

Is your utility listed?

If not, this brown bag likely won't be very useful so feel free to hang up and disconnect from the webinar.

Tacoma

Snohomish

Seattle City Light

Clark

EWEB

Central Lincoln PUD

Clallam County PUD

Central Electric Coop

Flathead

Midstate Electric Coop

Lincoln Electric Coop

Tillamook

Grays Harbor

# Ductless Heat Pump Electric Forced Air Furnace Participant Survey



June 22, 2017



# Evaluation Overview

# 2017 Data Collection Activities

## Document Review (Utility Files)

- 5 measure groups
- ~600 projects across 26 utilities

## Verification (Web & Phone Surveys)

- 2016 DHP eFAF sampled projects
  - *Utilities or Evaluation can field survey*

## OPTIONAL Billing Data

- DHP Zonal
- DHP eFAF
- Prescriptive DS

# DHP eFAF Evaluation Activities

## Initial Analysis (Phase I)

- Collect energy consumption data
- Billing analysis to estimate draft savings

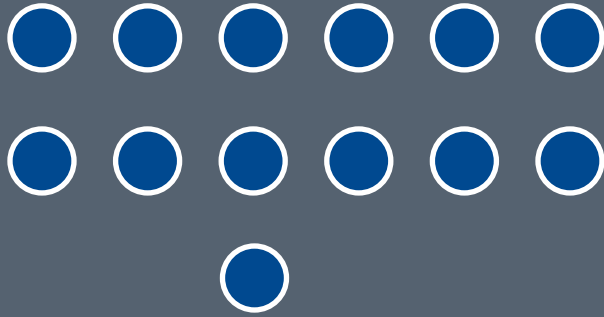
1



## Targeted Analysis (Phase II)

- Collect installation forms and customer surveys
- Better understand draft savings and identify possible improvements to the measure

2



# 13 Utilities Included in DHP eFAF Sample

Tacoma
Snohomish
Seattle City Light
Clark
EWEB
Central Lincoln PUD
Clallam County PUD
Central Electric Coop
Flathead
Midstate Electric Coop
Lincoln Electric Coop
Tillamook
Grays Harbor



# The Plan

# Timeline

*Our goal is to make evaluation results timely and relevant*

<b>June 13</b>	Draft survey circulated for utility comment
<b>June 22</b>	Brown bag to launch survey effort
<b>June 27</b>	Comments due on survey
<b>Early July</b>	Survey finalized
<b>Early July</b>	Survey instrument, contact lists, supporting docs sent to utilities that are fielding surveys
<b>July 17</b>	Launch survey
<b>End of August</b>	Close survey



# Survey Format



## Web Survey

- **Recommended option!**
- Higher response rate
- Easier for utilities and end users
- Ability to use visual aids
- *Data required: participant email address*

