the product? Other displays?
- How is signage kept current? Who is responsible for that?
- If no SDG&E (or WSA) promotional materials are being used: Why aren't you using the promotional materials?

2.2. Do you think the promotional materials provided by SDG&E (or WSA) are effective at promoting the sale of ENERGY STAR appliances?

- Why or why not?
- Do you have any suggestions for making these materials more effective?

2.3. Has your store created its own materials to promote the program's rebated products (e.g., in-store signage, circular ads, signage outside the store)?

- [If yes:] Please describe why your store created its own materials for this program.
- Are you able to send to me copies of the marketing materials that your store has developed for this program?

3. PROGRAM PROMOTION BY RETAIL STAFF

3.1. Are sales staff at your stores provided training on energy efficient appliances or details of the rebate program?

- What type of training?
- Who provides training?
- How often does training occur?
- Who receives the training; are all staff trained to sell appliances?

3.2. Are retail staff encouraged or incentivized to promote the rebated appliances? Please explain.

- How do you promote the program in your organization?
- How effective are the in-store promotional materials at influencing customer participation?

3.3. To your knowledge, do retail staff generally mention the program rebates to customers that are shopping for appliances and other products that might qualify for rebates from SDG&E? Please explain.

4. EFFECT OF ARRA REBATES

4.1. Did you notice a difference in sales of rebated appliances when the statewide ARRA-funded “Cash for Appliances” rebates ended in December 2010? Please explain.

- [If yes]: By what percentage would you say sales of rebated appliances dropped when the “Cash for Appliances” program ended?

5. SATISFACTION WITH INVOICING PROCESS

5.1. [If POS:] Can you describe the process of how this store applies for and receives incentive payments from SDG&E for the rebated appliances?

- Are you satisfied with this process?
- Is there anything you would like to change about this process?

5.2. [If POS:] Have you received reimbursement from SDG&E in a timely fashion?

- On average, how long does it take once you submit an invoice to get reimbursed?
- Have there been any problems? If so, have these been resolved?

6. PROGRAM STRENGTHS/AREAS FOR IMPROVEMENT

6.1. Overall, how satisfied are you with the program? Would you say you are...

Very satisfied,
Somewhat satisfied,
Neither satisfied nor dissatisfied,
Somewhat dissatisfied, or
Very dissatisfied?

- Please explain why you gave that rating.

6.2. What do you see as the greatest strengths of the program? What is working well?

6.3. What suggestions would you offer for improving the program? What would you most like to change?

7. END

7.1. Do you have anything to add? Is there anything I've forgotten to ask you about?

Thank you very much for taking the time in assisting us with this evaluation. Your contribution is a very important part of the process. If I have any additional questions, do you mind if I give you a quick call?

SDG&E Multi-Family Rebate Program Contractors In-Depth Interview Guide

Survey of MF Contractors

How long have you participated?

Do you participate in other utilities?

What measures do you install? Has this changed over time?

Do you charge customers?

Do you do much in tenant spaces?

How do you find clients? Is this an issue?

How does coordination with low income effect what you do?

Have you any issues with way program is run?

Do you have any suggestions as to how to improve program?

**SDG&E Business and Consumer Electronics
Retailers In-Depth Interview Guide**

SDG&E BCE - Retailer Interview Guide

FINAL - October 5, 2011

Interview Objectives:

1. Do marketing materials displayed at participating retail locations meet the guidelines and goals for marketing activities?
2. Are retail staff equipped to identify and sell qualifying units?
3. Are consumers demanding energy efficient electronics?
4. What are the distribution and sales channels for manufacturers and retailers of televisions, monitors, and desktop computers?
5. What is the influence of the program on the stocking and sales of incentivized products?
6. What is the influence of the program on manufacturing and product availability?
7. Are retailers satisfied with their participation in the program?
8. What suggestions do retailers have for program improvements?

Interviewees:

Ten corporate- or management- level staff at participating retail chains. These contacts will be taken from contact lists provided by Sempra.

1. INTRODUCTION

Hello my name is _____ from Energy Market Innovations. As a reminder, this interview is about the BCE program (Business and Consumer Electronics), which provides monetary incentives for the sale of energy-efficient televisions, computer monitors, and desktop computers in California. We are conducting an evaluation for San Diego Gas & Electric, so I will ask you to focus your answers on the San Diego market where you can. Your input into this evaluation is important to help determine the effectiveness of the program to help justify future program operations. We are also trying to determine what is going well with the program and what may need to be improved.

1.1. To start, will you please explain your role and scope of responsibilities at [RETAILER NAME]?

- How long have you held this position?

1.2. What is your role at [RETAILER NAME] with respect to the BCE Program?

- How do you typically interact with the program and its representatives?
- How long have you been involved with the program?
- How long has [RETAILER NAME] been participating in the program?

1.3. Can you briefly describe your knowledge of the BCE program? What are the program goals? How does the program operate to achieve those goals?

2. MARKETING MATERIALS

2.1. Please describe any marketing materials used at your retail locations to promote the electronics that qualify for the BCE Program.

- Probe for TVs, computer monitors, and desktop computers.
- What marketing materials are provided by the BCE Program?
- What marketing materials are developed by [RETAILER NAME]?

2.2. Has a representative of SDG&E (or QDI) made visits to [RETAILER NAME] store locations to place marketing materials on qualifying products?

- If so: How often do these visits occur?
- Have these visits been effective? Do you have any suggestions for improving the effectiveness of these visits?

2.3. Do you think the marketing materials are effective at promoting the sale of energy-efficient...

- televisions?
- computer monitors?
- desktop computers?
- Do you have suggestions for making these materials more effective?

3. PROGRAM PROMOTION BY RETAIL STAFF

3.1. Are sales staff at your stores provided training on energy efficiency with respect to [TVs/computer monitors/desktop computers]?

- What type of training?
- Who provides training?
- How often does training occur?

3.2. What percentage of sales staff would you say are aware of the benefits of energy efficient electronics?

- What percentage of sales staff would you say are aware of the BCE program?

3.3. Are retail staff encouraged or incentivized to promote energy efficient [TVs/computer monitors/desktop computers]? Please explain.

3.4. To your knowledge, do retail staff generally mention energy efficiency as a product feature? Please explain.

4. CONSUMER DEMAND

4.1. In your opinion, what particular technologies or features are consumers demanding right now, with respect to...

- Televisions?
- Computer Monitors?
- Desktop Computers?

4.2. What percent of consumers would you say ask for energy efficient...

- Televisions?
- Computer Monitors?
- Desktop Computers?

4.3. Are there particular energy-efficient features that consumers want for...

- Televisions? Please explain.
- Computer monitors? Please explain.
- Desktop computers? Please explain.

4.4. Over 2010 and 2011, has demand in California for energy-efficient televisions:

- Increased,
- Decreased, or
- Remained approximately the same?
- Please explain.
- Does this vary by region within CA? How about specifically for San Diego?

4.5. Over 2010 and 2011, has demand in California for energy-efficient computer monitors:

- Increased,
- Decreased, or
- Remained approximately the same?
- Please explain.
- Does this vary by region within CA? How about specifically for San Diego?

4.6. Over 2010 and 2011, has demand in California for energy-efficient desktop computers:

- Increased,
- Decreased, or
- Remained approximately the same?

- Please explain.
- Does this vary by region within CA? How about specifically for San Diego?

5. DISTRIBUTION AND SALES CHANNELS

5.1. Do individual [RETAILER NAME] stores typically buy differently for different regions or store locations, or does model assortment typically happen at a national level?

5.2. Do you find that particular store locations request or demand more energy-efficient electronics compared to other store locations?

- Which ones?
- Do stores in particular regions within California request or demand more energy-efficient electronics compared to other regions? Which ones?

6. INFLUENCE OF BCE PROGRAM ON STOCKING AND SALES PRACTICES

6.1. What percentage of your assortment for [televisions/computer monitors/computers] at stores in the San Diego area would you say is ENERGY-STAR rated?

- What percentage of your assortment for [televisions/computer monitors/computers] in San Diego would you say qualify for incentives under the BCE Program?
- If there were no BCE Program, what percentage of your assortment for [televisions/computer monitors/computers] in San Diego do you think would be ENERGY-STAR rated?
- If there were no BCE Program, what percentage of your assortment for [televisions/computer monitors/computers] in San Diego do you think would meet the standards that qualify products for incentives under the current BCE Program?

[FILL OUT TABLE BELOW:]

Assortment in San Diego	Televisions	Monitors	Computers
% ENERGY STAR (current)	%	%	%
% Qualified for BCE Program (current)	%	%	%
% ENERGY STAR (no program)	%	%	%
% Qualified for BCE Program (no program)	%	%	%

6.2. What impact do the current incentives have on encouraging your organization to *purchase and stock more* energy-efficient electronics in the San Diego area?

- Do you think more energy-efficient TVs are *purchased and stocked* in San Diego as a result of the program?
- Do you think more energy-efficient computer monitors are *purchased and stocked* in San Diego as a result of the program?
- Do you think more energy-efficient desktop computers are *purchased and stocked* in San Diego as a result of the program?

6.3. What impact do the current incentives have on encouraging your organization to *sell* energy-efficient electronics to its customers in the San Diego area?

- Do you think more energy-efficient electronics are *sold to customers* in San Diego as a result of the program?
- Is there any difference in impact between the product types: TVs, computer monitors, and desktop computers? Please explain.
- Do you think a different incentive level would be more effective?
- If yes, would you increase it or reduce it and by how much?

6.4. Approximately what percentage of the [TVs/computer monitors/desktop computers] sold by [RETAILER NAME] in the San Diego area since 2010 would you say were energy-efficient?

- Has this changed over time? Increased? Decreased?

6.5. Have you observed any differences between sales patterns in California vs. nationally, for....

- TVs?
- Computer monitors?
- Desktop computers?
- Does this vary by region within CA? How about specifically for San Diego?

7. INFLUENCE OF THE PROGRAM ON MANUFACTURING/ PRODUCT AVAILABILITY

7.1. Are manufacturers currently marketing products to you as being energy-efficient?

- Do you expect them to?
- Have you seen this change lately?

7.2. Are energy-efficient TVs generally available through manufacturers?

- If not: Please explain.

7.3. Do programs such as the National ENERGY STAR program, or the Consortium for Energy Efficiency, have influence on the types of electronics that are manufactured or sold?

- How much influence? More or less influence than the BCE Program?

7.4. Do you feel that the BCE Program has influenced the manufacturing and availability of energy-efficient...

- TVs?
 - Would you say there has been a... great deal of influence / some influence / or no influence? Why or why not?
- Computer monitors?

- Would you say there has been a... great deal of influence / some influence / or no influence? Why or why not?
- Desktop computers?
 - Would you say there has been a... great deal of influence / some influence / or no influence? Why or why not?

7.5. Looking forward to 2012, do you think the manufacturing of energy-efficient [TVs/computer monitors/desktop computers] will...

- Increase,
- Decrease, or
- Remain approximately the same?

- Please explain.
- Do you think the BCE Program has influenced this change? If so, how?

8. SALES DATA AND INCENTIVES

8.1. Please describe the process for submitting sales data.

- Who submits, to whom, and when?
- What data are submitted and how often?
- Are you satisfied with this process? Please explain.

8.2. Please describe the process for receiving incentive payments.

- How often are incentive payments received?
- Typically how long is it between data submittal and when you get paid?
- Are you satisfied with the timeliness of incentive payment process? Please explain.

