

# SoCalGas 2010-2011 Residential Program Process Evaluation

Final Report Appendix

March 30, 2012



research/into/action<sup>inc</sup>

*Wirtshafter Associates*  
*John Stevenson*  
*CIC Research*

## **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. Evaluabilty Assessment

# **SoCalGas Final Research Plan**





# **Residential Process Evaluation- Final Research Plan**

SCG 2010-2012 Efficiency Programs

August 16, 2011

Prepared for Southern  
California Gas Company

# Table of Contents

---

<b>1. Introduction .....</b>	<b>1</b>
<b>2. Researchable Issues and Evaluation Priority .....</b>	<b>3</b>
OVERARCHING RESEARCH ISSUES .....	3
PROGRAM-SPECIFIC RESEARCH ISSUES .....	4
<i>Local Whole House Performance and Prescriptive Whole House Retrofit</i> .....	4
<i>Multi-Family Programs (Rebates, On Demand Efficiency, Home Tune-Up, Solar Pool Heating, Direct Therm Savings)</i> .....	5
<i>Home Energy Efficiency Rebates</i> .....	5
<i>Home Energy Efficiency Surveys (HEES)</i> .....	5
<i>Energy Star Quality Install</i> .....	5
<i>HERS Rater Training Advancement</i> .....	5
<i>LivingWise™</i> .....	6
<i>CLEO and Pace Programs</i> .....	6
<i>Manufactured Mobile Home</i> .....	6
<i>Upstream High Efficiency Gas Water Heater</i> .....	6
EVALUATION PRIORITY .....	6
<b>3. Evaluation Approach .....</b>	<b>8</b>
PROGRAM PERFORMANCE METRICS / BEST PRACTICES .....	8
GEOGRAPHIC INFORMATION ANALYSIS .....	9
<b>4. Data Collection.....</b>	<b>11</b>
PHONE SURVEYS .....	11
IN-DEPTH INTERVIEWS .....	12
<b>5. Portfolio Analysis .....</b>	<b>14</b>
<b>6. Analysis, Reporting, and Synthesis.....</b>	<b>15</b>
<b>7. Scope of Work by Task.....</b>	<b>16</b>
TASK 1: CONDUCT PROJECT INITIATION MEETING .....	16
TASK 2: CONDUCT AN EVALUABILITY ASSESSMENT.....	16
TASK 3: DEVELOP A FINAL RESEARCH PLAN .....	17
TASK 4: DATA COLLECTION AND ANALYSIS .....	17
<i>Task 4A: Data Collection Instrument Development</i> .....	17
<i>Task 4B: Data Collection</i> .....	18
<i>Task 4C: Data Analysis</i> .....	18
TASK 5: PREPARE REPORTS AND DATABASE OF RESULTS .....	19
TASK 6: PRESENTATION OF RESULTS .....	20
TASK 7: PROJECT MANAGEMENT AND PROGRESS REPORTING.....	20
TASK 8 (OPTIONAL): ADDITIONAL RESEARCH .....	21
TIMELINE BY TASK.....	21
EVALUATION BUDGET .....	21



## 1. Introduction

This research plan covers all the 2010-2012 SCG 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: SCG and Residential Programs and Budgets**

SoCal Gas	Total 2010-2012 Program Cycle Budget	Total Administrative Cost	Total Marketing and Outreach	Total Direct Implementation
Local Whole Home Performance	\$5,656,350	\$407,745	\$369,000	\$4,879,606
Multifamily EE Rebates	\$8,467,674	\$771,897	\$506,934	\$7,188,844
Home Efficiency Rebates	\$34,675,022	\$1,292,497	\$989,587	\$32,392,938
Home Efficiency Energy Survey	\$2,378,112	\$336,795	\$496,317	\$1,545,000
Prescriptive Whole House Retrofit	\$8,000,000	\$694,456	\$523,677	\$6,781,868
Residential Energy Star Quality Instep	\$87,168	\$12,443	\$5,682	\$69,043
On Demand Efficiency	\$4,318,773	\$110,855	\$7,372	\$4,200,546
HERS Rater Training Advancement	\$1,715,220	\$85,596	\$92,592	\$1,537,032
Multifamily Home TuneUp	\$3,758,670	\$107,936	\$7,372	\$3,643,362
Multifamily Solar Pool Heating	\$2,415,308	\$107,936	\$7,372	\$2,300,000
Community Language Effic Outreach	\$998,517	\$349,328	\$255,251	\$393,938
Multifamily Direct Therm Savings	\$4,115,607	\$108,236	\$7,372	\$4,000,000
LivingWise™	\$2,745,417	\$448,046	\$307,372	\$1,989,999
Manufactured Mobile Home	\$8,675,926	\$451,304	\$307,372	\$7,917,250
Upstream High Efficiency Gas Water Heater	\$2,648,716	\$121,344	\$7,372	\$2,520,000
PACE Energy Savings Project	\$3,675,117	\$772,644	\$1,058,948	\$1,843,526
<b>Total SoCal Gas</b>	<b>\$94,331,597</b>	<b>\$6,179,057</b>	<b>\$3,883,272</b>	<b>\$83,202,951</b>

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](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?
- 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.

### **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 Programs (Rebates, On Demand Efficiency, Home Tune-Up, Solar Pool Heating, Direct Therm Savings)**

- 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?
- What issues have occurred (if any) getting the new MF programs implemented?

## **Home Energy Efficiency Rebates**

- Is the rebate process for tankless water heaters effective?
- 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 SCG 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?

## **HERS Rater Training Advancement**

- How effective is the HERS training, do attendees feel the training is worthwhile? Do they use the information from the training in practice?
- How is the new online training working, have the early implementation issues been worked out? Do trainees prefer online to in-person training? Is there any difference in perceived value between the online and in-person training content?
- Is demand for training greater than the program anticipated?
- Is there a need for more training than program is going to be able to provide?



- How do contractors respond to the quality of the trainers efforts now that they completed the training?

### **LivingWise™**

- Are the teacher and student surveys sufficient for estimating behavior or savings?
- What are the teacher experiences with the curriculum: accessibility, usability, relevance, supporting equipment?
- Any recommendations to improve the curriculum?

### **CLEO and Pace Programs**

- Is participation in the CLEO and Pace outreach events leading to energy efficiency activities?
- Are there significant segments of the target population that are being missed by these programs, either ethnically or geographically?

### **Manufactured Mobile Home**

- 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?

### **Upstream High Efficiency Gas Water Heater**

- Do the current incentive levels motivate suppliers to stock and advertise the qualifying equipment?
- Do the current incentive levels motivate plumbers/contractors to purchase the qualifying equipment?
- Is the program tracking data effective in supporting the program objectives?

### **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**

<b>SCG Program</b>	<b>Priority</b>
Home Energy Efficiency Rebates	High
Prescriptive Whole House Retrofit	High
Local Whole Home Performance	High
Multi-Family Energy Efficiency Rebates	Medium
Multi-Family Home Tune-Up	Medium
Manufactured Mobile Home	Medium
On Demand Efficiency	Medium
Community Language Efficiency Outreach	Medium
PACE Energy Savings Project	Medium
HERS Rater Training Advancement	Medium
Multi-Family Solar Pool Heating	Medium
Upstream High Efficiency Gas Water Heater	Medium
Multifamily Direct Therm Savings	Medium / Low
LivingWise™	Medium / Low
Home Energy Efficiency Energy Survey	Low
Residential Energy Star Quality Install	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: SCG Program PPMs and Data Collection Methods**

Statewide Program	Program Performance Metric	Reporting	Proposed PPM Data Source
Residential Sector	1. By targeted populations (homeowners, renters, 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
<i>HomeEnergyEfficiency Survey (HEES)</i>	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
<i>HomeEnergyEfficiency Rebate</i>	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
<i>Multi-Family Energy Efficiency Rebate (MFEER)</i>	1. Percentage of non-lighting measure savings as compared to the total EE measures adopted in the MFEER program. (KWh for single-commodity IOU and BTU for mixed-commodity IOU.)	Annually	Review of program tracking data
<i>Whole House Retrofit</i>	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 Ex-ante savings per home as reported (average kWh, therms, kW) for both performance and prescriptive programs by climate zone	Annually	
	4. Average and range of evaluated 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 IOU	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 to the participation data. This approach pioneered by Dr. Wirtshafter aggregates participant data at the block-group level. The block-group is the smallest census grouping for which detailed housing, income, poverty, and other economic data are assembled. 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**

<b>SCG Program</b>	<b>Target Group</b>	<b>Survey Type</b>	<b>Sample Size</b>
Multi-Family Energy Efficiency Rebates	Building Owners (participants)	Phone	50
	Building Owners (non-participants)	Phone	50
Home Energy Efficiency Rebates	Participants	Phone	350
Prescriptive Whole House Retrofit	Participants	Phone	15
	Contractors	Phone	15
On Demand Efficiency	MF Property Owners (participants)	Phone	30
Community Language Efficiency Outreach	Customers in targeted areas	Phone	100
Multi-Family Direct Therm Savings	MF Property Owners (participants)	Phone	30
Manufactured Mobile Home	Mobile park managers (participants)	Phone	15
	Mobile park managers (non-participants)	Phone	15
PACE Energy Savings Project	Hispanic customers in targeted areas	Phone	100
Manufactured Mobile Home	Mobile Home Owner (participants, if contact data available)	Phone	100
<b>Total Surveys</b>			<b>870</b>

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 SDG&E process evaluation, and some sample points from that survey will be used for the SCG evaluation as appropriate.

**Table 5: General Population Survey**

<b>SCG Program</b>	<b>Screen</b>	<b>Sample Size</b>
Multi-Family Energy Efficiency Rebates / Home Tune Up	Multi-family tenants	75
Home Energy Efficiency Rebates	Appliance purchasers (participants and non-participants)	100
General Awareness	Non-participants	200
<b>Total Surveys</b>		<b>375</b>

## 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 SCG programs. As shown in the table, up to 170 in-depth interviews are planned across a range of program staff, contractors, and other market actors.

**Table 6: Program Familiarization / In-depth Interview Samples**

<b>SCG Program</b>	<b>Program Staff Interviews</b>	<b>Contractor Interviews</b>	<b>Other Interviews</b>	<b>Ride Alongs (days)</b>	<b>Shopping /Events (days)</b>
Local Whole Home Performance/ Prescriptive Whole House Retrofit	3	10			
Multi-Family Energy Efficiency Rebates	2		Property Owners (10)	1	
Home Energy Efficiency Rebates	2	15	Retailers (10)		
Home Energy Efficiency Energy Survey	2				
Residential Energy Star Quality Installation	1				
HERS Rater Training Advancement	2		HERS raters (20)		2
Multi-Family Home Tune-Up	2		Property Owners (10)		
Multi-Family Solar Pool Heating	2	5	Property Owners (10)		
Community Language Efficiency Outreach	2				
Multi-Family Direct Therm Savings	2	5			
LivingWise™	2		Teachers (15)		
Manufactured Mobile Home	8	1		1	
Upstream High Efficiency Gas Water Heater	2	15	Wholesales/ Distributors (5)	1	
PACE Energy Savings Project	2				
<b>Totals</b>	<b>34</b>	<b>51</b>	<b>80</b>	<b>3</b>	<b>2</b>



## 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 with SCG in Downey, CA, 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 SCG 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 SCG 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 SCG 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 SCG 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 SCG Project Manager for review. We will incorporate comments and suggestions approved by the SCG 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 SCG 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 SCG 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 SCG 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 SCG 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 \$286,150 and covers all tasks described above.



# **SoCalGas Evaluability Assessment**



2525 NE Mason St.  
Portland OR 97211  
Tel 503-894-8676  
Fax 503-536-6637

[www.evergreenecon.com](http://www.evergreenecon.com)

## **MEMORANDUM**

---

July 3, 2011

**To:** Rob Rubin, SDG&E

**From:** Steve Grover

**Re:** Evaluability Assessments of the SCG Residential Energy Efficiency Programs

---

This memo presents our evaluability assessment conducted as part of the process evaluation of SCG's 2010-12 Residential Energy Efficiency Programs. Included with this memo is a separate Excel file *SCG 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:

- Local Whole House Retrofit (SCG3600)
- Prescriptive Whole House Retrofit (SCG3618)
- SW Home Efficiency Rebates (SCG3616)
- SW Home Efficiency Surveys (SCG3617)
- 3P Comprehensive Mobile Home (SCG3671)
- LivingWise (SDGE3173)
- Multifamily EE Rebates (SCG3615)
- Residential Energy Star Quality Inspection (SCG3651)
- On Demand Efficiency (SCG3664)
- HERS Rater Training Advancement (SCG3665)
- Multifamily Home Tune-Up (SCG3666)
- Multifamily Solar Pool Heating (SCG3667)
- Community Language Efficiency Outreach (SCG3668)
- Multifamily Direct Therm Savings (SCG3669)
- Upstream High Efficiency Gas Water Heating (SCG3674)
- PACE Energy Savings Project (SCG3677)



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 SCG 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 SCG 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) and the educational program (LivingWise) that have low expected participation and/or 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 *SCG Eval Assessment 070311*.

## **SCG Residential Program Evaluability Assessment Summary**

- **SW Prescriptive Whole House Retrofit (SCG3618).** 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 SCG. 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 (SCG3600).** See discussion for SW Prescriptive Whole House Retrofit.
- **SW Multi-Family (SCG3615).** 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. SCG 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 (SCG3616).** 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, consequently these participants will need to be identified through a general population survey. Level of evaluability is high.
- **SW Home Efficiency Surveys (SCG3617).** 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.
- **3P Manufactured Mobile Home (3671).** This program is an established statewide program implemented by a 3<sup>rd</sup> 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.
- **LivingWise (SCG3670).** The PIP contains information on the PT/LM but does not include PPMs as it is a 3<sup>rd</sup> party program. The evaluation team lacks participant data for students receiving the 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. 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.

- **Residential Energy Star Quality Inspection (SCG3651).** This program has a PTLM and PPMs are included in the PIP. However, the program is at the very early planning stages and it is unclear what progress will be made during the evaluation timeframe. Given the planning stage, some coordination with the same SDG&E program may be useful here; the evaluation may be able to facilitate some transfer of information based on the SDG&E evaluation results.
- **On Demand Efficiency (SCG3664).** This program has a PIP that discusses program theory, but there is no LM within the PIP. It is also unclear if specific PPMs will be tracked for this program. Customer contact information is tracked by the program and should be available for the evaluation. Evaluability is moderate.
- **HERS Rater Training Advancement (SCG3665).** This is a mature program with a detailed PIP that discusses program activities and general program theory. However, there is no LM in the PIP and it is unclear if PPMs are assigned to this program. The program tracks customer information and there are multiple training sessions planned through several channels (in-person and online). Evaluability for this program is high.
- **Multifamily Home Tune-Up (SCG3666).** This is a relatively new program and the PIP discusses general program activities and PT but does not include a LM. Program data are tracked through SMART. The evaluability rating for this program is moderate.
- **Multifamily Solar Pool Heating (SCG3667).** This is a new program with only two participants so far. There is no LM in the PIP but there is a discussion of program activities and general underlying PT. The evaluability of this program is moderate to low given its infancy. A market study might be more useful here.
- **Community Language Efficiency Outreach (SCG3668).** This is an established program with a LM included in the PIP. There is a discussion of PT in the PIP, but it is not related to the LM. Program participants are tracked through event attendee sign up sheets, given this method the participation data may not be complete. Evaluability of this program is moderate.
- **Multifamily Direct Therm Savings (SCG3669).** See comments for Multi-family Home Tune-up (SCG3666).
- **Upstream High Efficiency Gas Water Heater (SCG3674).** This is an established program with 9 wholesale/distributor participants. There is a PIP that discusses program activities and some underlying program theory. The PIP contains a diagram labeled as a LM, but it is not an actual logic model. It does not appear that plumber/contractor or end user data are tracked. The evaluability of



this program is low given the difficulty in identifying contractors and end users that will be affected by the program activities.

- **PACE Energy Savings Project (SCG3677).** The PACE program has a similar structure to the CLEO program discussed above. The PIP contains the LM and PT and the PPMs tracked. Program participants are mostly tracked through attendees lists from events and may not be complete. Evaluability of this program is moderate.

