



Better Buildings Neighborhood Program
Data and Evaluation Peer Exchange Call: *Homeowner and
Contractor Surveys*

Call Slides and Discussion Summary

January 19, 2012

- Call Logistics and Attendance
 - How does your project get real-time feedback from customers and/or contractors?
- Program Experience and Lessons:
 - Will Villota, Clean Energy Works Oregon
 - Beth Beckel, EnergySmart, Boulder
 - Jane Peters, Research Into Action
- Discussion:
 - How can surveys be used to evaluate and refine programs?
 - What are the right kinds of questions to ask—and when?
 - How can programs increase response rates?
 - What are alternatives to surveys for getting customer and contractor feedback?

Participating Grant Programs

- Austin, TX
- Babylon, NY
- Boulder, CO
- California (Energy Upgrade California)
- Chicago, IL
- Cincinnati, OH
- Maine
- Michigan
- Phoenix, AZ
- Portland, OR
- Seattle, WA
- University Park, Maryland
- West Rutland, VT
- Also: National Association of State Energy Officials, Cadmus Group, UNC Environmental Finance Center

Highlights: Clean Energy Works Oregon



- Clean Energy Works Oregon (CEWO) conducted a program evaluation on its pilot program via online surveys and telephone interviews in 2009-10
 - Information gathered informed the program scale-up in 2011
 - Worked with Research into Action on the evaluation
- Currently, CEWO monitors trends in customer satisfaction to better understand satisfaction with services and variance among contractors
 - Online surveys were conducted with 200 homeowners that completed work between March and Sept. 2011 (response rate was 50%)
 - A second satisfaction survey was just undertaken (Dec. 2012) with 350 homeowners
 - Many of these customers were “early adopters,” which may have spurred extra feedback
- CEWO also conducted a drop-out survey with 200 homeowners who were approved for financing and received a bid but did not complete a retrofit (response rate was 33%)
 - A contractor was used to conduct one-on-one phone interviews with about 20 participants to help pinpoint aspects of the program that may not be working well

- Conducting surveys in batches provided good information but had downsides
 - There was a lag between program completion and when the survey was provided to some customers (depending on when they completed their retrofits)
 - The time delay may have affected answers to questions that addressed motivation and value/satisfaction with their home assessment report
- The program is moving towards an “instant” survey system, with surveys that occur at different stages of the program:
 - After customers complete financing application and sign loan documents;
 - After initial site consultation/bid development;
 - During the construction process;
 - At the completion of projects; and
 - Potentially a year post-project to get more reflective input on the entire process
- As an incentive for survey completion, CEWO hopes to develop monthly sweepstakes incentives
- To get good response rates, surveys should be fewer than ten questions
- Using SurveyMonkey (<http://www.surveymonkey.com/>)
 - Allows the embedding of a unique homeowner ID in emails that are circulated, which saves the program and the customer time and effort in duplicating information the program already has (e.g., name, etc.)

Q&A: Clean Energy Works Oregon

- Q: It seems that contractor satisfaction questions are difficult because customers aren't always great at evaluating the technical aspects of energy efficiency. How do you separate out the quality of work vs. the more qualitative aspects of contractor services (e.g., timeliness, responsiveness, etc.)?
 - *A: Our survey breaks that into two different questions : (1) Did they show up on time, clean up their workspace, etc. which is on a five point scale; and (2) Please rate the quality of work on an "excellent to poor scale". Of the 200 or so completed surveys there were about 50 people who completed a narrative "other" question that described results of work done in their home. We don't expect to get answers on things like "my home is warmer/cooler" because the survey is done rather quickly post-project. That information will need to be collected a year or two later.*
- Q: During your evaluation efforts did you identify any changes needed in the program or any changes in the survey?
 - *A: CWEO has not address that issue yet due to the pace of the program. CEWO did validate the information collected outside the surveys (observations from staff) with what is collected from homeowners and that has been a helpful process.*

Highlights: Boulder, CO

- The program conducted a few surveys early in the process to help with branding because the program wanted to develop its own brand identity
- Now, the program conducts a voluntary post-project customer experience survey to gather feedback (using SurveyMonkey)
 - Customers receive automated emails from energy advisors throughout the program – e.g., when they select a contractor, during the retrofit project, etc. These emails include a request to complete a survey
 - The survey is the same for customers that complete the project and those that drop out
 - The response rate is about 10% (both those that complete or drop out), and the program is looking for ways to boost it
 - The program does not offer incentives to complete the survey ; it found they were not worth the administrative costs
 - Customers seem to like using SurveyMonkey – it is very easy to use and the question logic allows the program to tailor the responses (i.e., if they answer ‘no’ they can skip questions that are not relevant)

Highlights: Boulder, CO

- The pilot survey was 25-30 questions, which was too long; the program has worked to trim that down and it now includes 10 questions and an optional one page of demographic information
- Because the surveys go out immediately, there is no lag in response time and staff are able to access updated results once a week
- Survey Monkey provides a number of helpful graphs and trends that allow the program to identify major problems
- Survey results helped the program modify the audit report given to each homeowner
 - The original report was very detailed, and many homeowners said that they didn't understand the information included
 - In response, the program trimmed the report from 20 pages of building science to 3 pages of key statistics and the top five recommendations for moving forward
 - The report also includes next steps and pictures taken with an infrared camera


