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Business Cross-Cutting Evaluation Report

Final

Energy Efficiency / Demand Response Plan:
Plan Year 5
(6/1/2012-5/31/2013)

Presented to
Commonwealth Edison Company

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Table of Contents

Table of Tables

Table of Figures

NAVIGANT

E.1.   Introduction

ComEd's Smart Ideas for Your Business program serves Commercial and Industrial (C&I) and small business customers. Through incentives and technical services, the program provides business customers with solutions to help them implement efficiency projects. ComEd's goal is to provide a comprehensive suite of offerings that is seamless for customers regardless of which offer, implementer, or trade ally is involved. ComEd categorizes programs into three groups: 1) Core Programs, 2) Segmented Programs, and 3) Systems Programs. Core programs are basic incentive elements available to all customers with some distinctions by size.[1] Systems offerings deliver savings through optimizing specific systems within customer facilities such as HVAC or compressed air. Segmented offerings are targeted toward specific customer business segments. Segmented offerings differ from Core and Systems offerings in that they are vertically integrated by customer types whereas Core and Systems offerings are horizontally integrated.

This cross-cutting process evaluation is intended to provide insights into how the program offerings are working together and how the overall Smart Ideas for Your Business program functions as one unit.

To gain insights into the program, we looked at three distinct areas:

- Implementation Coordination
- Trade Ally Interface
- Customer Experience

E.2   Conclusions and Recommendations

The evaluation team conducted interviews with program managers, implementation contractor staff, program participants, and trade allies to gain insight into how the program operates as a unit. Key findings and recommendations are outlined below.

> **Finding 1: There is confusion among implementers about their roles in the program.** Given the current program structure, with both horizontally and vertically integrated elements, there is confusion about which implementer takes the lead with customers in certain situations.

> **Recommendation:** One approach to managing this situation is to form cross-functional teams consisting of representatives from all of the functional areas (i.e., Core and Systems offerings) applicable to the various market segments. The teams would be led and facilitated by the Segmented offering implementation contractors. Goals for the Core and Segmented implementation contractors would be tied directly to the success of the Segmented teams.

> **Finding 2: Implementers tend to focus primarily on the program elements they implement and often lose sight of the other offerings available to customers.** This can cause the program to appear disjointed or fragmented to customers and trade allies. There appear to be two dynamics that contribute to this: lack of understanding of other program offerings and lack of incentive to promote the entire program portfolio.

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[1] The Small Business Energy Savings and New Construction programs both have size requirements.

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Recommendation: Implementers noted that ComEd has done a lot of work in facilitating cross-program understanding, but ComEd also needs to ensure that implementer incentive structures fully align with the overall portfolio goal.

Finding 3: Trade allies tend to participate in multiple program elements, and while most view Smart Ideas as one program, more than a third say it is a series of separate programs. Because trade allies are a key channel for bringing customers into the program, it is critical that they understand and present the program as a comprehensive solution. Each implementer manages its own trade ally network and many trade allies cited different program designs, incentive structures, and implementation contractors as reasons they do not view Smart Ideas as a single, unified program.

Recommendation: We recommend that ComEd begin keeping a centralized database of trade allies. However, given that this could be a large investment in time and resources, perhaps future cross-cutting evaluation work could focus just on this aspect of cross-program coordination.

Finding 4: Past program participants are unaware of offerings available to them outside of the programs they participated in. We surveyed both program participants and customers that initiated the program participation process, but did not complete a project, and in both cases a majority of customers were unaware of other program elements even though they reported understanding the branding of Smart Ideas as a single program.

Recommendation: Past program participants, appear to be a source future projects and additional savings. We recommend that ComEd continue to revisit customers that have participated in the past (i.e., those that have completed projects and those who initiated but did not complete projects) to look for continued opportunities to participate in the program. Since many past participants were unaware of offerings outside of the ones they participated in, ComEd should work to increase their awareness of the whole portfolio.

Finding 5: Customers that drop out of the program, often complete their projects later without receiving an incentive. This evaluation was not intended to find non-participant program spillover; however, through the course of our survey work, it was determined that many customers do indeed complete projects that they cancel through the program. In some cases, they re-initiate their applications and in some cases they move forward without an incentive.

Recommendation: We recommend further research into the impact that the Smart Ideas program has on the decision to complete these projects to determine if this is indeed program spillover.

The Smart Ideas for Your Business program is maturing and evolving to meet the needs of customers and is currently in a period of transition with the addition of vertically integrated program elements over the original horizontally integrated elements. On the whole, participants, including those that drop out of the program, and trade allies have favorable views of the program. Additional findings and recommendations can be found in the "Conclusions" (page 27) section of this report.

1. Introduction

1.1   Program Description

The Smart Ideas for Your Business program is a suite of offerings for ComEd's business customers. The program offers customers incentives and technical assistance to help them implement energy efficiency measures in their facilities. Since the program's inception in 2008, ComEd has refined the offerings to encourage broader participation among its customer base and to provide additional assistance for specific types of projects. As of this report, there are nine different subcontractors implementing elements of the Smart Ideas for Your Business program on behalf of ComEd. Table 1-1 illustrates how new program offerings have been introduced over time.

Table 1-1: Introduction of New Offerings Over Time*

PY1	PY2	PY3	PY4	PY5
Standard	New Construction	Compressed Air	Building Performance with ENERGY STAR/ Commercial Real Estate	Industrial Systems
Custom	Retro-Commissioning	Small Business Energy Savings (SBES)	Industrial Process Efficiency	Healthcare
		Smart Ideas Opportunity Assessments	Data Centers	Monitoring-Based Commissioning
			Business Instant Lighting Discounts (BILD)	

* This table shows the introduction of new offerings. Each of the offerings represented above has continued since its initial introduction.

Each of the offerings leverages market providers to bring customers to the program. For some offerings, such as Retro-Commissioning, customers are required to use certain pre-approved service providers. Other offerings allow any contractor, or the customer, to install the equipment. For the purposes of this report, we refer to market providers affiliated with the program as "trade allies." Trade allies are one of the key channels for bringing customers into the program. Although the requirements of trade allies are different among the program elements, some trade allies do participate in more than one offering.

In addition to trade allies, each of the program implementation contractors relies on outreach staff to bring customers into the program. Outreach staff are employees of the various implementation contractors and are charged with making customers aware of the program and providing customer support to help them complete projects.

Although the program has distinct elements that are implemented by separate companies, ComEd recognizes the importance of projecting a unified "face" to customers in the market. As a result, ComEd supports outreach staff by providing a number of resources including a customer relationship

management database and monthly sales meetings to help the implementation contractors coordinate activities.

As a part of the annual process evaluation, ComEd asked the Evaluation Team to conduct a cross-cutting process analysis of its Smart Ideas for Your Business program. This cross-cutting process study is intended to analyze the entire Smart Ideas for Your Business portfolio as a whole to gain insight into how the different elements of the program are working together and identify areas where coordination can be improved.

The study consisted of in-depth interviews with ComEd program managers and lead implementers, an online survey of program implementers, and telephone interviews of program trade allies, participants, and "drop-out" participants.[2] The in-depth interviews were conducted in June through July 2013, online surveys of program implementers were conducted in August 2013, and telephone interviews were completed throughout July and August 2013.

Cross-cutting research is critical to ensuring consistency across a portfolio. Through a deep review of how program processes connect and how program stakeholders relate to one another, cross-cutting research delves into these relationships and examines their related impacts on the operation of the program. This study evaluates the relationships of involved stakeholders in the Smart Ideas for Your Business program.

1.2   Key Evaluation Questions

The key evaluation questions involved three key themes: Implementation Coordination, Trade Ally Interface and Experience, and Customer Experience.

1.2.1   Implementation Coordination

Because ComEd has nine implementation contractors operating within the outreach space, it is important that they coordinate with each other to capture as much energy savings as possible and maintain a high level of customer satisfaction.[3] As such, the process assessment will address the following questions:

- Do program processes enhance coordination among implementation staff delivering the portfolio of Smart Ideas programs? How can they be improved? What best practices have been identified? Are implementation staff working in a coordinated manner?
- How are the tools provided by ComEd used and leveraged to increase program participation and contractor coordination? Are there additional tools needed? Is additional training on tools needed? Are the tools and resources working, and what improvements could be made? How are they helping to increase productivity and efficiency? Where are there bottlenecks or concerns?
- Are there areas where the coordination still needs improvement? How can ComEd address these areas? How can the implementation staff work more effectively together to address these issues?
- Are the implementation staff channeling customers to other programs appropriately and effectively? How are referrals to other programs handled, and are there ways to improve this process?

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[2] A "drop-out" participant is one that initiated a project through the program but did not complete it.

[3] There were nine implementers at the time of this study, but as ComEd continues to add and refine program offerings, new implementers are continually added.

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1.2.2 Trade Ally Interface and Experience

Trade allies are involved in the delivery of many of the ComEd C&I programs and offerings. Some program elements have "open" programs, whereby participants are not required to use a specific trade ally, and other programs use a "closed" trade ally approach. The process assessment will explore the following areas for each trade ally type:

- Are market providers knowledgeable about other commercial program offerings and the portfolio of Smart Ideas for Your Business programs as a whole? Are there programs that they prefer to participate in and promote over others?
- Are there any conflicts, from the market provider perspective, that are the result of the different program implementers and delivery models active in the program marketing and outreach?
- What is their overall experience working with the program? Do they understand the various program elements? What areas are working well, what areas could use improvement, and what suggestions do they have for improvements?
- How have existing education materials and trainings worked for them? Is there additional training or information they would like to receive on the portfolio of programs?

1.2.3 Customer Experience

With so many entities involved in the customer's program experience, it is important to clearly understand the customer experience. Satisfied customers are more likely to return to the program for additional projects and are more likely to encourage others to participate in ComEd programs. To understand and provide feedback for further improving these processes, we will explore the following questions:

- What are the overall perceptions of the Smart Ideas programs?
- How many program entities did they interact with, and how seamless was the participation process? What was the communication, application, and participation experience?
- How did they hear about the ComEd programs? What drove them to participate? (This feedback can be matched with how Energy Orbit has them noted as coming into the program.)
- How did they come into the program? Were they aware they were handed off to another program or firm during the process? If so, how did that process go, and what feedback do they have on that process?
- What was their overall participation experience like? What went well? How could things have been improved (if at all)?
- How do customers perceive the program? Does the program appear to them as a unified program or unconnected pieces?
- Are customers confused by the program? Do they know what it is? Does the large assortment of companies involved cause any challenges for participation?
- Is there any potential spillover as a result of the program? How might program involvement in the past be influencing additional energy-saving decisions within the company more broadly?

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2. Internal Coordination

ComEd offers a suite of offerings through Smart Ideas. The program elements are implemented by a team of implementation contractors. In general, the research indicates that there is some confusion regarding the roles of the various team members and that implementer incentives are not necessarily aligned with ComEd's goals. ComEd also provides a number of resources for helping implementation contractors coordinate with each other and these resources are viewed favorably by implementers.

2.1 Program Structure

ComEd offers a suite of incentive offerings for customers; each with a different goal. The full suite at the time of this report is outlined in Table 2-1.

Table 2-1: Smart Ideas Offerings and Goals

Offering	Goal
Standard	Pre-determined incentives for standard measures
Custom	Incentives calculated for unique projects
Business Instant Lighting Discounts	Upstream customer incentives paid to distributors to buy down cost for customers
Small Business Energy Savings (SBES)	Direct install and standard incentives for small business customers
New Construction	Design incentives for new construction projects
Building Performance with ENERGY STAR	Focused outreach to commercial real estate
Healthcare	Focused outreach to hospitals and healthcare centers
Data Centers	Focused outreach and incentives for data centers
Non-profits	Focused outreach for non-profits
Industrial Process Efficiency	Focused outreach on ComEd's largest industrial customers
Industrial Systems	System assessments and low-cost/no-cost recommendations for industrial process systems
Retro-Commissioning	System assessments and low-cost/no-cost recommendations for building systems
Monitoring-Based Commissioning	System assessments and low-cost/no-cost recommendations for building systems

ComEd categorizes program elements into three groups: 1) Core, 2) Segmented, and 3) Systems offerings. These various offerings are implemented by a team of subcontractors. Table 2-2 outlines which elements fall into each group and which implementation contractor is responsible for each element according to the implementer guide.

Table 2-2: ComEd PY6 Program Categorization

Core Programs	Segmented Programs	Systems Programs
Standard (KEMA)	Building Performance with ENERGY STAR for Commercial Real Estate (CB&I)	Industrial Systems (SAIC)
Custom (KEMA with engineering review by ComEd)	Healthcare (Terralocke)	Retro-Commissioning (Nexant)
Business Instant Lighting Discounts (BILD) (KEMA)	Data Centers (Willdan)	Monitoring-Based Commissioning (Nexant)
Small Business Energy Savings (SBES) (Nexant/Franklin Energy Services)	Non-profits (CNT)	
New Construction (Energy Center of Wisconsin)	Industrial Process Efficiency (Nexant)	

Source: Evaluation analysis

The introduction of the Segmented offerings marks a strategy shift for ComEd. The Core programs and Systems programs are horizontally integrated, meaning they are offered to any interested customer, provided the equipment or service qualifies. The Segmented offerings are vertically integrated, meaning they only apply to certain business types. This is significant because it changes the way customers interact with the program. Prior to the introduction of the Segmented offerings, customers approached the program based on the type of technology they wanted to upgrade. With the Segmented offerings, the technology-based Core and Systems program elements are packaged and presented to customers based on the customers' business type. Figure 2-1 below illustrates the difference between vertically and horizontally integrated program elements.

Figure 2-1: Vertical and Horizontal Integration
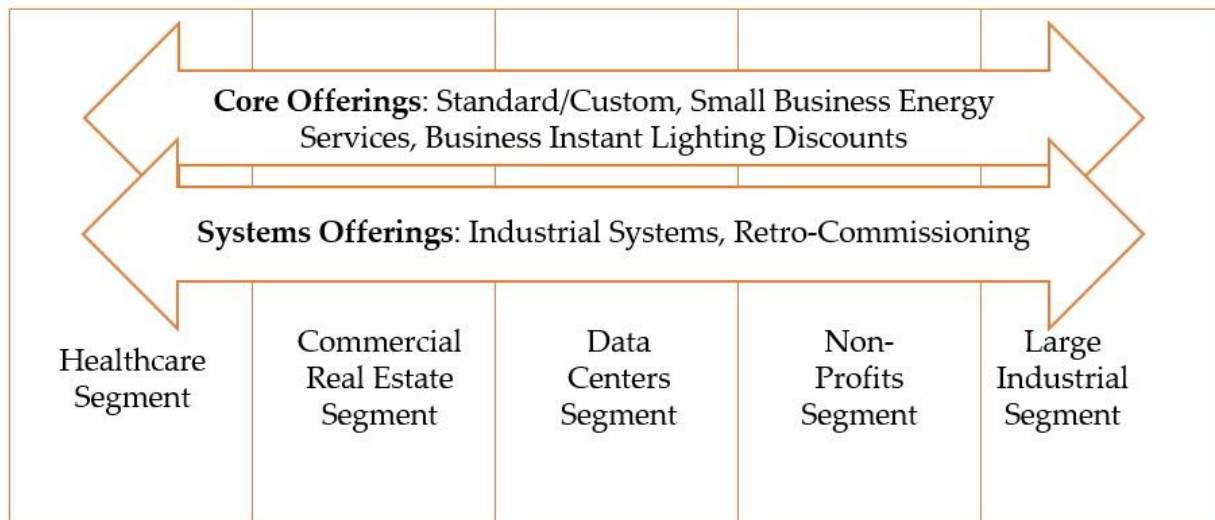
We asked program implementers to rate their familiarity with the other elements in the program portfolio. Figure 2-2 below presents these results in full.

