

You're Living Life in the Fast Lane

But a Change is Gonna Do you Good

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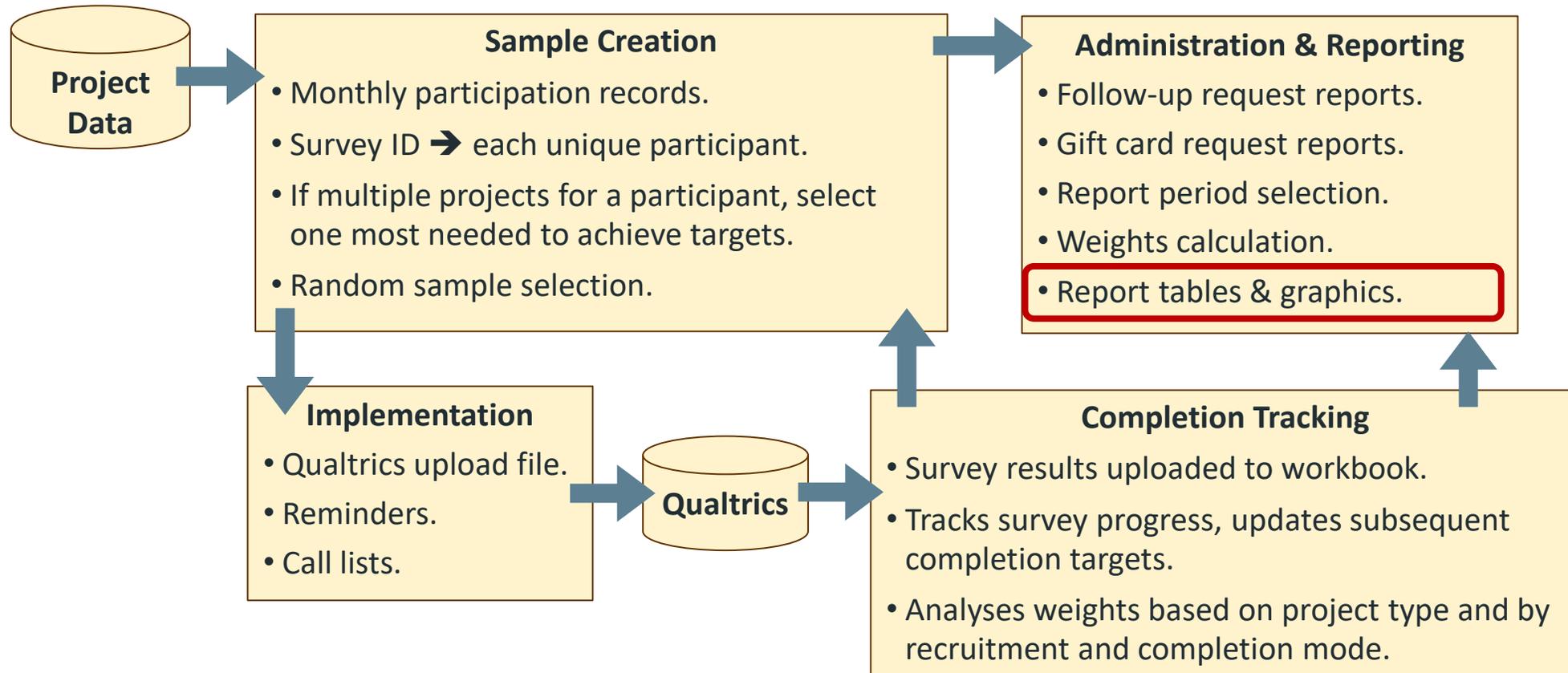
(Program) Fast Feedback is Good

- Collecting reliable data and presenting useful findings rapidly and cost-effectively is a challenge.
- Energy Trust has done the “Fast Feedback” monthly survey since 2009.
- ADM built an Excel-based system to quickly generate samples, track completions, and create reporting tables.
- Midyear and End-of-Year (EOY) reports very detailed: hard for program staff to absorb most important information.
- Energy Trust evaluation staff and ADM worked together to streamline reports, with minimal revisions to system.