Highlights: Boulder, CO

- The energy advisors for the program are hired and managed by an outside company. The survey has been a good way to gather information on how they are doing in the field
- The survey assumes that any feedback on contractors is based on how they present themselves (i.e., professionalism, cleanliness, etc.); the survey does not ask about the technical quality of work
 - Contractors are asked to sign a professionalism code of conduct
 - The quality of project work is checked by staff via home visits
- The program holds quarterly focus groups where it brings in volunteers and other program participants; this has been another good source of program feedback

Highlights: Research into Action

- The national program encourages everyone to ask for feedback from customers
- Research into Action is conducting an evaluation of the entire Better Buildings program, which will include some information on local feedback mechanisms; the goal is to get that evaluation out to everyone at the end of this year
- There are Google Docs templates available on the Better Buildings site that can help programs still looking for examples of questions; the templates were built off those from CEWO and they are designed to be embellished with local information and used by everyone (see next page)

Better Buildings Survey Resources on the Google Site



BETTER BUILDINGS
U.S. DEPARTMENT OF ENERGY

**Better Buildings
Neighborhood Program
Google Site**

[Better Buildings Neighborhood Program Google Site](#) >

Data and Evaluation

Exchange Calls
Workforce Development
Workshops & Meetings
Resources

Calendar

11

days until

**Better Buildings Quarterly
Program Report Due**

Get Useful Real-Time Feedback about Your Program

You have designed and launched your program. Now you need to understand how effectively your program is meeting your goals. Process and impact evaluation are two approaches to understanding and improving your program's strengths, weaknesses, and gaps. Use the process evaluation resources below to identify, frame, and collect qualitative data on your program design's performance to improve your program's effectiveness in real-time.

- Explore two libraries of evaluation topics, questions for your program to pose to program participants and contractors, and four example surveys demonstrating how to collect that information.
 - Research Into Action, [Example Email Survey for Successful Participants](#) (MS Word). Sample email survey template for successful program participants.
 - Research Into Action, [Example Phone Survey for Drop Outs](#) (MS Word). Sample phone survey template for program drop outs.
 - Research Into Action, [Example Phone Survey for Screened-out Applicants](#) (MS Word). Sample phone survey for applicants who have been screened out from participating in the program.
 - Examples for evaluating program effectiveness, including more sample surveys, can be found in the [Neighborhood Sweeps](#) section of the Marketing and Driving Demand page.
- Research Into Action, [Program Evaluation Topics & Questions Library - for Contractors](#) (MS Word). A menu of initial questions to build on and develop a real-time evaluation survey to collect qualitative data from contractors.
 - Research Into Action, [Example Phone Survey for Contractors](#) (MS Word). Sample phone survey template

Discussion: What are some of the questions that programs are finding particularly useful?

- Questions that segment out customers and help programs understand their needs, such as:
 - Would they be interested/willing to take out a loan?
 - How would they feel about working with a contractor?
 - Have they participated in previous green programs?
- Questions that help the program understand when a customer is most receptive to committing to an upgrade or receiving a sales pitch
 - Is this at the time of equipment failure, season after high electric bills, etc.?
 - In Boulder they are seeing two trends: (1) after the first cold snap; and (2) when rebate funds are available.
- “Rank your overall satisfaction with the program” – this is a broad question but speaks to how customers feel about the program
 - Anyone can pick apart a specific aspect of the program but the overall feel a customer is left with is very important.

Discussion: How can surveys of contractors be helpful?

- Surveys of contractor marketing capabilities have been helpful
 - The knowledge level of marketing varies from contractor to contractor and especially between large and small companies
 - Larger companies often have specific marketing staff
- Some programs found that contractor surveys showed an interest in sales training
 - Contractors want to know how to market to the public, and if these trainings are done right they can generate a lot of excitement for the program

Discussion: Lessons about getting customers to share their experiences with neighbors

- Customers don't know what they are getting into at the start of the program but once they go through the whole process they are usually less skeptical and more interested in sharing about their experiences
- People are most interested in sharing with their immediate neighbors
 - LA County has used a program "Road Show" where they come to a home with tents and games to do an open house. The homeowners only need to be present and open their doors – the program does everything else.
- If you are asking customers to share experiences, it helps to narrow down their potential audience and focus on a few questions so they don't feel overwhelmed
- It is difficult to get people to volunteer to share experiences broadly (i.e., beyond immediate neighbors) without an incentive

Discussion: Additional Points

- When asking questions in surveys (especially in-person or on the phone) it helps to have open ended questions; the problem with these types of questions is the text needs to be coded if you are going to conduct any type of analysis
- A few of the programs use Salesforce to organize information gathered from a variety of sources (e.g., email surveys, conversations, meetings, etc.) and track customers
- Google Tools (such as templates, forms, etc.) have been a good resource to solicit responses
- Surveys should reach out to customers at several “touch points;” this can be time consuming but it yields useful results

Evaluation Resources

- Data analysis software options:
 - PC: <http://www.pressure.to/qda/#intro>
 - Mac: <http://tamsys.sourceforge.net/>
- Web application (\$12 a month for one user – could be good for short periods of time and is feature rich):
<https://www.dedoose.com/>
- Google Forms: <http://www.google.com/google-d-s/forms/>
- Sales Force: <http://www.salesforce.com/>

Potential Future Call Topics

- Calculating and Communicating Program Results to External Stakeholders
- Program Course Corrections Based on Evaluation Results
- Using Home Energy Scoring Systems
- Experience with Software/CRM Options