- Are there often disputes in the amount of the payment? In other words, are there often many products that you don't receive incentives for that you think you should have? Why do you think that is?
- Are you satisfied with the amount of incentive payments? Please explain.

8.3. How are the incentives allocated once they are received from Energy Solutions?

- Are they allocated toward marketing the products that qualify for the program?
- Are they counted toward the profit margin for qualifying units?

9. SATISFACTION

9.1. How satisfied are you with the BCE program overall? Would you say you are:

Very satisfied,
Somewhat satisfied,
Neither satisfied nor dissatisfied,
Somewhat dissatisfied, or
Very dissatisfied?

- Please explain why you gave that rating.

9.2. How satisfied are you with the performance of the implementer QDI? They are responsible for setting up program contracting and other account management tasks. Would you say you are...

Very satisfied,
Somewhat satisfied,
Neither satisfied nor dissatisfied,
Somewhat dissatisfied, or
Very dissatisfied?

- Please explain why you gave that rating.
- Probe to determine the extent of interaction/knowledge of work performed.

9.3. How satisfied are you with the performance of the implementer Energy Solutions? They are responsible for collecting sales data and making incentive payments. Would you say you are...

Very satisfied,
Somewhat satisfied,
Neither satisfied nor dissatisfied,
Somewhat dissatisfied, or
Very dissatisfied?

- Please explain why you gave that rating.
- Probe to determine the extent of interaction/knowledge of work performed.

9.4. How satisfied are you with the marketing materials that the BCE Program has developed and placed in your participating stores? Would you say you are...

Very satisfied,
Somewhat satisfied,
Neither satisfied nor dissatisfied,
Somewhat dissatisfied, or
Very dissatisfied?

- Please explain why you gave that rating.

10. PROGRAM STRENGTHS AND AREAS FOR IMPROVEMENT

10.1. What do you see as the greatest strengths of the BCE program? What is working well?

10.2. What suggestions would you offer for improving the BCE program? What would you most like to change?

11. END

11.1. Do you have anything to add? Is there anything I've forgotten to ask you about?

Thank you very much for taking the time to assist us with this evaluation. If I have any additional questions, do you mind if I send you an email or give you a quick call?

**SDG&E Business and Consumer Electronics
Manufacturers In-Depth Interview Guide**

SDG&E BCE - Manufacturer Interview Guide

FINAL - October 5, 2011

Interview Objectives:

- Are manufacturers aware of the program?
- Are consumers demanding energy efficient electronics?
- What are the distribution and sales channels for manufacturers and retailers of televisions, monitors, and desktop computers?
- What is the influence of the program on the manufacturing of and retailer demand for energy efficient TVs, monitors, and desktop computers?
- What suggestions do manufacturers have for program improvements?

Interviewees:

Ten manufacturers of televisions, computer monitors, and desktop computer involved in the program. These contacts will be taken from contact lists provided by Semptra and QDI.

1. INTRODUCTION

Hello my name is _____ from Energy Market Innovations. As a reminder, this interview is about the BCE program (Business and Consumer Electronics), which provides monetary incentives for the sale of energy-efficient televisions, computer monitors, and desktop computers in California. We are conducting an evaluation for San Diego Gas & Electric, so I will ask you to focus your answers on the San Diego market where you can. Your input into this evaluation is important to help determine the effectiveness of the program to help justify future program operations. We are also trying to determine what is going well with the program and what may need to be improved.

1.1. To start, will you please explain your role and scope of responsibilities at [MANUFACTURER NAME]?

- How long have you held this position?

1.2. What is your role at [MANUFACTURER NAME] with respect to the BCE Program?

- How do you typically interact with the program and its representatives?
- How long have you been involved with the program?

1.3. Can you briefly describe your knowledge of the BCE program? What are the program goals? How does the program operate to achieve those goals?

2. CONSUMER/RETAILER DEMAND

2.1. In your opinion, what particular technologies or features are consumers demanding right now, with respect to...

- Televisions?
- Computer Monitors?
- Desktop Computers?

2.2. Are there particular energy-efficient features that consumers want in California for...

- Televisions? Please explain.
- Computer monitors? Please explain.
- Desktop computers? Please explain.
- Does this vary by region within CA? How about specifically for San Diego?

2.3. Over 2010 and 2011, has demand in California for energy-efficient televisions:

- Increased,
- Decreased, or
- Remained approximately the same?
- Please explain.
- Does this vary by region within CA? How about specifically for San Diego?

2.4. Over 2010 and 2011, has demand in California for energy-efficient computer monitors:

- Increased,
- Decreased, or
- Remained approximately the same?

- Please explain.
- Does this vary by region? How about specifically for San Diego?

2.5. Over 2010 and 2011, has demand in California for energy-efficient desktop computers:

- Increased,
- Decreased, or
- Remained approximately the same?
- Please explain.
- Does this vary by region within CA? How about specifically for San Diego?

3. DISTRIBUTION AND SALES CHANNELS

3.1. Do retailers typically buy differently for different regions or store locations, or does model assortment typically happen at a national level?

4. INFLUENCE OF BCE PROGRAM ON MANUFACTURING AND RETAILER PRACTICES

4.1. What percentage of the [televisions/computer monitors/computers] manufactured by [MANUFACTURER NAME] would you say are ENERGY-STAR rated?

- What percentage of your [televisions/computer monitors/computers] would you say qualify for incentives under the BCE Program?
- If there were no BCE Program, what percentage of your [televisions/computer monitors/computers] do you think would be ENERGY-STAR rated?
- If there were no BCE Program, what percentage of your [televisions/computer monitors/computers] do you think would meet the standards that qualify products for incentives under the current BCE Program?

[FILL OUT TABLE BELOW:]

Manufactured Products	Televisions	Monitors	Computers
% ENERGY STAR (current)	%	%	%
% Qualified for BCE Program (current)	%	%	%
% ENERGY STAR (no program)	%	%	%
% Qualified for BCE Program (no program)	%	%	%

4.2. Approximately what percentage of the [TVs/computer monitors/desktop computers] sold by [MANUFACTURER NAME] in California since 2010 would you say were energy-efficient?

- Has this changed over time? Increased? Decreased?
- Does this vary by region within CA? How about specifically for San Diego?

4.3. Have you observed any differences between sales patterns in California vs. nationally, for....

- TVs?
- Computer monitors?
- Desktop computers?
- Does this vary by region within CA? How about specifically for San Diego?

4.4. Does [MANUFACTURER] currently market its products (specifically TVs, computer monitors, and desktop computers) as being energy-efficient?

- [If yes:] How? Is this increasing over time? When did you begin marketing them as energy-efficient?
- [If yes:] What are examples of marketing televisions as energy efficient?

4.5. To your knowledge, are retailers currently marketing your products as being energy-efficient?

- Do you expect them to?
- Do you see this changing anytime soon? If so, how?

4.6. Do programs such as the National ENERGY STAR program, or the Consortium for Energy Efficiency, have influence on the types of electronics that are manufactured or sold?

- How much influence? More or less influence than the BCE program?

4.7. How do you think that the BCE program has influenced the manufacturing or design of energy-efficient TVs?

- Please explain.

4.8. Do you think retailers purchase more energy-efficient [TVs/computer monitors/desktop computers] in California as a result of the program?

- Please explain.
- Does this vary by region within CA? How about specifically for San Diego?

4.9. Looking forward to 2012, do you think the manufacturing of energy-efficient [TVs/computer monitors/desktop computers] will...

- Increase,
- Decrease, or
- Remain approximately the same?
- Please explain.
- Do you think the BCE Program has influenced this change? If so, how?

5. PROGRAM STRENGTHS AND AREAS FOR IMPROVEMENT

5.1. What do you see as the greatest strengths of the BCE program? What is working well?

5.2. What suggestions would you offer for improving the program? What would you most like to change?

6. END

6.1. Do you have anything to add? Is there anything I've forgotten to ask you about?

Thank you very much for taking the time to assist us with this evaluation. If I have any additional questions, do you mind if I send you an email or give you a quick call?

**SDG&E Mobile Home Program Technicians/
Implementers In-Depth Interview Guide**

Draft Questions

Comprehensive Manufactured and Mobile Home Program
ASC Staff

Name:

Introduction/Background

1. When did you begin working on this program?
2. What is your specific role in the program?
3. How long have you had that role?

Marketing and Outreach

4. We are familiar with the program, particularly in how it was implemented in 06-08, but want to confirm our understanding... Can you describe for me the overall marketing strategy for the program?
5. What are the most effective strategies?

Probes:

- a. [How common is a closed circuit TV channel? Has ASC had luck getting program information posted on these systems?]
- b. [How often has ASC been able to recruit resident ambassadors from within a park willing to reach out to their neighbors? How effective is this?]
- c. [Does ASC have any “leave behinds” like lawn signs or window clings visible to neighbors?]
6. Are there any new strategies you are considering or testing?
7. How does this program work with local government efforts?
 - a. What about community-based organizations or nonprofits?
 - b. Are there any ways this coordination could be improved?
8. [DOUG ONLY] When we talked in May, you (Doug) mentioned that ASC was able to get phone lists of park residents. I had the impression that this was happening more now (than in prior program years?).
 - a. How have you convinced managers to give you these lists?
 - b. What do you do with them? Do program representatives cold call residents?
9. Are you involved in identifying parks to contact?
 - a. If yes, how do you identify parks to contact?

10. Are there requirements that participants be served by SCE? What happens when a park is served by SCG but not Edison?
 - a. [IF NOT ANSWERED] Are these customers offered program services?
11. How prevalent is natural gas service among mobile homes?
12. Can you describe characteristics of parks likely to be interested vs. those less likely to consider participating?
(Probe: “senior” versus “family” parks, socioeconomic status, large versus small parks, etc.)
13. How do you track participating and nonparticipating parks? What kind of rotation seems to work for approaching parks regularly without being perceived as a pest? How many parks has Synergy treated over the years?
 - a. [DOUG ONLY] We want to complete interviews with a small sample of participating and non-participating park managers contacted by ASC. Is ASC able to provide a list of all of the park managers contacted? Does the list distinguish participating parks from non-participating parks? May we have a copy?
 - b. Does ASC track saturation rates in each participating park (percentage of participating residents within participating parks)? [Yes/No] If not, skip probes and next Q.
 - c. What is Synergy’s current average ‘saturation rate’ within parks (average percentage of participant residents within participating parks)?
 - i. We would like to talk to park managers from parks with different levels of saturation. Can you give us the saturation rates for each of the participating parks?

Park Manager Responses to Marketing

14. When first hearing of the program, how do park managers typically respond?
15. What are typical reasons a park manager decides not to participate?
16. What are the best tactics for overcoming the reluctance of a park manager?
17. We’ve heard that sometimes it’s not just the local park manager but also off-site administrators that can block access to a specific park. These offsite administrators might include park owners, general managers, boards or regional bodies that have approval authority.
 - a. How often would you estimate this happens?

- b. What, if any, specific outreach or communication efforts seem to overcome delays caused by multiple decision makers, especially these off-site decision makers?

Resident Participant Responses to Marketing

What about residents...

