

2018

EE  
Process

Survey  
Results

June 14, 2018



# Today's agenda

Introduction and context for this year's Process Evaluation

Survey overview, findings, recommendations

Comments from BPA staff on program direction and next steps

# Why Evaluation?



What do  
we all  
want?

Energy  
efficiency  
programs that  
save customers  
money and  
energy.

To be  
trustworthy  
stewards of  
their money.

# Evaluation

What did we achieve?

&

How do we improve?



# New Approach to Process Evaluation

We're focusing on the results here today!

1

Document the **program understanding**

2

**Survey customers** regularly to obtain feedback on program satisfaction, program processes, and areas for program improvement

3

If necessary, gather additional program information from market actors and stakeholders through **targeted assessments**

# Why did BPA conduct a survey?

**Identify**

areas for program improvement

Provide you with  
**program support**

Pinpoint program areas for

**targeted**

**assessments,**

as needed

Make programs

**easier**

for you to implement

# FY 2018 Process Evaluation

## Focus Areas

**General Questions:**  
Satisfaction & program participation

**Commercial TANs:**  
Given that TANs will be foundational to the commercial program, how can we make sure they're working as intended and supporting utilities optimally?

**Industrial Lighting:**  
Can we identify opportunities to meet customer needs and achieve savings with more streamlined resources?

**Residential HPWHs:**  
Given this is a measure with high potential and low uptake, how can we shift the offering to encourage more savings and meet customer needs?



# Survey process

EE Representatives  
(EERs) identified contacts  
at all BPA utilities

The evaluation team invited  
each contact to participate and  
left the survey open for fielding  
in late February and early  
March

**68 of 139 unique utilities responded,  
roughly a 50% response rate**

# General feedback across all sectors



Survey respondents stated they lack time  
and expertise for marketing, outreach,  
and technical assistance