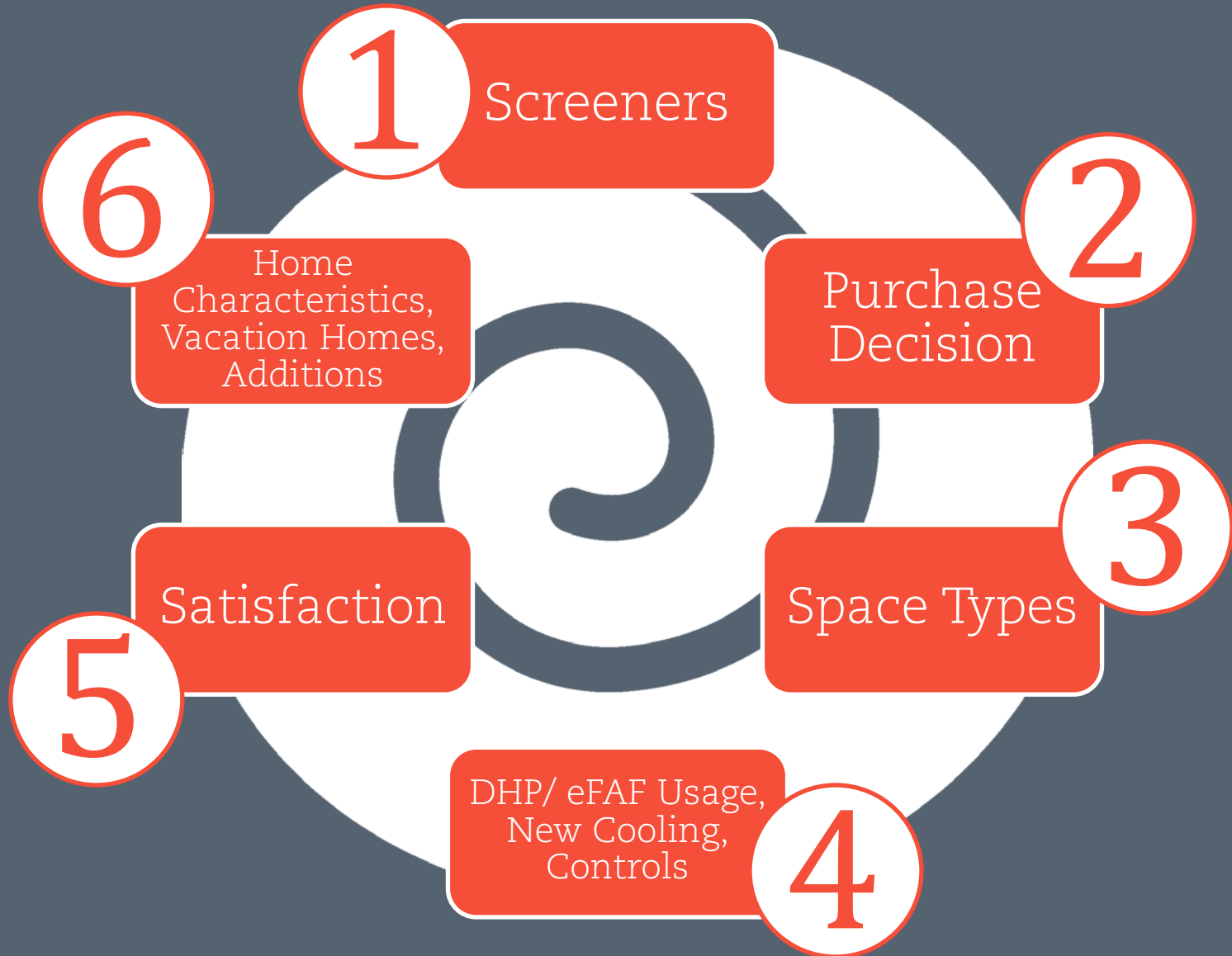
\$20 Thank You Gift  
for participating



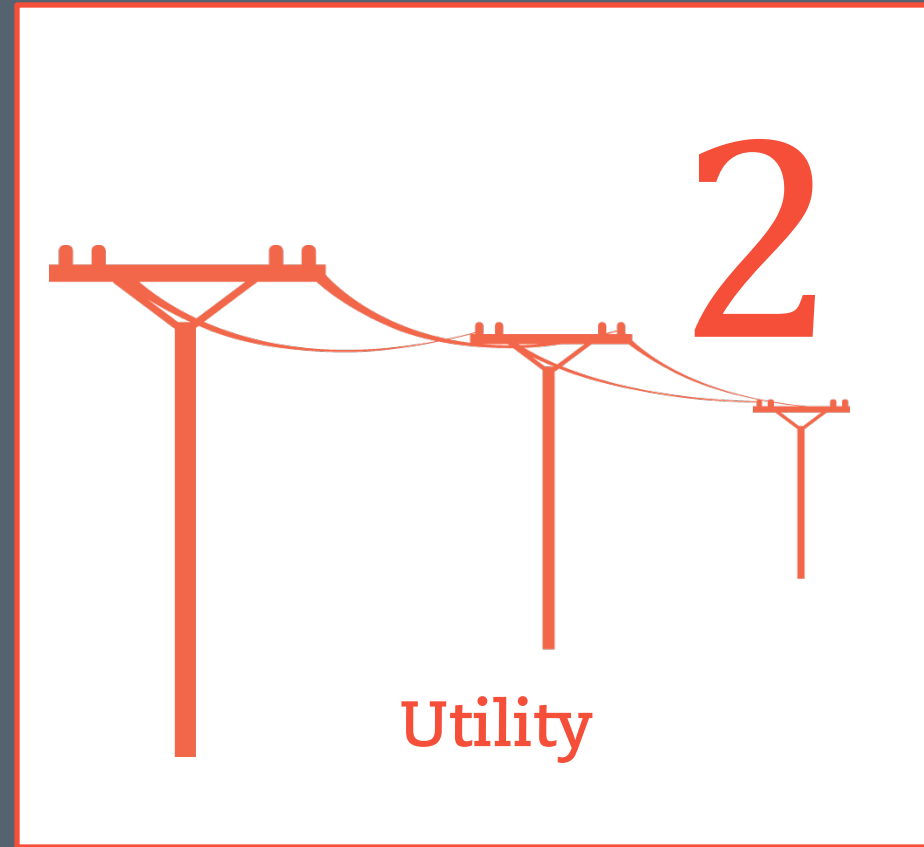
## Phone Survey

- Includes option to take web survey
- Collects email address to receive e-card
- *Data required: customer phone number*