Fast Feedback Survey Overview

- Monthly surveys of prior month's Res & Nonres program participants.
- Quarterly 90/10 completion quotas for ~30 strata and ~10 cross-cutting attributes.
- Online and phone fielding.
- Quarterly, midyear, and end-of-year (EOY) reporting.
- Results weighted by stratum and survey mode.

Sampling and Tracking System



Sampling and Tracking System

Sample selection → Sampled completion → Quota tracking: Completion counts, updates targets, by month

Recognized Date	Call List Date for this Month	Quota / Measure Groups	Cross-Cutting Group Name	Quarterly Target Quot	Prior Completions this Q	Target Quota for JUN	JUN Target Sample	Completions This Month As of 7/24	For JUN Call List	For JUN Backup Call List	Completions This Month	Still Need in JUN	Cum. Completions This Qtr	Still Need This Qtr
		Smart Thermostats		16	7	9	63	4	5	0	4	5	11	5
2/20/2025	3/24/2025	Heat Pump Advanced Controls		13	8	5	35	2	3	0	2	3	10	3
2/13/2025	3/24/2025	Ceiling Insulation		17	12	5	35	8	0	0	8	0	20	0
1/31/2025	3/24/2025	Other Insulation		16	11	5	35	6	0	0	6	0	17	0
2/13/2025	3/24/2025	Ducted Heat Pumps		17	15	2	14	2	0	0	2	0	17	0
1/31/2025	3/24/2025	Ductless Heat Pumps		17	14	3	21	3	0	0	3	0	17	0
1/31/2025	3/24/2025	Windows		16	13	3	21	4	0	0	4	0	17	0
1/30/2025	3/24/2025	Gas Fireplaces		16	14	2	14	2	0	0	2	0	16	0
2/20/2025	3/24/2025	Gas Furnaces		17	16	1	7	1	0	0	1	0	17	0
2/20/2025	3/24/2025	Duct Sealing		13	8	5	35	5	0	0	5	0	13	0
2/20/2025	3/24/2025	Sub-Total		170	118	52	364	37	8	0	37	15	155	15
2/13/2025	3/24/2025	Oregon Total		196	118	78	546	37	8	0	37	41	155	41
1/30/2025	3/24/2025	Residential - Washington		42	28	14	98	8	6	0	8	6	36	6
2/13/2025	3/24/2025	Moderate Income Track	Moderate Income Track	17	14	3	21	4	0	201	4	0	18	0
1/30/2025	3/24/2025	Rental Properties	Rental_Flag	16	14	2	14	0	2	79	0	2	14	2
		Manufactured Home Promotions	Manufactured Home Promotio	16	5	11	77	1	10	44	1	10	6	10

Highly Detailed Midyear/EOY Report

- More than 90 tables and 20 charts.
- Sector-level summary and demographics/firmographics data.
- For each of ~20 subprogram or quota groups:
 - Multiple satisfaction indices.
 - Satisfaction over last five program years.
 - Rated influence of incentive, information, contractor, etc.
 - Frequency of reported contractor source.

Summary and Demographics (Res.)