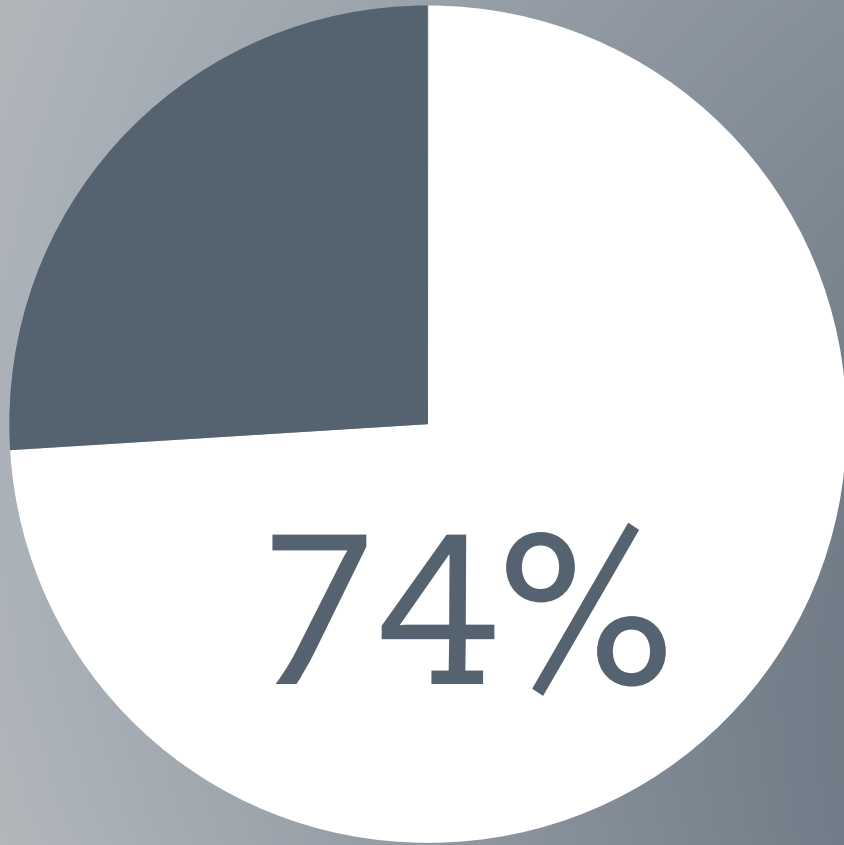
# General feedback across all sectors



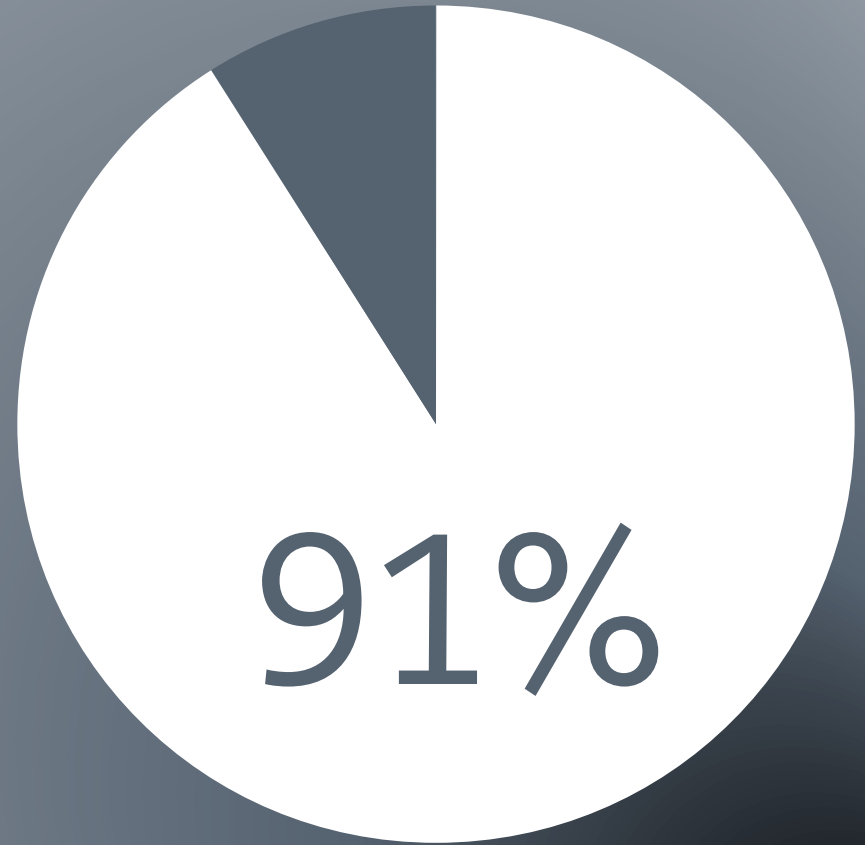
Customers feel like contractors need more education about BPA programs in general

# Commercial

# HVAC



# Lighting



*Percentages for this question based on n= 73*





Participant roles focus on administrative work, indicating opportunities for support in areas, like marketing and technical assistance



# How do the TANs help?



Increased/supplemented utility technical expertise



Increased ability to complete energy efficiency projects





BPA  
documentation

Incentive  
eligibility and  
other baseline  
questions

Explaining BPA  
programs and  
processes because  
contractors are  
not familiar with  
them

Customer utilities indicated having internal gaps in  
knowledge with more complex HVAC measures