- 18. When first hearing of the program, how do residents typically respond? [Probe: What concerns have residents typically expressed about participating?]
- 19. What is Synergy doing to reduce customer anxiety about having Synergy Technicians come into their homes?
- 20. Thinking about participating parks, about what proportion hold community meetings?
 - a. How frequently do the participating parks hold the meetings? Why?
 - b. [IF NOT ANSWERED] Among parks that hold community meetings, how frequently are Synergy technicians present at the meetings?
 - c. [IF NOT ANSWERED] How valuable is it to have technicians present at the meetings? Why?
- 21. How do you know when you are “done” marketing to a park?

Program Administration

Are you directly involved in program administration?

If yes, ask...

- 22. Have any issues emerged in working with San Diego Gas and Electric?
- 23. Any specific issues in working with So Cal Gas?
- 24. Any issues related to tracking systems or reporting?
[Probe: *Frequency, tenor of communication*]
- 25. What is the status of the Synergy Technical System Database? Is this up and running?
 - a. How is the database used?
 - b. What is the status of the efforts to obtain utility information to automatically populate forms?

- c. How common are data entry errors? Will this system eliminate or reduce data entry errors?
- d. Is it expected (or has it) simplified billing?

Technician Role in Program Delivery

- 26. We know the technicians play an important role in delivering measures to participants, since they are the ones that actually complete the installations, can you describe for me any other roles they might have in customer recruitment, workload scheduling, marketing, or other aspects of program delivery?
- 27. In 2007, we heard that staffing limitations created some delays in program delivery and implementation – how is this working for this program cycle? Has ASC experienced any difficulties recruiting and training technicians?
 - a. If yes: has this had any ripple effect on program progress? Has ASC had to pull back on any activities?
- 28. The 2010-2012 PIP seems to include manufactured homes, not just mobile homes. Is this a change from previous years?
 - a. How, if at all, has this change affected the program?
- 29. Are there important differences between the two types of homes that change the measures or program approaches?
 - a. If yes: in what ways?
 - b. Are the different types of homes tracked or reported?

QA/QC

- 30. Can you describe for me the quality assurance process ASC uses? What is involved, what happens?
 - a. What portion of projects are inspected? Who does the inspections?
 - b. Are there particular measures or types of installations that seem to create the most problems?
- 31. [If not mentioned above] Several years ago, ASC had technicians automatically loading results from the Duct Test and Seal and the Air Conditioning Tune-ups into handheld dataloggers. The data were then uploaded to the Internet and processed and analyzed to verify the quality of measure implementation . Are these processes still in place? Has this changed at all?
- 32. It is our understanding that ASC moved from conducting its own customer satisfaction surveys to using an independent company to conduct the satisfaction surveys.
 - [IF YES]
 - a. Why did ASC choose this approach?
 - b. What are results of this change?

- c. [IF NOT ANSWERED] What has ASC learned from the satisfaction surveys?
33. What portion of customers are surveyed? How often? What do you look for in these surveys? Can we have a copy of the questions, just to help us understand what's being tracked?

Utility's Role

34. What type of support do you get from SDG&E?
35. Are there specific branding, marketing or outreach efforts conducted by SDG&E that support the program?
36. Is there anything the utility could do to improve the success of the program (that they are not currently doing)?
37. Is there a role for utility account representatives in this program?
- a. What could they do?
 - b. How might ASC work with them?
 - c. Does this happen?
38. Do Synergy staff working on the mobile home program work with other programs that reach a similar market segment?
- a. [IF YES] Which programs?
39. In your view, is Synergy is competing with other programs that reach a similar market segment?
- a. [IF YES] How does this impact program marketing and delivery?
40. Are you aware of any opportunities to co-brand with other programs that reach a similar market segment to increase participation in the program?
41. Are you aware of any opportunities to leverage other programs that reach a similar market segment to identify prospective program participants?
42. Are you aware of any additional measures that might be covered by the program?
- a. [Probe: caulking, weatherstripping, gaskets, thermostatic shower starters]
 - b. If any, what are the barriers to adding additional measures to the current suite of measures offered by the program?

General Questions

43. What is working best about the program?
44. What isn't working as well as you had hoped?

45. Are there changes or improvements you would recommend?

46. Are there any questions you would like us to explore with participating and non-participating park managers?

Thanks for your time; those are all of my questions.

**SDG&E K-12 Energy Efficiency Education Teachers
In-Depth Interview Guide**

Energy & You Teacher Interview Guide

Contact Name :

Interviewer:

Date:

Hi my name is _____, and I'm calling on behalf of the Energy & You curriculum offered by the San Diego County Office of Education to school districts served by SDG&E . SDG&E has hired my company, Research Into Action, to evaluate Energy & You. I'd like to talk with you about your experience with Energy & You.

First, let me confirm that you taught the Energy & You curriculum to your students.

If Yes: Is now a good time to talk for 15 to 20 minutes?

If No: Did you take the training? If Yes: I'm sorry you aren't eligible for the donation but do you have a few minutes to talk about the curriculum and the training? If No: Thank you for your time.

Thank you. Be assured your responses will be kept confidential. I'd like to record this interview so that I don't miss anything important. Is that OK with you?

Great.

Awareness - interest

1. How did you hear about the Energy & You curriculum ?
 - a. What made this curriculum interesting to you?
 - b. What grade do you teach? How many students?

Training

2. Did you attend a training workshop, take the on-line training, or get comfortable with the curriculum some other way?
3. What did you think of the training?
 - a. How would you assess the quality of the information?
 - b. What about the time required to complete the training?
 - c. Did the training provide you with what you needed to use the curriculum? [Probe: What could have improved the training]

Curriculum - Use

4. You said that you did not use the curriculum in your classroom...why is that?
 - a. Do you intend to? When?
 - b. I have more questions for teachers that have used the curriculum, but because you haven't I'll finish by asking if you have any other feedback for SDG&E about your experience so far with Energy & You?
4. Thinking about how the curriculum worked for you in the classroom...
 - a. What would you say worked well?

- b. What didn't work as well as you had hoped?

Experience with curriculum

- 5. How did you structure the curriculum for your class? I'm wondering, for example, whether you taught it in a single week, spread it out over months, used one module but not others...

How much flexibility do you have in deciding how to use E&Y lessons or materials?

Are there school or district requirements (restrictions)?

- 6. In your opinion, how engaging did the students find the material?

- a. Is there any portion students found most engaging?

- b. Did they complain about anything?

- c. Was it age appropriate?

- d. How well do you think the classroom activities worked?

- 7. Is there anything in the curriculum that you would change?

- 8. What kind of homework did you give them?

Other Effects

Energy conversations

Parents

Behaviors

9. Has the curriculum sparked any other conversations about energy use or conservation in the classroom?
10. Have you heard anything from parents about this curriculum?
11. Have you noticed any changes in your students' energy use behaviors, such as turning off lights or computers?

Website

12. Did you use the Energy & You website?

If Yes:

- a. What were you looking for?
- b. Did you find what you needed?
- c. Were any specific features particularly useful to you (e.g., tips, guidelines, links, access to training materials)?

Standards

13. How well do you think the Energy & You curriculum aligns with the California Teaching Standards for content?
 - a. For teaching methods?
 - b. For assessment?

Recommendations and future use

Usefulness

14. Would you repeat the curriculum in your classroom?

15. Would you recommend this curriculum to other teachers?

If not, why not?

16. Do you have any recommendations or other comments for us about your experience with this curriculum, any feedback you'd like to provide?

Thank you for your time. In recognition, we will send a \$50 donation to your school.

SDG&E K-12 Energy Efficiency Education Staff In-Depth Interview Guide

LIVINGWISE IMPLEMENTATION STAFF INTERVIEW GUIDE

Contact Name :

Interviewer:

Date:

This is ____ from Research Into Action. I'm calling as part of a process evaluation effort covering the LivingWise program for Southern California Gas.

Today, I want to both confirm my understanding of the program and learn about any changes or challenges for this program cycle.

1. Are you the best person to talk to about the LivingWise program being implemented now in SCG territory? [If not, get name/number.]
2. Some of my questions have to do with the curriculum content and teaching materials—is there someone at RAP with particular expertise on those issues that would be better to talk to about those type of questions? [Get name/number.]
3. First, can you give me a brief description of how the program works, just to confirm our understanding and make sure we know of any major changes. Please talk me through how teachers become aware, engaged, how materials are provided, how students typically interact with the material and what if any interactions you tend to have with teachers.....
4. How is the program going this program cycle?
 - a) Any unexpected challenges?

- b) Any issues working with the Gas Company?
 - c) What are the KPIs for this program? [There are installation targets for measures in the PIP, are there other important performance indicators?]
 - d) Are there specific strategies you employ to emphasize natural gas savings when working for gas utilities, or is the program approach basically the same, just a different mix of measures in the kits?
- 5. Have you made any operational changes or non-curriculum changes to LivingWise since 2008?
 - a. What? Why?
 - 6. Have you revised the 6th grade Teacher Guide, Student Guide, or Student Workbook since 2008?
 - a. What? Why?
 - 7. What is the role of the website in the overall program?
 - 8. Have you made any changes to the website?
 - i. What? Why?

I have read the '06-'08 process evaluation of the LivingWise program as implemented for SCE, so I have general familiarity with the program.

- 9. The '06-'08 process evaluation recommended re-positioning the Resource Action Get Wise about Energy and Water Efficiency Blog (<http://resourceactionblogspot.com>) more

prominently on the Getwise.org site. It also recommended updating or removing the GetLivingwise.org site and merging any useful information to an appropriate spot on either the GetWise or RAP sites.

- a. Did you make or consider making these changes? Why/Why not? [ENSURE CLARITY ON WHETHER “CONSIDERED” OR “MADE”] Who made that decision? (Probe: Did you run it by advisory board? Why/why not?) [IF “TOO EXPENSIVE,” ASK] How much would it cost?

10. Is the type and level of blog activity for LivingWise meeting your expectations?

- a. [If not clear] Can you characterize for me the type and level of activity?

11. Are there any enhancements to the program – either the curriculum or program operations – that you are actively considering at this time?

- i. What? Why?

Alignment of the LivingWise Curriculum with California State Educational Standards

The '06-'08 process evaluation reported that the energy and environmental education promoted by the LivingWise program was generally aligned with the specific California content standards for grade six science and mathematics.

Are you familiar with this evaluation? [Are you able to answer some questions about curriculum development and alignment with state standards, or can you tell me who I could talk to about these issues, or should I follow up with whomever mentioned above... they may want to try to answer questions, and refer only the ones they can't.]

12. What, if any, changes have you made to the curriculum or teacher materials since the 06-08 program cycle?

13. How do changes get made? Do they need advisory board approval? Can you describe for me how this might happen?

The 06-08 evaluation noted several opportunities to enhance LivingWise alignment with educational standards and best practices. I'd like to get your status update and feedback on these recommendations.

14. The first recommendation: Revising the Pre and Post Surveys to measure student knowledge with respect to key LivingWise concepts.

- a. Did you make or consider making this change? Why/Why not? ? [ENSURE CLARITY ON WHETHER "CONSIDERED" OR "MADE"] Who made that decision? (Probe: Did you run it by advisory board? Why/why not?) [IF "TOO EXPENSIVE," ASK] How much would it cost?

15. Simplifying the Workbook calculations and directing teachers in an approach to discussing the calculations during class time.

- a. Explore as above

16. Include in the Teacher Guide directions for assessing learning with respect to the state's science and math content standards.

a. Explore as above.

