

A Moving Target – Evaluation Planning and Implementation for Infant Portfolios

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This poster discusses the challenges and solutions to rapidly designing and implementing early evaluation activities that target new portfolios of energy efficiency and demand response programs. The team evaluating ComEd's energy efficiency programs in Illinois developed some effective tools and procedures to support communication and evaluation management. These procedures fall into three areas.

1. Make liberal use of information technology. The ComEd evaluation team is large and is spread across the country and across several different companies. With many different evaluation activities happening concurrently, there was great potential for inefficiencies in managing the flow of documents. To solve this problem, the team made liberal use of several different information systems. For some purposes, standard, off-the-shelf solutions provided the needed functionality, e.g., a SharePoint site to provide an online repository for shared documents, a common calendar, a common contact list, and a facility for undertaking online discussions. The evaluation team also created a spreadsheet using Google Docs to contain the evaluation budget for each program and a roll-up budget across the portfolio.

When off-the-shelf solutions did not provide the necessary functionality, the ComEd evaluation team built custom Internet-facing applications, including the following:

- **Project Management System**, an on-line system to facilitate managing the evaluation and tracking deliverables.
- **Field Data Collection Tool**, a customized version of Summit Blue's proprietary system for managing field data collection samples and field data entry, which field engineers use to obtain samples and to enter field data. Managers use it to track the status of field activities.
- **Program tracking data**, a unified online program tracking database to contain program data for its entire portfolio and to provide a common reporting and management tool for its programs. ComEd developed an automated procedure to export the data from the system to the evaluation team.

2. Organize the team to ensure clear areas of responsibility and minimize bottlenecks. The ComEd evaluation team had a single point of contact at the utility and at the evaluation team to simplify communication. However, to avoid bottlenecks and ensure focused attention, the evaluation team was organized around program leads, each having complete responsibility for designing and managing the evaluation of their program. These program leads were supported by topic-specific cross-cutting leads who provided expertise and consistency of approach for specific issues (e.g., free ridership methodologies).

3. Plan and execute in a streamlined fashion. The evaluation team designed a standardized format for program-specific evaluation plans that was purposely concise and to the point to ensure that all discussion around the plans was tightly focused on the purpose of and method of specific evaluation activities. To keep the evaluation on track and responsive, ComEd gave approval to begin certain time-sensitive evaluation tasks before the evaluations plans were completed.