Specific measures:  
New construction,  
Non-Standard  
Options, Neon  
Signage

Lighting  
calculators

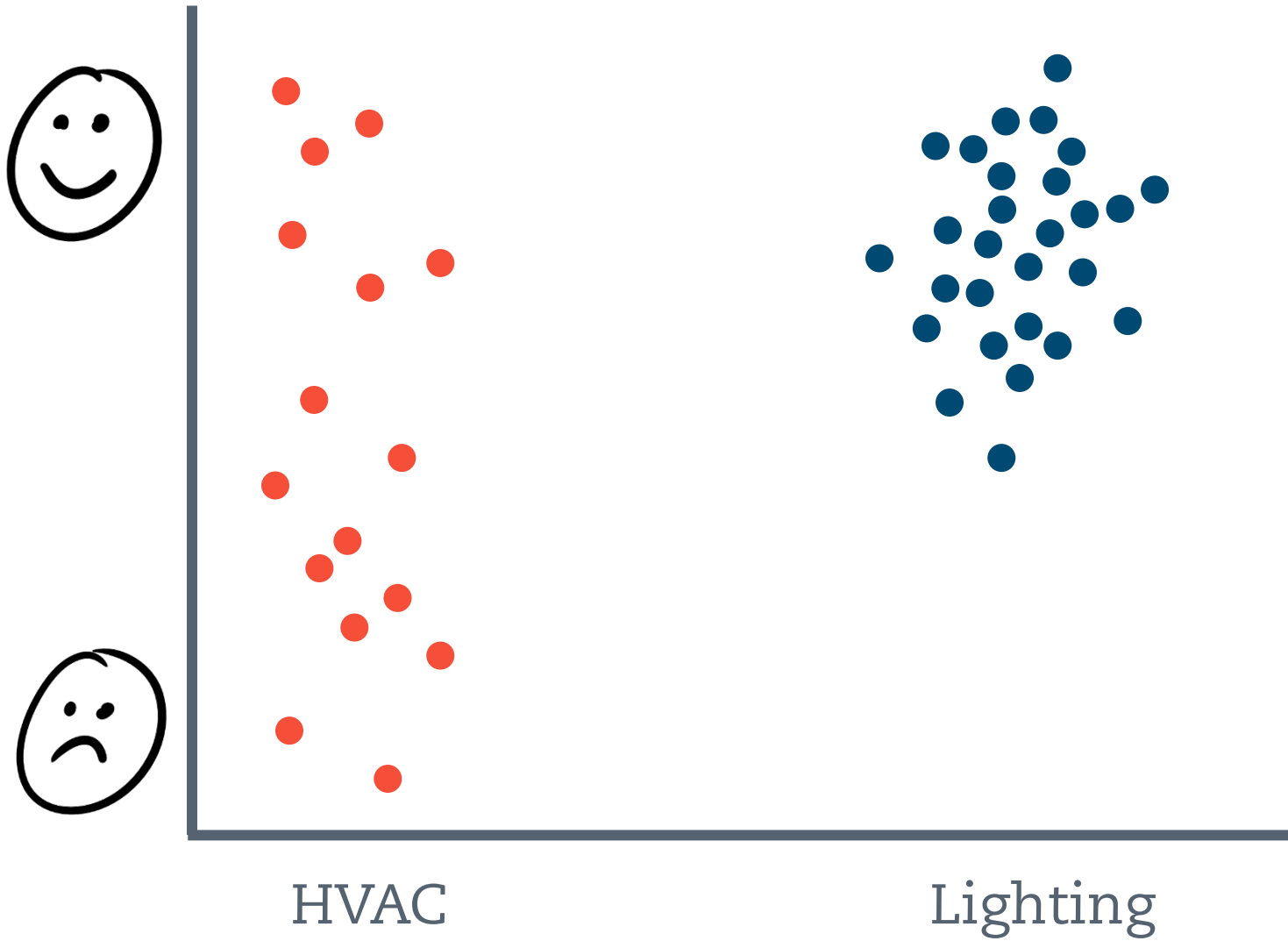
Fixture  
schedule  
page

BPA  
documentation



Customer utilities indicated having internal gaps in  
knowledge with more complex Lighting measures





\*Graph for illustrative purposes only.



Non-participants are mostly unaware  
of the TAN's service offerings



# Recommendation



TANs can play a key role in addressing the time and expertise gaps that utilities face. Assess how the TANs can provide more marketing, outreach, and technical assistance to customer utilities and end-use customers



# Recommendation



Conduct an outreach campaign to all customer utilities to help them understand and utilize TAN service offerings

Ensure customer utilities are aware of the TAN offering: marketing collateral, marketing support, training, and technical support

# Recommendation

Create targeted educational in-person and online trainings and print material to support customer utilities' and trade allies' knowledge of more complex measure offerings

## Lighting TAN

- The Lighting TAN could provide technical information on specific lighting measures and show contractors how to use lighting calculators
- BPA could standardize the lighting calculator and limit the number of updates provided to avoid confusion

## HVAC TAN

- The HVAC TAN could educate contractors on program eligibility, processes, and documentation through training sessions and informational materials
- Consider identifying a BPA HVAC TAN contact to answer contractor questions

# Commercial Program Response

- These findings validate some of the anecdotes we've heard about the programs.
- Having worked with the commercial programs for the last few years, we understood there was an opportunity to maximize our TAN services.
- We are taking a step toward that through the integration of the TANs' infrastructure with the new contract starting June 1.
- Streamlining the utility key points of contact to make it easier to access the TAN services.
- In support of utilities request for more marketing support, we've included more robust marketing services in the new program planning efforts.
- Lighting: we are already doing more lighting calculator trainings. For example, we imagine more events like the hands-on training offered at EFX18.
- HVAC: We're planning to deepen the relationship with HVAC installation contractors and distributors under the new contract.
- BPA and the TAN are planning utility kickoffs in the fall, coincident with the roundtables. Through those efforts, we plan to share the full range of services that are available to utilities and trade allies.