17. Integrate the activity kit and workbook activities into each lesson (instead of concentrating them in lesson six).

a. Explore as above.

18. Include in the Teacher Guide instructional strategies that engage the students in discussing essential questions and thinking about overarching ideas for which there may be multiple answers?

a. Explore as above.

19. Add teacher directions that clearly integrate the Activity Kit with the science content instruction.

a. Explore as above.

20. Incorporation of some of the content now positioned as optional.

a. Explore as above.

21. Make relatively minor changes to the lessons to better align with a few content standards? [IF ASKED] *Specifically, making minor edits to the content of Lesson Two to emphasize the following grade six science standards: Heat 3a, Energy in the Earth System 4a, and most importantly, Ecology 5 and 5e. The ecology standards should then be added to the correlation chart. Lesson Five could be enhanced by making minor edits to relate the topic of climate change to the curriculum standard Ecology 5e, which should then be added to the correlation chart. Lesson Six should have minor revisions to provide a more realistic*

estimate of the minimum class time required and internally consistent references to the time for home activities.

- a. Explore as above.

Diversity

22. The '06-'08 process evaluation also suggested the website might provide on-line Activity Kit information, savings estimates, and installation directions in multiple languages and diversifying the people and types of homes presented in the materials.

- a. Explore as above.

LivingWise Pre and Post Test

The '06-'08 process evaluation gave three recommendations for improved Pre and Post test.

23. Did you consider revising the questions on the Pre and Post test?

- a. Explore as above.

24. Publishing the Pre and Post tests on separate Scantron forms, rather than on the front and back of a single sheet?

- a. Explore as above.

25. Varying the question order from the Pre to the Post test, as well as the ordering of the responses, to reduce the possibility of students simply repeating answers from the Pre test onto the Post test.

- a. Explore as above.

LivingWise Status Reporting

26. What kind of program data do you provide to SCG?
27. Do you provide information comparing pre- and post- survey answers?
[if not, why not – considered? Possible?]
28. Do you track and report the proportion of students submitting survey data?
29. Do you track and report the proportion of teachers submitting program data?
30. Are the teacher and student surveys sufficient for estimating behavior and energy savings?
 - a. How does this work?

Opportunities for Improvement

And for my final questions:

31. What do you think are the program's strengths, or things that are working well?
32. And what do you think are the challenges now facing the program?
33. Any final comments?

Thank you for your time.

SDG&E Local Whole House Performance Contractors In-Depth Interview Guide

IDI Questions for RHA (QA/QC) Contacts: EUC

We conducted in-person interviews with contacts from SDG&E and SCG when this project kicked off in May, now that we are preparing to launch surveys with participants and contractors we wanted to take the time to understand the program from your perspective.

1. Can you describe for me your role in the EUC program for (SDG&E or SCG)?
2. What are your primary responsibilities?
3. What type of information do you report to (SDG&E or SCG)?
4. Can you give me a basic program update – how are things going from your perspective?

For QA/QC Firm Contacts:

5. Do you (yourself) conduct QC test-outs?

If yes: continue, else request contact info for inspector(s) and skip to Q8

6. Can you describe for me a typical QC visit? What happens first?
7. Who is present?
 - a. Do you interact with homeowners?
 - b. If yes: what type of questions or concerns have you heard?
8. Are there particular measures that seem to cause problems at test out?
9. How would you characterize the projects you see—in what ways are they similar?
 - c. What measures are the most popular?
 - d. Which do you see only rarely?
10. Have any issues emerged around using subcontractors – any challenges to QA/QC or things discovered at inspection that are attributed to non-BPI subs?
11. Do you (or your firm) have also QC basic package projects?
12. If so, how do these inspections differ from advanced path projects?
13. What if anything are you hearing from the contractors/raters in general about the program?
 - o Are they having any problems?
 - o What successes do they report?
14. What do you see as the program's strengths – what is working well?
15. What seems like it is not working so well?
16. Is there anything you're hoping to learn from this evaluation?

SDG&E Local Whole House Performance Implementers In-Depth Interview Guide

IDI Questions for CCSE and ICF [Contractor Recruitment/Training Firms]: EUC

We conducted in-person interviews with contacts from SDG&E and SCG when this project kicked off in May, now that we are preparing to launch surveys with participants and contractors we wanted to take the time to understand the program from your perspective.

1. Can you describe for me your role in the EUC program for (SDG&E or SCG)?
2. What are your primary responsibilities?
3. What type of information do you report to (SDG&E or SCG)?
4. Can you give me a basic program update – how are things going from your perspective?
5. How would you characterize EUC contractors – are they all General Contractors? Do you have HERS Raters active in the program?

For Contractor Recruitment Firm Contacts:

1. What types of contractor recruitment activities do you conduct?
2. What recruitment strategies seem to be working best?
3. What type of contact information do you collect?
 - a. Do you track who attends information sessions, who attends trainings, and who eventually completes their BPI certification?
 - b. Do you report these data to the program manager (utility staff)?
4. What portion would you estimate make it all the way to BPI certification?
 - a. And, if you track this, what portion of the BPI certified recruits become active in the EUC program?
5. In your opinion, why do contractors sign up for EUC?
6. What are they looking for?
7. Are their expectations for HP contracting realistic?
8. Do you hear any grumbling from the existing BPI contractors about the new comers to home performance?
9. What if anything are you hearing from the contractors/raters who are EUC trade allies?
 - o Are they having any problems?
 - o What successes do they report?
10. What do you see as the program's strengths – what is working well?
11. What seems like it is not working so well?
12. Is there anything you're hoping to learn from this evaluation?

SDG&E Local Whole House Performance Follow Up In-Depth Interview Guide

EUC program staff follow up interviews.

First, I want to check in with you about any major developments or new program wrinkles since we talked in early May.

1. Are there important new developments in the program I need to know about?
If not covered:
 - a. How's the program going right now?
 - b. What are participation levels looking like—about what you expected, more than you expected, less than you expected?
 - i. If more or less: why do you think that is?

Since we talked in May I've had a chance to dive a little deeper into the programs and I have a few follow up questions I'd like to check with you about—a few things I'm still unsure of...

2. First, is there a reservation system for EUC incentives (something about this in SCG interview, looks like yes)? How does this work?
3. Who usually (or always?) receives the EUC incentives – do they go to the homeowner, or does the contractor usually subtract the incentives and simply charge the homeowner less?
4. Are contractors required to use specific modeling software?
 - a. I heard *Energy Pro* and then heard *EQuest*...are either of these right?

SCG: does the gas company have any way of accepting stand alone projects (without Edison?)

Are there customers that can or have accessed LA County incentives and gas co incentives, but not Edison?

In May you mentioned that advanced path contractors had to have a "B" license, like in San Diego and that LA County was pushing back about that but that the Gas Co had said yes, you must have a "B" license... is this still the case?

How many contractors are participating now?

How, if at all, are Edison QI requirements affecting EUC participation for the gas company?

Do you think they will next year?

San Diego: In May you said something about SDG&E or CCSE had identified 900 potentially qualified contractors and about 32 were participating.

About how many are participating now?

And, did that 900 refer to those with “B” license (general contractors)? Have contractor requirements changed at all?

Are there complaints about the “B” requirement? What type of barrier do you think this is?

How (if at all) will QI potentially interact with EUC?

Are contractors allowed to use SDG&E (SCG) branding?

EUC branding?

How do those overlap?

How is the statewide web portal working? Do you hear any complaints about it? Can SDG&E modify content? Are EUC parts still sent to complete a HEES before they complete a test-in (or, maybe they never had to do it sequentially?) Does SDG&E have a sense for how many HEES parts are going to EUC? (portion?)

Can you walk me through a typical EUC job (assuming there is one) – first, the customer has to hear about EUC... do they hear from their contractors directly? What do they do then?

What about the pre-inspection? What is involved in that? Does RHA do this?

What about the post-inspection? What is involved in that?

**SDG&E HVAC Tune-up QI Participating Contractors
In-Depth Interview Guide**

SDG&E HVAC TUNE-UP – PARTICIPATING CONTRACTOR INTERVIEW GUIDE

FINAL - October 5, 2011

Interview Objectives:

1. Do these contractors participate in any other residential programs? If so, do these programs overlap?
2. Has participating in the program helped improve their business?
3. Are contractors changing their tune-up and installation practices as a result of education received through the program?
 - Are contractors receiving adequate training to change their installation/maintenance practices?
 - Are contractors receiving adequate promotional materials to successfully promote the program and recruit customers?
4. How is the quality tune-up and installation work ensured/verified?
5. Has the change in the role of VSPs affected contractors' experience with the program? If so, how?
6. Has the program missed any major market sectors? If so, what is the best way for the new ES Quality Install program to reach out to this group?
7. What suggestions do contractors have for increasing customer participation in this program or the new ES Quality Install program?
8. Are HVAC Tune-Up contractors likely to participate in the new ENERGY STAR Quality Install program? Why or why not?
9. Are contractors satisfied with their participation in the program?
10. What suggestions do contractors have for improving the program?

Interviewees:

- Fifteen contractors participating in the program by providing quality HVAC installation and/or quality tune-up services for which both the contractor and customer received incentives from SDG&E. These contacts will be taken from contact lists provided by Sempra.

RESPONDENT SCREENING

Hello, my name is _____ and I am calling from Energy Market Innovations. We are working with San Diego Gas & Electric to help evaluate the success of their HVAC Tune-Up Program, also known as AC Time. We are speaking with contractors who have participated in this program to get feedback on your experiences. [Provide description of program if needed:]

This program offers incentives to contractors and customers for the purchase and quality installation of new air conditioners, and air conditioner system tune-ups using advanced diagnostic methods. This includes refrigerant charge and airflow adjustment, condenser coil cleaning, and duct test and seal.

Are you the best person to speak with about this program? Do you remember helping one or more of your customers participate in this program?

If not: Is there another person available who may be more familiar with this program? (record name) _____

Is this a good time to talk with you about the program? I have a set of questions that should take approximately 30 minutes, depending upon your experiences and involvement with the program. All information you provide is confidential.

If cannot talk now, schedule a call back: _____ (time / date)

1. INTRODUCTION

1.1. To begin, how would you characterize the types of services/products that you generally provide for your customers or clients?

1.2. What is your target market, both by segment (residential, small commercial, large commercial) and by HVAC unit size (<5 tons, 5-10 tons, >10 tons)?

2. INVOLVEMENT WITH PROGRAM

2.1. Would you please give a brief overview of how your business has been involved with the SDG&E HVAC Tune-Up Program?

- Approximately how many years has your firm been working with this program?
- How did you first learn about the program? (Advertisements, brochures, utility staff, etc.)
- What first made you decide to participate in the program?
- Approximately how many projects has your firm applied for incentives from the SDG&E Program?

2.2. Of all the projects that have been incentivized by SDG&E, what proportion are new installations and what proportion have been tune-up services?

- What proportion of the tune-up services have been:
 - refrigerant charge and airflow (RCA) adjustment?
 - condenser coil cleaning?

- duct test and seal?

2.3. Do you participate in any other residential energy efficiency programs besides HVAC Tune-Up?

- [If yes]: Which ones? Is there any overlap across programs or are they fairly distinct in their offerings?
- Would you recommend combining any of these programs? Why or why not?