Assessment Criteria	Local Whole Home Performance (SCG3600)	Multifamily EE Rebates (SCG3615)	Home Efficiency Rebates (SCG3616)
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)	Cynthia (Cyd) Swaim (PM)	Hugo Gonzales (PM)	Gilda Ankele, Harvey Bringas (PM), OSS (3rd party does training) Customer data = Vanessa Amith. Savings data = Eric Kirchoff. Retailer training & visits = John Fields at OSS.
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	Yes, statement of work for OSS Contracted
How many staff and where are they located?	Only Cynthia, at SCG. She pulls in other staff as needed.	1 plus rebate processing and QA/QC	DK
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, planned activities described	Described in PIP, not LM Yes	Yes Yes	Yes Yes
expected effects documented	Discussion of MT indicators in PIP	Yes	Yes
5 Is there a marketing plan?	Unclear, coordinating with Edison and LA Co	Yes	We have a 2010 SF Rebates communications plan
How will potential participants be recruited once identified?	Participating contractors	Contractor does sales calls	POS retailers are recruited to participate. Customers are recruited via print media and in-store.
Is there a way to track participants?	Yes, however some will be Edison participants too	Yes	Yes, although customer contact data for POS rebates is limited. Should have customer contact info for non-POS rebates that involve an application.
Is there a way to track nonparticipants?	Unclear/unlikely	Hard to identify contacts especially smaller ones	DK, OSS might track NP retailers
6 Application forms available	Yes	Yes	Yes
7 Does this program have training activities?	Yes	No	Yes
Is there a way to track training participants	Yes	No	Yes
Is there a way to identify near and partial training participants	DK	No	DK
8 Program savings data available	Yes: modeled	Yes	Yes
9 Are PPMs measured?	Yes, but may be occurring at Edison	Yes	Yes
10 Are PPMs tracked (e.g., entered in shared database)?	SMART, CRM, but also "everything is tracked manually by Edison"	DK	Yes, but Eval team thinks they are calculated internally
11 Additional metrics for monitoring progress towards goals are tracked	Unclear	DK	DK
12 Stage of development (just launched, medium mature, end, etc.)	Early, but there are participants	Mature	Mature
13 How are data describing program being tracked?	Unclear, occurring through SMART but also by Edison	Rebates tracked	CRM. Applications are entered by SCG staff. POS sales data are tracked by the Mfrs and Retailers. For the most part, there is no customer data for POS -- there is a small amount of POS customer contact data obtained through a participant contest entry form.
14 Evaluability Rating	Moderate	High	High
Comment	Like SDG&E, new program so lots of lessons learned and pressure on staff. The contractor recruitment process is important and we will need to survey training recipients and those that expressed interest but did not enroll (assuming we can get those lists). The gas company must coordinate with Edison, LADWP and other munis to allocate incentives for therm savings. We may need to consider removing Edison participants and focusing on the participants in muni territories. Consider survey of the 12 munis to find out how they are interacting with the gas company. Program is likely understaffed.	This program is evaluable. Long established program--statewide.	Might need to focus on appliances, which has more customer contact info. Limited customer contact info for POS rebates.

Assessment Criteria	Home Efficiency Energy Survey (SCG3617)	Prescriptive Whole House Retrofit (SCG3618)	Residential Energy Star Quality Inspection (SCG3651)	On Demand Efficiency (SCG3664)
1 Identify primary users of the evaluation and their needs	Program managers, management	Program managed in tandem with Local Whole Home Performance	Program managers, management	Program manager, management, contractor
2 Identify key gatekeepers to information (which staff member is in charge of data? - customer data, savings data - may be more than one person)	Michelle Cook (PM), Krista Partridge (KEMA)	See comments under Local Whole Home Performance	Carlos Ruiz (PM)-only person now	Alice Ormsbee Beltran (PM)
3 Is there a description of the staff that will operate the program?	No		No	No
Is the staff internal or contracted staff?	Contracted		NA	Contractor: Bennington Group
How many staff and where are they located?	DK		NA	DK
4 Program logic model complete; includes:	Yes		Yes	No LM in PIP, but theory discussed
Set up: Need for the program or service, Mission documented, goals and obj's -- short term, midterm, longterm, context, planned activities described	Yes		Yes	Yes
expected effects documented	Yes		Yes	Yes
5 Is there a marketing plan?	Yes		No	Yes
How will potential participants be recruited once identified?	Statewide marketing, phone, online and mail in surveys in multiple languages		HVAC contractors will be recruited and obligated to attend training. Contractors and SCG will recruit customers.	Contractor does sales calls
Is there a way to track participants?	Yes		NA	Yes
Is there a way to track nonparticipants?	DK, but database likely contains info on respondents that started but did not finish survey.		NA	NA
6 Application forms available	NA		No	Yes
7 Does this program have training activities?	No		Yes, but have not begun yet	NA
Is there a way to track training participants	NA		NA	NA
Is there a way to identify near and partial training participants	NA		NA	NA
8 Program savings data available	NA		NA	DK
9 Are PPMs measured?	Yes		PPMs are outlined in the PIP	DK
10 Are PPMs tracked (e.g., entered in shared database)?	DK		PPMs are outlined in the PIP	DK
11 Additional metrics for monitoring progress towards goals are tracked	DK		No not yet	Yes 10% monitoring 100 customer satisfaction survey
12 Stage of development (just launched, medium mature, end, etc.)	Medium mature (mature program with new elements)		Design	New
13 How are data describing program being tracked?	Contractor maintains database.		NA - Program has not begun	SMART
14 Evaluability Rating	High	Moderate	Low	Moderate
Comment	Program staff and responsibilities are clearly defined, but existing survey is being replaced with an improved version at the end of 2011.		Evaluation priority for this program is low as it is still in infancy of planning stage. Perhaps some research with the QI program on the SDG&E side could help inform planning.	Program is evaluable



Assessment Criteria	HERS Rater Training Advancement (SCG3665)	Multifamily Home Tune-Up (SCG3666)	Multifamily Solar Pool Heating (SCG3667)	Community Language Effic Outreach (SCG3668)
1 Identify primary users of the evaluation and their needs	Program manager, management, contractor	Program managers, management, Honeywell, Ecos	Program manager, management, contractor	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)	CalCerts - Michael Bashan CHEERS - Doug Beevin BMI - Don Whipple	Susan Apeles (PM); Lorna Leigh Ross (Honeywell); Leslie Mestman (Ecos)	Liz Nemeth (former PM), Karen Mar (new PM), Energex Energy Controls (Contractor)	Alice Buczek (PM)
3 Is there a description of the staff that will operate the program? Is the staff internal or contracted staff?	Yes	Yes	Yes	Yes
How many staff and where are they located?	DK	DK	DK	8 in Diamond Bar CA
4 Program logic model complete; includes:  Set up: Need for the program or service, Mission documented, goals and obj's -- short term, midterm, longterm, context, planned activities described expected effects documented	No	No. A LM diagram is included in PIP but is actually a program process diagram	No	LM in PIP, PT generally discussed but not related directly to LM
5 Is there a marketing plan?	Yes	Yes	Yes	Yes
How will potential participants be recruited once identified?	Existing HERS raters	Ecos and Honeywell do recruiting	Contractor does sales calls	Main goal is solely marketing
Is there a way to track participants?	Yes	Yes	Yes, 2 so far	By surveys completed
Is there a way to track nonparticipants?	Probably, nonparts are HERS raters that don't attend training	No	No, contractor may have some names	DK
6 Application forms available	NA	NA	DK	NA
7 Does this program have training activities?  Is there a way to track training participants Is there a way to identify near and partial training participants	Yes	NA	NA	Has Efficiency Outreach Seminars
8 Program savings data available	NA	Yes, on SMART	Yes	Track number of surveys
9 Are PPMs measured?	No, KPIs are used and are currently being revised based on lessons learned to date.	No	No	DK
10 Are PPMs tracked (e.g., entered in shared database)?	DK	No	No	No
11 Additional metrics for monitoring progress towards goals are tracked	DK	No	No	No
12 Stage of development (just launched, medium mature, end, etc.)	Mature	Medium	New	Medium-mature
13 How are data describing program being tracked?	Training attendees tracked	SMART	Participants only	Sign up sheets for program events, likely not tracking all event participants
14 Evaluability Rating	Moderate	Moderate	Moderate / low	Moderate
Comment	Program is evaluable, but LMPT not developed	Program is evaluable	Can be evaluated but seems like market study is what is needed	Crosses over and works with SCE customers too

Assessment Criteria	Multifamily Direct Therm Savings (SCG3669)	LivingWise (SCG3670)	Manufactured Mobile Home (SCG3671)	Upstream High Efficiency Gas Water Heater (SCG3674)
1 Identify primary users of the evaluation and their needs	Program managed in tandem with 3P-Res03-Multifamily Home Tune-Up	Program managers, management, RAP	Program managers, managers, Synergy	Program managers, managers, implementer
2 Identify key gatekeepers to information (which staff member is in charge of data? - customer data, savings data - may be more than one person)	See comments under Multifamily Home Tune-Up	Susan Apeles (PM); Mike Gross and Joe Thrasher (RAP)	Liz Nemeth/Susan Apeles (PM); Doug (Synergy)	Alice Beltran (PM), Matrix (implementer)
3 Is there a description of the staff that will operate the program?		Yes	Yes	Yes
Is the staff internal or contracted staff?		Contracted	Contracted	Contracted
How many staff and where are they located?		Two people with RAP and all the teachers at the schools	8 key staff, plus two or three crews	DK
4 Program logic model complete; includes:		Yes	Yes	LM Diagram in PIP, but not really a true LM
Set up: Need for the program or service, Mission documented, goals and obj's -- short term, midterm, longterm, context, planned activities described		Yes	Yes in PIP, no diagram however	Not clearly stated
expected effects documented		Yes	Yes	Yes
5 Is there a marketing plan?		DK	DK	No Yes
How will potential participants be recruited once identified?		Participants are the teachers who influence students goal is to get 40,000 kits out into student families	DK did not ask, but Doug described their approach	Brochures and one-on-one meetings to recruit wholesalers.
Is there a way to track participants?		RAP tracks them	Yes - Synergy has a new database	Yes, although no customer data. Participants = 9 wholesalers. We don't know who the purchasers (plumbers) or end users are.
Is there a way to track nonparticipants?		No	Yes for the parks overall, not really for endusers	DK
6 Application forms available		NA	None needed	NA
7 Does this program have training activities?		No	Yes in that they train their own staff	No
Is there a way to track training participants		NA	Yes	NA
Is there a way to identify near and partial training participants		NA	NA	NA
8 Program savings data available		uploaded to SMART	SMART uploads	No
9 Are PPMs measured?		NA - KPIs	NO KPIs are used	No, KPIs are used
10 Are PPMs tracked (e.g., entered in shared database)?		NA	NA	No, KPIs are used
11 Additional metrics for monitoring progress towards goals are tracked		KPIs are identified in Contract, we don't have the contract	KPIs are in the contract, we do not have the contract	KPIs are tracked and outlined in the contract with Matrix
12 Stage of development (just launched, medium mature, end, etc.)		Medium	Mature program	Mature
13 How are data describing program being tracked?		RAP tracks and can provide the name of the teacher, the grade, the school and the number of students	Synergy has a new database they feel is working very well.	Sales data from Wholesalers is in SMART, but Matrix is late in posting data
14 Evaluability Rating		Moderate / low	High	Low
Comment		RAP has good information but access to students and parents is very difficult. Many teachers use these materials after testing, which means the end of semesters which will not coincide with the evaluation period. So in general it is likely that we will need to focus on teachers who have multiple years of experience rather than new teachers to the program. It is highly unlikely that we can reach students and parents, even in the general population survey, the population of students targeted is 6th grade and that is a small percent of all students given less than 35% of the households in LA county have children under 18 (2000 Census)	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.	Will be difficult to identify end-users or even purchasers (plumbers) for this upstream program.
		Focus should be on teachers perceptions, perhaps reviewing questions on post card follow-up to make sure it is providing good information for impact and asking teachers about efforts to get participation from parents	It might make sense to do end use surveys - which we could not do last time, and conduct interviews with mobile home park contacts and then see if there are any other mobile home programs and see how they operate. The main challenge seems to be gaining confidence of mobile park managers.	

## **Appendix B – Phone Survey Instruments**

---

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

1. Community Language Efficiency Outreach
2. General Population Survey
3. Home Energy Efficiency Rebates
4. Comprehensive Mobile Home
5. Multi-Family Programs-Participants
6. Multi-Family Programs-Non-Participants
7. PACE Energy Savings Project

**SoCalGas Community Language Efficiency Outreach  
(CLEO) Program Participant Survey Instrument  
(English Language)**

## **SoCal Gas Community Language Efficiency Outreach (CLEO) Program Participant Survey Instrument (English Language)**

Hello, my name is \_\_\_\_\_ and I am calling on behalf of The Southern California Gas Company. May I please speak with [CONTACT NAME]?

We are talking to Gas Company customers who participated in the CLEO Energy Savings Project (Community Language Efficiency Outreach) to find out how well this program is working and how it could be improved. Our records show that you [participated in an energy efficiency training class in your own language/visited an energy efficiency booth at a community event]. Is this correct? (PROGRAMMER: INSERT PARTICIPATION METHOD FROM SAMPLE INTO SCRIPT FOR VERIFICATION.)

1. Yes (CONTINUE)
2. No (ASK IF SOMEONE ELSE IN THE HOUSEHOLD DID. IF SO, REPEAT INTRO BEFORE CONTINUING. IF NOT, THANK & TERMINATE)

The survey takes about 10 minutes. Is this a good time? (ARRANGE CB IF NECESSARY)

That's great. This call may be monitored or recorded for quality purposes. First, I'm going to ask you a few questions about your experience with the CLEO program.

**Q1. I would like to know how you found out that you could learn about Gas Company programs in your own language. I'll read a list and I'd like you to just tell me yes or no if you heard about the CLEO program from any of these sources. How about . . . Did you get information about the CLEO program from there? (READ LIST; CHECK ALL THAT APPLY)**

1. Newspaper advertising or article
2. Radio show announcement or advertising
3. Brochure
4. Community Event Information Booth
5. Community cultural organization (SPECIFY) \_\_\_\_\_
6. From friend or family member
7. Church or Faith-based organization presentation or announcement
8. Adult daycare presentation or announcement
9. Adult learning center announcement
10. Information from children's school
11. Senior citizen center announcement or notice
12. Other community organization (SPECIFY): \_\_\_\_\_
13. Print announcement in store
14. On Internet
15. Other (SPECIFY:) \_\_\_\_\_
88. Don't Know

**Q2. Before I called you today, did you know that The Gas Company offers rebates for customers that install energy efficient equipment such as gas furnaces, high efficiency clothes washers, dishwashers, water heaters and insulation?**

1. Yes
2. No
88. Don't Know

**(IF Q1 = 4 (COMMUNITY EVENT INFORMATION BOOTH), THEN SAY:)**

**Now I'd like to ask you about some of the things the CLEO Program does to help households save energy. (NOW GO TO Q3a)**

**Now I'd like to ask you about some of the things the CLEO Program does to help households save energy. The first are energy efficiency information booths. These are booths at community events where Gas Company customers can get information about energy efficiency, take short surveys about their home energy use, and enter contests to receive prizes.**

**Q3. Have you visited any of these energy efficiency information booths?**

**Q3a. You told me earlier you visited one of these information booths, is that correct?**

1. Yes (GO TO Q5)
2. No
88. Don't Know

**Q4. Why haven't you visited any of the booths? (DO NOT READ CHOICES; CHECK ALL THAT APPLY)**

1. Do not attend community events
2. Have not seen any at events
3. Did not see any staff at booth
4. Not interested in information
5. Was a long line
6. Did not have time
7. Had attended an energy class or seminar
8. Already knew about energy efficiency
9. Other [SPECIFY:] \_\_\_\_\_
88. Don't Know

(SKIP TO INTRO BEFORE "(IF FROM TRAINING CLASS SAMPLE, AUTOCODE Q9=YES & SKIP TO Q10)

**Q9Q5. Which of the following are reasons you visited the energy efficiency booth?**

(READ CHOICES. CHECK ALL THAT APPLY.)