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Figure 2-2: Level of Familiarity with Smart Ideas for Your Business Program Elements[4]

Legend: Not at all familiar | Not very familiar | Somewhat familiar | Very familiar
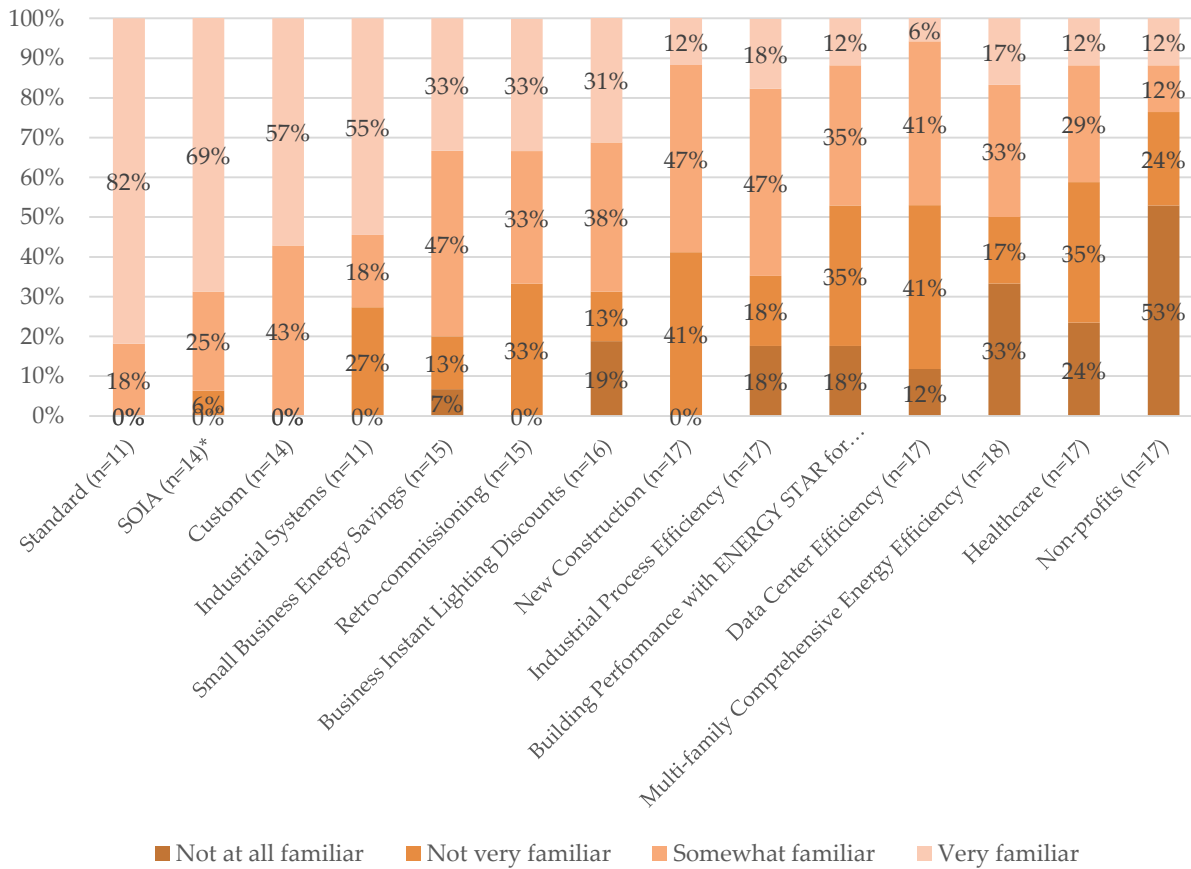
SOIA is an acronym for Smart Ideas Opportunity Assessments.

Several implementation staff members mentioned experiencing barriers in coordinating efforts with other implementers regarding the same customer. Some of these barriers involved understanding which program is the best fit. For example:

> "I think we could still benefit to have more structure as to when a project or customer might not be eligible for one program element. We should represent the program, not the elements. I think we are doing a much better job with this in PY6, but some sort of 'if/then' logic and flow chart might help knowing when to bring the other implementers on board."

The majority (60%) of implementers interviewed felt that customers tend to view the program as multiple or distinct programs. Implementers expressed confusion about who should take the lead with a customer in certain situations. Those who felt that the program is viewed as multiple or distinct elements said that customers are largely confused by program offerings. For example:

> "I can tell you… it feels disjointed. There are lots of people that aren't coordinated internally, so it kind of falls to the customer to figure it out."

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[4] Due to rounding, percentages may not sum to 100. The number of responses exclude respondents identified as implementation staff for the program in question to take stock of actual program awareness.

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"I guess this is my general impression, but I think, in general, they realize [the program] is fragmented"

Additionally, implementers noted that competition can further compound the issue. While only a few implementers cited high levels of competition among fellow implementers, those that acknowledged the issue pointed out that each implementation contractor is a separate business with its own objectives. For example:

"As program implementers [they] are all trying to grow their business and ensure that their particular program element is successful. It does feel like we get tunnel vision on our own program elements and lose sight of each other."

2.2 Resources for Coordination

To mitigate the confusion resulting from having many different program elements and implementation contractors, ComEd offers support to implementers, including customer relationship management databases, coordination events and a guidebook. On the whole, implementers appeared satisfied with the resources, but offered some feedback on the individual pieces which are detailed below.

2.2.1 Frontier Tracking Database:

Frontier was originally designed to support Custom and Standard projects. Implementers expressed some concern over its ability to support alternative program designs. One implementer said:

"Frontier is definitely a challenge that we are going through right now, but we have some solutions that we are just trying to work that through."

2.2.2 Energy Orbit:

Energy Orbit was introduced during the program's fifth year and is intended to help outreach staff from the various implementation contractors coordinate their activities in the outreach space. Energy Orbit is relatively new and is still being refined. It is the primary outlet for sharing leads regarding a potential project; however, a third (35%) of implementation staff interviewed reported preferring to track, receive, and share leads through e-mail, phone conversations, or their internal tracking systems. Two program managers noted that while Energy Orbit is a fine outreach tool, it cannot be the sole communication channel between program elements. One program manager said:

"I would say with the other programs, they tend to kind of like to try and do their own thing for the most part, and while we have Energy Orbit, it does not coordinate a marketing plan… You really have to dig into it to see what activities someone is doing and that is not coordination."

2.2.2.1 Regarding usability, most implementers reported no problems with Energy Orbit, aside from the initial learning curve. Many noted that the tool seems to be working well, and when faced with a problem it has been resolved quickly.

The larger challenge for ComEd is finding the right balance of ensuring information regarding customer touch points and potential projects is complete, which requires a significant investment in staff time to make sure outreach staff are able to spend as much time as possible meeting with customers. ComEd is

working with implementers to learn about how to make the best use of Energy Orbit, and given that the system is still quite new, refinements are still being made. For example, one implementer said:

> *"Sometimes we would have meetings off-site and we're not in front of a laptop whenever we have a conversation and so we kind of required some other way of logging this information in and then coming back to enter it into Energy Orbit. [Now we are] actually using it for the purpose of both logging our activities and trying to see what had happened with this building prior to talking to the building and understand a bit more about it before contacting them."*

2.2.3   Annual Implementer Meeting:

ComEd hosts an annual implementer meeting where implementation staff can network with each other and learn about ComEd's other program offerings. All but one of the respondents reported attending the meeting, and over a third of the interview respondents (36%) felt that the meeting was "extremely useful" to their work as an implementer.

Several respondents reported wanting to hear more about program changes and portfolio goal accomplishments. Implementers also indicated interest in getting more in-depth information on how the programs work together. A couple implementers asked for more opportunities to connect with fellow implementers working on similar or related programs. One implementer suggested that ComEd hold a mid-year meeting for implementers, which could be an opportunity to update implementers on program changes and allow staff to re-connect. Another respondent suggested adding sessions where implementers working on similar programs or programs with similar customer segments could work together and discuss strategies for reaching these customers and encouraging them to participate in the other related Smart Ideas programs. Related to this concept, another implementer suggested that the presentation of project success stories could be a great motivator and could potentially encourage collaboration among implementers working in similar segments.

2.2.4   Smart Ideas for Your Business Implementer Guide:

Over the past two program years, ComEd program managers have helped develop a guide for implementers working on the Smart Ideas for Your Business program. The guide includes program contact information and general facts about each program element, so implementation staff can refer customers to the appropriate Smart Ideas program if needed.

When we asked implementation staff about their exposure to the guide, 70% reported having reviewed the guide, while two respondents reported not reviewing it and three claimed to have not received a guide. Of those who received and have used the guide, over half (55%) claimed to use the guide for finding program contact information, while only a few reported using the guide to find program information. The implementers interviewed also provided a number of suggestions to improve the guide, including:

- Refine program contact information to include the program manager staff responsible for specific program elements to shorten the length of service times
- Provide an outline of the process or ordering of program-to-program participation to improve referral success rates

- Include more guidance regarding the use of Energy Orbit
- Make the implementer guide more accessible and searchable, so implementers can more quickly access program information

Two program managers contended that the guide should be shortened to include only contact information. However, four of the program managers argued that while the guide covers the basics needed to grasp the general differences among program elements, it lacks details that could improve the project lead transfer process.

2.2.5   E-mail Announcements:

ComEd sends regular e-mails to key program staff to communicate program changes or provide updates. Only seven of the 12 implementation staff members surveyed reported receiving e-mail announcements from ComEd program managers regarding program happenings and updates. Of this group, all felt that the e-mails were at least somewhat useful to their work. Most implementers said that the most useful part of the e-mail updates was notification of program changes.

2.2.6   Sales Meetings:

ComEd has begun hosting regular sales meetings with all of the outreach staff involved in the portfolio. The meeting topics include tactics for effective selling, Energy Orbit updates, and program changes. These meetings also help close the feedback loop regarding the usability of Energy Orbit; outreach staff provide tips on how they use the tool and work together to find solutions to some of the issues that arise in the field.

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3. Trade Ally Interface and Experience

Each program element manages its own trade ally network and overall trade allies appear to be satisfied. The majority of trade allies (76%) reported always promoting the Smart Ideas program to their customers. Trade ally networks are decentralized and managed at the program level and there is not a single database where trade ally data is housed so trade ally activity cannot be tracked across the portfolio. Additionally, 36% of trade allies reported viewing Smart Ideas as a series of separate programs and not a single, unified program.

3.1   Program Interaction

Each program element interacts with trade allies in a different way, depending on the program design and the trade ally business type. Some program elements are "open" and have low requirements for being a trade ally, and do not require customers to use pre-qualified trade allies; others program elements are "closed," meaning customers are restricted to using pre-qualified trade allies, and the program only accepts highly qualified companies as trade allies. Trade allies tend to participate in multiple program elements, as demonstrated in Figure 3-1 below. In fact, almost half of the trade allies report participating in two or more program elements, and 40% reported participating in three or more.

Figure 3-1: Count of Programs in Which Trade Allies Participate
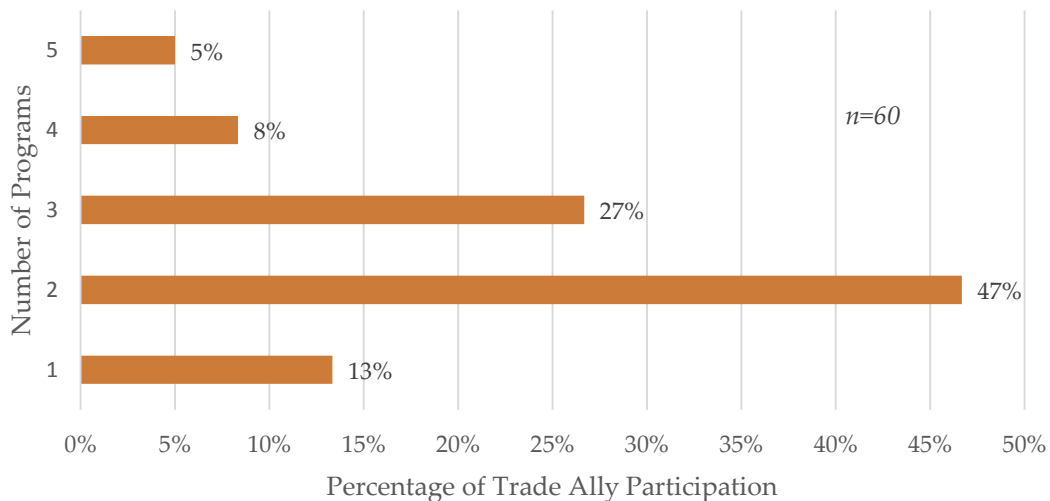
Source: Evaluation analysis

Forty-one percent of trade allies reported meeting with more than 10 Smart Ideas staff members, including ComEd and implementation staff, and more than a third (36%) reported being in regular contact with six or more Smart Ideas staff.

Table 3-1: Comparison of Trade Ally Interaction with ComEd and Implementation Staff

Count	All Interactions Percent (n=59)	Regular Interactions Percent (n=51)
Did not interact with anyone	2%	N/A
1-2	7%	43%
3-5	20%	22%
6-10	31%	24%
More than 10	41%	12%

Source: Trade ally survey

The trade allies rely on the program outreach staff when looking for assistance regarding ComEd's energy efficiency programs. Trade allies reported most frequently going to their outreach manager or program implementer (58%) for help; however, nearly a quarter (22%) go to ComEd's website for answers.

Table 3-2: Trade Ally Sources for Program Answers (Multiple Response)

Response	Percent (n=59)
Outreach Manager/Program Implementer	58%
Website	22%
ComEd Program Manager	14%
ComEd Call Center/Hotline	14%
Other	2%

Source: Trade ally survey

Ninety-eight percent (98%) of the ComEd trade allies interviewed were aware of the Smart Ideas for Your Business branding. Nevertheless, over a third (36%) viewed the program as multiple distinct programs. Figure 3-3 below shows the reasons that trade allies gave for viewing Smart Ideas as a series of separate programs.