3. IMPACT ON BUSINESS

3.1. Has the HVAC Tune-Up Program impacted your business in any way?

- Would you say your business has increased, decreased, or remained the same since your company began participating in the program? Please explain.
- Does the program make it easier for you to sell your services or products? Please explain.
- What percentage of customers participate in the program? What percentage of sales calls correspond to the program? What percentage of revenue can be attributed to work for the program?
- Does the program impact the number of service calls you are able to make in a day? Does it present any personnel limitations?

4. TRAINING

4.1. Did you attend a workshop before joining the program?

- [If yes:] Who conducted the workshop (SDG&E or someone else)?
- What information was included in the workshop?
- Were you satisfied with the content of the workshop?
 - Did the training provide you with all the information you needed to understand the program and promote it to your customers?
- How would you improve the workshop?

4.2. Have you attended any training classes that provided a review of quality installation and tune-up practices?

- [If yes:] Who conducted the training (SDG&E or someone else)?
- What information was included in the training?
- Were you satisfied with the training?

- Did it include the information you needed to provide the type of services required by the Program (e.g., information on Program measures and how to use the technical platform used for diagnostic and tune-up tests)?
- How would you improve the training?

4.3. How have your installation practices changed since you began participating in the SDG&E HVAC Tune-Up Program?

- Have your practices changed for projects outside of those related to the SDG&E program?

4.4. How have your tune-up practices changed since you began participating in the Program?

- [Probe for changes to RCA, condenser coil cleaning, and duct test and seal]
- Have your practices changed for projects outside of those related to the SDG&E program?

5. VERIFICATION OF QUALITY PERFORMANCE

5.1. I am interested in learning about the verification process for quality tune-up work performed for the Program. Could you please describe this process for me?

- Are you satisfied with this process?
- What would you improve, if anything?

5.2. Are there any other ways that the quality of work performed for the program is monitored or tracked? Please explain.

- Does your company have a procedure for monitoring the quality of work performed by specific technicians?

6. ROLE OF KEMA AND VSPs

6.1. In what capacity have you interfaced with the VSPs for this Program (i.e., Enalysis, FDI [Field Diagnostics Inc], or Verified, Inc)? Please describe.

- 6.2. Have you been satisfied with the service provided by the VSPs? Why/why not?**
- 6.3. In what capacity have you interfaced with KEMA (e.g., submitted invoices for incentives to KEMA, received training from KEMA, had onsite QA/QC performed by KEMA)? Please describe.**
- 6.4. Have you been satisfied with the performance of KEMA? Why/why not?**
- 6.5. My understanding is that the role of VSPs has recently changed so that they no longer engage in training outside of how the verification tool is used, and they are no longer responsible for onsite QA/QC inspections. Is this correct?**
- Has the change impacted your experience with the program in any way, positively or negatively?

7. MARKETING/OUTREACH

- 7.1. I am interested in learning how you market this program with your customers. Could you please describe this process for me?**
- 7.2. Have you received promotional materials to help you promote the program and recruit customers?**
- [If yes:] Have these materials helped you promote the program?
 - Has marketing and outreach for the program been effective overall? [If not:] Please explain the nature of the challenges.
 - What marketing strategies appear to be the most effective?
 - How can SDG&E help to improve the marketing of the program to customers?
- 7.3. Are you able to demonstrate the benefits of quality installation and advanced diagnostic methods (energy savings, increased uptime, unit longevity, etc.) to customers before, during, or after the service visit?**
- How do you show this value? What tools or materials do you employ?
 - Do you give customers a ballpark percentage for the energy savings expected from quality installation or quality tune-up practices (e.g. 10%)? [If so:] Where does this number come from?

8. NEW ENERGY STAR QUALITY INSTALL PROGRAM

- 8.1. Are you familiar with the plans for the new ENERGY STAR Quality Install Program, which is set to replace the current HVAC Tune-Up Program?**
- 8.2. [If aware:] Are you planning to participate in the new program? Why/why not?**
- 8.3. [If aware:] Do you believe customers will want to participate in the new program? Why/why not?**
- 8.4. [If aware:] What suggestions do you have for increasing the likelihood that customers will participate in the new program?**
- 8.5. [If aware:] Are there certain types of residential customers you think are not being reached by the HVAC Tune-Up Program that the new program could try to reach?**
- [If yes]: What do you see as the best way to reach out to these customers?
- 8.6. [Unaware:] The new program will be based on ACCA 5 standards, and contractors will be required to attend program-specific QI/QM training in order to participate in the program. Substantial incentives for equipment and QI will offset a substantial percentage of product costs to customers. (Details are unknown at this time, as the program has not yet launched.)**

Is this (the new ENERGY STAR Program) a program that you would be interested in participating in?

- Why/why not?
- Are there particular aspects that would encourage your participation? Discourage participation?

9. PROGRAM STRENGTHS/AREAS FOR IMPROVEMENT

- 9.1. Overall, how satisfied are you with the HVAC Tune-Up Program?**

Would you say you are...

Very satisfied,
Somewhat satisfied,
Neither satisfied nor dissatisfied,
Somewhat dissatisfied, or
Very dissatisfied?

- Please explain why you gave that rating.

9.2. What do you see as the greatest strengths of the program? What is working well?

9.3. What suggestions would you offer for improving the program? What would you most like to change?

9.4. What recommendations do you have for the new ENERGY STAR Quality Installation Program for the future?

9.5. Without a utility program in place, will you continue to engage in quality installation and quality maintenance services?

- Will you offer standard, non-QI/QM (quality installation/quality maintenance), levels of service?
- What percentage of customers do you expect will select QI/QM vs. standard service?

10. END

10.1. For comparison purposes, about how many employees does your company have...

- At this location?
- In California?

10.2. And how many HVAC systems does your firm service each year?

- How many new installations does your firm perform each year?

10.3. Do you have anything to add? Is there anything I've forgotten to ask you about?

Thank you very much for taking the time in assisting us with this evaluation. Your contribution is a very important part of the process. If I have any additional questions, do you mind if I give you a quick call?

SDG&E HVAC Tune-up QI Non-participating Contractors In-Depth Interview Guide

SDG&E HVAC TUNE-UP – NONPARTICIPATING CONTRACTOR INTERVIEW GUIDE

FINAL - October 5, 2011

Interview Objectives:

1. Are nonparticipating contractors aware of the program?
2. What are the best channels to use to reach nonparticipating contractors?
3. Of those that are aware, why have they not participated?
4. Are contractors likely to participate in the new ES Quality Install program? Why or why not?
5. What suggestions do contractors have for ways SDG&E could help them market the program and recruit customers to participate?

Interviewees:

- Fifteen contractors not participating in the program since 2010 (i.e., they have not provided quality HVAC installation and/or quality tune-up services for which both the contractor and customer received incentives from SDG&E). These contacts will be taken from contact lists provided by Semptra.

RESPONDENT SCREENING

Hello, my name is _____ and I am calling from Energy Market Innovations. I am calling about the HVAC Tune-Up Program, also known as AC Time, which is offered by San Diego Gas & Electric. We are speaking with firms who provide HVAC installation and maintenance services in the San Diego area. We would like to understand your experiences and perspectives in order to help SDG&E improve the programs they offer to firms like yours.

My records indicate that your firm has not participated in this program since January 2010. Is that correct? [If yes, continue. If no, clarify nature of participation and schedule Participant interview, if appropriate.]

Is this a good time to talk? I have a set of questions that should take approximately 10 to 15 minutes. All information you provide is confidential.

If cannot talk now, schedule a call back: _____ (time / date)

1. INTRODUCTION

- 1.1. To begin, how would you characterize the types of services/products that you generally provide for your customers or clients?**

- 1.2. What is your target market, both by segment (residential, small commercial, large commercial) and by HVAC unit size (<5 tons, 5-10 tons, >10 tons)?**

2. BARRIERS TO PARTICIPATION

- 2.1. Are you familiar with the HVAC Tune-Up, or AC Time program offered by SDG&E?**

- [If aware:] What is your understanding of how the program works?
- [If unaware:] The HVAC Tune-Up Program offers incentives to contractors and customers for the purchase and quality installation of new air conditioners, and air conditioner system tune-ups using advanced diagnostic methods. This includes refrigerant charge and airflow adjustment, condenser coil cleaning, and duct test and seal.

- 2.2. Have you ever participated in any HVAC tune-up programs offered by SDG&E in the past (prior to 2010)?**

- [If yes:] Please describe your experiences with the program.
 - Has this influenced your decision to not participate in the current program?
 - Why is your firm no longer participating?
 - What about the program worked well?
 - What were the major challenges?
 - What recommendations for improvement would you have?
- [If never participated:] Why has your firm never participated in the program?
 - What, if anything, would influence you to participate in the program?

3. MARKETING

- 3.1. [If aware of the HVAC Tune-Up Program:] How did you first learn about the HVAC Tune-Up Program? (Advertisements, brochures, utility staff, etc.)**

- Did this provide you with enough information or the type of information you needed up front?
- [If no:] How would you improve the information you reviewed about the program?

- 3.2. What is the best way to get information out to firms like yours – how would you recommend SDG&E keep HVAC firms informed about this program?**

4. NEW ENERGY STAR QUALITY INSTALL PROGRAM

- 4.1. Are you aware of the plans for the new ENERGY STAR Quality Install Program, which is set to replace the current HVAC Tune-Up Program?**

- [If Aware]: How did you find out about the program? (e.g., SDG&E representative, advertisements, brochures, etc.)
 - Are you planning to participate in the new program? Why/why not?
- [If Not Aware:] The new program will be based on ACCA 5 standards, and contractors will be required to attend program-specific QI/QM training in order to participate in the program. Substantial incentives for equipment and QI will offset a substantial percentage of product costs to customers. (Details are unknown at this time, as the program has not yet launched.)
 - Is this (the new ENERGY STAR Program) a program that you would be interested in participating in?
 - Why/why not?
 - Are there particular aspects that would encourage your participation? Discourage participation?

- 4.2. Do you believe customers will want to participate in the new program? Why/why not?**

- What level of incentives do you think will be necessary to influence customer participation?
- Thinking about the marginal cost of quality installation compared to standard installation, what percentage of the additional cost do you think the Program would need to cover to influence customer participation?

- 4.3. What suggestions do you have for increasing the likelihood that customers will participate in the new program?**

- 4.4. In what ways could SDG&E help firms like yours recruit customers to participate in the new program?**

5. PROGRAM STRENGTHS/AREAS FOR IMPROVEMENT

- 5.1. What do you see as the greatest strengths of the current program?
What is working well?**
- 5.2. What suggestions would you offer for improving the current program?
What would you most like to change?**
- 5.3. What recommendations do you have for the new ENERGY STAR
Quality Installation Program for the future?**

6. END

- 6.1. For comparison purposes, about how many employees does your
company have...**
- At this location?
 - In California?
- 6.2. And how many HVAC systems does your firm service each year?**
- How many new installations does your firm perform each year?
- 6.3. Do you have anything to add? Is there anything I've forgotten to ask
you about?**

Thank you very much for taking the time in assisting us with this evaluation. Your contribution is a very important part of the process. If I have any additional questions, do you mind if I give you a quick call?

SDG&E Appliance Recycling Retailers In-Depth Interview Guide

SDG&E Appliance Recycling – Appliance Retailer Interview Guide

FINAL - October 5, 2011

Interview Objectives:

- Are nonparticipating appliance retailers aware of the program?
- Do partnering retailers market the program to customers?
- What do retailers normally do with appliances that they collect outside of the program?