1. To learn about ways to save energy
2. To learn about Gas Company programs
3. Because friends/family did
4. Someone recommended it to me
5. To get free prizes or equipment
6. You were curious
7. Other (SPECIFY:) \_\_\_\_\_
88. Don't Know

**Q6. Did you read or take home any of the energy efficiency information available at the booth?**

1. Yes (IF FROM TRAINING CLASS SAMPLE, AUTOCODE Q9 = YES & SKIP TO Q10)
2. No
88. Don't Know (IF FROM TRAINING CLASS SAMPLE, AUTOCODE Q9=YES & SKIP

TO Q10)

**Q9**

**Q7. How useful was the information about energy efficiency benefits and strategies? Would you say it was....?**

- 5. Extremely useful
- 4. Very useful
- 3. Somewhat useful
- 2. Slightly useful
- 1. Not at all useful
- 88. Don't Know

**Q8. Did the information help you understand how to use the utility rebate programs?**

- 1. Yes
- 2. No
- 88. Don't Know

**Another activity of the CLEO Program is free energy efficiency training classes. These are classes that take place at schools, religious organizations and community centers that cover topics such as energy saving benefits and strategies and available Gas Company programs.**

**(IF FROM TRAINING CLASS SAMPLE, AUTOCODE Q9=YES & SKIP TO Q10)**

**Q9. Were you aware of these energy efficiency training classes before I called you today?**

- 1. Yes
- 2. No (GO TO Q20)
- 88. Don't Know (GO TO Q20)

**Q10. How did you become aware of the energy efficiency classes? (DO NOT READ CHOICES. CHECK ALL THAT APPLY)**

- 1. Energy booth at community event
- 2. Brochure
- 3. Radio advertising
- 4. Newspaper advertising
- 5. CLEO Staff told me
- 6. Ad/display in store
- 7. Web advertising
- 8. Adult learning center
- 9. Information from children's school
- 10. Church or Faith-based organization presentation
- 11. Adult daycare presentation
- 12. Senior citizen center
- 13. Community cultural organization
- 14. Other community organization
- 15. From friend or family member
- 16. Notice in my apartment building
- 17. From apartment building manager
- 18. Other (SPECIFY:)

---
- 88. Don't Know

**(IF FROM TRAINING CLASS SAMPLE, ASK Q11A INSTEAD OF Q11)**

**Q11. Did you attend an energy efficiency training class?**

**Q11A. You attended one of these CLEO energy efficiency training classes, isn't that correct?**

1. Yes (GO TO Q13)
2. No
88. Don't Know

**Q12. Why did you decide not to go to a class? [DO NOT READ CHOICES. CHECK ALL THAT APPLY]**

1. Was not aware of class
2. Not interested in information
3. Am too busy/no time
4. Preferred class was full
5. Had no transportation
6. Offered at bad time for me
7. Not convenient (PROBE FOR BETTER ANSWER. ASK:) How was it not convenient?
8. Already knew about energy efficiency
9. Visited community booth instead
10. Class not in my language
11. Others (SPECIFY:)  
\_\_\_\_\_
88. Don't Know

(GO TO Q20)

**Q13. Which of these were reasons you went to the energy efficiency class? How about . . . [READ ALL. ALLOW MULTIPLE RESPONSES]**

1. To learn about ways to save energy
2. To learn about Gas Company programs
3. Because friends/family did
4. Someone recommended it to me
5. To get free prizes or equipment
6. You were curious
7. Other (SPECIFY:)  
\_\_\_\_\_
88. Don't Know

**Q14. How useful was the information about energy efficiency benefits and strategies that you received in the class? Would you say it was....**

5. Extremely useful (SKIP TO Q16)
4. Very useful (SKIP TO Q16)
3. Somewhat useful
2. Slightly useful
1. Not at all useful
88. Don't Know (SKIP TO Q16)

**Q15. Why do you say that?**

[RECORD RESPONSE VERBATIM] \_\_\_\_\_  
88. Don't Know



**Q16. How well did the class help you understand how to use the utility rebate programs? Would you say it helped you....**

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

**Q17. Why do you say that?**

[RECORD RESPONSE VERBATIM] \_\_\_\_\_  
88. Don't Know

**Q18. Is there anything about the class you would change? [DO NOT READ/ MULTIPLE RESPONSES]**

- 1. No
- 2. Offer on a different day of week [PROBE FOR DETAILS] \_\_\_\_\_
- 3. Offer at a different time [PROBE FOR DETAILS] \_\_\_\_\_
- 4. Offer at different location [PROBE FOR DETAILS] \_\_\_\_\_
- 5. Make information less technical [PROBE FOR DETAILS] \_\_\_\_\_
- 6. Reduce amount of information provided
- 7. Provide more detailed technical information [PROBE FOR DETAILS, WHAT DO THEY WANT TO KNOW MORE ABOUT?] \_\_\_\_\_
- 8. Is too short
- 9. Is too long
- 10. Is too crowded
- 11. Better trainer [PROBE FOR DETAILS] \_\_\_\_\_
- 12. More opportunities for questions
- 13. Other (SPECIFY:) \_\_\_\_\_
- 88. Don't Know

**Q19. Did you recommend the class to others?**

- 1. Yes
- 2. No
- 88. Don't Know

**The CLEO program also lets you complete Home Energy Efficiency Surveys, where you answer questions about your home's gas, electricity and water use, and then you get tips on how to improve your home's energy efficiency.**

**Q20. Did you complete a home energy efficiency survey?**

- 1. Yes
- 2. No (GO TO Q29)
- 88. Don't Know (GO TO Q29)

**Q21. Which of these were reasons you took the energy survey? (READ CHOICES, ACCEPT MULTIPLES)**

- 1. To better understand my home energy use
- 2. To learn about energy saving opportunities for my home

3. Friends/family recommended it
4. To get free prizes or equipment
5. You were curious
6. Other (SPECIFY:)

---
88. Don't Know

**Q22. How did you complete the survey? Did you...**

1. Fill out a form in person at a booth or class
2. Fill out a form on the Internet (SKIP TO Q24)
3. Answer questions over the phone (SKIP TO Q24)
4. Have an energy inspector come to your home (SKIP TO Q26)
5. Complete a mail-in survey (SKIP TO Q24)
88. Don't Know (SKIP TO Q29)

**Q23. Did you take a "short" survey, which takes about 5 minutes to complete, or a "long" survey, which takes about 15 minutes to complete?**

1. Short survey
2. Long survey
88. Don't Know

**Q24. Overall, how easy or hard was it for you to take the energy survey? Would you say it was...**

4. Very easy (SKIP TO Q27)
3. Somewhat easy (SKIP TO Q27)
2. Somewhat hard
1. Very hard
88. Don't Know (SKIP TO Q27)

**Q25. How was it hard for you to fill out?**

- [RECORD RESPONSE VERBATIM]

---
88. Don't Know

(SKIP TO Q27)

**Q26. Did the energy inspector share any results of their energy audit with you when they were at your home?**

1. Yes
2. No (SKIP TO Q28)
88. Don't Know (SKIP TO Q28)

**Q27. How useful were the survey results for telling you how to save energy in your home? Was it...**

5. Extremely useful
4. Very useful
3. Somewhat useful
2. Not very useful
1. Not at all useful
6. Have not received survey report yet
88. Don't Know

**Q28. Have you recommended the energy survey to others?**

1. Yes
2. No
88. Don't Know

**Q29. Now I'm going to ask you a few questions about your energy usage and equipment. Did you change anything about the way you use energy at home after [going to the CLEO training class/visiting a CLEO energy-efficiency booth]? (DO NOT READ CHOICES, PROBE WELL, ACCEPT MULTIPLE RESPONSES)**

1. No changes
2. Turn off lights in unused rooms
3. Reduce lighting use
4. Raise thermostat setting for cooling
5. Lower thermostat setting for heat
6. Have heating and cooling system cleaned and tuned
7. Lower hot water temperature
8. Closer off air and heat vents in unused rooms
9. Shade windows to keep house cool
10. Turn on refrigerator energy saver switch
11. Keep refrigerator full
12. Wash with cold water
13. Always wash with full load
14. Always dry with full load
15. Dry clothes on line or rack
16. Thaw food before cooking
17. Use the microwave whenever possible
18. Cover pots with lids when heating
19. Turn down burner when boiling point is reached
20. Turned off waterbed heater
21. Other (SPECIFY:)

---
88. Don't Know

**Q30. Did you install any of the following energy efficient equipment after [you went to the CLEO energy efficiency class/visited a CLEO energy-efficiency booth]? (READ CHOICES. ACCEPT MULTIPLES)**

1. Compact fluorescent (CFL) or T-8 lighting
2. Low flow showerheads
3. Water faucet aerators
4. (deleted)
5. (deleted)
6. Whole house fan
7. (deleted)
8. (deleted)
9. High efficiency gas furnace
10. Efficient clothes washer
11. Efficient clothes dryer
12. Efficient dishwasher
13. Efficient refrigerator
14. Efficient water heater
15. Efficient windows

- 16. Other (SPECIFY:)

---
- 17. None (SKIP TO Q32)
- 21. More insulation (SPECIFY:) wall, attic, or both? \_\_\_\_\_
- 22. Efficient air conditioner (SPECIFY:) central or window? \_\_\_\_\_
- 88. Don't Know

**Q31. How satisfied are you with the amount of energy you're saving with your new efficient equipment? Would you say are...[READ ALL]**

- 5. Extremely satisfied
- 4. Very satisfied
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Don't Know

**Q32. Now I'd like to talk about Gas Company rebates for energy efficient appliances and equipment. Before you participated in the CLEO program, had you ever received any rebates from the Gas Company?**

**If needed: Rebates are payments that the Gas Company gives customers like you if they purchase certain type of energy efficient equipment for their homes.**

- 1. Yes (GO TO Q34)
- 2. No
- 88. Don't Know (GO TO Q35)

**Q33. Why not? [DO NOT READ CHOICES; ACCEPT MULTIPLE RESPONSES]**

- 1. Was not aware that rebates existed
- 2. Did not try to apply
- 3. Language barriers with application process
- 4. Didn't understand rebate program/applications
- 5. Did not want/need energy efficient equipment
- 6. Application is very long/has too many questions
- 7. Too much hassle to get rebates
- 8. Efficient equipment is too expensive
- 9. The rebates are too low
- 10. Other (SPECIFY:)

---
- 88. Don't Know

(GO TO Q35)

**Q34. What equipment did you receive rebates for? [DO NOT READ CHOICES, ACCEPT MULTIPLE RESPONSES]**

- 1. High efficiency gas furnace
- 2. Low flow showerheads
- 3. Water faucet aerators
- 4. Wall insulation
- 5. Attic insulation
- 6. Efficient clothes washer
- 7. Efficient dishwasher
- 8. Efficient water heater
- 9. Pipe wrap

10. Other (SPECIFY:)  
88. Don't Know

**Q35. Did you take a Gas Company rebate application home with you from [the energy efficiency training class you went to/the information booth you visited?**

- 1. Yes (GO TO Q39)
- 2. No
- 88. Don't Know (GO TO Q42)

**Q36. Were applications available for you to take home?**

- 1. Yes
- 2. No (GO TO Q38)
- 88. Don't Know (GO TO Q42)

**Q37. Why didn't you take an application? [DO NOT READ. ACCEPT MULTIPLES]**

- 1. Application was not in my language
- 2. Did not understand application
- 3. No immediate need for efficient equipment or rebate
- 4. Application is very long/has too many questions
- 5. Too much hassle to get rebates
- 6. Efficient equipment is too expensive
- 7. Rebates are too low
- 8. Already had too many program materials
- 9. Can get from website
- 10. Other (SPECIFY:)

(GO TO Q42)

**Q38. Would you have taken a rebate application if it had been available in your language?**

- 1. Yes
- 2. No
- 88. Don't Know

(GO TO Q42)

**Q39. Did you complete and mail the application?**

- 1. Yes (GO TO Q41)
- 2. No
- 88. Don't Know (GO TO Q42)

**Q40. Why not? [DO NOT READ, ACCEPT MULTIPLE RESPONSES]**

- 1. Application was not in my language
- 2. Did not purchase efficient equipment
- 3. Did not understand application
- 4. Application is very long/has too many questions
- 5. Too much hassle to get rebates
- 6. Efficient equipment is too expensive
- 7. Rebates are too low
- 8. Other (SPECIFY:)

88. Don't Know

(GO TO Q42)

**Q41. What equipment did you receive rebates for? (DO NOT READ, ACCEPT MULTIPLE RESPONSES)**

1. High efficiency gas furnace
2. Low flow showerheads
3. Wall insulation
4. Attic insulation
5. Efficient clothes washer
6. Efficient dishwasher
7. Efficient water heater
8. Other (SPECIFY:)

88. Don't Know

**Q42. Do you have access to the Internet?**

1. Yes
1. No (GO TO Q47)
88. Don't Know (GO TO Q47)

**Q43. Have you tried to use the Gas Company website to get an application for energy efficiency rebates?**

1. Yes
2. No (GO TO Q47)
88. Don't Know (GO TO Q47)

**Q44. Were you able to apply for the rebates you wanted using the website?**

1. Yes (GO TO Q47)
2. No
88. Don't Know

**Q45. Did language barriers prevent you from applying for rebates?**

1. Yes
2. No
88. Don't Know

**Q46. Overall, how satisfied were you with the information on the Gas Company website? Would you say were....**

5. Extremely satisfied
4. Very satisfied
3. Somewhat satisfied
2. Not very satisfied
1. Not at all satisfied
88. Don't Know

**Q47. The CLEO program also provides a phone number to help answer your questions about energy efficiency and rebate programs. Did you use the CLEO program phone line to get more information about energy efficiency or available rebate programs?**

- 1. Yes
- 2. No (GO TO Q51)
- 88. Don't Know (GO TO Q51)

**Q48. How helpful was the phone line? Would you say it was....**

- 5. Extremely helpful
- 4. Very helpful
- 3. Somewhat helpful
- 2. Not very helpful
- 1. Not at all helpful
- 88. Don't Know

**Q49. Did you call the phone line to get help applying for a rebate?**

- 1. Yes
- 2. No (GO TO Q51)
- 88. Don't Know (GO TO Q51)

**Q50. Did you get the help you needed?**

- 1. Yes
- 2. No
- 88. Don't Know

**Q51. How would you describe your overall satisfaction with the CLEO Program? Would you say you were...**

- 5. Extremely satisfied
- 4. Very satisfied
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Don't Know

**DEMOGRAPHICS –D1-INTRO.**

[READ IF Q30 = 1-16] **Last I have just a few questions about the property where the equipment was installed to help us improve our program.**

[READ IF Q30 = 17 or 88] **We're almost done. I just have a few final questions that will help us group your answers with those of others.**

**D1. [ASK IF Q30 = 1-16, ELSE →SKIP TO D3] 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. [IF D1 = 1 or Q30 = 17 or 88, ASK:] Do you own or rent your home?**

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

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

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

**[IF D1 = 2, ASK:] What type of home is the property where the equipment was installed? Is it a: (READ CHOICES)**

1. Single-family detached home
2. Condo
3. Townhouse
4. Mobile home or 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 D1 = 1 or Q30 = 17 or 88, ASK:] Including all adults AND children, how many people are in your household?**

**[IF D1 = 2, ASK:] Including all adults AND children, how many people are in the household where the equipment was installed?**

[ENTER RESPONSE]: \_\_\_\_\_  
888. Don't Know  
999. Refused

**D6. In what year was the home originally built?**

[ENTER RESPONSE]: \_\_\_\_\_ (NOW SKIP TO Q7)  
888. Don't Know (CONTINUE)  
999. Refused (SKIP TO Q7)

**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. [IF D1 = 1 or Q30 = 17 or 88, ASK:]** Approximately how many square feet is your home?

**[IF D1 = 2, ASK:]** Approximately how many square feet is the home where the equipment was installed?

[ENTER RESPONSE]: \_\_\_\_\_ (SKIP TO D8)

888. Don't Know (CONTINUE)

999. Refused

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

**D8. Which of these groups includes your age?**

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

888. Don't Know

999. Refused

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

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 for your time and cooperation.