Table 3-3: Reasons the Smart Ideas Program Is Viewed as Multiple Programs

Response	Percent (n=19)
Different incentives/rules/paperwork	26%
Administrators are different/multiple companies/program contacts	21%
Different focus/sectors/areas/customers	21%
Consists of more than one program	16%
Marketing/branding	5%
Other	11%

Source: Trade ally survey

Figure 3-2 shows the reported levels of knowledge that trade allies have regarding program elements.

Figure 3-2: Trade Allies' Level of Knowledge of Smart Ideas Program Elements

Legend: ■ Not knowledgeable (0-3) ■ Neutral (4-6) ■ Knowledgeable (7-10)
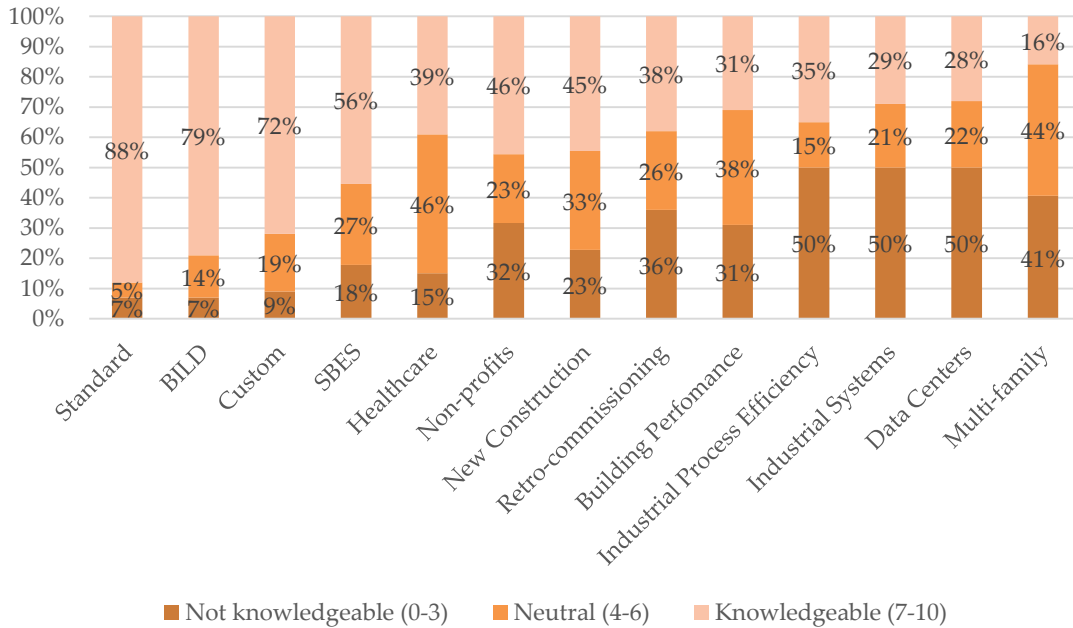
Source: Trade ally survey

Trade allies were divided in their responses over whether their customers understand their program and incentive qualifications with slightly more than half (53%) indicating that their customers do not understand their program. Additionally, 57% reported that their customers would not know how to find out what programs and incentives are available to them. From the trade allies' perspective, their customers face a number of barriers that make it difficult to participate in the Smart Ideas program. In particular, 32% of trade allies reported that project costs and a lack of capital limit participation, while 22% stated a simple lack of awareness that the program is available (See Table 3-4).

Table 3-4: Trade Allies' Perception of Customer Barriers to the Smart Ideas Program

(Multiple Response)

Response	Percent (n=59)
Project cost/money	32%
Lack of awareness	22%
Paperwork/application process	14%
Incentives	9%
Skepticism/stubbornness	9%
Return on investment/payback	7%
Customer lack of understanding of efficiency	5%
Issue with program measures/desired equipment not covered by incentives	5%
Time to complete	2%
Other	3%
No barriers to participation	12%

Source: Trade ally survey

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Additionally, 22% of trade allies interviewed reported having seen customers with incentive-eligible projects decide to complete these project outside of the Smart Ideas program (see Figure 3-3).

Figure 3-3: Trade Allies-Customers Completing Projects Outside of Program

■ Yes ■ No ■ Don't Know
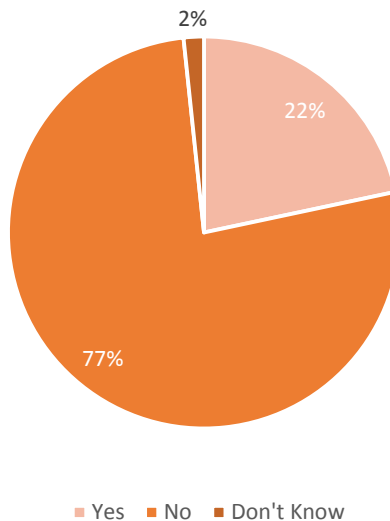
Source: Trade ally survey

According to trade allies, an average of 3.9 projects were completed without incentives. The reasons for deciding not to pursue incentives ranged from it being reportedly "easier" (46%), to issues dealing with project and program timelines (23%), to paperwork requirements (23%), to a lack of financing options (23%), to a lack of awareness (23%). Two trade allies described the reasons their customers decided not to participate in the Smart Ideas program:

> *"Rebates were very small and [customers] didn't feel it was worth the effort."*
> *"[They] didn't have time to wait for the process."*

3.2   Trade Ally Satisfaction

The trade allies reported few problems with the program on the whole. The trade allies interviewed rated the ease of becoming a Smart Ideas trade ally, getting notifications about program changes, and knowing how to contact with a question as 8.5 on average,[5] respectively (See Figure 3-4.)

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[5] On a scale of 0 to 10, with 0 being "very difficult" and 10 being "very easy."

Figure 3-4: Level of Difficulty with Various Aspects of Being a ComEd Trade Ally (Means)
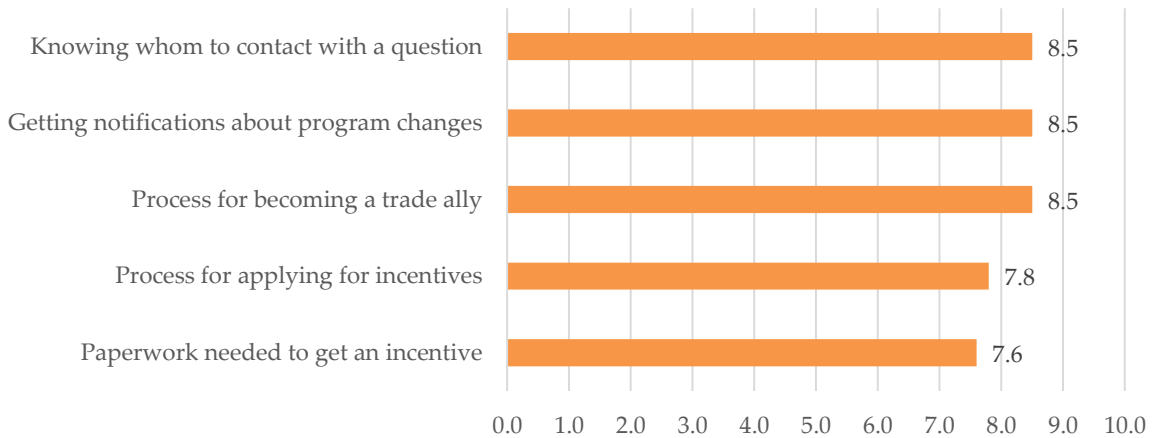
Source: Trade ally survey

Only a third (37%) of the trade allies interviewed reported experiencing problems in completing projects through the Smart Ideas program. Table 3-5 shows the reported challenges that trade allies have faced with paperwork/calculations and changing requirements/information at the top of the list.

Table 3-5: Difficulties Faced by Trade Allies in Completing Smart Ideas Projects (Multiple Response)

Response	Percent (n=21)
Paperwork problems/too many calculations	43%
Changing requirements/inconsistent information	38%
Pre-approval problems	24%
Pricing issues/budget problems	19%
Project timing	5%
Other	10%

Source: Trade ally survey

Nearly three-quarters (70%) of the trade allies interviewed reported that the process for working as a ComEd trade ally was "easy" and of that group 20% felt that it was "very easy" (Figure 3-5).

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Figure 3-5- Ease of Working as a ComEd Trade Ally

Difficult, 7%

Very Easy, 20%

Neutral, 23%

Easy, 50%
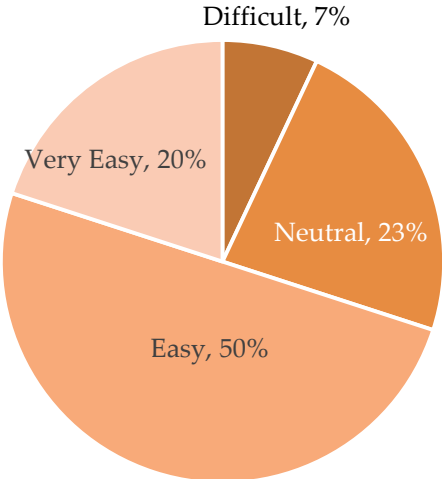
n=60

Source: Trade ally survey

4. Customer Experience

Overall, customers who complete projects and those that initiate, but do not complete projects through the program, are satisfied with their program interactions and report being likely to participate again. However, they are also unaware of other program offerings outside of the ones they participated in. Customers that receive assessments report being "very likely" to complete the projects identified.

4.1 Customer Participation Process

Based on interviews with implementation contractors and a review of the implementer guide, we mapped out the value stream for customers once they have been recruited into the program either by program staff, trade allies, or through the website or hotline. Value stream mapping, a technique often associated with lean manufacturing and Six Sigma, is a visual representation of the flow of materials, or in this case, information required to deliver a product to a customer. This diagram illustrates how a participant, once engaged in the program, can be passed between the various program elements depending on the customer's needs. As mentioned earlier, ComEd intends for customers to view the program as a comprehensive solution as opposed to multiple separate program elements. *This requires a high degree of coordination between program implementers behind the scenes.* Figure 4-1 *attempts to capture what this behind-the-scenes coordination requires based on interview with key implementer and ComEd staff.*

Figure 4-1: Smart Ideas for Your Business Value Stream Map
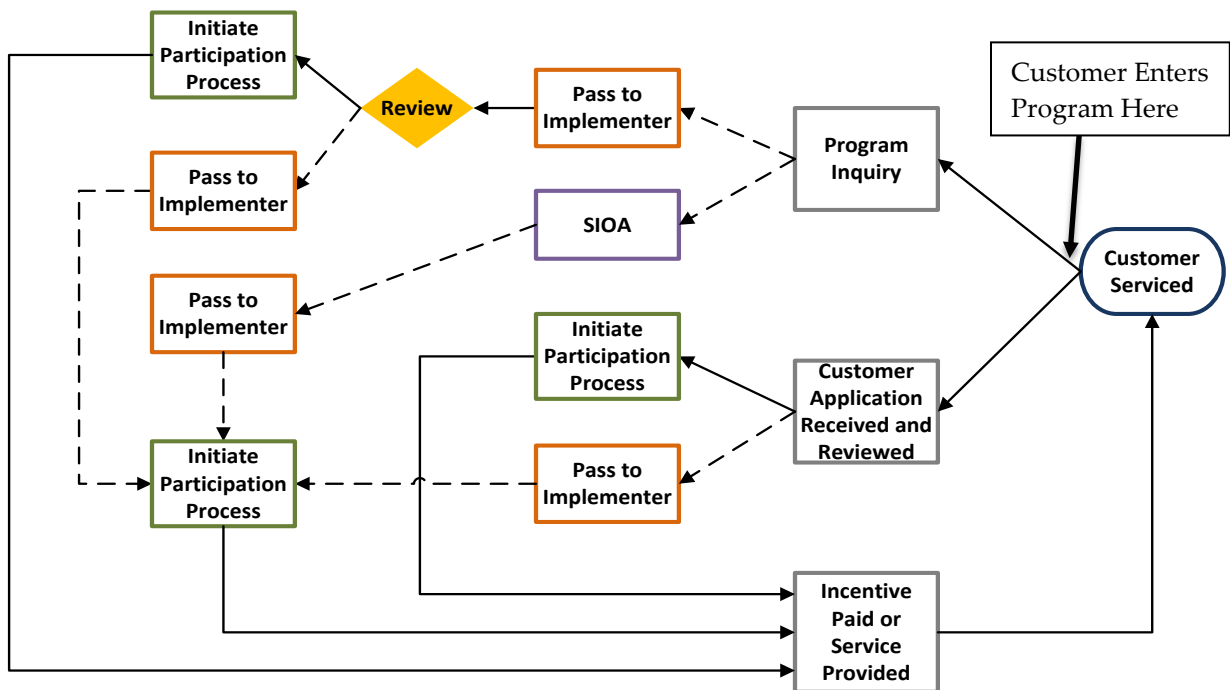
Source: Evaluation analysis

As illustrated in Figure 4-1, customers are passed between implementation contractors based on the guidance provided in the implementer guide combined with the knowledge, experience, and relationships that the implementation contractors have with other program elements and implementers.

4.2   Customer awareness

Participants, both with completed projects and those that dropped out, are largely unaware of program offerings other than the program in which they submitted an application. Table 4-1 shows the unaided awareness of program elements which shows a very high level (77%) of participant "unawareness" of other programs.

Table 4-1: Unaided Program Awareness (Multiple Response)

Response	Participants (n=93)	Drop-out Participants (n=51)
Unaware of any other programs	77%	75%
Business Instant Lighting Discounts	11%	4%
Industrial Systems	5%	-
Custom	3%	2%
Standard	2%	2%
Measure or Equipment	2%	22%
Other	5%	2%

Source: Participant survey

Most of the participants and drop-out participants interviewed reported first hearing about Smart Ideas from trade allies or contractors. Table 4-2 shows how customers reported first hearing about the program.

Table 4-2: How Participants First learned about the Smart Ideas program

Response	Participants (n=98)	Drop-out Participants (n=53)*
Trade ally/contractor	44%	38%
Word of mouth	9%	6%
ComEd website	6%	4%
ComEd account manager	7%	11%
Direct mail	6%	11%
Program staff	3%	8%
Other	25%	23%

*Due to rounding, may not sum to 100%.
Source: Participant survey

In terms of direct interaction with program staff, drop-out participants tended to report meeting with fewer staff people, if any at all, compared to program participants. Some 19% of drop-out participants claimed to have not interacted with anyone at all, compared to 14% of program participants, as shown in Table 4-3.