Table 13: Household Size (Number of Members) by Residential Quota Group

		Quota Group		One	Two	Three	Four	Five	At Least Six
Overall (n = 905)				3%	23%	41%	22%	12%	5%
Smart Thermostats (n = 63)				2%	11%	52%	12%	15%	6%
Heat Pump Advanced Controls (n = 52)				6%	10%	51%	23%	8%	1%
Ceiling Insulation (n = 71)				1%	12%	53%	17%	6%	7%
Other Insulation (n = 65)				2%	18%	37%	16%	24%	1%
Ducted Heat Pumps (n = 97)				0%	30%	33%	18%	10%	2%
Ductless Heat Pumps (n = 78)				2%	36%	42%	6%	8%	2%
Central Air Conditioner (n = 58)				0%	12%	41%	17%	17%	8%
Windows (n = 75)				3%	27%	31%	24%	9%	5%
Gas Fireplaces (n = 62)				8%	18%	49%	19%	5%	1%
Gas Furnaces (n = 67)				5%	17%	26%	30%	13%	7%
Duct Sealing (n = 48)				0%	30%	49%	12%	2%	7%
Residential WA (Exclusive Quota)									
Residential-Washington (n = 169)				2%	17%	53%	13%	10%	5%
Cross-Cutting Quotas									
Moderate Income Track (n = 70)				0%	20%	39%	23%	6%	8%
Rental Properties (n = 67)				8%	16%	28%	19%	21%	4%
Manufactured Home Promotions (n = 63)				0%	42%	33%	16%	6%	2%
Instant Incentives (n = 359)				2%	23%	41%	17%	12%	2%
No Cost Offers (n = 35)				0%	23%	40%	13%	7%	0%
Oregon Population									
US Census				28%	37%	15%	12%	5%	3%
Oregon Population									
US Census				19%	18%	17%	18%	28%	
US Census				4%	2%	14%	1%	<1%	6%
US Census						72%	28%		

And Then These ... Times 20

Table 40: Satisfaction Ratings: Heat Pump Advanced Controls

Satisfaction		Percent	
Measure Satisfaction			
Overall experience (n = 48)			88%
Performance of new measure (n = 53)			91%
Comfort of home after new measure (n = 52)			94%
Incentive application form (n = 24)			80%
Time it took to receive incentive (n = 23)			73%
Contractor Satisfaction			
Overall experience (n = 48)			88%
Quality of installation work (n = 53)			93%
Information about incentives (n = 39)			92%
Communication (n = 53)			93%
Assistance with application (n = 24)			98%

Table 41: Influence Ratings: Heat Pump Advanced Controls

Influence Level	Overall Influence (n = 53)	Energy Trust Incentive (n = 40)	Energy Trust Information or Materials (n = 12)	Contractor (n = 52)
High	96%	43%	53%	90%
Medium	2%	21%	14%	3%
Low	2%	36%	33%	8%
	33%	8%	Not Applicable	Not Applicable
	Don't know	Energy Trust referral	Don't know	Don't know

Table 42: Where Respondent Found the Contractor: Heat Pump Advanced Controls

Contractor Source (n = 55)	Percent
Word of mouth	72%
Online service	1%
Web search	16%
Advertisement	6%
Energy Trust website	2%
Energy Trust referral	3%
Not Applicable	2%
Don't know	0%

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Program Feedback

- Hard to absorb the program status and direction.
- April & May 2024, Evaluation Project Manager held 3 sessions with 9 staff of residential, commercial, industrial programs to identify needs.
- Feedback from sessions:
 - Detailed data important for long-term tracking but often not new or surprising.
 - Programs looking for more noteworthy findings: things that are different, require attention or additional investigation.

Proposed Revisions

- Keep summary and demographic/firmographic information.
- Move quota-group details to an appendix.
- Add information on quota groups with...
 - particularly high or low current overall satisfaction.
 - substantive increase or decrease in satisfaction over the last ~3 years.

High/Low Satisfaction

- Feedback differed among programs on standards/thresholds for high/low satisfaction or changes: had to compromise on standard definitions.

Quota Group Satisfaction Level	Percentage of Respondents in Group That Are Satisfied
Very High	≥97%
Low	85% to 89%
Very low	<85%

High/Low Satisfaction : Example

This replaced
17 tables in
report body.

Quota Group	Quota Type	n	%
Very High Satisfaction			
Duct Sealing	Exclusive	45	99%
Moderate Income Tract	Cross-cutting	62	97%
Manufactured Home Promotions	Cross-cutting	58	99%
Low Satisfaction			
Smart Thermostats	Exclusive	62	88%
Heat Pump Advanced Controls	Exclusive	48	88%
Ceiling Insulation	Exclusive	72	88%
Other Insulation	Exclusive	60	89%
Central Air Conditioner	Exclusive	45	88%
Very Low Satisfaction			
Windows	Exclusive	69	70%
Gas Fireplaces	Exclusive	61	81%