(INTERVIEWER, RECORD GENDER:)

1. Male
2. Female

# **SoCalGas General Population Survey Instrument**

## SoCAL GAS COMPANY GENERAL POPULATION SURVEY INSTRUMENT

### **INTRO 1**

*Hello, my name is \_\_\_\_\_ and I am calling on behalf of Southern California Gas Company. We are conducting a brief study to learn more about residential energy use and your household was randomly chosen from The Gas Company's customers.*

*SoCalGas and other companies have created programs to help households keep energy costs down and reduce the overall 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 these programs.*

### **INTRO2**

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

- 1. Yes → **SKIP TO B1**
- 2. No
- 99. Refusal → **SKIP TO TERM1**

### **INTRO3**

*May I speak to the person who is most knowledgeable about energy use in your household?*

- 1. Person coming to phone → **GO ON TO INTRO4**
- 99. No, refusal → **SKIP TO TERM1**

### **INTRO4**

*Hello, my name is \_\_\_\_\_ and I am calling on behalf of Southern California Gas Company. We are conducting a brief study to learn more about residential energy use and your household was randomly chosen from The Gas Company's customers.*

*SoCalGas and other companies have created programs to help households keep energy costs down and reduce the overall 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 these programs.*

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

- 1. Yes → **SKIP TO B3**
- 2. No (ask for knowledgeable respondent)
- 99. REF → **SKIP TO TERM1**

**B3. Since January 2010 have you purchased...: [Record “yes” or “no” for each option]**

1. CLOTHES WASHER
2. DISHWASHER
3. FURNACE
4. INSULATION
5. LOW-FLOW SHOWERHEAD
6. WATER HEATER (REGULAR STORAGE TYPE)
88. NOT SURE/DON'T KNOW
99. REFUSED

For B3 responses <88, ask B4 for each product purchased:

**B4. Did you receive an instant rebate at the case register for the product(s) you bought? This instant rebate would have been provided by SoCalGas 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

**[THE SYSTEM WILL RANDOMLY ASSIGN ONE OF THE ITEMS FOR WHICH RESPONDENT INDICATES IN 1 THROUGH 11 FOR B3 FOR WHICH B4 ALSO=1 TO “PRODUCT1.”]**

**If GP = 1 skip to Q12  
If HEER = 1 go on to A1**

**Now I'd like to ask you a few questions about your purchase of appliance.**

**A1. How did you first become aware of the rebates available through the HOME ENERGY EFFICIENCY REBATE PROGRAM [DO NOT READ LIST]?**

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 RADIO
9. AD TV

- 10. AD 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. THE NAVY EXCHANGE 32<sup>ND</sup> 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...?**

- 1. VERY INFLUENTIAL
- 2. SOMEWHAT INFLUENTIAL
- 3. NOT VERY INFLUENTIAL
- 4. NOT AT ALL INFLUENTIAL
- 88. NOT SURE / DON'T KNOW
- 99. REFUSED

**A6. Had you already decided on purchasing the [PRODUCT1] with the same energy efficiency rating 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...?**

- 1. VERY INFLUENTIAL
- 2. SOMEWHAT INFLUENTIAL
- 3. NOT VERY INFLUENTIAL
- 4. 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]?**

**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]?**

- 1. VERY IMPORTANT
- 2. SOMEWHAT IMPORTANT
- 3. NOT VERY IMPORTANT
- 4. 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]?**

- 1. VERY IMPORTANT
- 2. SOMEWHAT IMPORTANT
- 3. NOT VERY IMPORTANT
- 4. 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]?**

- 1. VERY IMPORTANT
- 2. SOMEWHAT IMPORTANT
- 3. NOT VERY IMPORTANT
- 4. NOT AT ALL IMPORTANT
- 5.
- 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

**15. What was the most important factor in your decision to purchase (ALL MEASURES EXCEPT INSULATION: an) energy efficient [PRODUCT1]? [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

**SATISFACTION**

**S1-INTRO.** Next, I'd like you to rate your satisfaction with various aspects of the program. For each question 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?**

1. VERY SATISFIED → **SKIP TO S3**
2. SOMEWHAT SATISFIED
3. NOT VERY SATISFIED
4. NOT AT ALL SATISFIED
5. 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 made the process of receiving your instant discount more satisfying?**

- [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 ...?**

1. VERY SATISFIED → **SKIP TO S5**
2. SOMEWHAT SATISFIED

- 3. NOT VERY SATISFIED
- 4. NOT AT ALL SATISFIED
- 88. NOT SURE / DON'T KNOW → SKIP TO S5
- 99. REFUSED → SKIP TO S5

**S4. What would have been a satisfying 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 ...?**

- 1. VERY SATISFIED → SKIP TO S7
- 2. SOMEWHAT SATISFIED
- 3. NOT VERY SATISFIED
- 4. 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...?**

- 1. VERY SATISFIED
- 2. SOMEWHAT SATISFIED
- 3. NOT VERY SATISFIED
- 4. NOT AT ALL SATISFIED

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

**S9. Did a SoCalGas 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 ...**

- 1. VERY SATISFIED → **SKIP TO S12**
- 2. SOMEWHAT SATISFIED
- 3. NOT VERY SATISFIED
- 4. 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...?**

- 1. VERY SATISFIED → **SKIP TO S14**
- 2. SOMEWHAT SATISFIED
- 3. NOT VERY SATISFIED
- 4. 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 would you make to improve the HOME ENERGY EFFICIENCY REBATE PROGRAM?**

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

**CLEAR INFORMATION**

**CL-INTRO.** Next we would like to know how well SoCalGas 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 ...**

1. EXTREMELY CLEAR
2. PRETTY CLEAR
3. NOT VERY CLEAR
4. NOT AT ALL CLEAR
5. DID NOT RECEIVE
6. DOES NOT APPLY
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...?**

1. EXTREMELY CLEAR
2. PRETTY CLEAR
3. NOT VERY CLEAR
4. NOT AT ALL CLEAR
5. DID NOT RECEIVE
6. DOES NOT APPLY
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 ...**

1. EXTREMELY CLEAR
2. PRETTY CLEAR
3. NOT VERY CLEAR
4. NOT AT ALL CLEAR
5. DID NOT RECEIVE
6. DOES NOT APPLY

88. NOT SURE / DON'T KNOW

99. REFUSED

**Q1 (Q12). Now I'd like to ask you about 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 Q3**

**Q2 (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 Q3**
88. DK/don't remember → **SKIP TO Q3**

**Q2a (Q13a). What changes did you implement? Enter verbatim\_\_\_\_\_**

**Q3 (Q14). (DO NOT ASK IF Q1=3) How likely would you be to complete a free home energy audit on the Internet if sponsored by SCG? Would you say...**

1. Very likely
2. Somewhat likely → **SKIP TO Q4**
3. Somewhat unlikely → **SKIP TO Q4**
4. Very unlikely
88. DK

**Q3a (Q14a). (DO NOT ASK IF Q1=3) Why do you say that? Enter verbatim\_\_\_\_\_**

**Q4 (Q15). In the last year, do you recall receiving any communication from SCG on energy efficiency programs?**

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

**Q5 (Q16). Do you recall hearing any TV ads regarding any of the energy efficiency programs?**

1. Yes
2. No → **SKIP TO Q7**
88. DK/don't remember → **SKIP TO Q7**

**Q6 (Q17). What was the message of that TV ad? Enter verbatim\_\_\_\_\_**

**Q7 (Q18). Do you recall ever visiting the SoCalGas's website for information?**

- 1. Yes
- 2. No → **SKIP TO Q11**
- 88. DK/Don't remember → **SKIP TO Q11**

**Q8 (Q19). What information were you looking for? [DO NOT READ – multiple choice]**

- 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)\_\_\_\_\_

**Q9 (Q20). Overall, how satisfied were you with the SoCalGas website, would you say you were...**

- 1. VERY SATISFIED → **SKIP TO Q11**
- 2. SOMEWHAT SATISFIED
- 3. NOT VERY SATISFIED
- 4. NOT AT ALL SATISFIED
- 88. NOT SURE / DON'T KNOW → **SKIP TO Q11**

**Q10 (Q21). What would have improved your satisfaction with the SoCalGas website?**

Enter verbatim\_\_\_\_\_

**Q11 (Q22). What other programs or offerings could the utility provide to help you manage your energy use better?**

Enter verbatim\_\_\_\_\_

**Q12 (Q23). How many Compact Fluorescent Lightbulbs, or CFLs, do you have installed in your home?**

[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

**Q13 (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 Q13 <1 skip over Q14

**Q14 (Q25). What is the reason that you have not replaced these incandescent lamps with the Compact Fluorescent Lamps? (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

**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 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

## **DEMOGRAPHICS**

**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, associate's 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.

**SoCalGas Home Energy Efficiency Rebate (HEER)  
Participant Survey Instrument**

## SoCal Gas Home Energy Efficiency Rebate (HEER) Program Participant Survey Instrument

**Hello. My name is \_\_\_\_\_ and I'm calling on behalf of *Southern California Gas Company, or SoCalGas*. 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 participated in the SoCalGas Rebate Program, which gives instant rebates for buying energy efficient products. It looks like you received an instant rebate from SoCalGas when you purchased [EQUIP1] at [STORE NAME] around [DATE].

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

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

[IF EQUIP1 = WATER SAVINGS KIT:] Records show you participated in an a SoCalGas 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 SoCalGas 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 SoCalGas 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

**A2. 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?**

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 SoCalGas for qualifying energy efficient appliances and equipment?**

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

**C2. Did your contractor suggest buying (a) [EQUIP1] that was ENERGY-STAR rated?**

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

**C3. How influential was the contractor in your decision to buy (ALL MEASURES EXCEPT INSULATION: an) ENERGY STAR [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. Had you already decided on purchasing (ALL MEASURES EXCEPT INSULATION: a) [EQUIP1] that was ENERGY-STAR rated 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. What changed your mind to go with the [EQUIP1] that was ENERGY STAR rated?**

- [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 32<sup>ND</sup> 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 SoCalGas REBATE PROGRAM?**

1. Yes

2. No (SKIP TO R6)

88. Not sure / Don't know (SKIP TO R6)

99. Refused (SKIP TO R6)

**R4. How influential was the salesperson in your decision to buy (ALL MEASURES EXCEPT INSULATION: an) ENERGY STAR [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. Had you already decided on purchasing (ALL MEASURES EXCEPT INSULATION: a) [EQUIP1] with an ENERGY STAR rating before talking with the salesperson?**



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

**R6. Do you remember seeing any SoCalGas 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. How influential were the promotional materials in your decision to buy (ALL MEASURES EXCEPT INSULATION: a) ENERGY STAR [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. 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?**

- 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. 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

- 15. 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 SoCalGas 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 SoCalGas 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 SoCalGas 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 SoCalGas 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 the SoCalGas 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 SoCalGas 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 SoCalGas 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 SoCalGas 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. SoCalGas Bill insert
10. SoCalGas 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 SoCalGas 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 W4A)
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 SoCalGas 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 the following SoCalGas program that is 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
f. Any other SoCalGas programs? (SPECIFY:) Program #1 ____ _____	1 →	2	9	1	2	9
g. Any other SoCalGas 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 SoCalGas 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

**SoCalGas Mobile Home Residents Energy Efficiency  
Program Participant Survey Instrument**

## **SoCal Gas 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

**SoCalGas Multi-family Rebate Program Participant  
Survey Instrument**

# SoCal Gas Multi-family Rebate Program Participant Survey Instrument

Data coming into survey includes:

[CONTACT]—Contact if known

[ADDRESS]—Property address

{Equipment\_from\_Program<sub>nu</sub>}—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 Southern California Gas. May I speak to [CONTACT]? (IF NO LONGER WITH COMPANY, GO TO INTRO B)  
We're conducting an evaluation of the SCG multifamily rebate program. Your input will help SCG 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<sub>nu</sub> IS YES AND A2<sub>NU</sub> IS NOT YES]. **Our records indicate that [Equipment\_from\_Program<sub>nu</sub>] 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 SCG or some other energy efficiency program or (3) was it a combination of internal and utility money?**

	Paid for & installed <u>By my company</u>	Part of SCG or other EE <u>program</u>	Combo of SCG & 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<sub>NU</sub> IS YES AND A4 IS NOT UTILITY OR BOTH ASK]. **Our records indicate that [Equipment\_from\_Program<sub>nu</sub>] was installed as part of a program sponsored by SCG. Why did you not indicate that [Equipment\_from\_Program<sub>nu</sub>] was part of a utility-sponsored program?**
- 1 I forgot its source was SCG [correct A4 to Utility]
  - 2 I did not know that source was SCG [correct A4 to Utility]
  - 3 Other (SPECIFY) \_\_\_\_\_
- A6.** [IF Equipment\_from\_Program<sub>nu</sub> IS NO AND A4<sub>NU</sub> IS UTILITY OR BOTH ASK]. **Our records do not show you receiving [Equipment\_from\_Program<sub>NU</sub>] from one of the SCG 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 SCG 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 SCG 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 SCG 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 SCG Multifamily Rebate Program, please indicate which were turnkey operations done by contractors? Was [Equipment\_from\_Program<sub>nu</sub> 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 SCG 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 SCG 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 SCG 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 SCG were to offer you a \$300 rebate on new refrigerators to replace your old units and SCG 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<br>Agree    | Completely<br>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 SCG send you information about energy efficiency programs currently available to Multi-Family Property Managers? (CONFIRM NAME & MAILING ADDRESS)**

**SoCalGas Multi-family Rebate Program Non-Participant Survey Instrument**

## SoCal Gas Multi-family Rebate Program Non-Participant Survey Instrument

Hello I am \_\_\_\_\_ calling from CIC Research on behalf of Southern California Gas. 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 SCG 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 SCG 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 SCG, or an independent company supporting SCG, 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 SCG 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 SCG 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, SCG 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 SCG 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 SCG form, and received a rebate. Has this property participated in this program?	1 →	2	8
4-3. Another program SCG offers to multi-family buildings is where representatives working for SCG 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 SCG offers is where a contractor to SCG 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 SCG offers is where you purchase energy efficient appliances at a store or from a contractor and then receive a rebate from SCG. Has this property participated in this program?	1 →	2	8
4-6. Another SCG 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 SCG 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 SCG 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 SCG 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 SCG
- 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 SCG 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 SCG 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 SCG 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 SCG were to offer a \$300 rebate on new refrigerators to replace your old units and SCG 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)  
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? (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<br>Agree    | Completely<br>Agree |        |
|--|------------------------|---------------------|--------|
| a. I am very concerned about how energy use affects the environment.                       | 0 1 2 3 4 5 6 7 8 9 10 | 10                  | DK Ref |
| b. Household electricity use has an impact on the environment.                             | 0 1 2 3 4 5 6 7 8 9 10 | 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 | 10                  | DK Ref |
| d. Conserving electricity will help reduce global warming.                                 | 0 1 2 3 4 5 6 7 8 9 10 | 10                  | DK Ref |

Thank you very much for participating in this survey. Would you like to have SCG send you information about energy efficiency programs currently available to Multi-Family Property Managers? (CONFIRM NAME & MAILING ADDRESS)

# **SoCalGas PACE Participant Survey Instrument**

## SoCal Gas (PACE) Participant Survey Instrument

Hello, my name is \_\_\_\_\_. I am calling on behalf of The Southern California Gas Company. May I please speak with (CONTACT NAME)?

We are talking to Gas Company customers who participated in the PACE Energy Savings Project (PACE) to find out how well this program is working and how it could be improved. Our records show that you participated in an energy efficiency training class in your own language or visited an energy efficiency booth at a community event or energy efficiency information was mailed to your home or you got information at PACE's office. Is this correct?

1. yes (CONTINUE)
2. no (ASK IF SOMEONE ELSE IN THE HOUSEHOLD DID. IF SO, REPEAT INTRO BEFORE CONTINUING. IF NOT, THANK & TERMINATE)

The survey takes about 10 minutes. Is this a good time? (ARRANGE A CALLBACK IF NECESSARY.)

That's great. This call may be monitored or recorded for quality purposes. First I'm going to ask you a few questions about your experience participating in the PACE program.