Table 4-3: Comparison of Program Participant Interaction with ComEd and Implementation Staff

Count	All Interactions		Regular Interactions	
	Participants (n=96)	Drop-out Participants (n=53)	Participants (n=87)	Drop-out Participants (n=47)
Did not interact with anyone	14%	19%	53%	49%
1-2	34%	51%	32%	36%
3-5	30%	17%	9%	11%
6-10	14%	6%	6%	4%
More than 10	8%	7%	0%	0%

Source: Participant survey

Table 4-4 shows where customers look for information about the program. Among program particpants, it appears 37% learned of the program through the ComEd website and 21% learned of the program through account managers.

Table 4-4: Typical Sources for Program Answers (Multiple Response)

Response	Participants (n=100)	Drop-out Participants (n=51)
ComEd website	37%	31%
ComEd account manager	21%	6%
Trade ally	20%	24%
Program implementer	9%	12%
ComEd program manager	7%	12%
ComEd program hotline	6%	20%
Other	21%	12%

Source: Participant survey

Three-quarters (76%) of drop-out applicants, and 60% of participants with completed projects reported having heard the term "ComEd's Smart Ideas for Your Business". Large portions of both drop-out participants (52%) and participants that completed projects (40%) view the portfolio as a unified program.

Reasons given by both of drop-out participants and participants with completed projects for viewing Smart Ideas as a series of separate programs included:

- Operational differences related to requirements
- Different incentive amounts
- Different staff involved in each element
- Program marketing

4.3 Participant Satisfaction

Satisfaction with the Smart Ideas program and its various elements play a role in participant retention. As this section illustrates, satisfaction levels among program participants and drop-out participants are quite different in some cases. While customers across the board are generally satisfied with the Smart Ideas program, these results indicate that there are opportunities to make some gains with customers. On average, respondents indicated satisfaction (7.4 mean) with the ease of the program participation process in ComEd programs. Program participants were most satisfied with their interactions with the call center

(8.1 mean), but also rated the Smart Ideas program overall and the equipment and services offered by the program very highly (7.9 means, respectively). This is shown in Figure 4-2.

Figure 4-2: Mean Satisfaction of Participants with Various Elements of the Smart Ideas program

Call center's ability to answer questions (n=14)	8.1
Smart Ideas program overall (n=98)	7.9
Equipment and services offered by program (n=89)	7.9
Program incentive amounts (n=97)	7.7
ComEd Website's ability to provide information about the program (n=42)	7.6
ComEd overall (n=100)	7.4
Communication with Smart Ideas staff (n=87)	7.4
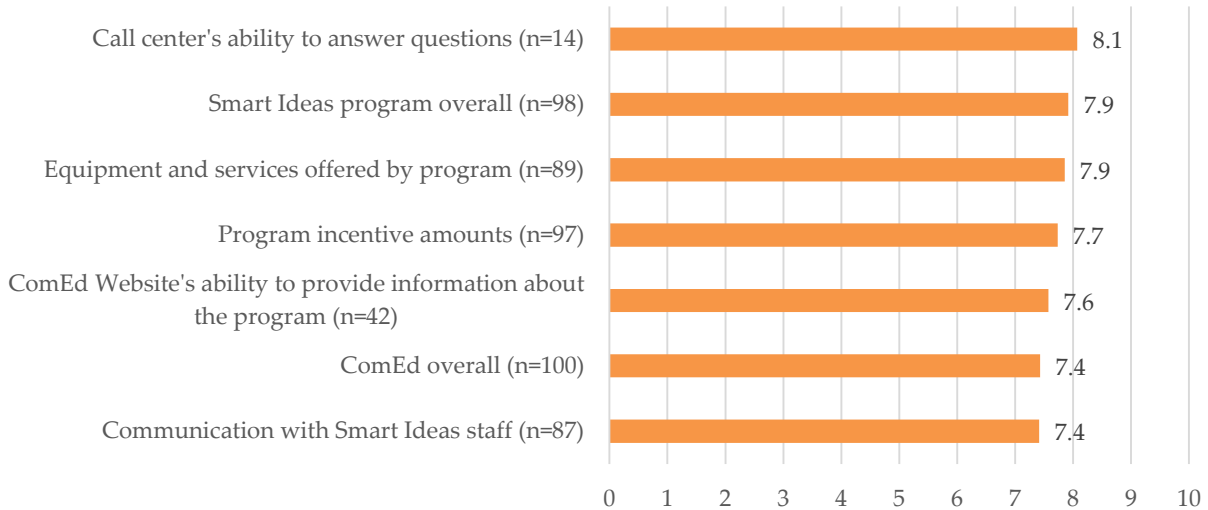
Source: Participant survey

Respondents that reported receiving a facility assessment (67%) were also asked about their view of the value of facility assessments. Figure 4-3 shows the level of interest these respondents reported regarding perusing the opportunities identified through their assessments – 53% indicated that they were interested in other energy efficiency projects with 30% indicating they were neutral on that point.

Figure 4-3: Interest in Pursuing Other Energy Efficiency Project identified through Facility Assessment

Mean = 6.3
n=36

■ Not interested (0-3) ■ Neutral (4-6) ■ Interested (7-10)
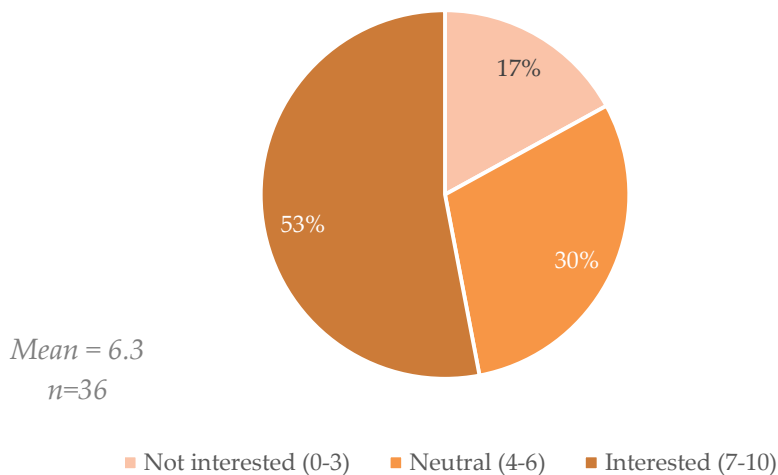
Source: Participant survey

Of those with interest in pursuing the additional projects, over a three quarters (79%) were "very likely" to complete these projects, as shown in Figure 4-4.

Figure 4-4: Likelihood of Completing Additional Projects identified in Facility Assessment

Mean = 7.7
n=19

■ Not likely (0-3)   ■ Neutral (4-6)   ■ Likely (7-10)
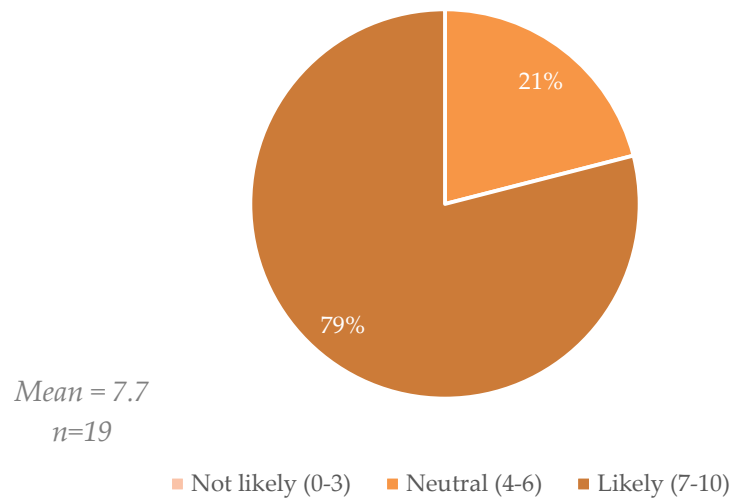
Source: Participant survey

Respondents that completed projects also reported that the process for completing program applications was fairly easy, with an average rating of 7.8.[6] Figure 4-5 shows that 73% of participants stated that they plan to participate in the Smart Ideas program again in the future.

Figure 4-5: Plans for Future Program Participation

n=99

■ Yes   ■ No   ■ Maybe   ■ Don't Know
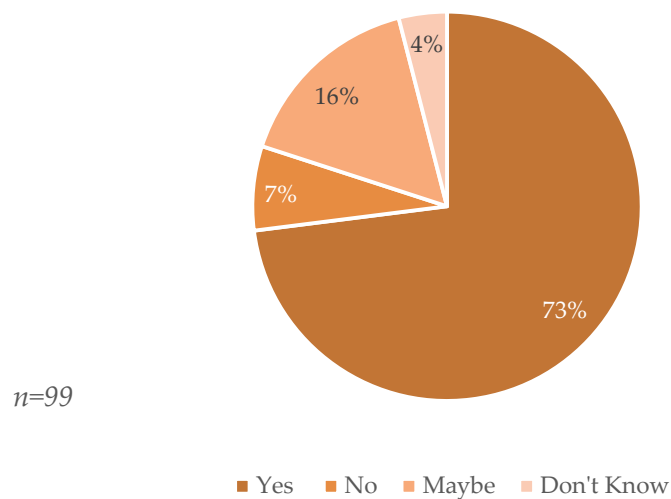
Source: Participant survey

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[6] On a scale of 0 to 10, with 0 being "extremely difficult" and 10 being "extremely easy."

Figure 4-6: Likelihood to Participate again in ComEd's Energy Efficiency Programs in the Future (Customers with completed projects)

3%

6%

[VALUE]

44%

n=100

■ Very likely   ■ Somewhat likely   ■ Not very likely   ■ Not at all likely
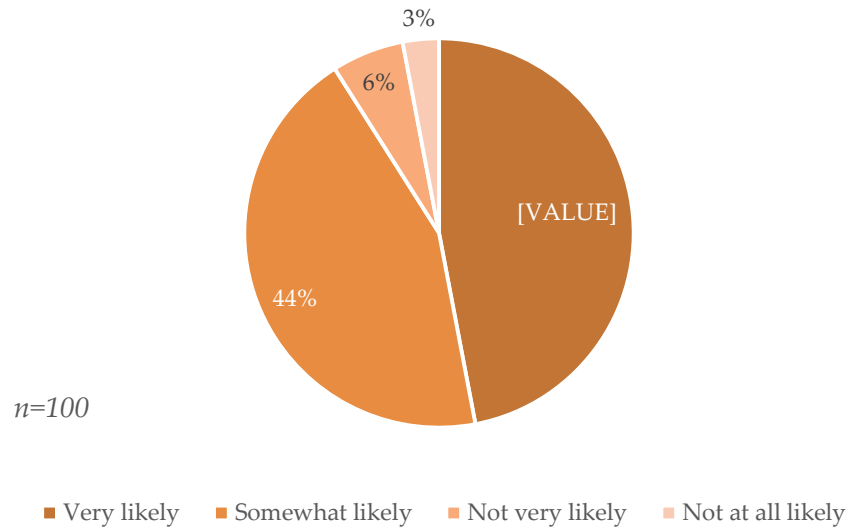
Source: Participant survey

Drop-out respondents are somewhat satisfied with the ease of the program participation process, providing an average rating of 5.9.[7] While this is significantly lower than participants who completed projects through the program (who report a mean score of 7.4), it backs up previous indications that dissatisfaction with the ease of the participation process is not a major issue for drop-outs.

Other satisfaction scores for participants that dropped out of the program process are presented in Figure 4-7.

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[7] On a scale of 0 to 10, with 0 being "extremely difficult" and 10 being "extremely easy."

Figure 4-7: Mean Satisfaction of Drop-out Participants with Various Elements of the Smart Ideas Program

Element	Mean
Results of facility accessment completed through program (n=23)	7.4
Call center's ability to answer questions (n=15)	7.1
ComEd overall (n=52)	6.9
Communication with Smart Ideas staff (n=48)	6.9
Smart Ideas program overall (n=50)	6.8
Standard program overall (n=44)	6.7
Equipment and services offered by program (n=44)	6.6
ComEd Website's ability to provide information (n=30)	6.5
Program incentive amounts (n=49)	6.2
Custom program overall (n=9)	6.2

Source: Participant survey

4.4   Completion of Projects Outside of the Program

Over a third (38%) of drop-out participants reported that they completed projects outside of the program without receiving an incentive from ComEd.[8] Over 40% of those respondents cited timing as why they completed the project without receiving an incentive. Figure 4-8 illustrates the reasons these drop-out participants gave for completing the project outside of the program.

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[8] One-quarter (26%) of the drop-out participants indicate that they still expect to receive an incentive at some point in the future. This potentially indicates either a misunderstanding on the part of the applicants about the status of their project, which, by extension, may have caused the respondent to have been incorrectly categorized as a drop-out participant when the respondent's project could have still been in the pipeline; or it could be the case that these respondents are also planning to conduct additional work with ComEd in the future that could qualify for an incentive. One applicant (5%) indicated that an application was submitted to ComEd but they never received a response.

Figure 4-8: Reasons for Projects Being Completed Without Receiving an Incentive

- Expect to receive incentive in future
- Timing issue
- Measure qualifying issue
- Submitted application
- Other issue

n=19
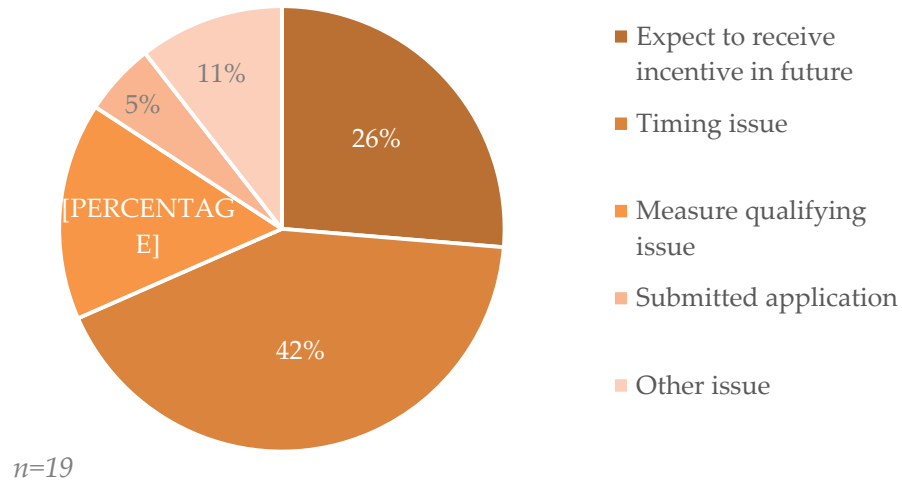
Source: Participant survey

Cost and financing was the top reason cited for not completing a project; followed by project timing. Almost one-fifth (19%) of respondents cited internal company issues as the reason they did not finish a project begun through the program (See Figure 4-9). One respondent said:

"Company was sold and told not to proceed with the project."