Interviewees:

Five corporate- or management- level staff at retail chains that sell appliances in the SDG&E service territory. The focus will be on retailers that are trained to promote the Appliance Recycling Program. These could either be partnering directly with the AR Program, or they could be participating in the HEER Program and trained to promote appliance recycling to customers purchasing new appliances. Interviews may also be conducted with non-participating retailers to understand the appliance market from their perspective and how the program may be impacting their business.

RESPONDENT SCREENER

[If retailer is working with HEER or is partnering with the Appliance Recycling Program:]

Hello, my name is _____ and I am calling from Energy Market Innovations. We are working with San Diego Gas & Electric to help evaluate their Appliance Recycling Program. I understand that your company is... [choose appropriate option below]

- working with their Home Energy Efficiency Rebate, or HEER Program, and you may have heard about the Appliance Recycling Program.
- now partnering with the Appliance Recycling Program.

[If no contact provided, ask for store manager or appliance department manager – someone who is familiar with the program and involved with decision making for the program.]

Are you the best person to speak with about this program?

If not: Is there another person available who may be more familiar with the Appliance Recycling program? (record name)

If no other person, continue interview with current person (their opinions and knowledge on the market in general are still valuable).

Is this a good time to talk with you about the program? I have a set of questions that should take approximately 15 minutes. All information you provide is confidential.

If cannot talk now, schedule a call back: _____ (time / date)

[Nonparticipating retailers:]

Hello, I am calling from Energy Market Innovations. We are working with San Diego Gas & Electric, to provide them with feedback that will help them improve their Appliance Recycling program. May I please speak with the owner or a manager of your company? We are conducting 15-minute in-depth telephone interviews to gain a better understanding of the appliance recycling market in and around San Diego. Any information you provide will be strictly confidential and will only be used to improve the utility's program in the future.

Is now a good time to talk, or is there a better time when I can call back?

(record name of respondent) _____

If cannot talk now, schedule a call back: _____ (time / date)

1. AWARENESS/PROMOTION OF APPLIANCE RECYCLING PROGRAM [FOR RETAILERS PARTICIPATING IN HEER OR PARTNERING WITH THE APPLIANCE RECYCLING PROGRAM]

1.1. I'm curious to understand how your company is involved in the SDG&E Appliance Recycling Program – can you explain the nature of your company's involvement?

- Promoting the program?
- Do retail staff help customers enroll for the program? Or do customers go home and enroll for the program on their own?

1.2. Are there any promotional materials for the Appliance Recycling Program that are displayed in your stores?

- How effective are the in-store promotional materials at influencing customer participation?

1.3. Are sales staff at [Retailer Name] provided training on details of the Appliance Recycling program?

- What type of training?
- Who provides training?
- How often does training occur?
- Who receives the training and when?

1.4. To your knowledge, do retail staff generally mention the Appliance

Recycling Program to customers that are shopping for a new refrigerator, freezer, or room air conditioner? Please explain.

- What percentage of time would you say retail staff mention the Appliance Recycling Program when a customer is shopping for a new refrigerator, freezer, or room air conditioner?

1.5. Does the incentive available from the Appliance Recycling Program impact your company in any way?

- Benefits? Disadvantages?
- Does the incentive for Appliance Recycling influence customers to purchase more expensive or more efficient appliances?
- Please explain.

1.6. Are retail staff encouraged or incentivized to promote the recycling program? Please explain.

2. AWARENESS AND INFLUENCE OF APPLIANCE RECYCLING PROGRAM [FOR NONPARTICIPATING RETAILERS]

2.1. To start, are you familiar with SDG&E's Appliance Recycling Program?

- [If yes:] What is your understanding of how the program works?
- How did you become aware of the program?

2.2. Is this a program that your sales staff are likely to mention to customers?

- [If yes:] What are the reasons that staff mention the program to your customers? Is it primarily a customer service, or does it help sell new appliances?
- What percentage of time would you say retail staff mention the Appliance Recycling Program when a customer is shopping for a new refrigerator, freezer, or room air conditioner?
- [If no:] Why not?

2.3. (Other than what we may have already discussed) Has the Appliance Recycling Program impacted your business in any way? Please explain.

3. APPLIANCE RECYCLING MARKET [ALL]

3.1. Does your company offer pickup of old appliances to customers who purchase new appliances?

- Which appliances? Refrigerators? Freezers? Room air conditioners?

3.2. Can you please explain the type of service your company offers?

- Do you charge a fee for this service?
- How is the process for appliance pickup coordinated with the customer?

3.3. Does your company have any requirements for the old appliance being picked up (e.g., size limitations, easily accessible)?

- Does the appliance have to be working or in a certain condition when picked up?

3.4. How long does it typically take to pick up the appliance after a customer requests the service?

- Do you offer same-day delivery and pickup of the old appliance?
 - What percentage of customers receive same-day pick-up?

3.5. What does your company do with an appliance after picking it up?

- [If sold/ given to another party:] Do you know what they do with it? Please explain.
- Do you know the ultimate destination of the appliance? (Is it refurbished, resold, sold for scrap, taken abroad to be sold, etc.)

3.6. Do customers know what your company does with the appliance?

3.7. Why do you think customers decide to have your company pick up their appliance, rather than using another service?

3.8. If a customer does not use your pickup service, what are the other options a customer has if they want to get rid of an old appliance?

3.9. Who do you view as the major players who are responsible for picking up used appliances?

4. END [ALL]

4.1. For comparison purposes, about how many employees does your company have...

- At this location?
- In California?

4.2. Are there any issues you can think of concerning appliance recycling that we have not yet discussed?

Thank you very much for taking the time in assisting us with this evaluation. Your contribution is a very important part of the process. If I have any additional questions, do you mind if I give you a quick call?

Appendix D – Maps

Appendix D consists of the GIS maps created to spatially describe the SDG&E customer population, including its demographics, energy usage, and participation in SDG&E energy efficiency programs. A spatial examination of the utility's customer account database allowed us to explain how SDG&E energy efficient program assistance is distributed across its customers. This analysis helps us identify any areas in the service territory that are potentially being underserved or missed altogether by the utility's residential programs.

Below is a short explanation to help the reader interpret the meaning of each map:

Figure D-1. Total SDG&E Electric Accounts per Square Mile, 2011, shows the distribution of electric customer accounts per square mile within SDG&E's service territory. The pattern follows the normal population patterns, with more accounts located within San Diego and the northern communities near the coast. Note that low income areas (as determined by US Census data and defined as household income at 150 percent of the Federal Poverty guidelines) are marked with a cross hatch in the map.

Figure D-2. Low Income SDG&E Electric Accounts per Square Mile, 2011, shows the distribution of low income electric accounts per square mile, with low income accounts identified in the SDG&E CIS customer data. The pattern of low income electric accounts matches general population and total electric account distributions. The same low income areas found in Figure D-1 are marked with a cross hatch.

Figure D-3. Low Income SDG&E Gas Accounts per Square Mile, 2011, shows the distribution of low income gas accounts, identified by SDG&E, per square mile. The pattern of low income gas accounts matches general population and total electric account distributions.

Figure D-4. Average Annual kWh Usage for Low Income Accounts, 2011, shows the average electricity usage per low income accounts within the service territory for only those accounts identified by SDG&E as low income. From this map it is apparent that there are some high usage low income households, particularly in the eastern part of the service territory that presumably have a high air conditioning load.

Figure D-5. Average Residential Rebates (\$) per Household with Poverty Concentration, 2011, shows the distribution of SDG&E program rebate dollars to all residential households, with the distribution broken down by income quintile. This map is consistent with Map 3 in Section 3.4 showing that the wealthier households are receiving a greater share of the rebate dollars from SDG&E. Again, this does not include rebate dollars provided through the Lighting Programs, HEER, or BCE where participation is not tracked for individual customers. Also note that this map does not reflect the share the rebate is covering of the measure cost (recall

from Map 3 that the wealthier households are also spending more of their own money on the program measures). When the fraction of total cost covered by the measure is considered (as shown in Map 3), the wealthier homes are provided with a similar amount of assistance from the SDG&E programs as the other income groups.

Figure D-6. Average Low Income Measure Costs (\$) Across All Households with Poverty Concentration, 2011, shows the distribution of low income program assistance across all households within the service territory. For the low income program, the entire measure cost is paid for by SDG&E, as compared with the other residential programs where only a fraction of the measure cost is covered by the rebate. This map is consistent with the information shown in Map 4 in Section 3.4, where the lower income areas are receiving a greater share of program assistance compared to wealthier Census Tracts.

Figure D-7. Average Residential Rebates Plus Low Income Measure Costs (\$) per Household, 2011, shows the distribution of the residential program rebate dollars plus low income program assistance. For the low income program, the entire measure cost is paid for by SDG&E, as compared with the other residential programs where only a fraction of the measure cost is covered by the rebate. This map is consistent with the information shown in Map 4 in Section 3.4, where the lower income areas are receiving a greater share of rebate dollars from the SDG&E even when both the low income and Residential Program rebates are considered.

Figure D-8. Average Low Income Measure Costs (\$) per Low Income Household, 2011, shows the same low income program assistance received by households identified as low income by SDG&E. Low income areas identified by the US Census are marked with a cross hatch. This map indicates that SDG&E has been successful at targeting low income areas in south San Diego with high levels of program assistance relative to wealthier areas.

Figure D-9. Average Multi-Family Program Rebates (\$) per Multi-Family Household, 2011, shows rebates associated with the Multi-Family Program that were received by multi-family households within the service territory. Areas with a high concentration of multi-family households, as identified by the US Census, are marked with a cross hatch. Note that some of the multi-family areas are associated with university student areas and may not be specifically targeted by the Multi-Family Program.