**Q1. I would like to know how you found out that you could learn about Gas Company programs in your own language? I'll read a list and I'd like you to tell me if you got information from any of these sources. How about . . . Did you get information from there? (READ LIST; CHECK ALL THAT APPLY)**

20. The PACE office
  1. Newspaper advertising or article
  2. Radio show announcement or advertising
  3. TV show announcement or advertising
  4. Brochure
  5. Community event information booth
  6. Community cultural organization (SPECIFY) \_\_\_\_\_
  7. From a friend or family member
  8. Church or Faith-based organization presentation or announcement
  9. Adult daycare presentation or announcement
  10. Adult learning center announcement
  11. Information from children's school
  12. Senior citizen center announcement or notice
  13. Other community organization (SPECIFY) \_\_\_\_\_
  14. Print announcement in store
  15. On Internet
  16. Information mailed from the PACE program
  17. Someone from PACE came to my house or apartment
  18. Other (SPECIFY) \_\_\_\_\_
88. Don't Know

**Q2. Before I called you today, did you know that The Gas Company offers rebates for residential customers that install energy efficient equipment such as gas furnaces, high efficiency clothes washers, dishwashers, water heaters and insulation?**

1. Yes
2. No
88. Don't Know

**(If Q1 = 5) Community Event Information Booth, then ask: Now I'd like to ask you about some of the activities conducted by the PACE Program to help households save energy. The first are energy efficiency information booths.**

**Q3. You told me earlier you visited one of these information booths, is that correct?**

**(If Q1 ≠ 5) Community Event Information Booth, then ask: Now I'd like to ask you about some of the activities conducted by the PACE Program to help households save energy. The first are energy efficiency information booths. These are booths at events in your community where Gas Company customers can receive information about energy efficiency, take short surveys about their home energy use, and enter contests to receive prizes.**

**Q3. Have you visited any of these energy efficiency information booths?**

1. Yes → **GO TO Q5**
2. No → **ASK Q4**
88. Don't Know → **SKIP TO INTRO BEFORE Q12**

**Q4. Why haven't you visited any of the booths? (DO NOT READ CHOICES; CHECK ALL THAT APPLY)**

1. Do not attend community events
2. Have not seen any at events
3. Did not see any staff at booth
4. Not interested in information
5. Was a long line
6. Did not have time
7. Had attended an energy class or seminar
8. Already knew about energy efficiency
9. I received energy efficiency information in the mail
10. Someone came to my door and discussed energy efficiency
11. Other (SPECIFY) \_\_\_\_\_
88. Don't Know

**NOW SKIP TO INTRO BEFORE Q12**

**Q5. Were you aware of the Energy Efficiency Booths before you attended the community event?**

1. Yes → **ASK Q6**
2. No → **GO TO Q7**
88. Don't Know → **GO TO Q7**

**Q6. How did you become aware of the energy efficiency booth? (DO NOT READ ITEMS; CHECK ALL THAT APPLY)**

1. Just saw it at event
2. Advertised at community event
3. Brochures
4. Radio advertising or show announcement
5. TV advertising or show announcement
6. Newspaper advertising or news article
7. PACE staff told me
8. Print announcement in store
9. Notice at adult learning center
10. Information from children's school
11. Web advertising or article
12. Faith-based (church) organization presentation or announcement
13. Adult daycare presentation or announcement
14. Notice at senior citizen center
15. Notice at community cultural organization
16. Other community organization announcement or notice
17. From friend or family member
18. Other (SPECIFY:)

---

**Q7. Which of the following are reasons you visited the energy efficiency booth? How about . . . (READ ITEMS. CHECK ALL THAT APPLY.)**

1. To learn about ways to save energy
2. To learn about Gas Company programs
3. Because friends/family did
4. Someone recommended it to you
5. To get free prizes or equipment
6. You were curious
7. Other (SPECIFY:)

---
88. Don't Know

**Q8. Did you review or take home any of the energy efficiency information available at the booth?**

1. Yes
2. No
88. Don't Know

**Q8a. Did you receive energy efficiency information at PACE's office?**

1. Yes
2. No
88. Don't Know

**Q9. Did you receive energy efficiency information in the mail to your home or apartment, or from PACE staff that visited your home?**

1. Yes
2. No
88. Don't Know

**(IF Q8, Q8A, OR Q9= YES, THEN CONTINUE WITH Q10, OTHERWISE SKIP TO INTRO BEFORE Q12.)**

**Q10. How useful was the information about energy efficiency benefits and strategies? Would you say it was....?**

5. Extremely useful
4. Very useful
3. Somewhat useful
2. Not very useful
1. Not at all useful
88. Don't Know

**Q11. Did the information help you understand how to qualify for the utility rebate programs?**

1. Yes
2. No
88. Don't Know

**Another activity sponsored by the PACE Program is free energy efficiency workshops and presentations. These take place at PACE's offices, residential building meetings and religious, community and cultural centers, among others. The classes cover topics such as energy saving benefits and strategies, and available Gas Company programs.**

**Q12. Were you aware of these energy efficiency workshops before I called you today?**

1. Yes
2. No → **GO TO Q23**
88. Don't Know → **GO TO Q23**

**Q13. How did you become aware of the PACE energy efficiency workshop or presentation? (DO NOT READ LIST. CHECK ALL THAT APPLY)**

1. Energy booth at community event
2. Brochure
3. Radio show announcement or advertising
4. TV show announcement or advertising
5. Newspaper article or advertising
6. PACE staff told me
7. Ad/display in store
8. Web advertising or article
9. Faith-based (church) organization presentation or notice
10. Adult daycare presentation or announcement
11. Notice at senior citizen center
12. Community cultural organization notice
13. Other community organization announcement
14. From friend or family member
15. Notice in my apartment building

- 16. From apartment building manager
- 17. Other (SPECIFY:)

---
- 88. Don't Know

**Q14. Did you attend a PACE energy efficiency workshop or presentation?**

- 1. Yes → **GO TO Q16**
- 2. No
- 88. Don't Know → **SKIP TO Q23**

**Q15. Why did you decide not to attend a PACE workshop or presentation? [DO NOT READ LIST. MULTIPLES OK]**

- 1. Was not aware of class
- 2. Not interested in information
- 3. Am too busy/no time
- 4. Preferred class was full
- 5. Had no transportation
- 6. Offered at bad time for me
- 7. Not convenient (PROBE FOR BETTER ANSWER. ASK:) How was it not convenient?
- 8. Already knew about energy efficiency
- 9. Visited community booth instead
- 10. Received energy information in the mail
- 11. Class not in my language
- 12. Other (SPECIFY:)

---
- 88. Don't Know

**SKIP TO Q23**

**Q16. Which of the following were reasons you attended the PACE energy efficiency workshop or presentation? How about . . . [READ LIST. CHECK ALL THAT APPLY]**

- 1. To learn about ways to save energy
- 2. To learn about Gas Company programs
- 3. Because friends/family did
- 4. Someone recommended it to you
- 5. To get free prizes or equipment
- 6. You were curious
- 7. Other (SPECIFY:)

---
- 88. Don't Know

**Q17. How useful was the information about energy efficiency benefits and strategies that you received in the workshop or presentation? Would you say it was....**

- 5. Extremely useful (SKIP TO Q19)
- 4. Very useful (SKIP TO Q19)
- 3. Somewhat useful
- 2. Not very useful
- 1. Not at all useful
- 88. Don't Know (SKIP TO Q19)

**Q18. Why do you say that?**

RECORD RESPONSE 

---

88. Don't Know

**Q19. How well did the session help you understand how to use the utility rebate programs? Would you say it helped you ....? (READ CHOICES)**

- 5. Extremely well (SKIP TO Q21)
- 4. Very well (SKIP TO Q21)
- 3. Somewhat
- 2. Not very well
- 1. Not at all
- 88. Don't Know (SKIP TO Q21)

**Q20. Why do you say that?**

RECORD RESPONSE \_\_\_\_\_  
88. Don't Know

**Q21. Is there anything about the workshop or presentation you would change? [DO NOT READ LIST; CHECK ALL THAT APPLY]**

- 1. No
- 2. Offer on a different day of week (PROBE FOR DETAILS) \_\_\_\_\_
- 3. Offer at a different time (PROBE FOR DETAILS) \_\_\_\_\_
- 4. Offer at different location (PROBE FOR DETAILS): \_\_\_\_\_
- 5. Make information less technical [PROBE FOR DETAILS] \_\_\_\_\_
- 6. Reduce amount of information provided
- 7. Provide more detailed technical information [PROBE FOR DETAILS - WHAT DO THEY WANT TO KNOW MORE ABOUT?]
- 8. Is too short
- 9. Is too long
- 10. Is too crowded
- 11. Better trainer (PROBE FOR DETAILS) \_\_\_\_\_
- 12. More opportunities for questions
- 13. Other (SPECIFY:) \_\_\_\_\_
- 88. Don't Know

**Q22. Did you recommend the workshop or presentation to others?**

- 1. Yes
- 2. No
- 88. Don't Know

**The PACE program also lets you fill out Home Energy and Water Efficiency Surveys, where you answer questions about your home's gas, electricity and water use, and then you get recommendations on how to improve your home's energy efficiency.**

**Q23. Did you complete one of these surveys?**

- 1. Yes
- 2. No →GO TO Q31
- 88. Don't Know →GO TO Q31



**Q24. Which of the following were reasons you took the energy survey? (READ ITEMS, CHECK ALL THAT APPLY)**

1. To better understand my home energy use
2. To learn about energy saving opportunities for my home
3. Friends/family recommended it
4. To get free prizes or equipment
5. You were curious
6. Other (SPECIFY:)

---
88. Don't Know

**Q25. How did you complete the survey? Did you...**

1. Fill out a form in person at a booth or class
2. Fill out a form on the Internet (SKIP TO Q27)
3. Answer questions over the phone (SKIP TO Q27)
4. Complete a mail-in survey (SKIP TO Q27)
88. Don't Know (SKIP TO Q31)

**Q26. Did you take the "short" survey, which takes about 5 minutes to complete, or the "long" survey, which takes about 15 minutes to complete?**

1. Short survey
2. Long survey
88. Don't Know

**Q27. Overall, how easy or hard was it for you to take the energy survey? Would you say it was .....**

4. Very easy (SKIP TO Q29)
3. Somewhat easy (SKIP TO Q29)
2. Somewhat hard
1. Very hard
88. Don't Know (SKIP TO Q29)

**Q28. How was it hard for you to fill out?**

RECORD RESPONSE \_\_\_\_\_  
88. Don't Know

**Q29. How useful were the survey results for increasing your understanding of ways to save energy in your home? Was it...**

5. Extremely useful
4. Very useful
3. Somewhat useful
2. Not very useful
1. Not at all useful
6. Have not received survey report yet
88. Don't Know

**Q30. Have you recommended the energy survey to others?**

1. Yes
2. No

88. Don't Know

**Q31. Now I'm going to ask you a few questions about your energy usage and equipment. Did you change anything about the way you use energy at home after participating in the PACE program? (DO NOT READ ITEMS. CHECK ALL THAT APPLY.)**

1. No changes
2. Turn off lights in unused rooms
3. Reduce lighting use
4. Raise thermostat setting for cooling
5. Lower thermostat setting for heat
6. Have heating and cooling system cleaned and tuned
7. Lower hot water temperature
8. Close off air and heat vents in unused rooms.
9. Shade windows to keep house cool
10. Keep refrigerator full
11. Wash with cold water
12. Always wash with full load
13. Always dry with full load
14. Dry clothes on line or rack
15. Cover pots with lids when heating
16. Use correct size pots when cooking
17. Turn down burner when boiling point is reached
18. Replace light bulbs with CFLs
19. Use fans instead of air conditioners
20. Open windows at night to let in cool air
21. Take shorter, cooler shower
22. Unplug or recycle extra refrigerators or freezers
23. Inspect refrigerator seals for tightness
24. Cover pool or spa when not in use
25. Fix leaky faucets
26. Install low flow showerheads and faucet aerators
27. Install wall and/or attic insulation
28. Install a water heater blanket
29. Replace appliances with energy-efficient, Energy Star rated models
30. OTHER specify: \_\_\_\_\_
88. Don't Know

**Q32. Did you install any of the following energy efficient equipment after participating in this program? [READ ITEMS. CHECK ALL THAT APPLY]**

1. Compact fluorescent (CFL) or T-8 lighting
2. Low flow showerheads
3. Water faucet aerators
4. More wall insulation
5. More attic insulation
6. Whole house fan
7. Efficient central air conditioner
8. Efficient window unit air conditioner
9. High efficiency gas furnace
10. Efficient clothes washer
11. Efficient clothes dryer
12. Efficient dishwasher
13. Efficient refrigerator
14. Efficient water heater
15. Efficient windows
16. Other (SPECIFY:)
17. None (SKIP TO Q34)
21. More insulation (ASK:) Wall, attic, or both?
22. Efficient air conditioner (ASK:) Central or window?
88. Don't Know

**Q33. How satisfied are you with the amount of energy you're saving with your new efficient equipment? Would you say are.... (READ)**

5. Extremely satisfied
4. Very satisfied
3. Somewhat satisfied
2. Not very satisfied
1. Not at all satisfied
88. Don't Know

**Q34. Now I'm going to ask you some questions about your experiences applying for Gas Company rebates for energy efficient appliances and equipment. Before you participated in the PACE program, had you ever received any rebates from the Gas Company?**

1. Yes → **GO TO Q36**
2. No
88. Don't Know → **GO TO Q38**

**Q35. Why not?** [DO NOT READ ITEMS; CHECK ALL THAT APPLY]

1. Was not aware that rebates existed
2. Did not try to apply
3. Language barriers with application process
4. Didn't understand rebate program/applications
5. Did not want/need energy efficient equipment
6. Application is very long/has too many questions
7. Too much hassle to get rebates
8. Efficient equipment is too expensive
9. The rebates are too low
10. Other, (SPECIFY:) \_\_\_\_\_
88. Don't Know

**SKIP TO Q38**

**Q36. Before you participated in PACE, what equipment did you receive rebates for?** [DO NOT READ, ACCEPT MULTIPLE RESPONSES]

1. High efficiency gas furnace
2. Low flow showerheads
3. Water faucet aerators
4. Wall insulation
5. Attic insulation
6. Efficient clothes washer
7. Efficient dishwasher
8. Efficient water heater
9. Pipe wrap
10. Other (SPECIFY:) \_\_\_\_\_
88. Don't Know

**Q37. During your participation in the PACE Program, did you receive a Gas Company rebate application in the mail or from someone who visited your home or apartment?**

1. Yes → **GO TO Q42**
2. No
88. Don't Know

**Q38. Did you take a Gas Company rebate application home with you from an energy efficiency workshop presentation, or information booth?**

1. Yes → **GO TO Q42**
2. No
88. Don't Know → **GO TO Q45**

**Q39. Were applications available for you to take home?**

1. Yes
2. No → **GO TO Q41**
88. Don't Know → **GO TO Q45**

**Q40. Why didn't you take an application? [DO NOT READ LIST. ACCEPT MULTIPLES]**

1. Application was not in my language
2. Did not understand application
3. No immediate need for efficient equipment or rebate
4. Application is very long/has too many questions
5. Too much hassle to get rebates
6. Efficient equipment is too expensive
7. Rebates are too low
8. Already had too many program materials
9. Can get from website
10. I had received one in the mail → **GO TO Q42**
11. Other (SPECIFY:)
88. Don't Know

**SKIP TO Q45**

**Q41. Would you have taken a rebate application if it had been available in your language?**

1. Yes
2. No
88. Don't Know

**SKIP TO Q45**

**Q42. Did you complete and mail the application?**

1. Yes → **GO TO Q44**
2. No
88. Don't Know → **GO TO Q45**

**Q43. Why not? [DO NOT READ LIST; ACCEPT MULTIPLES]**

1. Application was not in my language
2. Did not purchase efficient equipment
3. Did not understand application
4. Application is very long/has too many questions
5. Too much hassle to get rebates
6. Efficient equipment is too expensive
7. Rebates are too low
8. Other (SPECIFY:)
88. Don't Know

**SKIP TO Q45**

**Q44. What equipment did you receive rebates for? (DO NOT READ, ACCEPT MULTIPLES)**

1. High efficiency gas furnace
2. Low flow showerheads
3. Wall insulation
4. Attic insulation
5. Efficient clothes washer
6. Efficient dishwasher
7. Efficient water heater
8. Other (SPECIFY:)
88. Don't Know

**Q45. Do you have access to the Internet?**

1. Yes
2. No → GO TO Q50
88. Don't Know → GO TO Q50

**Q46. Have you tried to use the Gas Company website to get an application for energy efficiency rebates?**

1. Yes
2. No → GO TO Q50
88. Don't Know → GO TO Q50

**Q47. Were you able to apply for the rebates you wanted using the website?**

1. Yes → GO TO Q49
2. No
88. Don't Know → SKIP TO Q49

**Q48. Did language barriers prevent you from applying for rebates?**

1. Yes
2. No
88. Don't Know

**Q49. Overall, how satisfied were you with the information on the Gas Company website? Would you say were....**

5. Extremely satisfied
4. Very satisfied
3. Somewhat satisfied
2. Not very satisfied
1. Not at all satisfied
88. Don't Know

**Q50. The PACE program also provides free phone assistance to help answer your questions about energy efficiency and rebate programs. Did you use the PACE**

**program phone line to get additional information about energy efficiency or available rebate programs?**

- 1. Yes
- 2. No → **GO TO Q54**
- 88. Don't Know → **GO TO Q54**

**Q51. How helpful was the phone line? Would you say it was....**

- 5. Extremely helpful
- 4. Very helpful
- 3. Somewhat helpful
- 2. Not very helpful
- 1. Not at all helpful
- 88. Don't Know

**Q52. Did you call the phone line to get help applying for a rebate?**

- 1. Yes
- 2. No → **GO TO Q54**
- 88. Don't Know → **GO TO Q54**

**Q53. Did you get the help you needed?**

- 1. Yes
- 2. No
- 88. Don't Know

**Q54. How would you describe your overall satisfaction with the PACE Program? Would you say you were...**

- 5. Extremely satisfied
- 4. Very satisfied
- 3. Somewhat satisfied
- 2. Not very satisfied
- 1. Not at all satisfied
- 88. Don't Know

## **DEMOGRAPHICS**

**D1-INTRO. [READ IF Q32 = 1-16] Lastly I have just a few questions about the property where the equipment was installed to help us improve our program.**

**[READ IF Q32 = 17 or 88] We're almost finished. I just have a few last questions about your home and the members of your household.**

**D1. [ASK IF Q32 = 1-16, ELSE → SKIP TO D3] 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. [IF D1 = 1 or Q32 = 17 or 88, ASK:] Do you own or rent your home?  
[IF D1 = 2, ASK:] Do you own or rent the property where the equipment was installed?**

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

**D4. [IF D1 = 1 or Q32 = 17 or 88, ASK:] What type of home is it? Is it a . . . (READ CHOICES)**

**[If D1 = 2, ASK:] Why 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 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 D1 = 1 or Q32 = 17 or 88, ASK:] Including all adults AND children, how many people are in your household?**

**[If D1 = 2, ASK:] Including all adults AND children, how many people are in the household where the equipment was installed”]?**

[ENTER RESPONSE]: \_\_\_\_\_

- 888. DK
- 999. Refused

**D6. In what year was the home originally built?**

[ENTER YEAR]: \_\_\_\_\_

- 888. DK (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. [IF D1 = 1 or Q32 = 17 or 88, ASK:] Approximately how many square feet is your home?**

**If D1 = 2, ASK:] Approximately how many square feet is the home where the equipment was installed?**

- ( )  
[ENTER SQUARE FOOTAGE]: \_\_\_\_\_  
888. DK (ASK D7a)  
999. Refused (SKIP TO Q8)

**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

**D8. Which of these groups includes your age?**

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 so far? Is it a . . . ? (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 category 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 or
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 for your time and cooperation.