# Survey Flow



# Option for **You** to Field the Survey



*We are happy to field the survey, but let us know if you'd prefer to*



# Fielding the Survey

Evaluation develops sample file for each utility



## WEB SURVEY



Possible Outcomes

Completes survey

No response

Feed into analysis

Send up to 3 reminders

## PHONE SURVEY



Evaluation staff calls participants in sample file

Possible Outcomes

Completes survey

Chooses option to take web survey

Wrong number – OR- Refusal

Requests callback

No answer

Feed into analysis

Shift contact to web survey

Remove from sample

Attempt contact 3 times



# The Process

# Web-Based Survey Administration Tool



[Enter the following information from the sample file for the contact you are about to call.]

Survey ID   
Quantity

[Dial the contact's phone number.]

My name is [Name] and I'm calling from [Utility Name]. Our records show that you recently purchased a ductless heat pump system in your home. Is that correct?

- Yes
- No
- Don't know
- NO ANSWER
- NUMBER NOT IN SERVICE/FAX LINE

I'd like to ask you a few questions about your experiences with the ductless heat pump.

My questions should take no more than 15 minutes, and you may be eligible to earn a \$20 Amazon gift card for completing the survey. I just need to ask a few questions first to determine if you are eligible.

Is now a good time? Another option is to take a web version of the survey if that is more convenient for you.

- Yes - continue with phone survey
- Switch to web survey
- No - please call back later
- No - I don't want to participate

What is the best email address to reach you at? [Record email address]

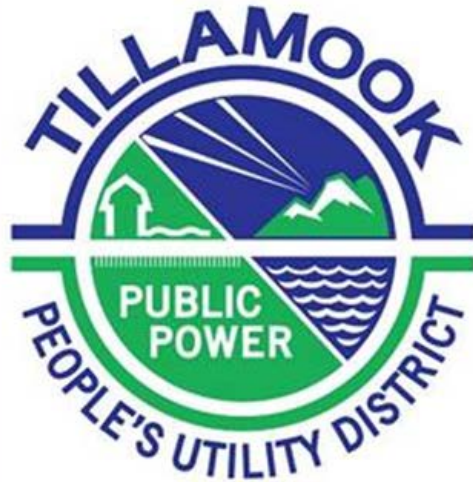
Thank you for your time. We will send you an email with the web survey link within the next three days.

[Mark contact as "Switch to Web Survey" in sample file.]

Email Address



# Custom Options Available



Welcome to the Northwest Ductless Heat Pump Survey!

Thank you for taking the time to complete this survey. Your responses will help Tillamook People's Utility District improve their ductless heat pump program and better serve customers like you.

Note that you can use the "Back" arrow button if you want to go back and change an answer, and if you need to finish the survey at a later time, your responses will

*We can customize emails and the web-survey landing page with your logo*



# If You Field the Survey

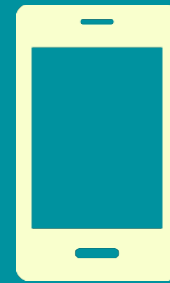


# We've Got You Covered!



## Customized sample file

- Contact information
- A process for logging survey status
- Personalized web links to be emailed to participants (if administering via web)



## Web-based survey administration tool

- Customized module with automated logic to be used for both phone and web surveys

# Customized Sample File

	A	B	C	D	E	F	G	H	I	J
1	Survey ID	FirstName	LastName	PhoneNumber	Email Address	Survey Link	Quantity	Utility	Survey Status	Scheduled Callback Time
2	100009	Jan	Levinson	(232) 762-2115	jan@gmail.com	<a href="https://navigantenergy.a">https://navigantenergy.a</a>	1	Utility A	Callback	
3	100010	Jim	Halpert	(152) 515-5563	jim@gmail.com	<a href="https://navigantenergy.a">https://navigantenergy.a</a>	2	Utility A	Callback	Before 9am
4	100014	Meredith	Palmer	(287) 548-8538	meredith@gmail.com	<a href="https://navigantenergy.a">https://navigantenergy.a</a>	1	Utility A	Callback	Tuesday after 4pm
5	100018	Phyllis	Vance	(355) 230-9577	phyllis@gmail.com	<a href="https://navigantenergy.a">https://navigantenergy.a</a>	1	Utility A	Callback - Different Contact	
6	100002	Angela	Martin	(175) 595-5829	angela@gmail.com	<a href="https://navigantenergy.a">https://navigantenergy.a</a>	1	Utility B	Complete	
7	100004	Darryl	Philbin	(308) 539-9201	darryl@gmail.com	<a href="https://navigantenergy.a">https://navigantenergy.a</a>	2	Utility A	Complete	
8	100005	David	Wallace	(408) 987-7033	david@gmail.com	<a href="https://navigantenergy.a">https://navigantenergy.a</a>	1	Utility A	Complete	
9	100008	Holly	Flax	(470) 879-4034	holly@gmail.com	<a href="https://navigantenergy.a">https://navigantenergy.a</a>	1	Utility B	Complete	
10	100011	Karen	Fillipelli	(438) 843-8056	karen@gmail.com	<a href="https://navigantenergy.a">https://navigantenergy.a</a>	3	Utility B	Complete	