Figure 4-9: Primary Reasons for Not Completing Projects

- Cost/Financing
- Time
- Not approved
- Internal company issue
- Other

n=32
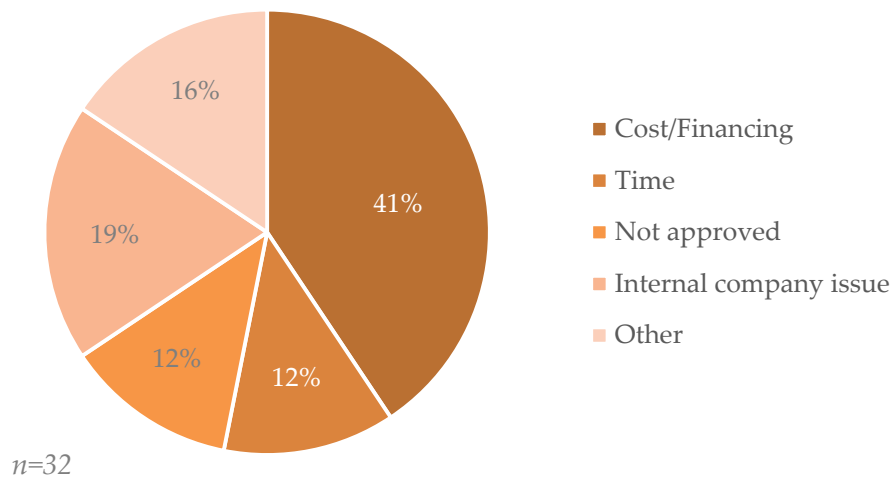
Source: Participant survey

Half of the drop-out respondents that had not yet completed their projects (52%) indicated that they did *not* plan to continue the project the originally applied for but almost a third (32%) indicated that they planned to continue the project; 19% were unsure. The majority of the respondents that said they would

complete their projects claimed that they would complete the project through a ComEd program. Only one respondent said that they intended to go forward with their project without a ComEd program–this respondent commented that they desired to bring a contractor in who was not involved with the program and that they could not complete the project in the required timeframe. Finally, over half (54%) of drop-out participants reported that they were "very likely" to participate in ComEd's energy efficiency programs in the future. Over one-third (35%) indicated that they were "somewhat likely," and 12% indicated that they were "not very likely." No respondents indicated that they were "not at all likely" to participate in ComEd energy efficiency programs in the future.

Figure 4-10: Likelihood of Future Participation in ComEd's Energy Efficiency Programs

n=52 ■ Very likely ■ Somewhat likely ■ Not very likely

Source: Participant survey

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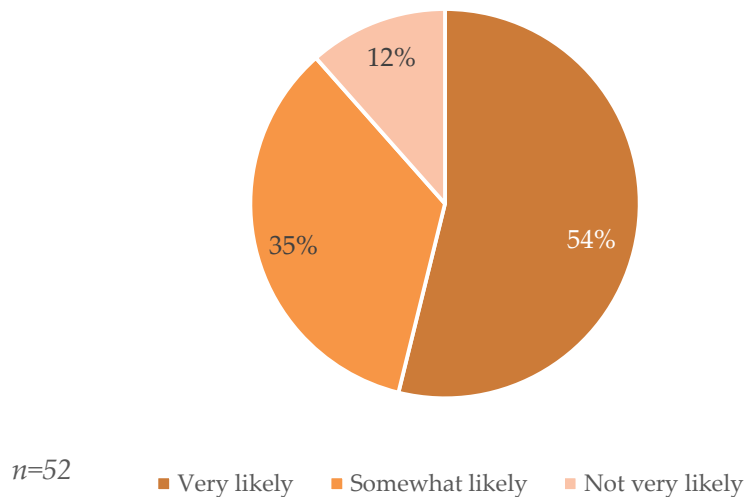
5. Conclusions

Customers and trade allies are generally satisfied with the Smart Ideas for Your Business program; however, the centrally occurring theme heard throughout the research is despite efforts to deliver a comprehensive "solution" to customers, the Smart Ideas program appears fragmented or disjointed to many of the internal and external stakeholders. The key factors contributing to this are confusion surrounding implementer roles in the overall portfolio, implementer incentives not completely aligning with the program delivery goals, and lack of coordination with trade allies.

5.1   Confusion around Program Design

Program implementers report some confusion surrounding their roles, as well as the roles of other contractors in implementing Smart Ideas program elements. Also, there is consensus between program implementers and program management staff that customers and trade allies are confused about the program. This confusion persists despite ComEd's attempts to brand the program as a unified and comprehensive solution for customers and work closely with implementers to coordinate the different program elements. The program structure itself may be the source of the confusion. ComEd currently has a program structure that combines vertical and horizontal program elements, but still intends for customers to view the program as a unified set of offerings that provide comprehensive solutions.

> **Recommendation 1:** One way to approach the combination of vertical and horizontal integration is by looking at the portfolio as a "Matrix" organization. The Core and Systems program implementers can be viewed as cross-sector specialists in technology and incentive delivery and the Segmented program implementers can be viewed as specialists, who are best equipped to deal with barriers faced by and opportunities presented by different types of customers. An example of a Matrix organization would be a firm with separate marketing and engineering departments, where marketing staff report to a marketing manager and engineering staff report to an engineering manager. In a Matrix organization, although the marketing and engineering staff report to different managers, they are pulled together to form cross-functional teams where they report to the same project manager.

> This model could be applied to ComEd by forming cross-functional teams made up of Core and Systems staff centered on the Segmented offerings, as appropriate. Generally the segmented offerings leverage Core and Systems offerings to deliver energy savings for their customers. For example, in practice, this would involve having a representative from Standard/Custom, Retro-Commissioning, SBES, and BILD form a team lead by the Building Performance with ENERGY STAR®/Commercial Real Estate implementer. The teams would consist of a designated staff member representing each of the applicable Core and Systems program elements. This would streamline communication between the programs by clearly designating a single point of contact between the Core and Systems programs and the Segmented offerings.

> **Recommendation 2:** Cross-implementer coordination should be done behind the scenes. Instead of passing a customer to a Core or Systems implementer, the Segmented implementers should work directly with those implementers to address whatever program barrier exists, and ensure that administrative barriers are addressed.

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5.2   Aligning Implementer Incentives

When two parties working together have interests or motivations that are aligned in some areas and not others and both parties do not share the same level of expertise or information, then the "principal-agent problem" or "agency dilemma" can occur. One party, the "principal," may struggle to motivate the "agent" to act in the best interests of the principal, rather than agent's own interests. There are a number of areas where the principal-agent theory could apply within the Smart Ideas for Your Business program, most importantly between ComEd and the program implementers. Several program implementers and program managers acknowledged that while they understand it benefits the program overall, there is not a direct incentive to promote the entire portfolio. For example:

> "I would say that outside of this is a part of what we do and that it's in everybody's best interest to represent the portfolio and help the customer, I think that that's always in the best interest of the program. At no point in time are we ever going to be able to force a customer to do what they don't want to do, and the best thing that we can do on behalf of the portfolio and even for ourselves long-term, especially with our long-term relationships with customers, is to offer them the best opportunity for where they're at. Contractually, outside of you know we deliver a scope of work for you know working in Energy Orbit and sharing leads and that sort of thing, I think you know that's understood. I would not say that there's incentive mechanisms or financial structures in place to better facilitate that and keep all implementers in the same motivation. I think from what I've seen going on this year for PY6, it seems more like it's a newly developed scope of work and concept for marketing and outreach teams, which is still a work in progress. **My personal opinion is if ComEd could restructure how they incentivize marketing and outreach, it might put motivations in a better place**."

It is ComEd's expectation that implementation contractors will channel customers to the appropriate program element. However, program implementers may not be motivated to do this because they are concerned about the success of their program element above all others. Figure 5-1 illustrates the basic structure of a principal-agent problem.

Figure 5-1: Principal-Agent Theory
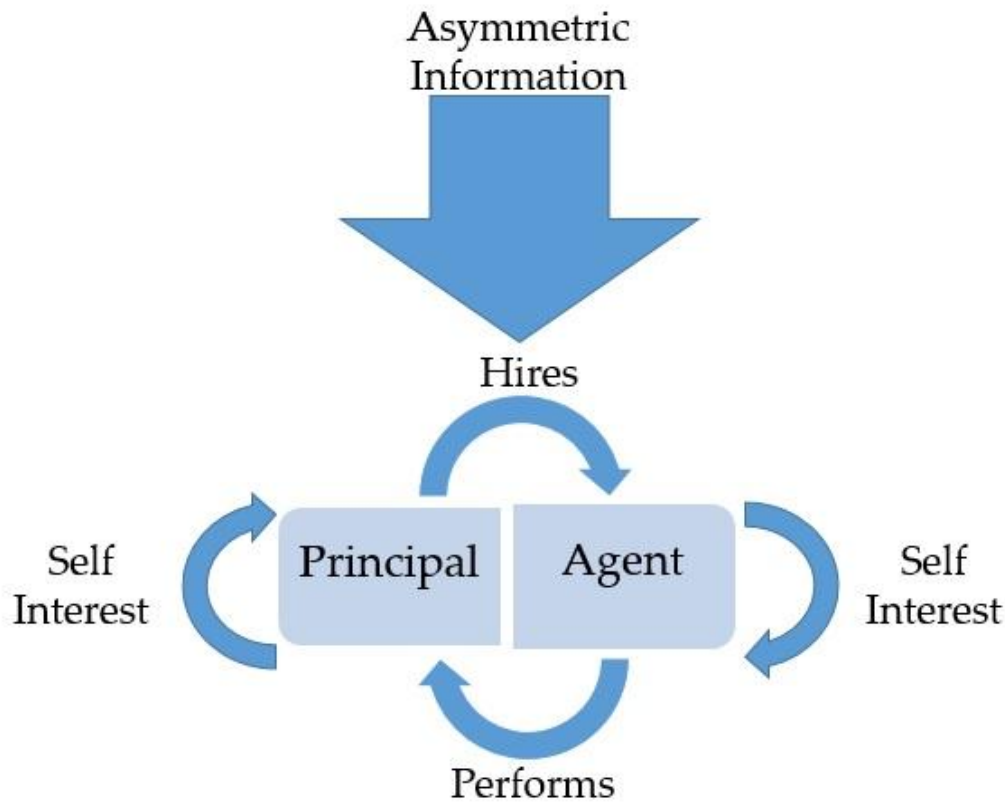
Recommendation 1: ComEd can mitigate this principal-agent problem through contract design and program evaluation. If implementer compensation is tied not only to the performance of the program element they manage, but also to how much assistance they provide in channeling customers to other program elements, implementers may be more motivated to cross-promote program offerings.

Recommendation 2: Another way to overcome the principal-agent problem is through regular evaluations. Process evaluations should explore not only how each program offer operates on its own, but also how it interacts with other elements.

5.3   Trade Ally Interface

Trade allies tend to participate in multiple program elements and while most view Smart Ideas as one program, more than a third say it is a series of separate programs. The latter respondents cite different program designs, incentive structures, and implementation contractors as reasons they do not view Smart Ideas as a single, unified program. This has implications for how trade allies communicate with customers about the program as well; if they see the program as a series of separate programs, they are less likely to present the program as a single, comprehensive solution.

Each implementer manages its own trade ally network and many trade allies cited different program designs, incentive structures, and implementation contractors as reasons they do not view Smart Ideas as a single, unified program. Also, trade ally data is housed at the program implementer level and is not centralized. This makes it difficult to track and analyze cross-program participation.

Recommendation: The evaluation team recommends that ComEd begin developing a centralized database of trade allies. This would allow ComEd to better understand which trade allies are participating in various program elements and eventually begin to manage the outreach to them in a similar manner to Energy Orbit. However, given that this could be a large investment in time and resources, perhaps future cross-cutting evaluation work could focus just on cross-cutting trade ally participation.

Additionally, more than a third (36%) of trade allies also report being in regular contact with more than six different Smart Ideas staff members. Twelve percent (12%) report being in regular contact with more than 10 staff members. While this is not necessarily a problem, it does open up the potential for confusion about whom to contact when certain situations arise.

5.4   Resources for Coordination

ComEd provides a number of resources to help implementation contractors coordinate their activities including: Energy Orbit, Annual Implementer Meeting, Implementer Guide, E-mail updates and a monthly sales meeting. On the whole, implementers are satisfied with the resources provided. Implementers understand that Energy Orbit is still in a developmental phase but they almost unanimously agreed that it is and will continue to be a useful tool. Additionally, the monthly sales calls are well received.

Recommendation: ComEd may want to consider hosting an internal SharePoint site for implementation staff. The site could contain an updated implementation guide, calendar of events, detailed instructions on how to use Energy Orbit, program contact information. It could also be used to send update e-mails.

5.5   Continued Engagement with Past Participants

Three-quarters of drop-out participants and 77% of participants are unaware of any of the other elements ComEd offers its business customers and at the same time 91% of participants reported that they would be "likely" or "very likely" to participate in the program again. These customers are, in general, quite satisfied with their experience, and interested in completing additional projects. They tend to not be aware of offerings outside of those they have already had experience with while participating in the program.

Recommendation: ComEd should continue following up with customers that have completed or initiated projects through the program. Since they appear to be largely unaware of ComEd's other program offerings, they represent a possible fruitful opportunity for cross-marketing of new program elements.

5.6   Completion of Projects Outside of the Program

Twenty-two percent (22%) of trade allies reported completing eligible projects outside of the program and when we interviewed customers who had dropped out of the program, we found that almost a third of them ended up completing the project without an incentive. The most often-cited reason these program drop-outs gave is the project timing. At this point, we cannot say exactly what is happening with these customers and this finding would benefit from further research. Depending on ComEd's level

of influence regarding the customers' selection of the equipment they installed, this could be indicative of "non-participant" spillover.

> **Recommendation:** Further research should be conducted to determine why these projects are being completed outside of the program and what influence ComEd has on the project completion, given the customer does not receive an incentive.

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This appendix presents the survey sampling designs established for each survey conducted as a part of the ComEd Cross-Cutting Evaluation Report. Each section provides details on how the survey sample was established, as well as some descriptive information about each survey sample.

Program Staff and Implementer Interviews

Interviews with ComEd program staff were conducted in June and July 2013. During this time, the evaluation team interviewed nine ComEd program managers representing 14 ComEd Smart Ideas for Your Business program elements.

The evaluation team attempted a census of interviews with implementation staff working on the Smart Ideas for Your Business program. The sample of program implementers was derived from the program contacts identified in the Smart Ideas for Your Business Implementer Guide.[9] Based on information provided by ComEd program managers, four implementer contacts were excluded and five implementer contacts were added to the contact list in order to account for changes in the management of various program elements. In total, 31 individuals representing 12 program elements were identified as program implementation staff.