Satisfaction Change

INCREASE

*5 percentage points above
previous year.*

OR

*5 percentage points above
lowest level in past 4 years*

AND

*Flat or upward trend
over past 3 years.*

DECREASE

*5 percentage points below
previous year.*

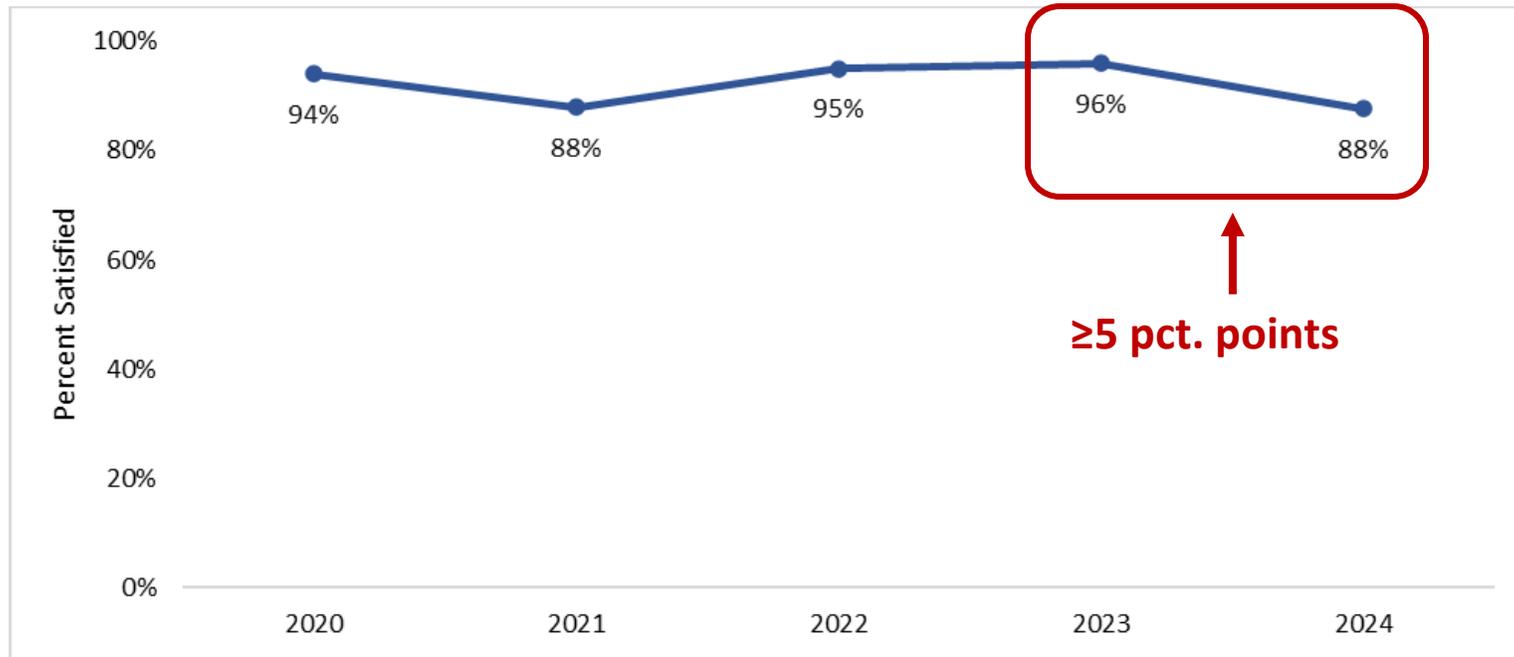
OR

*5 percentage points below
highest level in past 4 years*

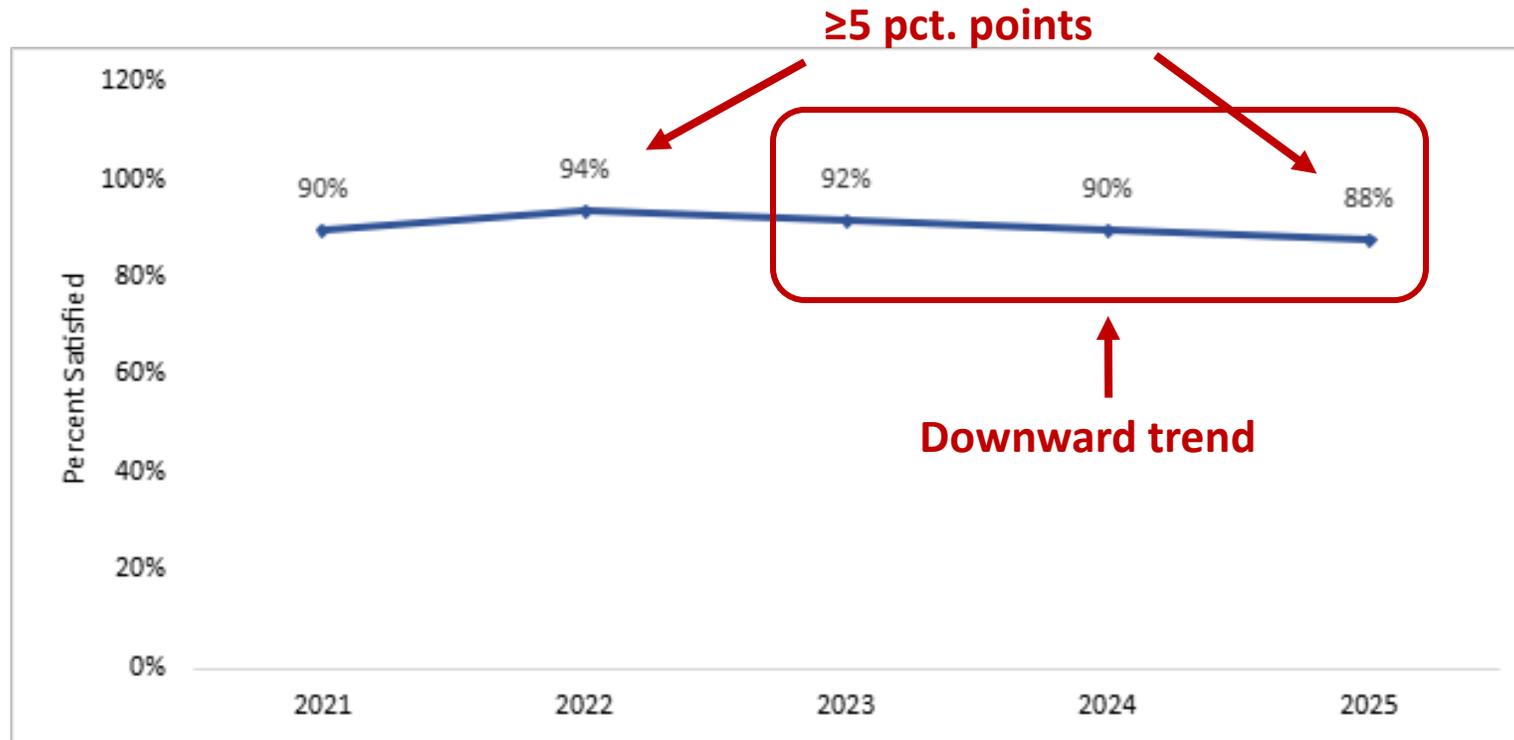
AND

*Flat or downward trend
over past 3 years.*

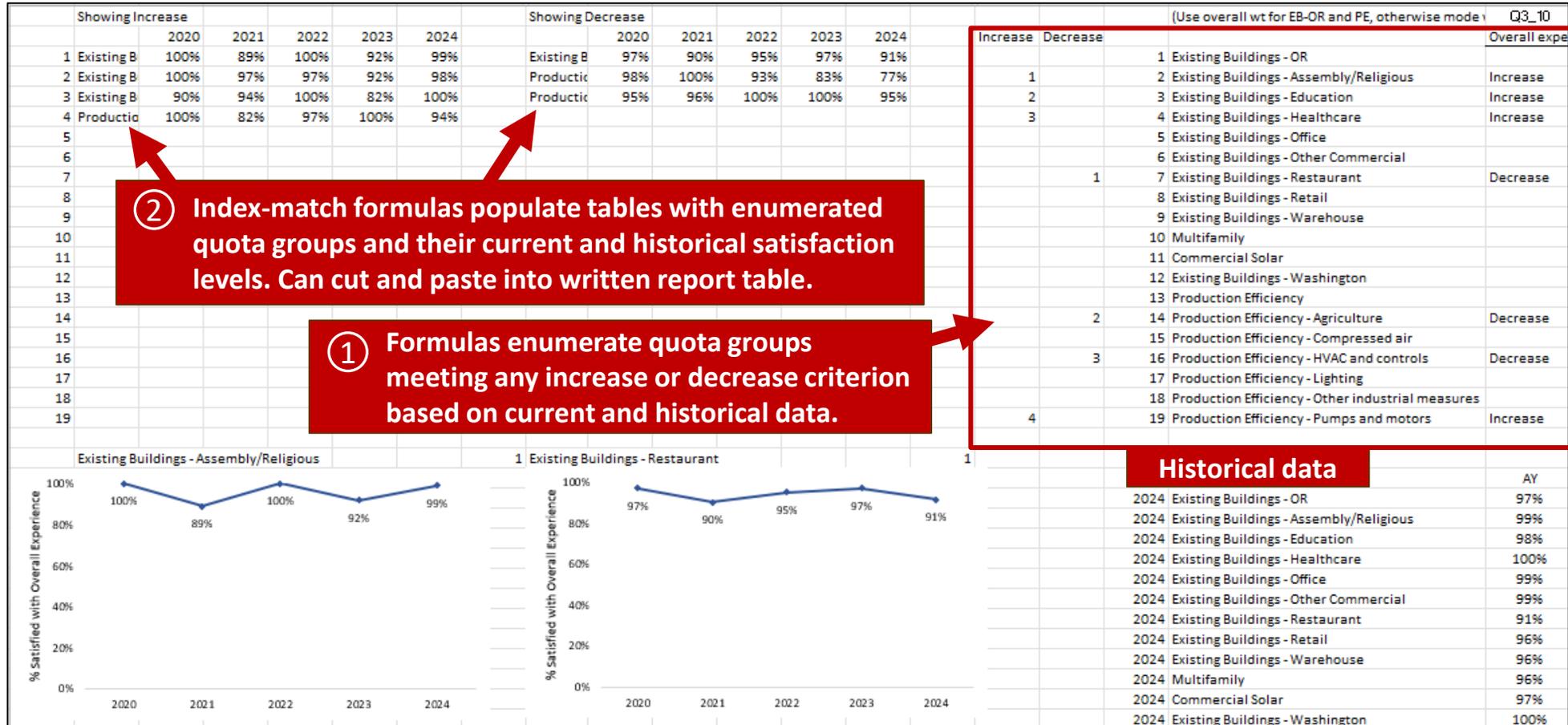
Satisfaction Decrease: Example



Satisfaction Decrease: Example



Satisfaction Change Analysis



Program Feedback on Revisions

- Helped the program quickly identify areas where overall program satisfaction changed.
- Helped identify areas for improvement to overall customer satisfaction.
- Not enough time yet to identify program improvements resulting from new information.
- Possible future revisions:
 - Add table summarizing main sources of program influence.
 - Incorporate qualitative data (verbatim) to enrich narrative.
 - Move demographic/firmographic data into appendix.

Conclusions

- This demonstrates the value of open dialog among PA's evaluation team, program staff, and the evaluation contractor.
- Don't just listen to comments about the report but respond as *an evaluator* with a systematic approach:
 - Gather additional details about information needs.
 - Propose report revisions.
 - Implement those revisions.
 - Seek feedback on the revisions to assess whether they addressed the original concerns.

Conclusions

- Also demonstrates value of existing workbook survey tracking and reporting system.
- Tables and charts of satisfaction changes easily generated using satisfaction data already generated for quota group–specific tables.
- This minimized project resources that might otherwise be diverted.

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