

SESSION 4C

LEARNING FROM THE PAST: NEW DIRECTIONS FOR EVALUATION POLICIES, PLANNING AND BUDGETING

*Moderator: Edward Vine, California Institute for Energy and Environment &
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PAPERS:

Portfolio Evaluation Versus Program Evaluation: Is There a Balance?

Nick Hall, TecMarket Works
Patrick McCarthy, TecMarket Works

A New Evaluation Paradigm for a New Generation of Energy Efficiency Programs

Bill Saxonis, New York State Department of Public Service

Options for Improving Energy Efficiency Evaluation in California: “Houston, We Have a Problem ...”

Rafael Friedmann, Pacific Gas & Electric Co.
Chris Ann Dickerson, CAD Consulting

SESSION SUMMARY:

This session focuses on what lessons have been learned from conducting large multi-program evaluations in California and New York in order to design and implement program evaluations in the future. All three papers identify key issues confronting the evaluation of energy efficiency programs and portfolios of programs. The last two papers address new paradigms where policies and procedures are more aligned to the current context in New York and California.

The first paper by Hall and McCarthy examines two different frameworks for establishing the energy impact evaluation function: the portfolio evaluation framework and the program evaluation framework. This paper focuses on the need for policy makers and evaluation professionals to establish their energy impact evaluation functions within a framework that plans for a wide range of information needs, all of which are dependent on well planned, managed, timed and budgeted program-level evaluations. The paper demonstrates that the benefits of a portfolio framework can be achieved within a program framework if that framework is well designed and implemented. The paper also demonstrates that a portfolio framework cannot meet the needs of a number of information consumers.

The second paper by Saxonis provides the roadmap of New York’s journey to a new evaluation paradigm. In many cases, the elements are evolving, but how New York addresses the challenges and “lessons learned” will prove insightful to evaluators, regulators, and policy makers, especially from organizations initiating or expanding their energy efficiency program portfolios.

The third paper by Friedmann and Dickerson asserts that California evaluation policies and practices are in need of an in-depth review to re-align energy-efficiency portfolio and program evaluation with the broader societal goals that seek to mitigate global climate change. This paper discusses key issues being faced by current policies and practices and how these issues can be changed for the better to reflect the emerging context in which energy efficiency and evaluation are now being called upon to operate. In order to not just allow, but also foster that order of magnitude increase in energy efficiency and conservation uptake, California needs to rethink how it uses public resources and the policies that guide publicly funded efforts. In the current context, public resources could be used to

“oil” a much larger “machinery” of private entities that sell energy products and services. This may require a substantial re-thinking regarding the traditional roles of energy efficiency evaluation.