In June and July 2013, eight in-depth interviews were conducted with 13 Smart Ideas implementation staff members. In August 2013, an online survey was launched to capture feedback from the remaining pool of implementation staff, where an additional 12 interviews were completed. In total, 20 interviews were completed with 25 implementation staff members.

Table A-1: Program Staff and Implementer Sample Design

Program Component	Sample Frame	Completed Interviews	Response Rate	Cooperation Rate
Program Staff—Census	9	9	100%	N/A
Implementation Staff—Census	31	20	65%	N/A

Trade Ally Interviews

The Trade Ally Survey sample was composed of 599 contractors representing 587 unique trade ally organizations that have participated in the following Smart Ideas for Your Business program elements in the past or most recent program year:

- Standard
- Custom
- Small Business Energy Savings (SBES)
- Retro-Commissioning
- Industrial Systems
- Data Centers

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[9] For the purposes of sample selection, we used the guide dated Program Year 6, Version 1.

- Business Instant Lighting Discounts (BILD)

The sample was constructed by merging the lists of participating trade allies provided by program implementers using contact name, trade ally organization name, and phone number. These data were cleaned to remove records without phone numbers and identify missing contact names using e-mail addresses. Nine records were identified as duplicated entries and were removed from the sample.

Trade allies in the sample participated in one to four programs, with the majority (67%) participating in two programs. The top two programs represented in the sample were Standard/Custom (89.5% participated) trade allies followed by Data Centers (73.3% participated) trade allies[10].

Table A-1: Trade Ally Survey Sample Design

Program Component	Sample Frame	Completed Interviews	Response Rate	Cooperation Rate
Trade Allies—Sample	599	60	16%	50%

Participant Interviews

The participant sample consisted of 5,875 customers who had initiated projects in PY5. The sample was compiled using participant data files and customer contact information files provided by ComEd. These files included 6,450 projects that were dropped from the sample frame because they were completed before 2011, had been cancelled, or had not progressed beyond scheduling a site visit. The Evaluation Team conducted an extensive preliminary cleaning of the company and contact name fields, and then collapsed related projects into a single piece of sample by customer name, organization name, and phone number, while maintaining a record of the participant's project categories.

Next, the data were checked for duplicate names and phone numbers. Here, we also looked for differences in the spelling of business names to avoid retaining what was actually a single contact multiple times. As a result of this step, 85 records were removed from the database. An additional 137 records were removed in order to minimize overlap with other ComEd surveys being conducted concurrently, including the separate program evaluation of the Business Instant Lighting Discounts (BILD) program. Likewise, 1,861 records were removed after also being identified in the Standard program evaluation sample. Further, 67 records were removed after being identified in the Custom program evaluation sample, and 31 records were removed after being identified as being Gas program customers. A total of 3,694 participants were contacted, with only 2% being identified in the ComEd database as having participated in more than one Smart Ideas program.

Balancing program representation with potential differences between single program participants and multiple program participants, the sample frame established for the evaluation of program participants consisted of participants representing eight Smart Ideas for Your Business programs, including the following:

- Standard
- Custom

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[10] The Data Centers program does not maintain a separate trade ally network, rather they use trade allies associated with other program elements so this number is high given the size of the program.

- Small Business Energy Savings (SBES)
- Retro-Commissioning
- Industrial Systems
- Industrial Study
- Data Centers
- Commercial Real Estate

Table A-2: Participant Survey Sample Design

Program Component	Sample Frame	Completed Interviews	Response Rate	Cooperation Rate
Participant—Sample	3,694	100	10%	35%

Drop-Out Participant Interviews

The Drop-Out Participant Survey sample was composed of 352 program applicants who initiated projects in PY4 and PY5, but have since "dropped-out" of the program. Programs represented in the sample include Custom, Standard, and Industrial Systems. The majority (85%) of applicants in the sample dropped out of the Standard program, and only 2% dropped out of more than one program.

The sample was based on a list of 1,930 cancelled applications provided to the Evaluation Team by ComEd. The team dropped 19 applications from the sample that were dummy/test cases, and 726 applications that were cancelled due to eligibility, project duplication, cost-effectiveness of the project, and projects that were later continued. Duplicate applicants between programs were consolidated into a single record based on contact name, organization name, and phone number. Five records were identified as having duplicate phone numbers and were removed from the sample.

After comparing the Drop-Out Participant sample to the Participant sample, 217 records were removed as a result of being identified as respondents who did complete a project and therefore were not true drop-out participants. Finally, three records were removed because the programs they dropped out of are no longer offered (Lodging and RFI) by ComEd through the Smart Ideas program.

Table A-3: Drop-Out Participant Survey Sample Design

Program Component	Sample Frame	Completed Interviews	Response Rate	Cooperation Rate
Drop-out—Sample	352	53	25%	38%

Appendix B- Expected Program Participation of ComEd Customers by Implementer Staff

Table B-1 below illustrates the expectations of program implementers regarding which programs customers are likely to continue participation. The base program element represents the program the implementer works in, and the counts arrayed across the row illustrate how many implementer respondents agreed that their customers were mostly likely to pursue opportunities in that Smart Ideas program in the future.

**Table B-1: Future Potential Program Participation by Base Participation Program (Multiple Response)*

Programs in Which Customers Will Be Most Likely to Complete Additional Projects

Base Program Element	Standard	Custom	RCx*	Industrial Systems	BILD*	Industrial Process	SBES*	Health care	Building Performance for CRE	Data Centers	New Construc-tion	MCEEP
Industrial Systems (n=7)	7	7	3	4	1	5						
Standard (n=6)	5	5	3	3	4	1	1	1	1			
Custom (n=3)	4		2	3	1	2				1		
Retro-Commissioning (n=3)	3	3		1					1	2	1	
Smart Ideas Opportunity Assessments (n=3)	3	2	3	1		1			1		1	
Small Business Energy Savings (n=3)	3				1	1	1		1			
Data Center Efficiency (n=2)	2	2	1		1				1			
Non-profits (n=2)	2	2	1				1				1	
Healthcare (n=2)	2	2	1		2				1	2		
Business Instant Lighting Discounts (n=2)	2	1	1	1		1	1	1				

Base Program Element	Standard	Custom	RCx*	Industrial Systems	BILD*	Industrial Process	SBES*	Health care	Building Performance for CRE	Data Centers	New Construc-tion	MCEEP
Industrial Process Efficiency (n=1)	1	1	1	1								
New Construction (n=1)	1	1		1		1					1	
Building Performance with ENERGY STAR for Commercial Real Estate (n=1)	1	1			1		1					
Multi-family Comprehen-sive Energy Efficiency (n=1)	1						1					1
Count	14	11	9	8	7	7	6	5	4	4	2	1

* A number of responses exclude respondents identified as implementation staff for the program. Further, due to low response numbers, these results should be viewed with caution. The following acronyms were also included in the table to save spaces: RCx (Retro-Commissioning), BILD (Business Instant Lighting Discounts), and SBES (Small Business Energy Savings).

Appendix C- Implementer Guide Program Matrix

Table C-1 highlights how Smart Ideas programs are presented to implementation staff through the *Smart Ideas for Your Business Implementer Guide*.

Table C-1: Smart Ideas Program Matrix Based on Implementer Guide Directions

	Standard (KEMA)	Custom (KEMA)	BILD (KEMA)	New Construction (ECW)	Small Business Energy Savings (ComEd)
Standard				Work REFERRAL - Application	Incentive MONITORING
Custom				Work REFERRAL - Not Specified	Work REFERRAL - Not Specified
BILD	Lead COORDINATION; Outreach Lead Identified	LEAD COORDINATION; Outreach Lead Identified			Savings Goals MONITORING
New Construction	Project NOTIFICATION	Work REFERRAL - Not Specified; Work COORDINATION; Outreach Lead Identified			Lead REFERRAL - Not Specified
Small Business Energy Savings	Lead REFERRAL - E-mail & LeadXchange	Lead REFERRAL - E-mail & LeadXchange		Lead REFERRAL - E-mail	
Commercial Real Estate	Incentive MONITORING; Optional Lead REFERRAL	Incentive MONITORING; Optional Lead REFERRAL		Lead REFERRAL - Not Specified	Lead REFERRAL - E-mail
Data Centers	Work REFERRAL - Energy Orbit; Outreach Leads Dependent on Project Type	Work REFERRAL - Energy Orbit		Eligibility Notice; Outreach Leads Dependent on Project Type	Lead REFERRAL - Not Specified
Non-Profits	Work COORDINATION	Work COORDINATION		Lead REFERRAL - Not Specified	Lead REFERRAL - Not Specified; Outreach Lead Identified
Healthcare	Eligibility Notice	Eligibility Notice		Work REFERRAL - Not Specified	
Industrial Systems	Outreach Lead Identified	Eligibility Notice		Work REFERRAL - Not Specified	Eligibility Notice
Industrial Process Efficiency	Outreach Lead Dependent on Project Type			Work COORDINATION	Eligibility Notice

	Standard (KEMA)	Custom (KEMA)	BILD (KEMA)	New Construction (ECW)	Small Business Energy Savings (ComEd)
Retro-Commissioning	Work COORDINATION; Lead REFFERAL - Not Specified	Optional Referral		Eligibility Notice	Eligibility Notice
Multi-Family Comprehensive Energy Efficiency Program	Lead REFERRAL - Not Specified	Work REFERRAL - Application		Lead REFERRAL - E-mail	Eligibility Notice
SIOA					

	Building Performance for Commercial Real Estate (CB&I)	Data Centers (Willdan)	Non-Profit/Hospitality (CNT Energy)	Healthcare (TerraLocke)	Industrial Systems (Nexant)
Standard	Outreach Lead Identified	Work REFERRAL - Not Specified	Outreach Lead Identified	Outreach Lead Identified	Outreach Lead Identified
Custom	Incentive MONITORING	Work REFERRAL - Not Specified			Eligibility Notice
BILD					
New Construction	Work REFERRAL - Not Specified	Work REFERRAL - Not Specified; Work COORDINATION		Work REFERRAL - Not Specified	
Small Business Energy Savings	Lead REFERRAL - E-mail	Lead REFERRAL - Not Specified			
Commercial Real Estate		Lead REFERRAL - Not Specified			
Data Centers	Lead REFERRAL - Energy Orbit				
Non-Profits					
Healthcare	Outreach Lead Identified	Outreach Lead Identified			
Industrial Systems		Work REFERRAL - Not			

	Building Performance for Commercial Real Estate (CB&I)	Data Centers (Willdan)	Non-Profit/Hospitality (CNT Energy)	Healthcare (TerraLocke)	Industrial Systems (Nexant)
		Specified			
Industrial Process Efficiency	Outreach Lead Identified	Outreach Lead Identified			Eligibility Notice
Retro-Commissioning	Eligibility Requirements; Lead REFERRAL - Not Specified	Work REFERRAL - Not Specified			
Multi-Family Comprehensive Energy Efficiency Program	Lead REFERRAL - Not Specified	Lead REFERRAL - Not Specified			
SIOA		WORK REFERRAL - Not Specified			

	Industrial Process Efficiency	Retro-Commissioning (Nexant)	Multi-Family Comprehensive Energy Efficiency Program	SIOA (ComEd)	Energy Usage Data Systems (ComEd)
Standard		Lead MONITORING		Work COORDINATION; Lead REFERRAL - Not Specified	
Custom				Lead MONITORING - Energy Orbit	
BILD				Work COORDINATION	
New Construction		Eligibility Notice; Outreach Lead Identified		Lead REFERRAL - Energy Orbit	
Small Business Energy Savings		Lead REFERRAL - SharePoint			
Commercial Real Estate		Lead REFERRAL - Direct to Customer		Lead REFERRAL - Energy Orbit & Contact Not Specified	Project Data Monitoring
Data Centers		Lead REFFERAL - Direct to Customer & Energy Orbit		Outreach Leads Identified & Dependent on Project Work	
Non-Profits				Lead MONITORING - Energy Orbit & Contact Not Specified	
Healthcare		Lead REFERRAL - Not Specified		Outreach Lead Identified	
Industrial Systems		Eligibility Notice		Lead MONITORING - Energy Orbit	
Industrial Process Efficiency		Eligibility Notice; Alternative Outreach Lead Identified		Lead MONITORING - Not Specified; Outreach Lead Identified	
Retro-Commissioning				Lead REFERRAL - Energy Orbit & Contact Not Specified	

	Industrial Process Efficiency	Retro-Commissioning (Nexant)	Multi-Family Comprehensive Energy Efficiency Program	SIOA (ComEd)	Energy Usage Data Systems (ComEd)
Multi-Family Comprehensive Energy Efficiency Program		Lead REFERRAL - E-mail & SharePoint			
SIOA					

Source: Evaluation analysis

NAVIGANT

ComEd Program Manager In-Depth Interview Guide

Introduction and Background:
Hello, may I speak with [**PROGRAM MANGER NAME**]? Is now still a good time to talk? [IF NEEDED: This interview should not last longer than one hour.]

Before we get started, I would like to go over a few points regarding this interview and its purpose.

First, this interview is part of ComEd's Cross-Cutting C&I evaluation. This is a new evaluation activity, added this year at the request of ComEd, to take a look at how all of the various program elements are working together. Today's interview will not be about the operations of individual SIFYB elements, rather we are interested in learning about how those elements work together and how the programs you manage engage and interact with other programs.

Because of this new cross-cutting piece, you will be asked to participate in two interviews; this one today focuses on cross-cutting issues and one to be conducted at a later date that will focus on the actual operations of your programs. If they have not already, someone will be reaching out to you to schedule that interview as well.

I would also like you to know that your feedback will be kept confidential. Any comments or suggestions you make that are included in our final report will not be directly attributed to you and all collected responses will be reported in aggregate to protect the identities of those interviewed for this effort.

Finally, since we are interviewing a number of stakeholders involved in this process, to keep my notes straight, would you mind if I record our interview today? [IF YES] Great, thanks!

With that out of the way, we can get started…

Program Interaction Questions:
As a part of our background research for this interview, we have reviewed the implementer handbook and based on that review, we would like to ask you about how your program interacts with other program elements. As we go through these elements, we will discuss the ideal model of how these programs *should* interact as well as how these interactions happen in the "real world".

1. According to our records, you manage the **[PROGRAM NAME]** Program. Is that correct?

2. At a really high level, could you describe the program(s) you manage?

3. Beyond the changes affecting implementers, were there any major changes to your program(s) in PY5? Also, I understand that PY6 is just getting underway now, so are there any additional changes that we should be aware of?

4. Generally speaking, how do you think customers perceive the SIFYB program? Do they view it as a single program with multiple elements or as multiple programs? Is that how you would like them to perceive it?

NAVIGANT

General Coordination Questions:

5. Now, I would like to talk about the Implementer Handbook. What was your role in putting the guide together? What are your thoughts about the handbook? What do you like about it? Is there anything that you would change? If so, what?