Industrial



76% of utility customers  
that offer industrial  
measures offer lighting



*Percentages for this question based on n= 74*





Utilities mainly fill administrative roles when it comes to industrial lighting projects

Utilities lack the time and expertise to conduct functions related to trade allies and non-administrative roles to end-use customers



Benefit to  
cost ratios

Receiving  
final project  
invoices

Lighting  
calculator

The program  
in general,  
deemed  
measures



Participants mainly requested technical assistance, while some requested a variety of additional assistance



# Recommendation

BPA should take steps to work to better understand the various roles that utility staff have in relation to the industrial lighting program (e.g., who uploads the lighting calculator to BPA). This will allow the organization to better work with customers, trade allies, and implementers at each point in the process and provide more efficient program support.



Through its work with contractors, program implementers, and customers, BPA should work to ensure installers, manufacturers, and wholesalers understand that the industrial lighting program offer mirrors that of the commercial lighting program.



BPA should take steps to improve coordination across all BPA programs and program implementers that impact industrial lighting such that we maximize our opportunities to engage and support industrial customers in lighting improvements.



# Industrial Program Direction



- BPA will work with customers and trade allies to understand the additional technical assistance available for industrial facilities through the ESI program.
- BPA will work to improve coordination with the Lighting TAN. Ensure installers, manufacturers, and wholesalers understand that the industrial lighting program offer mirrors the commercial lighting program.
- BPA will work with customers to better understand all industrial lighting opportunities that are available in their territories (e.g., in water and wastewater facilities).



# Residential



Many offer HPWH rebates,  
although a smaller amount  
proactively market the  
rebates



Participants mostly fill  
administrative roles and  
are not providing  
assistance to HPWH  
distributors and installers