---

(INTERVIEWER, RECORD GENDER:)

1. Male
2. Female

## Appendix C – Interview Guides

---

This appendix includes all in-depth interview guides in the order listed below:

1. Home Energy Efficiency Rebates Contractors
2. Home Energy Efficiency Rebates Retailers
3. Multi-Family Programs
4. Mobile Home Program Technicians / Implementers
5. HERS Raters
6. Upstream Gas Water Heater Wholesalers/Distributors
7. CLEO and PACE Program Managers
8. CLEO and PACE Program Implementers

**SoCalGas Home Energy Efficiency Rebates  
Contractors In-Depth Interview Guide**

## **SCG 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. How do contractors inform customers of the rebate for tankless water heaters? Do contractors assist customers with this process?
7. What suggestions do contractors have for increasing customer participation in the program?
8. Are contractors satisfied with their participation in the program?
9. 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 heaters, and/or insulation. 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 Southern California Gas Company 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 heaters.

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 (tankless/storage), insulation, furnaces, pool heaters]

### **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 be the most effective?
- How can SCG 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?

**4.7. [For contractors who provide tankless water heaters:] Have you informed any of your customers about the rebate for tankless water heaters?**

- [If yes]: How do you present this information?
- What is the process for customers to receive the tankless rebate? Do you assist customers with this process?
- Do you think this process works well? How would you improve it?

## **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?

**SoCalGas Home Energy Efficiency Rebates  
Retailers In-Depth Interview Guide**

## **SCG 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 Southern California Gas Company 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 clothes washers, dishwashers, and water heaters, as well as energy-efficient showerheads.

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 SCG?**

## **2. MARKETING MATERIALS**

**2.1. Are you using promotional materials provided by SCG (or OSS)? 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 SCG (or OSS) promotional materials are being used: Why aren't you using the promotional materials?

**2.2. Do you think the promotional materials provided by SCG (or OSS) 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 SCG? 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 SCG 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 SCG 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?

**SoCalGas Multi-Family Programs 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?



**SoCalGas 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.

# **SoCalGas HERS Raters In-Depth Interview Guide**



# HERS Rater Training – Participant IDI Guide

## Introduction

Hi, my name is \_\_\_\_\_ and I am calling on behalf of the SoCal Gas to discuss your recent participation in HERS Rater Training classes. This is not a sales call; we are simply conducting research in order to help the program improve, if needed. The program really values the input and opinions of participants.

All of your responses will be kept confidential. We will present our overall findings to the utility with no mention of you or your company. The interview should take approximately 20 minutes.

Will you participate?

YES – Thank and continue

NO – Thank and terminate

NOT A GOOD TIME – Thank and schedule (when would be a better time to discuss this?)

## Rater/Consultant Information

First I would like to get some background information about your company.

1. What is the primary type of work your firm typically does? What kind of customers or market segments do you normally serve?
2. Where is your office located? Do you have more than one office? Where are the others?
3. Assuming much of your work is outside of the office, on site, where are your jobs located?
4. How many years has your company been in business? How many years have you worked for this company?
5. How many employees do you have?
6. About what percent of your company revenues come from the inspection and rating of multifamily properties? Single-family properties?

## HERS Training Questions

Now I would like to talk with you about the HERS Rater training you have received. I see you attended **<# of classes>** classes, including **<list classes and dates>**.

7. Do you recall attending these classes? (Y/N – If no, follow up by asking them about the particular class(es) they reportedly attended, from the participant sheet)
8. Was the material presented during the training useful and informative? Why do you say that? Were there any other subjects you thought should be addressed as part of the class(es) you attended?
9. Was the instructor able to present the information effectively? Were you able to understand the concepts? If you had any questions, was the instructor able to answer them? How could the presentation of the information been improved?
10. Overall, how effective was the training you received? Why do you say that?
11. Do you feel that the training(s) was/were worthwhile? Why do you say that?
12. Do you use the information from the training in your practice? How often?
13. Do you feel that the training gave you a sufficient understanding of the subject matter? Is there a need for more training than provided in the class?
14. Were you able to attend all of the trainings you wanted to attend? (If not) Why not?
15. Was/were the training time(s) and location(s) reasonably convenient for you? Why do you say that?
16. Did you participate in any online training courses? (Y/N)
17. [If 10=Yes] Did you prefer online or in person training? Why?
18. [If 10=Yes] If you had to pay for the course, would you choose online or in-person? Why?

19. [If a selection is made in 18] How much less would the **<option not selected in 18>** course have to be for you to select that course over the other? Why?

**SoCalGas Upstream Water Heater Wholesalers/  
Distributors In-Depth Interview Guide**

# SEMPRA Upstream High Efficiency Water Heater Rebate Program Interview Guide

*--For Wholesalers/Distributors--*

*DRAFT 11/28/11*

Hi, I'm \_\_\_\_\_ with Evergreen Economics, an energy research firm based in Portland, Oregon. My company has been hired by Southern California Gas Company (SCG) to evaluate their Upstream High Efficiency Water Heater Rebate program, which offers a point-of-sale rebate system at the wholesaler/distributor level for replacement water heaters. The overall rebate is split between wholesalers/distributors and contractors. The goal of the program is to incentivize contractors to stock and install high efficiency water heaters to replace standard efficiency models.

**[IF PARTICIPANT]** SCG has asked us to speak with trade allies such as yourself in order to gain a better understanding of what is working well with the program and what challenges you may have come across, so the program can be improved to better help you and your customers.

**[IF NON-PARTICIPANT]** SCG has asked us to speak with trade allies such as yourself in order to gain a better understanding of your familiarity with the program, its rebate structure, and marketing materials. SCG wants to understand how it can improve the program in order to encourage businesses such as yours to participate in the future.

Are you the correct person to speak with? **[IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]** Please be assured that this isn't a sales call and that all responses will be treated confidentially. Our interview should take about 30 minutes and your information will be reported to NEEA anonymously. Neither your name nor organization information will be used in our reporting.

Interviewee may offer to speak at this time, but for most say you want to get on their calendar in next 10 days – before they can say “I’m too busy”. When you confirm date/time, get their email so you can send them an iCal appointment – reduces odds they will back out later. Sometimes I also send an email reminder the night before. Tell them what number you will call them at.

If you have to leave VM, ask them to leave their email if they must leave you a VM – sometimes it's easier to schedule by email.

## 1. Respondent Background

- What is your position title?
- What are your responsibilities?
- Which sectors do you serve? (choose all that apply – Residential, Agriculture, Industrial, Commercial)
- What products do you primarily sell to your customers? Choose all that apply (Water heaters/ motors and pumps/ drives/ lighting/ HVAC / Boilers/ Food Service Equipment / Laundry Equipment/ Retro-commissioning / technical assistance or audits / Other - specify)
- Does your company specialize in the specification (e.g., sale, application) of energy efficient (rather than standard) technologies? (Y/N/Don't know / Other – specify)

- Have you participated in other SCG Energy Efficiency Rebate programs over the past two years? **[IF YES]** Which ones? Can you estimate how many rebate applications you have applied for, or helped customers apply for in the past two years?
- What percentage of your sales are to contractors and other building professionals, and what percentage is made to retail customers?

## 2. Marketing / Outreach

- **[IF PARTICIPANT]** How did you first hear of the Hot Water Heater Rebate program? (e.g., SCG program announcement, mailings, adhesive water heater labels, wholesaler, program website, through other trade allies, conferences or trade association meetings, other - specify).
- What considerations or limitations do your customers (particularly contractors) face when deciding whether to purchase and stock high efficiency water heaters? What information or messages have you found to be effective in overcoming those barriers?
- What considerations or limitations does your business face when deciding whether to participate in a program such as this?
- **[IF PARTICIPANT]** Does your business distribute high efficiency identifying pre-printed adhesive labels, supplied by **XXXMatrix/SCGXXX**, to contractors to be placed on rebated hot water heaters?
- **[IF PARTICIPANT]** Have you been educated—by either program staff or field representatives—to differentiate between standard and high efficiency units, and do you pass this knowledge to contractors and other building professionals?
- **[IF PARTICIPANT]** Have program staff made repeated contact with you to ensure your staff members are fully aware of the program and how it works?

## 3. Program Design and Participation Experience

### **[FOR PARTICIPANTS]**

*--NOTE: Contractors receive rebate (\$10) from wholesaler (who receives \$5). Wholesalers invoice the program and share the rebate with contractors through an arrangement set up by the wholesaler.--*

- Were you asked to sign a program agreement that details the responsibility of each party before participating in the program?
- Were you given a program manual? Did it adequately explain the program? Why or why not?
- Does the rebate provide your business the incentive to stock high efficiency water heaters and advertise them to your customers?
- For equipment sales that qualify for a program rebate, how long did it take you to complete rebate paperwork and send it to program staff?
- On average, approximately how long does it take for you to receive a rebate from the program, once all applicable paperwork has been submitted? Do you believe that this is an acceptable amount of time? **[SHOULD BE 10 WORKING DAYS]**
- Have you set up a payment arrangement with contractors who purchase eligible hot water heaters? What are the specifics of this arrangement?
- On average, approximately how long does it take for you to pass the \$10 portion of the rebate to contractors who purchase eligible hot water heaters once they have applied for the rebate?

- Do you think the amount of rebate is a key participation driver for your customers, or does it have relatively little purchase influence?
- Do you feel that the rebate makes prices between standard and high efficiency comparable?
- About what percentage of your hot water heater sales receive rebates through the program?
- Does the existence of the program influence your decisions with regard to selecting energy efficiency water heaters in lieu of standard-efficiency units?

**[FOR NON-PARTICIPANTS]**

- Are there any barriers preventing you from participating in a point-of-sale rebate program such as this one?
- What types of incentives would encourage your business to stock your inventory with high efficiency water heaters and advertise them to your customers?
- What types of program related marketing materials would be most visible to your business and customers?

#### **4. General Closing Questions**

**[FOR PARTICIPANTS]**

- Overall, how satisfied would you say you are with the High Efficiency Hot Water Heater program? (1-5 scale, where 1 is not at all satisfied and 5 is extremely satisfied).
  - Why did you choose that number?
- What is working best about the program?
- What area(s) is most in need of improvement?
- Does this program leave you with a positive impression of energy efficient products in general, and SCG's efficiency program in particular?
- We are about to wrap up. Do you have any other comments you'd like to make?

**[FOR NON-PARTICIPANTS]**

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

**SoCalGas CLEO and PACE Program Managers In-  
Depth Interview Guide**



## Interview Guide for CLEO, PACE Programs Manager

1. What are the key program changes since the 2007- 2009 program cycle?
  - a. CLEO
  - b. PACE
  
2. Can participants get in-language rebate applications at the booths or classes? If NOT, why?
  - a. CLEO
  - b. PACE
  
3. How do you work with each program implementer, and how is this going?
  - a. Are program responsibilities well defined and understood (e.g., printing)?
  - b. Do you hear about potential problems proactively?
  - c. Are there any problems related to data tracking and reporting to SCG? Have you tried or needed to verify any of the participation data?
  - d. Would you say you have a strong relationship with the implementer?
  
4. How did the initial contracting go, including goals setting?
  - a. CLEO:
  - b. PACE: Were there any key changes to their marketing requirements, so they do not just recruit existing PACE customers?
  
5. How are program materials translated to in-language, and how has this process gone?
  - a. CLEO:
  - b. PACE:
  
6. Do you have summary documents describing your progress towards specific programs goals that you can provide (e.g., booth attendees by ethnicity/language)?
  - a. CLEO –
  - b. PACE –
  
7. What have been the key challenges for each program, and will these impact final goals attainment?

- a. CLEO – has there been more progress in reaching Hispanics and African Americans?
  - b. CLEO – has there been more progress on communities partnering (e.g., mayoral participation)?
  - c. PACE – any concerns about inappropriate venues?
8. What has been working particularly well for each program?
  - a. CLEO –
  - b. PACE -
9. Are there any changes to the programs that you would like to make?
  - a. CLEO
  - b. PACE
10. Are there any ways your programs could work closer or more effectively with other programs offered by SoCal Gas?
  - a. Can you track CLEO/PACE participants that purchase deemed measures, or participate in other programs? If not, why? Is subsequent participation a formal goal?

**California EE Strategic Plan (CEESP) and Program Performance Metrics (PPMs)**

11. Are these programs formally linked to any CEESP goals? If so, how?
12. Do you or others track and report on any PPMs (e.g., to assess progress towards CEESP goals)? How is this process going? Have you received any feedback from CPUC?
13. Have any changes been made to the programs implementation or data tracking as a result of PPM requirements?

**SoCalGas CLEO and PACE Program Implementers  
In-Depth Interview Guide**

## Program Implementer In-Depth Interview Guide for CLEO and PACE Programs

1. What are the key program changes since the 2007- 2009 program cycle?
  - a. (CLEO) What measures, prizes do class attendees get?
  - b. (CLEO) Doing in-home audits, in-language?
  - c. Can participants get in-language rebate applications at the booths or classes?
  - d. (PACE) In the mail? If not, why?
  
2. (CLEO) Do you mostly work with SCE or SCG?
  - a. How do you work with SCG’s program manager, and how is this going?
  - b. Are program implementation responsibilities well defined and understood?
  - c. Are there any problems related to data tracking and reporting to/by SCG?
  
3. How did the initial contracting go, including goals setting?
  
4. How are program materials translated to in-language, and how has this process gone?
  
5. What are your program goals and budget?
  - a. Do you have a summary document describing your progress towards specific program goals that you can provide (e.g., booth attendees by ethnicity/language)?

	2010	2011	2012	Progress to date
Goals				
Milestones				
Budget				

6. (*Market understanding*) What have been your most successful media for participant recruitment? Do these media vary by ethnic group? Why?

PACE: How have you expanded outreach beyond regular PACE clientele?

7. What have been the key challenges for this program? For instance, have there been any major implementation delays, cost overruns, or particular outreach challenges?

CLEO: Have there been any issues targeting new counties, cities or groups?

PACE: Do customers still have to fill out sign-up forms and equipment receipt forms – has this reduced participation?

a. Will these issues prevent you from reaching your program goals?

8. Are there any things that you think are working particularly well with the program?

9. How much follow up assistance are you providing to participants via phone or electronic means? Is this always in-language? Do participants seem to get engaged and ask for additional help?