6. In general, how do you coordinate with other programs? [PROBE: Do you hold regular meetings? Are there mechanisms in place for data management? Are there coordinated marketing plans/meetings/tactics/ activities?]

7. How much contact/involvement do you have with the implementation staff? Are you aware of how your implementation contractors represent themselves in public? [PROBE: Do they represent themselves as ComEd, Smart Ideas, or as their own companies? Do you think that this matters to the customer?]

8. Now, I would like to ask you about the lead or referral tracking process. We understand that there are a number of tracking databases involved in the programs, like Energy Orbit, Frontier, and SharePoint. Which databases or tracking methods do you use most/least? How helpful are these tracking databases? Do you receive notifications of referrals (do you go looking or are they sent to you)? Have you experienced any challenges with exchanging leads/referrals? Is there anything you would recommend/ suggest to make it better?

Program Specific Questions:

At this point, I would like to go through how your program(s) interact(s) with a few other ComEd programs. [IF NEEDED: So that you are aware, we are going to go through the same set of questions for each program interaction identified in the Implementer Handbook.]

[PROGRAM to PROGRAM RELATIONSHIP]

9. Could you briefly describe your programs interaction with <**PROGRAM NAME**> program? [PROBE: How does the Implementer(s) fit into this arrangement? How about the Trade Allies? Is there Trade Ally overlap in this process? Does it complicate matters?]

10. In what situations does your program refer a customer TO that program? Likewise, how do you receive referrals FROM that program? How do you manage the customer during these "hand offs"? What is the approximate frequency of these "hand offs"?

11. Can you describe how the customer's point-of-contact is determined? [PROBE: When you are not the point of contact, how do you manage communication with the customer? Do you go through the established point-of-contact? Have you encountered any barriers? If so, what?]

12. Are there rules regarding when customers can participate in both programs? [PROBE: When this occurs, how is it typically handled? (i.e., who takes responsibility for notifying the customer? Who tracks the lead to follow up with the customer when they can participate?)]

[REPEAT FOR ADDITIONAL PROGRAMS LISTED IN IMPLEMENTER GUIDE]

NAVIGANT

Wrap-Up Questions:

13. Are there any programs that you are still trying to determine the best way to work together? [PROBE: Are there compatibility issues with other programs? (IF NEEDED: Could you speak to that a bit more.)]

14. Overall, how do you think customers perceive of this process? [PROBE: Do you think these program changes have succeeded in reducing the amount of redundant communication the customer receives from ComEd representatives? Is it better before or now? Would you make any further changes to the handling of customer communication? What changes would you make?]

15. Thank you so much for talking with me today. Before we end, is there anything else you would like to say or add to the comments you have already shared?

Those are all of my questions. Thanks very much for your help today. Remember we will be following up with you to discuss your program(s)'s operations soon. Thanks again for your help and talk to you soon!

NAVIGANT

ComEd Program Implementer In-Depth Interview Guide

Hello, this is _____ from Opinion Dynamics. We are an independent evaluator hired by ComEd to evaluate the Smart Ideas for Your Business Program. We are calling today to talk to you about how the programs you manage interact with other programs in ComEd's business portfolio. This interview will focus on higher level, cross cutting issues as opposed to the day to day operations of your program.

1. According to our records, you were the implementer of record for <PROGRAM NAME>. Is that correct?
      1.   Yes
      2.   No → [ASK FOR CORRECT INDIVIDUAL & RESTART INTERVIEW]

2.   I'd just like to let you know that your responses will remain confidential and will only be reported in aggregate with the other responses. Also, since we are reaching out to a number of your colleagues and we'd like to keep our notes straight, would you mind if we recorded this interview?
      1.   Yes → [CONTINUE]
      2.   No → [CONTINUE]

Background
To get started, I have a few background questions for you.

3. We understand that through the ComEd [PROGRAM NAME] you primarily serve C&I customers. Could you, at a really high level, describe your program, its processes, and your role and function in the program?
      00. [OPEN-ENDED]

4. Could you tell us a bit more about the types of customers you typically work with through the program? In other words, what size or business sectors do you typically work with? Approximately how many customers do you serve?
      00. [OPEN-ENDED]

5. What is your program's interaction with customers? What is the primary mode of engagement/communication? [*Probe for if they visit location, call, send out emails, letters*]
      00. [OPEN-ENDED]

5a. Does your program require assessments? If so, can you describe the assessment process?
     00. [OPEN-ENDED]

6. How engaged would you say your customers are with the Smart Ideas Program? Are they aware of the branding and of all the distinct program elements? Do you make it a priority to make customers aware of other program elements? Why or why not?
      00. [OPEN-ENDED]

7. How do you present your program and your company to the public? Do you present yourself as a [COMPANY NAME] staff member or a Smart Ideas staff member?

        00. [OPEN-ENDED]

Program Awareness

8. How familiar would you say you are with the individual Smart Ideas for Your Business Program elements?

How about the… [READ IN PROGRAM NAME BELOW, SKIP INTERVIEWEE'S PROGRAM] Would you say it is very familiar, somewhat familiar, not very familiar, not at all familiar?

Program	4 – Very familiar	3 – Somewhat familiar	2 – Not very familiar	1 – Not at all familiar
SIOA				
Custom				
Standard/Prescriptive				
Retro-Commissioning				
Business Instant Lighting Discount (BILD)				
New Construction				
Small Business Energy Savings (SBES)				
Building Performance with ENERGY STAR for Commercial Real Estate				
Data Center Efficiency				
Non-profits				
Healthcare/Hospitality				
Industrial Process Efficiency				
Industrial Systems				
Multi-Family Comprehensive Energy Efficiency				

Annual Implementer Meeting
9. Did you attend the Annual Implementer Meeting held in May? What did you think of the event? What, if anything, would you like to see at next year's event?

Implementer Handbook
Now, I would like to talk to you about the implementer handbook.

10. Have you had a chance to review it? What did you think of the Implementer Handbook? Have you found it useful in implementing your program and working with other Smart Ideas programs?

        00. [OPEN-ENDED]

11. Since receiving the guide, how often would you say you have you referred to it for guidance? [PROBE: When you have used it, what have you used it for?]

        00. [OPEN-ENDED]

12. Do you feel the implementer handbook as it is now for PY6 provides you with enough information about the program to effectively promote all of the program elements and assist customers in getting started with their participation?

      1.   Yes → [PROBE: What do you like about the guide? Why?]

      2.   No → [PROBE: What could make the guide more useful to you?]

13. In your opinion, is there anything you think is missing from the guide or that you would like to see included in it? Also, is there anything you think should be excluded or cut from the guide?

      00. [OPEN-ENDED]

14. Are there other handbooks or guides that you refer to when you need to learn about other program elements?

      00. [OPEN-ENDED]

Database Use/Lead Referral and Tracking

We understand that a combination of Energy Orbit and the Frontier Tracking databases are used to track projects and leads across the Smart Ideas programs.

15. In your capacity as program implementer, do you use both databases? Are there other databases that you use?

      00. [OPEN-ENDED]

16. How useful is Energy Orbit in tracking incoming project leads? Do you find it useful for referring leads and/or receiving referrals from other implementers?

      00. [OPEN-ENDED]

17. Does the Frontier Tracking database provide enough information about project progress? Is it timely? If not, how could it be improved?

      00. [OPEN-ENDED]

18. Do you find this process of using Frontier and Energy Orbit to communicate project updates and lead referrals is working? Is there any other way that information is passed along to ComEd Program staff? How would you prefer to track, receive, and share leads?

      00. [OPEN-ENDED]

Referrals and Goals

Now, I would like to talk to you about program referrals and goals.

19. Which programs are most complimentary to your program? [Which program offerings are participants in your program most likely to complete additional projects through?]

      00. [OPEN-ENDED]

20. Can you talk about how you are motivated to refer customers to other programs and/or motivated to coordinate closely with the other programs running under the Smart Ideas umbrella?

      00. [OPEN-ENDED]

NAVIGANT

21. Is there a contractual element to how you work with the Smart Ideas program that promotes the active referral of customers to other programs when appropriate? Are there contractual elements or elements of the goal that make it inherently difficult to focus on referrals?
00. [OPEN-ENDED]

22. Are there project types that are more difficult to refer? Are there customers and/or opportunities that you think are being missed all together? From your perspective, is there a way to bring these customers into the program?
00. [OPEN-ENDED]

23. Is there anything more that ComEd could do in the structuring of the program, goals, and/or contract that would help increase cross program coordination and referrals?
00. [OPEN-ENDED]

Implementer Relationships

24. How often does your company receive leads from other implementation contractors? How does your program receive those leads? If so, which of the other program elements do you receive most of your leads from?
00. [OPEN-ENDED]

25. Are there program elements that you think you should be receiving more leads from than you currently do? Which ones? Why do you think you don't receive as many leads from those programs as you think you should?
00. [OPEN-ENDED]

26. Which programs does your program send leads to? How often do you send leads?
00. [OPEN-ENDED]

27. How easy has it been to cooperate with other implementers working within the Smart Ideas program? Are there operational and or program framework barriers that prevent or inhibit you from sharing leads with other programs?
00. [OPEN-ENDED]

28. Do you feel that there is a lot of competition among implementers? What is the primary driver for that competition (limited customer pool, too much program overlap, big goals, etc.)?
00. [OPEN-ENDED]

29. Do you think improving coordination would increase program achievements? Do you have any suggestions for how to improve coordination among implementers working in the Smart Ideas programs?
00. [OPEN-ENDED]

Trade Ally Relationships
At this point, I would like to talk to you about your involvement with the trade allies' network, which includes the service providers, contractors, and/or vendors.

30. Does your program use trade allies or service providers? If so, how are trade ally/service providers involved in your program? Is it an open or closed program? (If closed) How are trade allies selected? How many trade allies or service providers do you work with in your program?
  00. [OPEN-ENDED]

31. How often do you communicate with your trade ally network?
  00. [OPEN-ENDED]

32. How familiar do you think YOUR trade allies or service providers are with other elements in the Smart Ideas portfolio of programs?
  1. Not at all familiar → [PROBE: What do you think could make Smart Ideas more accessible to the trade allies?]
  2. Slightly familiar
  3. Somewhat familiar
  4. Moderately familiar
  5. Extremely familiar

33. How familiar do you think OTHER trade allies/service providers are with YOUR program element?
  1. Not at all familiar → [PROBE: What do you think could make Smart Ideas more accessible to the trade allies?]
  2. Slightly familiar
  3. Somewhat familiar
  4. Moderately familiar
  5. Extremely familiar

34. To the best of your knowledge, do any of your trade allies work across programs? What programs do they work across?
  00. [OPEN-ENDED]

35. How do you think trade ally relationships can be leveraged more effectively within the programs?
  00. [OPEN-ENDED]

Customer Relationships
Now, I'd like hear your perspective on how customers view the Smart Ideas programs.

36. Generally speaking, how do you think customers perceive the Smart Ideas program? Do you think customers view it as a single program with multiple elements or as multiple or distinct elements?
  00. [OPEN-ENDED]

37. Do you think the program seems complicated to customers? [PROBE: From your perspective, is it difficult for customers to know what resources are available to them from the Smart Ideas program? Do you think that customers get lost in the referral process? Do you think the structure and organization of the program makes it difficult for customers to stay with the program beyond their initial brush with it?]
  00. [OPEN-ENDED]

38. In your view, what are the major barriers to participating in the Smart Ideas for Your Business program? Do you have any suggestions/ideas to overcome those issues? (If so, what in your opinion could be done to mitigate those barriers?)

      00.   [OPEN-ENDED]

39. Thank you so much for talking to me today. Before we end, is there anything else you would like to say or add to the comments you have already shared?

Those are all of my questions. Thank you very much for your time!

NAVIGANT

ComEd Program Implementer Online Survey

Opinion Dynamics, on behalf of ComEd, is conducting this survey of implementers working on programs operating under the Smart Ideas for Your Business Program to assess program processes and satisfaction.

We expect the survey to take approximately 15 minutes to complete. Your responses will be kept confidential and the results of this survey will be reported in aggregate.

E-mail Invitation

From: Opinion Dynamics

Subject: ATTN: Survey of ComEd Smart Ideas Staff

[PROGRAMMING NOTES: Please include the Opinion Dynamics logo at the top of the e-mail.]

Dear [NAME],

Opinion Dynamics, on behalf of ComEd, is conducting an evaluation of the Smart Ideas for Your Business Program. As a part of this evaluation, we are conducting an online survey with program implementers. This survey is intended to solicit your feedback on the program operations, as well as your thoughts on the program. Your feedback is incredibly important and greatly appreciated!

Please click on the link below to take this short survey:

[INSERT UNIQUE URL TO SURVEY]

Sincerely,

Erinn Monroe, LEED-AP, CEM
Project Manager
Opinion Dynamics

tel 608 819 8828 x 103
fax 608 819 8825
2979 Triverton Pike, Ste 102
Fitchburg, WI 53711
www.opiniondynamics.com

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Landing Page
[PROGRAMMING NOTES: Include Opinion Dynamics logo at the top of page.]

Thank you for taking a few minutes to complete this survey about ComEd's Smart Ideas for Your Business Program! We expect the survey to take no longer than 15 minutes to complete. Remember your responses will be kept confidential. Thanks again for participating in this important survey!

Survey Start
[PROGRAMMING NOTES: Please include a "Progress Bar" at the top of each page. Also, please only put one question on each page.]

S1. Please indicate what Smart Ideas program offering you are currently working on as an implementer. Check all that apply. [MULTIPLE RESPONSE]

Program Offering Name	(1=YES, I currently work on this program offering)
a. Smart Ideas Opportunity Assessments	
b. Custom	
c. Standard (Prescriptive)	
d. Retro-Commissioning	
e. Business Instant Lighting Discounts (BILD)	
f. New Construction	
g. Small Business Energy Savings (SBES)	
h. Building Performance with ENERGY STAR for Commercial Real Estate	
i. Data Center Efficiency	
j. Non-profits	
k. Healthcare/Hospitals	
l. Industrial Process Efficiency	
m. Industrial Systems	
n. Multi-Family Comprehensive Energy Efficiency	

[CREATE VERIFIED_PROGRAM FLAG OF EACH S1 RESPONSE (i.e., INDIVIDUAL FLAGS]

S2. What do you consider to be your primary role?
  1. Engineering/Technical
  2. Administrative
  3. Outreach
  00. Something else – please describe: _____)

Program Awareness

P1. How familiar would you say you are with the individual Smart Ideas for Your Business Program elements?