# Why not offer HPWH measures?

1 lack of knowledgeable installers

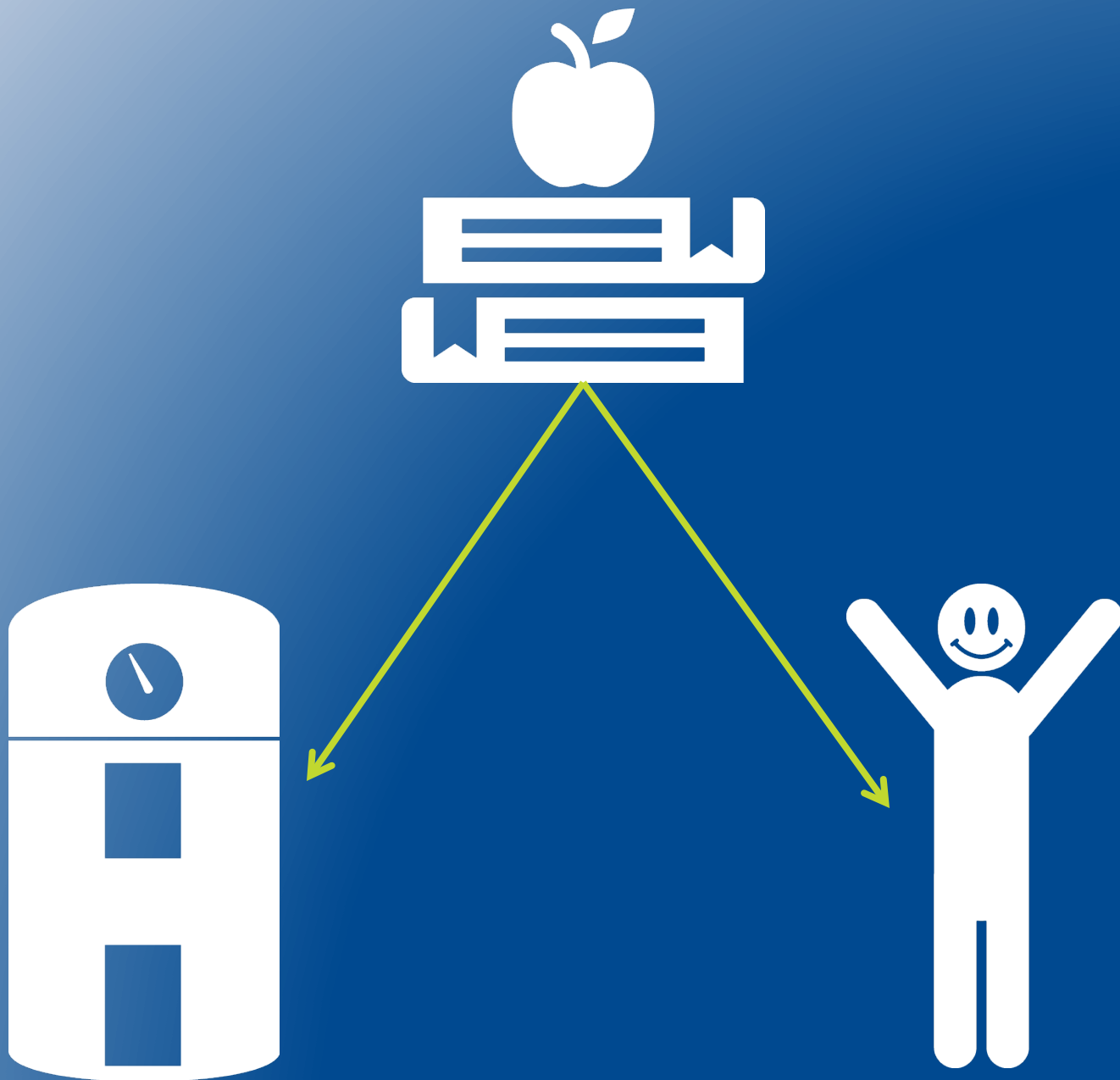
2 time constraints

3 lack of distributors











Most participants seem uninterested in Simple Steps or a midstream program **for HPWHs**, although their time and expertise gaps align well with this type of program





Gather  
Stakeholder  
Input



Educate  
Stakeholders



Communicate  
Continuously



# Recommendation

**Marketing:** Determine the best way to assist customer utilities with marketing HPWH incentives to end-use customers

## **Education: Distributors and Installers**

Conduct market research to learn about the HPWH distributors and installers in utility territories

Educate HPWH distributors and installers about BPA's HPWH programs through regular gatherings with distributors and/or manufacturers

Explore cooperative marketing opportunities with distributors and manufacturers to take advantage of their networks of contractors and other stakeholders

## **Education: Utilities and Customers**

Create a workshop on HPWH to educate customer utilities about benefits of HPWH and distributors and installers in their territories

Establish a HPWH forum to educate and communicate with all key stakeholders (customer utilities, distributors, installers)



# Recommendation



**Midstream programs** offer ease for end-use customers and can increase satisfaction with their utility. They can also increase program engagement while decreasing the utility's administrative burden and lessen the utility's need for in-house expertise. BPA could quantify the benefits to customer utilities such as:

- increased distributor stocking of eligible HPWHs, promotion of HPWHs by contractors/builders,
- increased installation rates,
- reduction in kWh, increased market penetration,
- development of new efficiency standards



**Increase** utility branding for the a midstream or Simple Steps program. Marketing should still include midstream products (e.g., point of purpose signage, radio, billboard, TV, educational webpages, direct mail, and geo-targeted online ads)

# Residential Program Response

- We understand your concerns about lack of resources for measure support and information about HPWHs in general.
- We want to make sure we share and enhance all available educational resources that currently exist. We will work to create those that do not currently exist.
  - HotWaterSolutions.org
  - Marketing resources created by NEEA
  - BPA is currently evaluating available marketing materials – we’ll use this feedback to inform how that work proceeds.
- Simple Steps: Thank you for your feedback on the challenges of the Simple Steps Program, especially in terms of the potential to include HPWHs.
  - Over the last 5 years, we have tried twice without success to create a viable promotion for customers.
  - High incentive amounts and the need to cover non-participating savings incentives have prevented an attractive offer being released to customers.
- We will continue to explore new program designs that solve this issue, in partnership with customers.
- Increasing and improving utility customer attribution will remain one of our guiding principles.



# THANK YOU

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