10. Are there any changes to the program that you would like to make?

11. Are there any ways your program could work closer or more effectively with other programs offered by SoCal Gas?

12. Do other members of your team need an interview?

## Appendix D – Maps

---

Appendix D consists of the GIS maps created to spatially describe the SoCal Gas customer population, including its demographics, energy usage, and participation in SoCal Gas energy efficiency programs. A spatial examination of the utility's customer account database allowed us explain how SoCal Gas 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 SoCal Gas Accounts per Square Mile, 2011**, shows the number of gas accounts per square mile along with areas that have higher concentrations of low income households (as determined by US Census data and defined as household income at 150 percent of the Federal Poverty guidelines). This map indicates a significant number of low income households within SoCal Gas' service territory.

**Figure D-2. Low Income SoCal Gas Accounts per Square Mile, 2011**, shows the number of low income gas accounts identified in the SoCal Gas customer data per square mile. Concentrations of low income households, as identified by the US Census, are marked with a cross hatch.

**Figure D-3. Average Annual SoCal Gas Bill for All Accounts, 2011**, shows the average annual gas bill over all households in the service territory. Gas bills are highest outside the Los Angeles core where households are physically larger and wealthier.

**Figure D-4. Average Annual Therm Usage for All Accounts, 2011**, shows the distribution of gas usage within SoCal Gas' service territory. Average them usage is higher outside the Los Angeles core where households are physically larger and wealthier.

**Figure D-5. Average Rebates (\$) per Household for the Residential Program, 2011**, shows the distribution of SoCal Gas program rebate dollars to all residential households. Low income areas, identified by the US Census, are marked with a cross hatch. This map does not include rebate dollars provided through the HEER program where participation is not tracked for individual customers.

**Figure D-6. Average Low Income Measure Costs (\$) Across All Households, 2011**, shows the distribution of low income program assistance. For the low income program, the entire measure cost is paid by SoCal Gas, as compared with the standard Residential Programs where only a fraction of the measure cost is covered. This map is consistent with the information shown in Map 4 of Section 3.3, where the lower income areas are receiving a greater share of program assistance compared to wealthier Census Tracts.

**Figure D-7. Average Residential Program 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 by SoCal Gas, as compared with the standard Residential Programs where only a fraction of the measure cost is covered. This map is consistent with the information shown in Map 4 of Section 3.3, where the lower income areas are receiving a greater share of rebate dollars from SoCal Gas when both the low income and Residential Program rebates are considered.

**Figure D-8. Average Residential Program Rebates Plus Low Income Measure Costs (\$) per Household, with Los Angeles Area Asian Population Concentration, 2011**, shows the same rebate and measure cost data shown in Figure D-7, except it indicates the distribution of areas of high concentration of Asian households as identified by the US Census (marked as a cross hatch). This map shows that rebates tend to be low in areas of high Asian household concentration relative to other areas in Los Angeles.

**Figure D-1. Total SoCal Gas Accounts per Square Mile, 2011**

**Total Gas Accounts per Square Mile, 2011**

By 2000 Census Block Group



Data Sources: US Census Bureau, ESRI, Inc., and Sempra Energy.  
 Data. Calculations by Wirtshafter Associates Inc., and Evergreen Economics  
 Note: Approx 5% of customer records did not produce an address match.

**Total Gas Accounts per Square Mile**

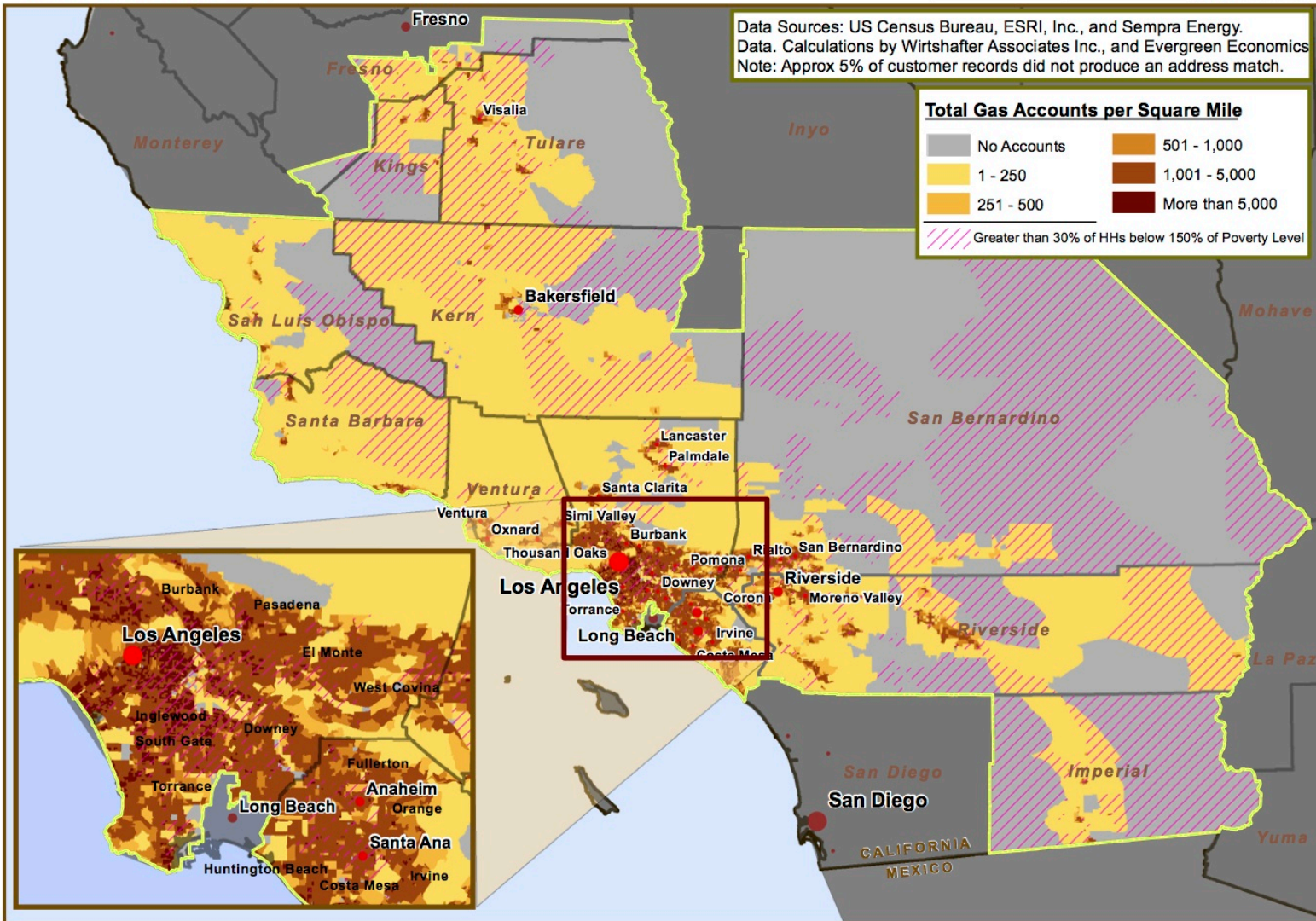
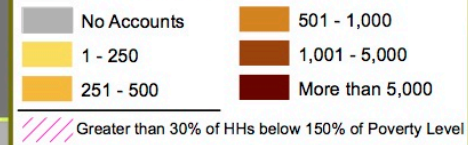




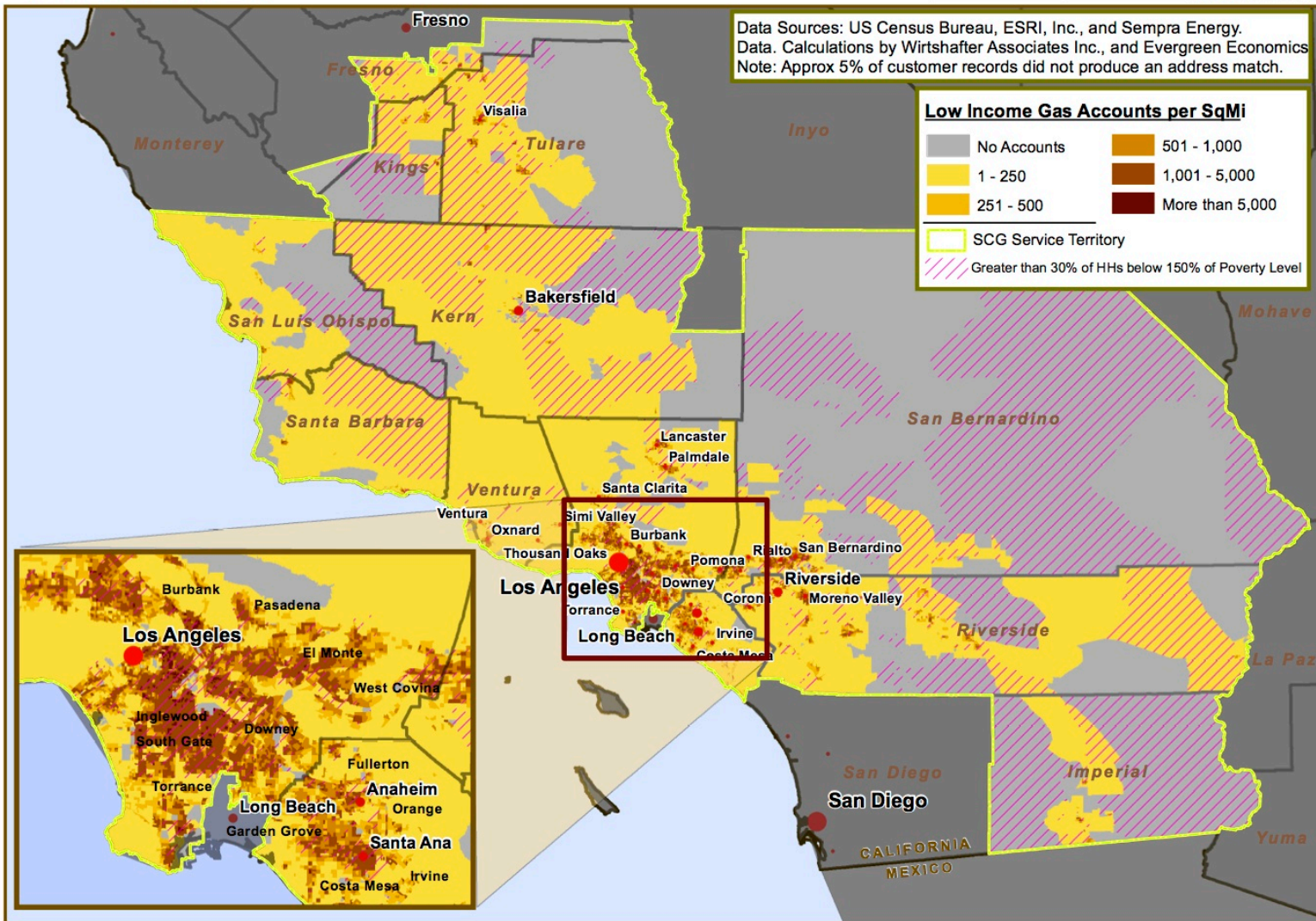
Figure D-2. Low Income SoCal Gas Accounts per Square Mile, 2011

Low Income Gas Accounts per Square Mile, 2011

By 2000 Census Block Group



Data Sources: US Census Bureau, ESRI, Inc., and Sempra Energy.  
 Data. Calculations by Wirtshafter Associates Inc., and Evergreen Economics  
 Note: Approx 5% of customer records did not produce an address match.



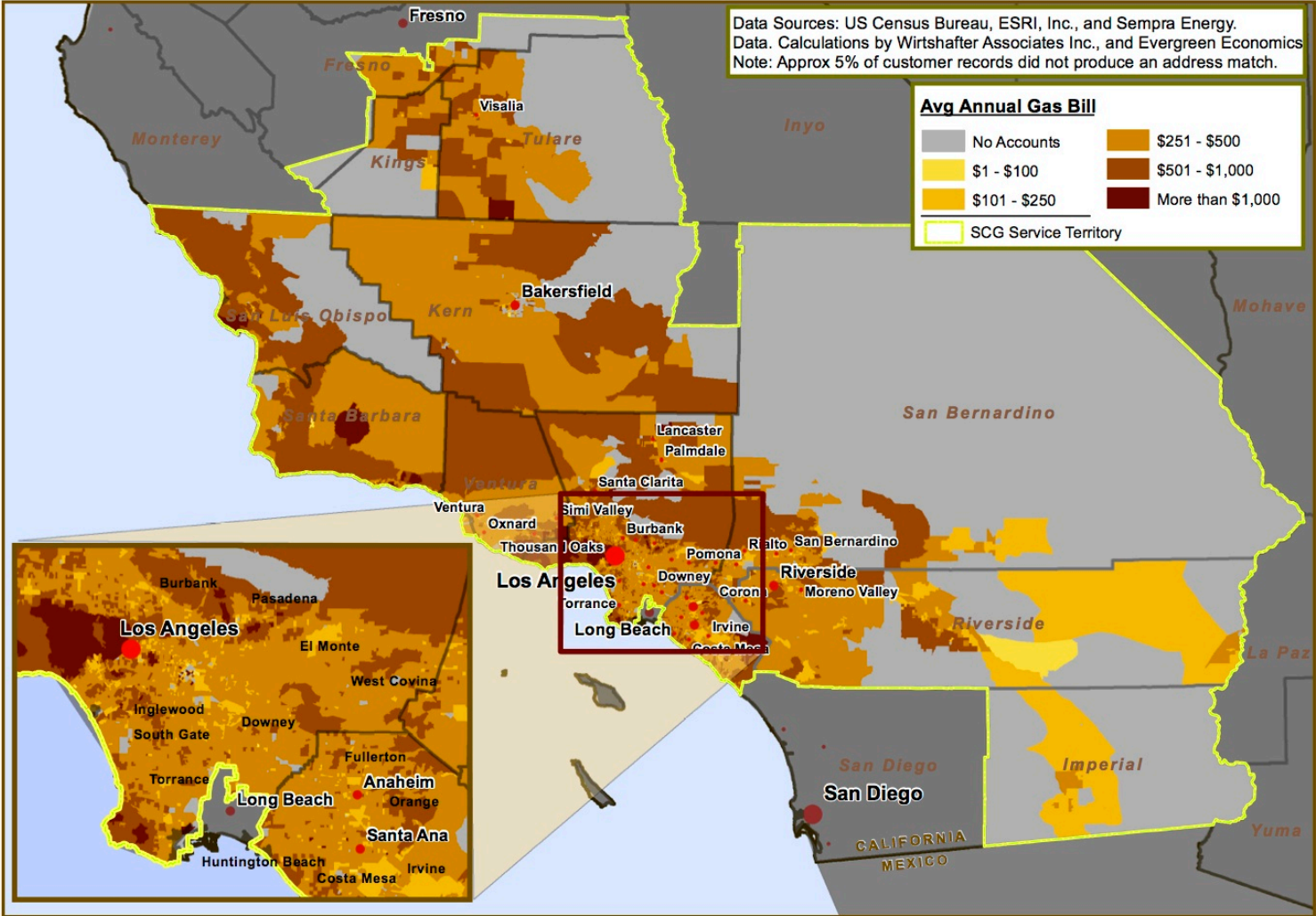
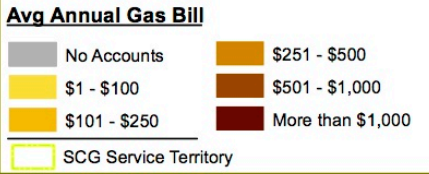
**Figure D-3. Average Annual SoCal Gas Bill for All Accounts, 2011**

**Annual Average Gas Bill for All Accounts, 2011**

By 2000 Census Block Group



Data Sources: US Census Bureau, ESRI, Inc., and Sempra Energy. Data. Calculations by Wirtshafter Associates Inc., and Evergreen Economics. Note: Approx 5% of customer records did not produce an address match.





**Figure D-4. Average Annual Therm Usage for All Accounts, 2011**

**Annual Average Therm Usage for All Accounts, 2011**

By 2000 Census Block Group



Data Sources: US Census Bureau, ESRI, Inc., and Sempra Energy.  
 Data. Calculations by Wirtshafter Associates Inc., and Evergreen Economics  
 Note: Approx 5% of customer records did not produce an address match.

