

SESSION 9A

WORKING EFFECTIVELY WITH PROGRAM CYCLES (OR: HOW NOT TO DO EVALUATION PLANNING IN A VACUUM)

Moderator: Ralph Prah, Prah & Associates

PAPERS:

Evaluation Planning Across Multiple Cycles: Delivering Value through Continuous Improvement and Innovation

Carmen Best, Energy Division, California Public Utilities Commission

Mike Rufo, Itron Inc.

To Do or Not to Do: Is It Time for Another Impact Evaluation?

Susan Haselhorst, ERS, North Andover, MA

Erik Mellen, Northeast Utilities, Westwood, MA

Chad Talarico, DNV KEMA, Syracuse, NY

Panel Studies – The Perfect Marriage of Formative and Summative Evaluations

Ellen B. Steiner, Ph.D., Energy Market Innovations

Donna D. Whitsett, Ph.D., Energy Market Innovations

Hannah Carmalt Justus, M.A., Energy Market Innovations

Kara Crohn, Ph.D., Energy Market Innovations

Todd Malnick, Ph.D., Energy Market Innovations

SESSION SUMMARY:

Too often, evaluation planning occurs in a relative temporal vacuum, giving short shrift to such issues as the timing of the evaluation relative to the program cycle, the need to take past evaluation experience and results into account, and the desirability of building a cumulative body of evidence. This session spotlights three papers that help illustrate how to avoid these pitfalls.

Best and Rufo provide lessons learned from one of the largest and most complex evaluation planning operations in North America, California's. They compare and contrast the evaluation planning goals, strategies, tactics, and outcomes across three planning cycles, discussing how evaluation planners responded to both changing and ongoing regulatory and program administrator requirements. The authors compare across a set of evaluation planning cycles with different organizational structures, stakeholder interaction approaches, methods of prioritizing needs, schedules, and resource allocations.

Haselhorst et al. present a novel approach for developing objective criteria to aid in deciding whether to proceed with a new gross savings impact evaluation, using as inputs the results of the last impact evaluation and a desk review of current ex-ante engineering estimation practices. This evaluation planning approach was applied to a large C&I gas custom measures program, but it is potentially applicable to any situation in which there is a past impact evaluation track record, detailed information available on current engineering estimation efforts, and a need to make defensible decisions as to whether to do a new impact evaluation.

Lastly, Steiner et al. discuss the virtues of ongoing panel studies, or longitudinal studies that repeatedly contact a selected group of people over a period of time, as a tool for generating timely and cumulative feedback on issues pertaining to program processes, customer engagement, and market

characterization. They review a number of actual panel studies, including challenges encountered, steps taken to overcome these challenges, and lessons learned.