Figure D-1. Total SDG&E Electric Accounts per Square Mile, 2011

Total Electric Accounts per Square Mile, 2011

By 2000 Census Block Group

0 20 Miles

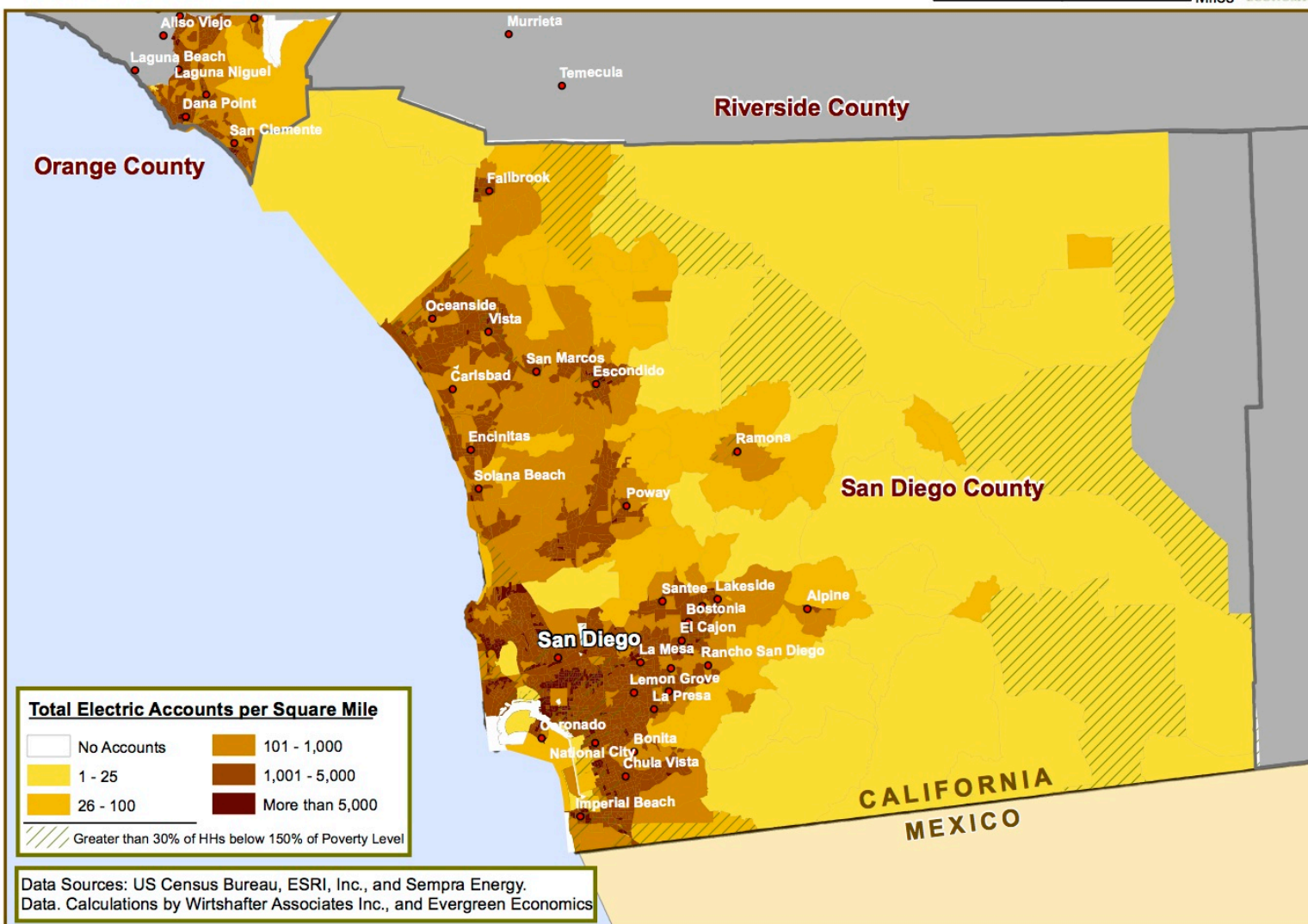


Figure D-2. Low Income SDG&E Electric Accounts per Square Mile, 2011

Total Low Income Electric Accounts per Square Mile, 2011

By 2000 Census Block Group

0 20 Miles

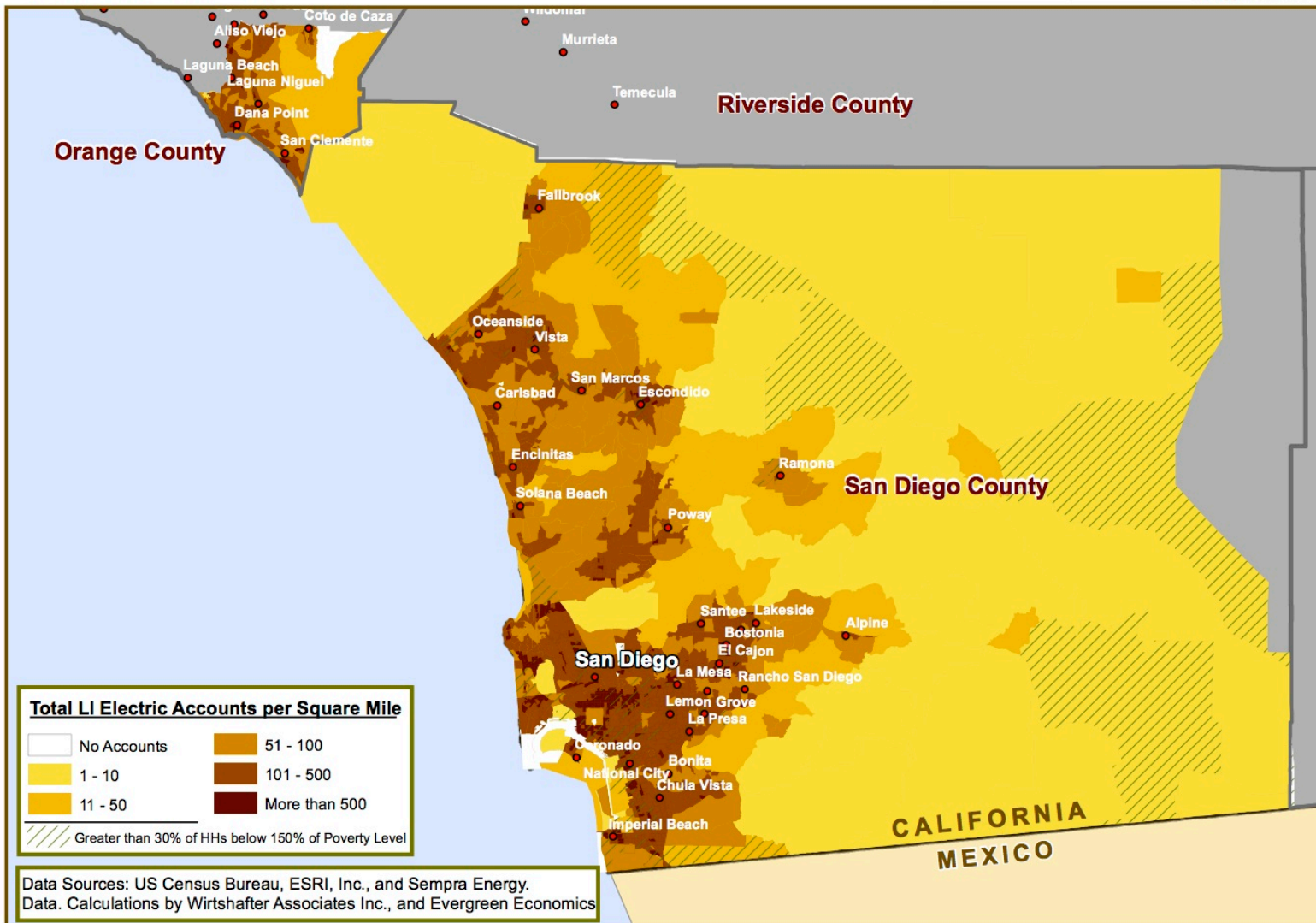


Figure D-3. Low Income SDG&E Gas Accounts per Square Mile, 2011

Total Low Income Gas Accounts per Square Mile, 2011

By 2000 Census Block Group

0 20 Miles

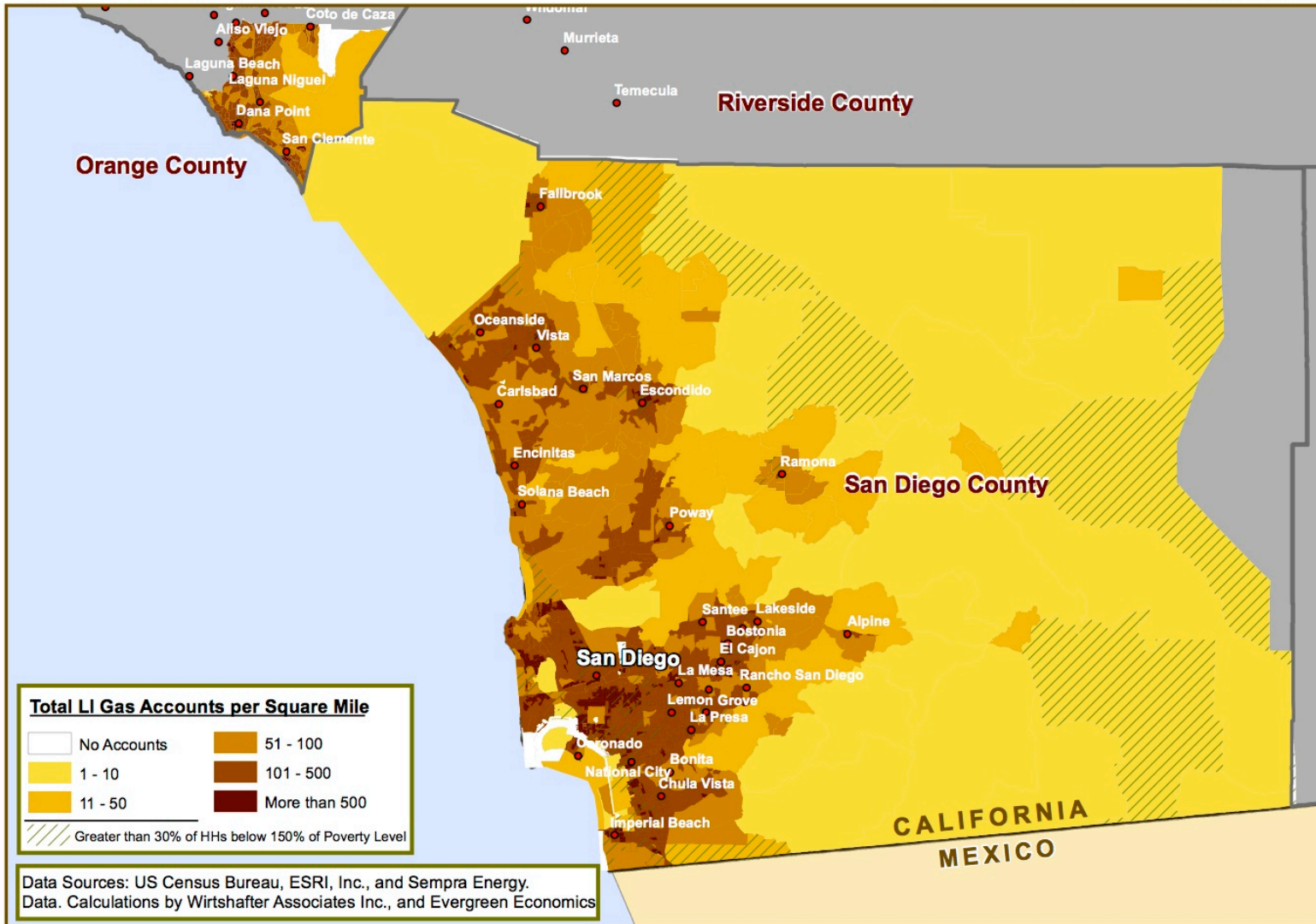


Figure D-5. Average Residential Rebates (\$) per Household with Poverty Concentration, 2011
Average Residential Rebates (\$) per Household, 2011