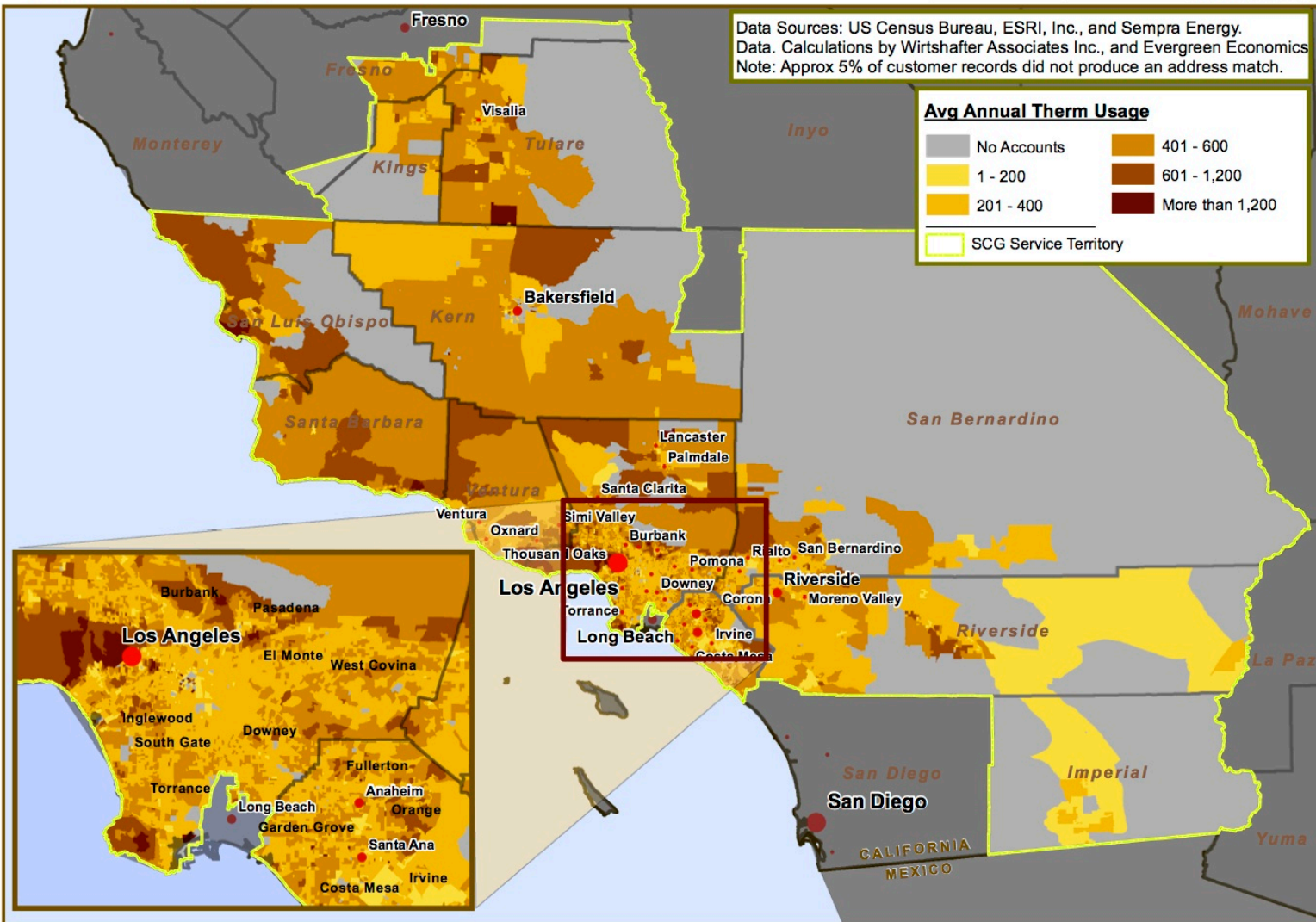


Figure D-5. Average Rebates (\$) per Household for the Residential Program, 2011

Average Residential Rebates (\$) per Household, 2011

By 2000 Census Block Group



Data Sources: US Census Bureau, ESRI, Inc., and Sempra Energy.  
 Data. Calculations by Wirtshafter Associates Inc., and Evergreen Economics  
 Note: Approx 5% of customer records did not produce an address match.

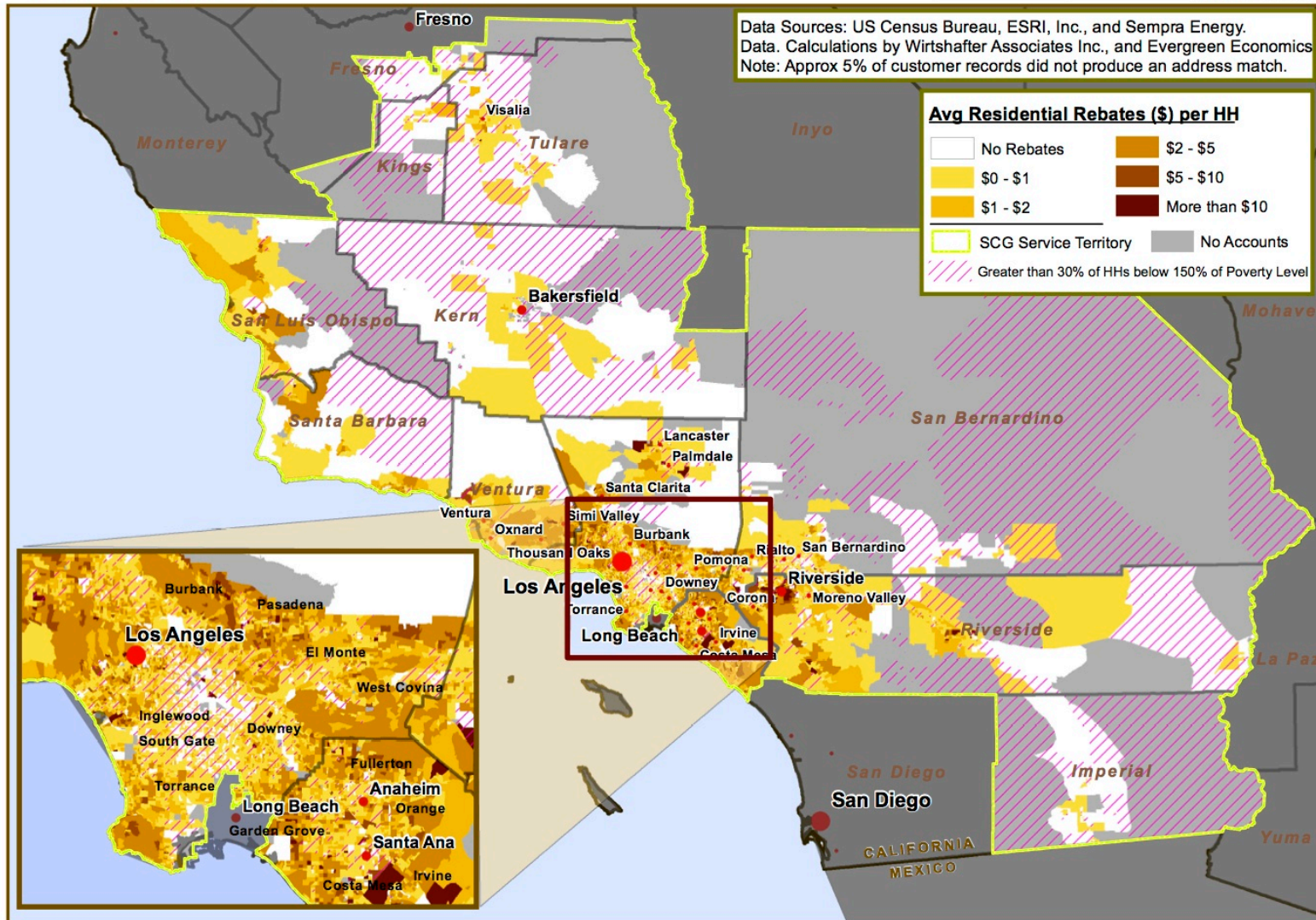




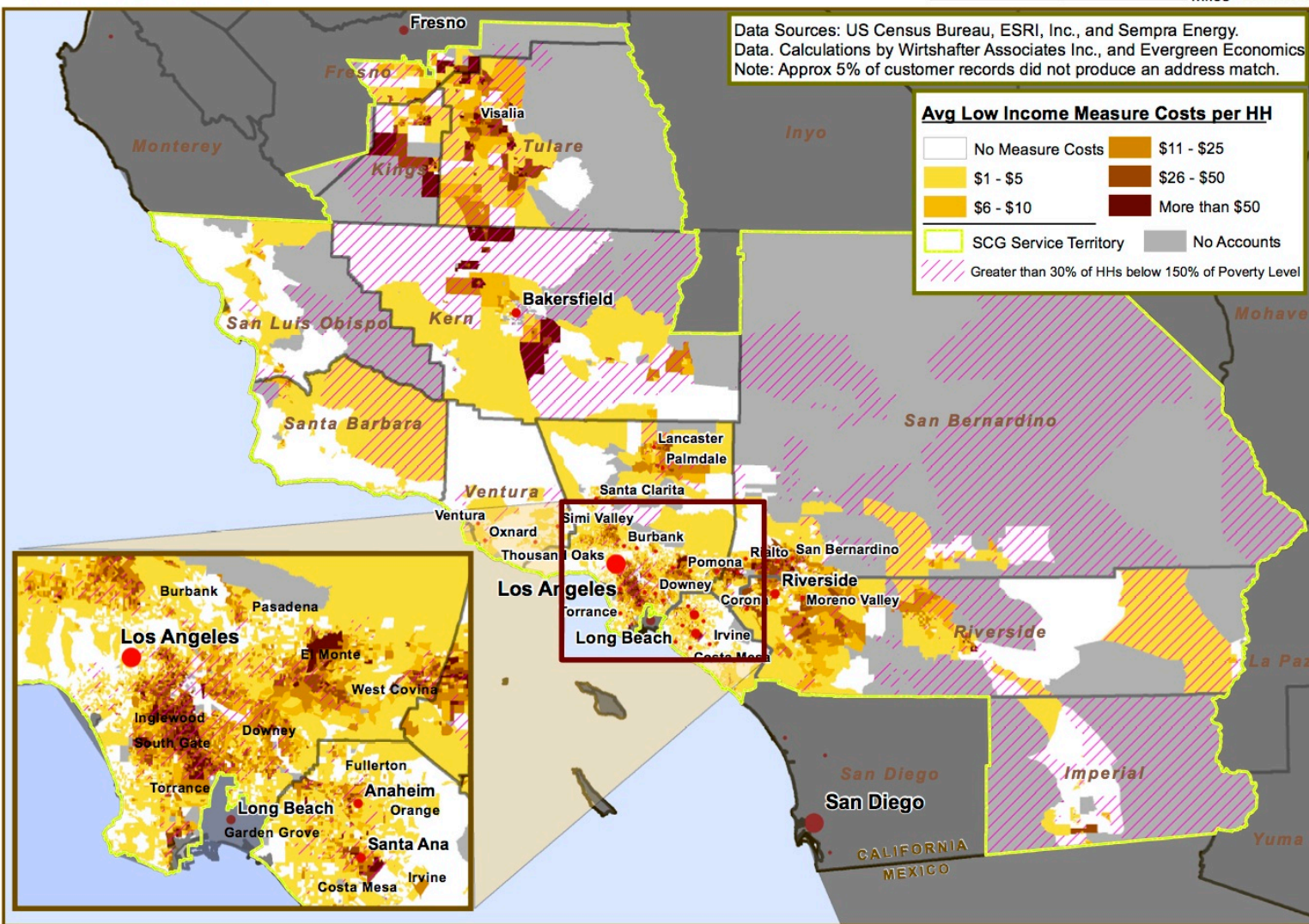
Figure D-6. Average Low Income Measure Costs (\$) Across All Households, 2011

Low Income Measure Costs (\$), All Households, 2011

By 2000 Census Block Group



Data Sources: US Census Bureau, ESRI, Inc., and Sempra Energy.  
 Data. Calculations by Wirtshafter Associates Inc., and Evergreen Economics  
 Note: Approx 5% of customer records did not produce an address match.



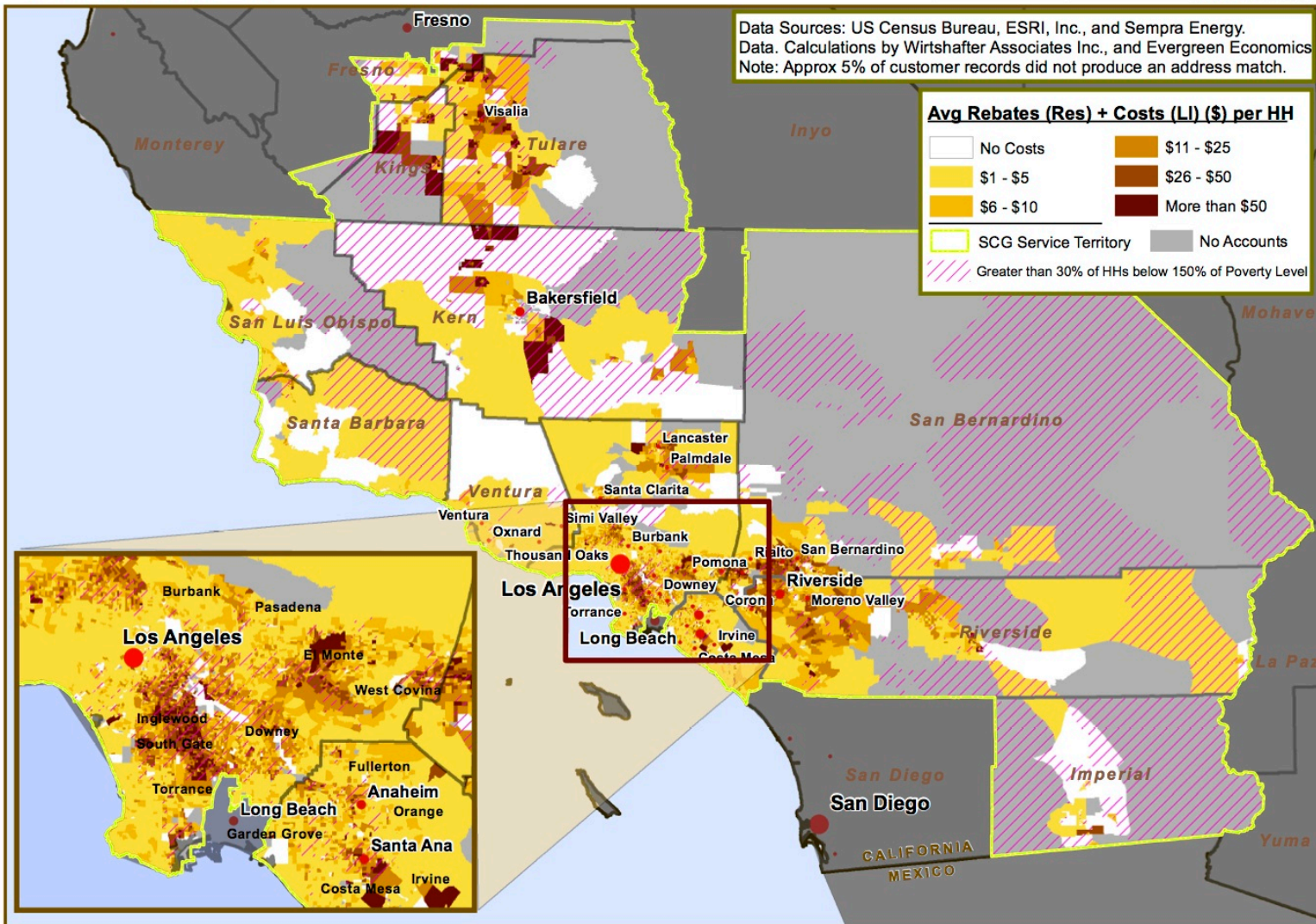
**Figure D-7. Average Residential Program Rebates Plus Low Income Measure Costs (\$) per Household, 2011**

**Average Residential Rebates + Low Income Measure Costs (\$) per Household, 2011**

By 2000 Census Block Group



Data Sources: US Census Bureau, ESRI, Inc., and Sempra Energy.  
 Data. Calculations by Wirtshafter Associates Inc., and Evergreen Economics  
 Note: Approx 5% of customer records did not produce an address match.





**Figure D-8. Average Residential Program Rebates Plus Low Income Measure Costs (\$) per Household, with Los Angeles Area Asian Population Concentration, 2011**

**Average Residential Rebates + Low Income Measure Costs (\$) per Household, 2011**

By 2000 Census Block Group, with concentration of reported asian population.