For phone surveys, we will include instructions on how to manage the sample and record call outcomes

# Supporting Material



Call  
Center  
Alerts



Technical  
Support

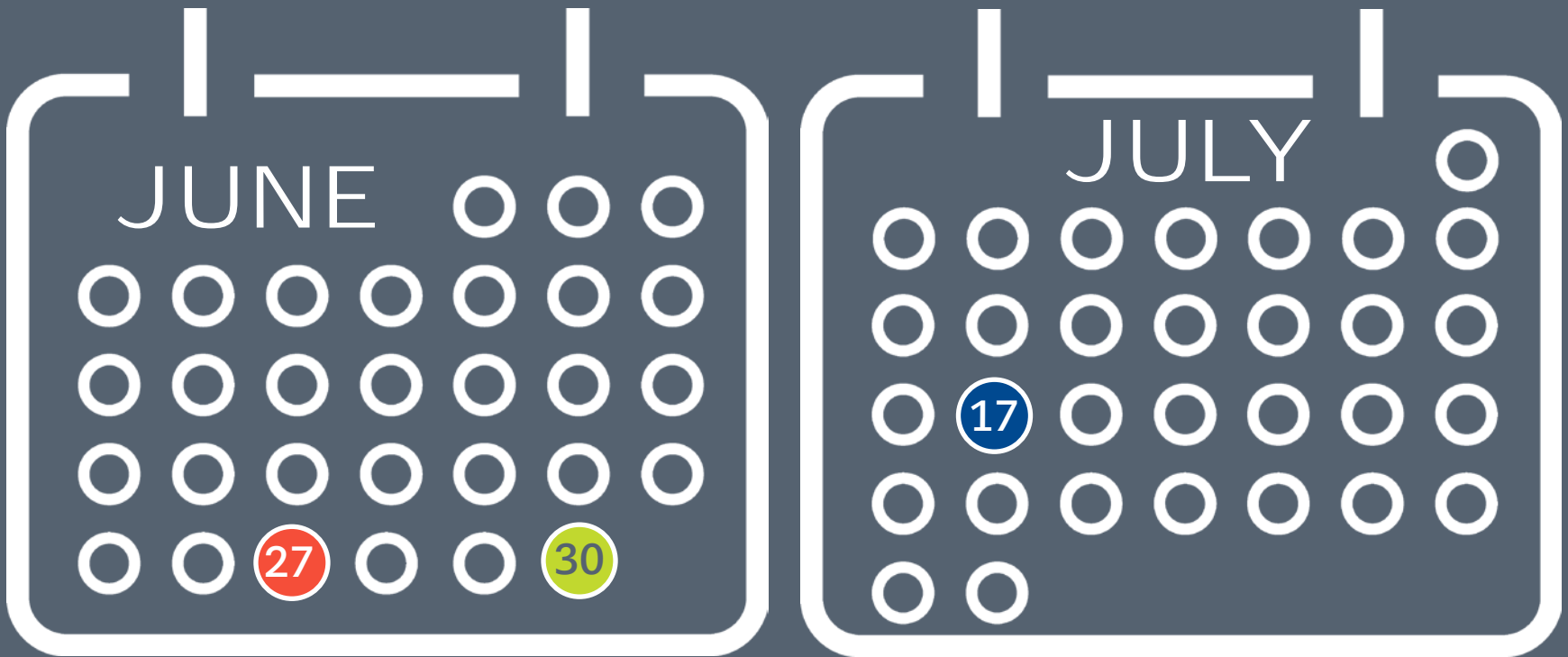


Something  
else?



Questions?

# Next Steps



June 27 Provide comments on draft survey

June 30 Let us know if you prefer to field the survey

July 17 Survey launch

# Thank you!



[www.bpa.gov/goto/evaluation](http://www.bpa.gov/goto/evaluation)

