Observing Where the Rubber Meets the Road

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2015 IEPEC Conference — Long Beach, California
What are Mystery Shopping and Ride-Alongs?

• Observational Data Collection Methods
• Type of Qualitative Inquiry
When are Observational Methods Most Useful?

• Retail Products
• Mid-stream incentive
• Examples:
  ▪ Energy Trust of Oregon Products Program
  ▪ Northwest Energy Efficiency Alliance Consumer Electronics Television Initiative
What are the ‘Best Practices’ for Direct Observation Methods?

• Decide sampling strategy: purposive vs. representative sample
• Standardized but flexible guide
• Observer Training
Why use observational methods in evaluations?

• Discrepancies in implementation
  → Unanticipated findings
Why use observational methods in evaluations?

• Program design breakdowns
  → Actionable recommendations
Why use observational methods in evaluations?

- Unique perspective
  - Alternative to other methods
Conclusions

- Direct observations add value but are underutilized in process evaluations
- Useful in mid-stream evaluations
- Having a sound methodology will improve results
Thank You!

Questions?

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