By 2000 Census Block Group

0 20 Miles

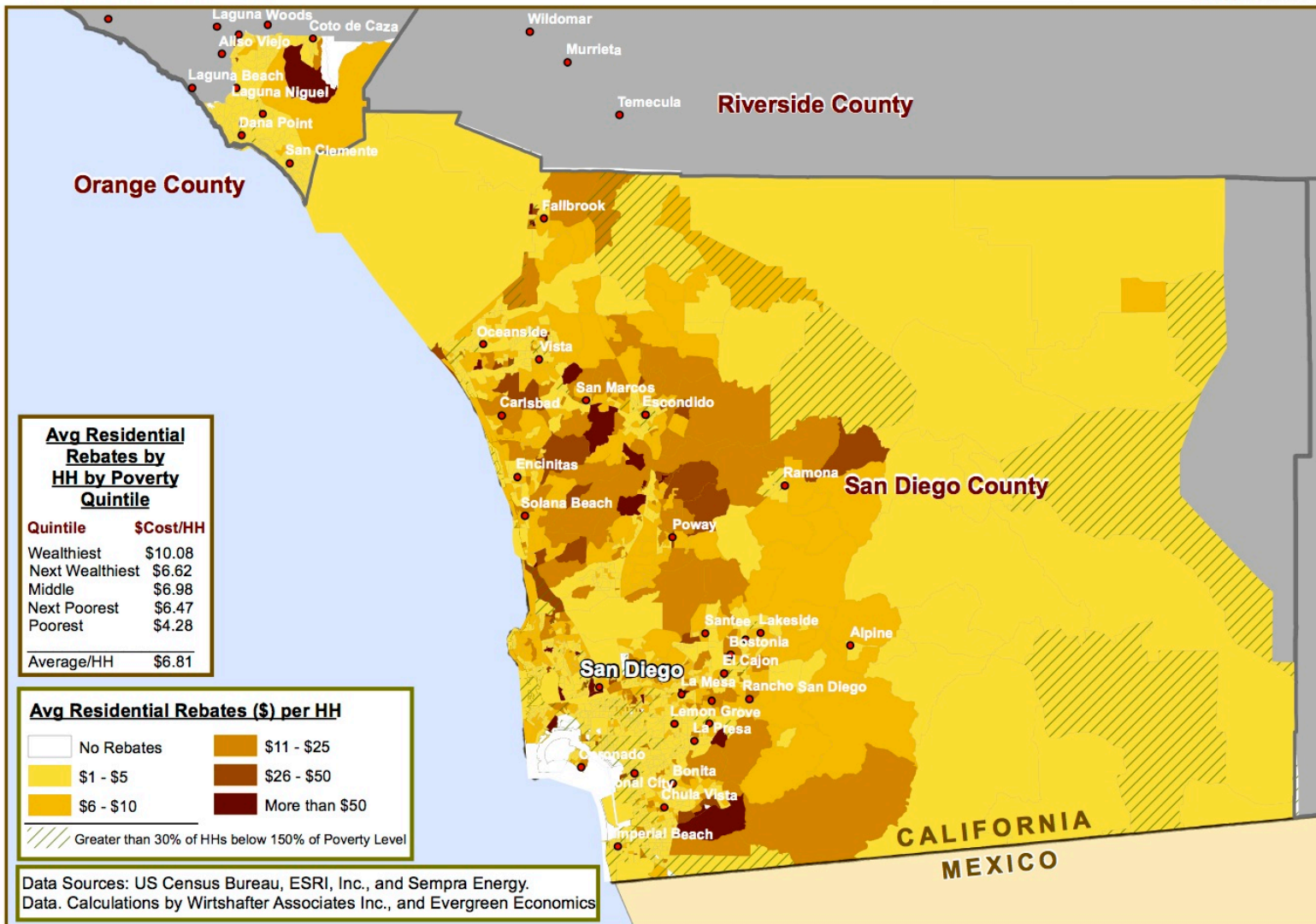


Figure D-6. Average Low Income Measure Costs (\$) Across All Households with Poverty Concentration, 2011

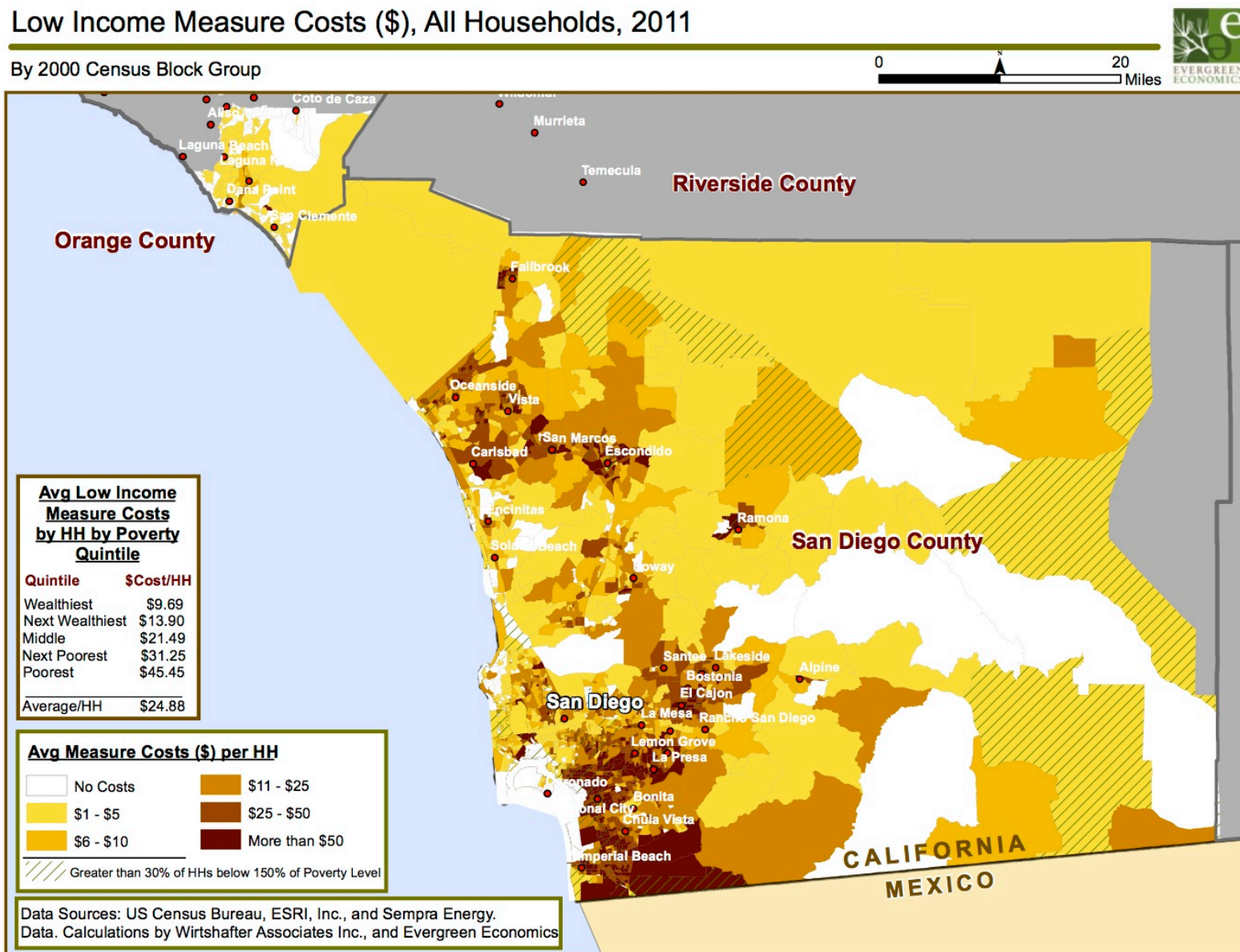


Figure D-7. Average Residential Rebates Plus Low Income Measure Costs (\$) per Household, 2011
Average Residential Rebates + Low Income Measure Costs (\$) per Household, 2011

By 2000 Census Block Group

0 20 Miles

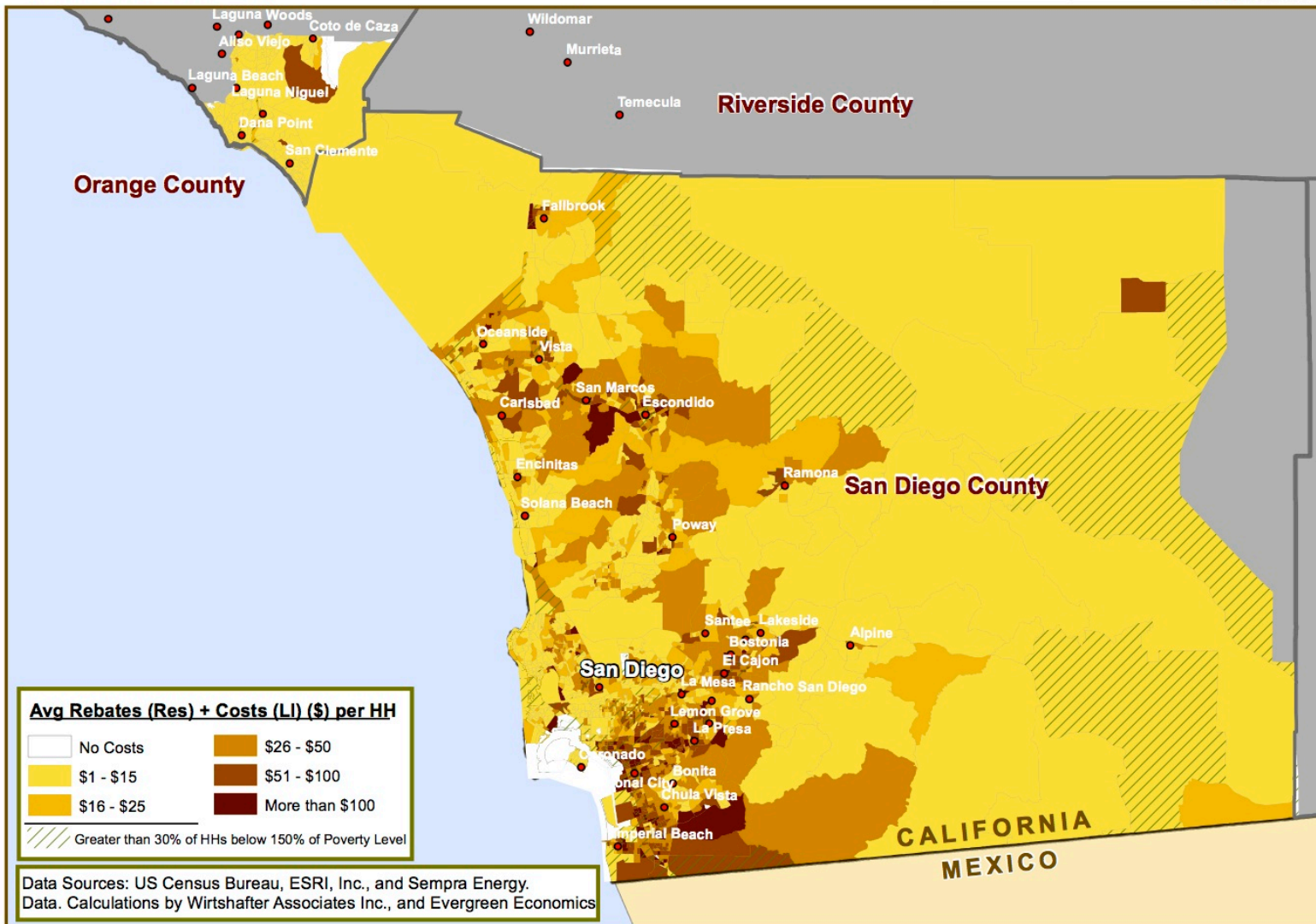


Figure D-8. Average Low Income Measure Costs (\$) per Low Income Household, 2011

Average Low Income Measure Costs (\$) per Low Income Household (Gas & Electric Accounts), 2011

By 2000 Census Block Group

0 20 Miles

