

SESSION 1D

SOWING WHAT WE REAP: FIELD LESSONS

Moderator: Bobbi Tannenbaum, KEMA

PAPERS:

What Have We Learned About Email Surveys

Dulane Moran, Research Into Action
April Armstrong, Research Into Action,
Jun Suzuki, Research Into Action

Intercepts: “How-to,” Lessons Learned, and Potential Application in a Post-CFL World

Katherine Swayne, The Cadmus Group, Inc
Brian Shepherd, The Cadmus Group, Inc

True Stories from the Trenches: Do’s and Don’ts of Quality Site Visits

Katie G. Parkinson, Cadmus Group, Boulder, CO
Jane Colby, Cadmus Group, Boulder, CO

Mission Control, We Have a Problem: Questioning the Reliability and Validity of On-site Data

David Filiberto, NMR Group, Inc.
Lisa Wilson-Wright, NMR Group, Inc.
Lynn Hoefgen, NMR Group, Inc.

SESSION SUMMARY:

This session focuses on data collection methods. The papers identify challenges with data collection that may affect results. As Parkinson and Colby point out that in their paper “. . . data collected from these efforts form the backbone of many evaluation studies.” The authors discuss and provide examples of challenges with telephone versus online data collection, store intercept studies, and on-site CFL saturation studies. Some of the issues they address are ubiquitous, but rarely discussed openly. The authors offer practical recommendations and lessons learned to improve data collection. Regardless of the data collection method, the papers point to the importance of basic research methodological practices – clear and neutral data collection instruments, quality control procedures, and sufficient training of staff assigned to data collection. How these are executed, however, varies by data collection method. The devil is in the details and these authors take on the devil.

In *What Have We Learned* the authors discuss email (web based) and telephone surveys in light of the increased challenge of getting telephone responses. After discussing the advantages and disadvantages of the two methods, based on a literature review, they report the findings from two mixed mode studies. These studies resulted in similar data (not statistically different), but respondent characteristics varied by method, and email respondents appeared less engaged as the questionnaire progressed.

Energy program evaluators increasingly rely on store intercept studies to address purchase behavior. These studies are particularly valuable for upstream programs where it is difficult to identify participating customers. In *Intercepts* Swayne and Shepherd identify lessons learned from multiple CFL intercept studies and point out that these lessons apply to other products. They identify specific applications, advantages, disadvantages, and procedural challenges to conducting these types of studies.

True Stories From the Trenches identifies best practices for all steps of on-site data collection. Based on multiple field studies (many focused on lighting), the authors provide us with a comprehensive discussion of the steps involved and procedures to improve data collection (and the resulting data) quality.

The final paper in this session *Mission Control, We Have a Problem* looks at CFL on-site saturation data. We generally assume that data collected on site is more reliable and valid than telephone survey self reports. A comparison of data collected across two consecutive years (2009 and 2010) at the same households (a panel study) showed large variation in the bulb and room counts, as well as in the type of rooms listed. Some of these differences across the two years appear to be due to measurement error - specifically how the technicians filled out the inventory forms. These findings draw into question the reliability and validity of some on-site data. The authors identify approaches to minimizing measurement error for studies of this type.