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[SKIP INTERVIEWEE'S PROGRAMS FROM S1 or INCLUDE "Not Applicable" option-Rotate]

How about the…	4 – Very familiar	3 – Somewhat familiar	2 – Not very familiar	1 – Not at all familiar
a. Smart Ideas Opportunity Assessments				
b. Custom				
c. Standard/Prescriptive				
d. Retro-Commissioning				
e. Business Instant Lighting Discounts (BILD)				
f. New Construction				
g. Small Business Energy Savings (SBES)				
h. Building Performance with ENERGY STAR for Commercial Real Estate				
i. Data Center Efficiency				
j. Non-profits				
k. Healthcare/Hospitals				
l. Industrial Process Efficiency				
m. Industrial Systems				
n. Multi-Family Comprehensive Energy Efficiency				

Annual Implementer Meeting

AI1. Did you attend the Annual Implementer Meeting held in May?
1. Yes
2. No → SKIP TO IH1

[ASK IF AI1=1, ELSE SKIP TO IH1]
A1a. How useful to your work as an implementer was the Annual Implementer meeting?
1. Not at all useful
2. Slightly useful
3. Moderately useful
4. Very useful
5. Extremely useful
8. Don't know

[ASK IF A1A=1,2,3]
A1aa. What could have made the Annual Implementer Meeting more useful to you?
00. (OPEN END)

A1b. What, if anything, would you like to see at next year's event? [OPEN END]
00. [OPEN END]

96.   No recommendations

Implementer Handbook

IH1. Have you had a chance to review ComEd's Smart Ideas for Your Business Implementer Guide?
    1.   Yes
    2.   No → SKIP TO CE1
    6.   I have not received a guide→ SKIP TO CE1

IH2. How do you typically use the Implementer Guide as a resource to your work as an implementer?
    00.   [OPEN END]
    96. I do not use the Implementer Guide → SKIP TO CE1

IH3. How often do you refer to the guide?
    1.   Never
    2.   Hardly Ever
    3.   Monthly
    4.   Weekly
    5.   Daily

IH4. Does the guide provide you with enough information about all of the Smart Ideas program offerings to assist your customers?
    1.   Yes
    2.   No
    8.   Don't know → SKIP TO CE1

[ASK IF IH4=2]
IH4a. What could make the guide more useful to you? [OPEN END]
    00.   [OPEN END]
    98.   Don't know

[ASK IF IH4=1]
IH4b. What suggestions do you have for improving the guide?
    00.   [OPEN END]
    96.   No suggestions

ComEd E-mail Announcements

CE1. Do you recall receiving e-mail announcements from ComEd managers regarding program happenings and updates?
    1.   Yes
    2.   No

[ASK IF CE1=1, ELSE SKIP TO R1]

CE1a. How useful were these e-mails to you?
    1.   Not at all useful
    2.   Slightly useful
    3.   Somewhat useful
    4.   Moderately useful
    5.   Extremely useful

[ASK IF CE1a=1, 2, or 3]
CE1b. What could make these e-mails more useful to you? [OPEN END]
    00.   [OPEN END]
    96.   No suggestions

[ASK IF CE1a=4 or 5]
CE1c. What did you find useful about these e-mails? [OPEN END]
    00.   [OPEN END]
    96.   No suggestions

Referrals and Goals
Now, we would like to ask you about referrals and goals.

R1. In your view, where are most of your leads or referrals generated from for the program elements you work on? Are your leads or referrals generated from…
    1.   Trade Allies
    2.   Other ComEd program implementers [SPECIFY]
    3   Internal outreach staff
    4.   ComEd account managers
    98.   Don't know

R2. Thinking of your customers, who participate in the <VERIFIED PROGRAM_FLAG> program, which of the following program offerings would these customers be most likely to complete additional projects through in the future? [MULTIPLE RESPONSE UP TO 5; ASK FOR EACH VERIFIED_PROGRAM_FLAG]
    1.   Standard (Prescriptive)
    2.   Custom
    3.   Retro-Commissioning
    4.   New Construction
    5.   Industrial Systems
    6.   Small Business Energy Savings
    7.   Commercial Real Estate/Building Performance with ENERGY STAR
    8.   Business Instant Lighting Discounts
    9.   Data Centers
    10.   Healthcare/Hospitals
    11.   Multi-Family Comprehensive Energy Efficiency

12.   Industrial Process
98.   Don't know

R3. How often do you respond to customer or trade ally questions about program offerings for elements OTHER THAN the ones you work on?
     1.   Never
     2.   Hardly Ever
     3.   Monthly
     4.   Weekly
     5.   Daily
     8.   Don't know

R4. Do you feel that you have enough information to answer questions about other program offerings or elements?
     1.   Yes
     2.   No
     8.   Don't know

[IF R4=2, ELSE SKIP]
R4a. What information would help you answer those questions?
     00.   [OPEN END]
     98.   Don't know

R5. In your day-to-day responsibilities, how often do you make customers aware of the other program elements?
     1.   Never
     2.   Almost never
     3.   Occasionally/Sometimes
     4.   Almost always
     5.   Always

Database Use/Lead Referral and Tracking
We understand that a combination of Energy Orbit and the Frontier Tracking databases are used to track projects and leads across the Smart Ideas program offerings.

D1. Do you use the Frontier Tracking database?
     1.   Yes
     2.   No
     6.   Not Applicable
[ASK IF D1=1, ELSE SKIP TO D2]
D1a. How often do your use the Frontier Tracking database?
     1.   Never
     2.   Hardly Ever

3. Monthly
4. Weekly
5. Daily
8. Don't know

D1b. Does the Frontier Tracking database provide enough information about project progress?
1. Yes
2. No

[ASK IF D1b=2]
D1c. What suggestions do you have to make Frontier Tracking database more helpful? [OPEN END]
00. [OPEN END]
96. No Suggestions

D2. Do you use Energy Orbit?
1. Yes
2. No → SKIP TO D3
6. Not Applicable

[ASK IF D2=1, ELSE SKIP TO D3]
D2a. How often do your use Energy Orbit?
1. Never
2. Hardly Ever
3. Monthly
4. Weekly
5. Daily
8. Don't know

D2b. How useful is Energy Orbit in tracking incoming project leads?
1. Not at all useful
2. Slightly useful
3. Somewhat useful
4. Moderately useful
5. Extremely useful

D2c. How effective is Energy Orbit as a tool for sharing leads with other implementers?
1. Not at all effective
2. Slightly effective
3. Somewhat effective
4. Moderately effective
5. Extremely effective

D3. What other databases do you use? [OPEN END]
  00. [OPEN END]
  96. None

D4. How would you most prefer to track, receive, and share leads?
  1. E-mail
  2. Phone conversation
  3. Energy Orbit
  00. Other method, specify: _____

Implementer Relationships

I1. Have you ever had any trouble getting leads or referrals from other programs?
  00. Yes- please describe the trouble you experienced
  02. No

I2. In your experience, have you ever had any trouble passing a project on to another Smart Ideas implementer?
  1. Yes
  2. No
  8. Don't know

[ASK IF I2=1]
I2a. How often have you encountered difficulty in referring a project to another Smart Ideas program implementer?
  1. Never
  2. Rarely
  3. Sometimes
  4. Often
  5. Always
  8. Don't know

I3. How would you rate the level of coordination between implementers?
  1. Not at all coordinated
  2. Slightly coordinated
  3. Moderately coordinated
  4. Very coordinated
  5. Extremely coordinated

I4. How would you rate the level of competitiveness among implementers?
  1. Not at all competitive
  2. Slightly competitive
  3. Moderately competitive

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4.   Very competitive
5.   Extremely competitive

[ASK IF I4= 3, 4, or 5]
I4a. Why do you think implementers are competitive? [OPEN END]
      00.   [OPEN END]
      98.   Don't know

I5. What suggestions do you have for how to improve coordination among implementers working in the Smart Ideas programs? [OPEN END]
      00.   [OPEN END]
      96.   No suggestions

I6. What challenges, if any, have you faced in working with multiple implementers? [OPEN END]
00.   [OPEN END]
      96.   No challenges

Trade Ally Relationships
At this point, we would like to ask you about your involvement with the Smart Ideas trade allies' network, which includes the service providers, contractors, and/or vendors.

TA1. How often do you communicate with trade allies or service providers?
      1.   Never
      2.   Hardly Ever
      3.   Monthly
      4.   Weekly
      5.   Daily

TA2. How familiar do you think YOUR trade allies or service providers are with other elements in the Smart Ideas portfolio of programs?
      1.   Not at all familiar
      2.   Slightly familiar
      3.   Moderately familiar
      4.   Very familiar
      5.   Extremely familiar

TA3. How familiar do you think OTHER trade allies/service providers are with YOUR program element?
      1.   Not at all familiar
      2.   Slightly familiar
      3.   Moderately familiar

4. Very familiar
5. Extremely familiar

TA4. What challenges do you experience in dealing with trade allies in your program?
  00. [OPEN END]
  96. No challenges

TA5. What challenges do you experience in dealing with trade allies from other programs?
  00. [OPEN END]
  96. No challenges

TA6. What suggestions do you have for how trade ally relationships can be leveraged more effectively between the programs? [OPEN END]
  00. [OPEN END]
  96. No suggestions

Customer Relationships

Now, we would like to get your perspective on how customers view the Smart Ideas programs.

CR1. Generally speaking, do you think customers view Smart Ideas as a single program with multiple elements or as multiple or distinct elements?
  1. Single program with multiple elements
  2. Multiple or distinct programs
  00. Other, please describe: _____
  98. Don't know

[ASK IF CR1=1]
CR1A. Can you elaborate on why you see Smart Ideas as one program with multiple tracks or offerings? [OPEN END]
  00. (OPEN END)
  98 (Don't know)

[ASK IF CR1=2]
CR1B. Can you elaborate on why you see Smart Ideas as multiple or distinct programs? [OPEN END]
  00. (OPEN END)
  98 (Don't know)

CR2. What are your biggest customer service challenges?
  00. [OPEN END]
  96. I have no customer service challenges

CR3. From your perspective, is it difficult for customers to know what resources are available to them from the Smart Ideas program?

1.   Yes
2.   No
8. Don't know

[ASK IF CR3=1]
CR3a. What makes you think that it is difficult for customers to know what resources are available to them? [OPEN END]
      00.   [OPEN END]

CR4. In your view, what are the major barriers to participating in the Smart Ideas for Your Business program? [OPEN END]
      00.   [OPEN END]
      96.   There are no major barriers to participating
      98.   Don't know

[ASK IF CR4=00]
CR4a. What suggestion do you have for overcoming those issues?
      00.   [OPEN END]
      96.   None

End of Survey Message
Thank you for taking the time to participate in this important survey! ComEd and Opinion Dynamics appreciates your feedback!

Thanks & Terminate Message
Thank you for your participation in this survey!

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ComEd Trade Ally Survey for the ComEd Cross-Cutting Evaluation

Hello, this is _____ from Opinion Dynamics calling on behalf of ComEd. THIS IS NOT A SALES CALL. We are doing a brief survey with program allies who have been involved in projects supported by the ComEd Smart Ideas for Your Business Program.

We are interested in your experience with the program and any feedback you may have received from your customers about the program. ComEd plans to use the information to improve the energy efficiency programs and services it offers to its business customers.

[If name on list] May I please speak with the person most knowledgeable about your company's involvement in the Smart Ideas for Your Business Program?

[If name name on list] May I please speak with <CUSTOMER NAME> or the person most knowledgeable about your company's involvement in the Smart Ideas for Your Business Program?

(IF NEEDED: This survey will take about 15 minutes to complete)

Alert interviewee that the call will be recorded.
Note that responses will remain confidential and only be reported in aggregate with other responses.

Screening

[LOOP THROUGH S1 FOR EVERY PROGRAM FLAGGED IN SAMPLE]
S1.   First, I'd like to verify the programs for which you work as a trade ally. Our records indicate that you are a trade ally partner in ComEd's <PROGRAM NAME> program. Is that correct?
   1.   (Yes)
   2.   (No)
   98.   (Don't Know)
   99.   (Refused)

[TERMINATE IF NO PROGRAM FLAGGED IN SAMPLE IS VERIFIED]
S2.   Is your company a trade ally or partner in any other ComEd efficiency programs?
   1.   (Yes)
   2.   (No)
   98.   (Don't Know)
   99.   (Refused)

[ASK IF S2 = 1, else skip]
S3.   In what other programs are you a ComEd Trade Ally or Provider? [MULTIPLE RESPONSE; DO NOT READ LIST]

1.   (Standard also known as Prescriptive)
2.   (Custom)
3.   (Retro-Commissioning or Monitoring-based Commissioning)
4.   (New Construction)
5.   (Industrial Systems, which includes compressed air, process cooling, industrial refrigeration, process refrigeration)
6.   (Small Business Energy Savings also known as SBES)
7.   (Commercial Real Estate/Building Performance with ENERGY STAR)
8.   (Business Instant Lighting Discounts or BILD)
9.   (Data Centers)
11.   (Nonprofits)
12.   (Healthcare or Hospitality)
13.   (Multi-Family Comprehensive Energy Efficiency also known as MCEEP)
14.   (Industrial Process Efficiency)
00.   (Other, specify: _____)
98.   (Don't know)
99.   (Refused)

[CREATE VERIFIED FLAGS FOR EACH SAMPLE VARIABLE VERIFIED IN S1. ONLY THESE VERIFIED FLAGS, ORIGINALLY IN THE SAMPLE, WILL BE LOOPED THROUGH]
[Create variable "PartProg_all" for the answers from S3 and the read-ins from S1. For instance, if <PROGRAM NAME> equals "Standard" and the respondent says that they have also worked on Custom and BILD projects, then <PartProg_all> should read as "Standard, Custom, and BILD"]

[Create variable "PartProg_[Prog]" for each program flagged for participation.]

[LOOP S3A & S3B series FOR ALL VERIFIED SAMPLE FLAGS and for ALL responses to S3]
S3a.   How long have you worked as a trade ally partner in ComEd's <PROGRAM NAME> program?
1.   (Less than a year)
2.   (One year)
3.   (Two years)
4.   (Three years)
5.   (Four years)
6.   (Five years or more)
98.   (Don't know)
99.   (Refused)

S3b.   On a scale of 0-10 with 0 being "very difficult" and 10 being "very easy" how would you rank the following aspects of the <Part Prog> Program?

        A. The process for becoming a trade ally or program partner

B. The process for applying for incentives for your customers

C. The paperwork needed to get an incentive for a customer

D. Getting notifications about program changes

E. Knowing who to contact with questions on a project

Unaided Awareness

UA1. Now, I'd like to talk to you about your awareness of ComEd efficiency programs. On a scale of 0-10, with 0 being "not at all familiar" and 10 being "extremely familiar", how familiar are you with ComEd's efficiency program offerings? [0-10, 98="Don't know," 99="Refused"]

UA1A. Aside from the <PartProg_all> program(s) that you work with in your business, can you name any other energy efficiency programs that ComEd offers its business customers? [MULTIPLE RESPONSE; DO NOT READ]

      1.   (Standard, also known as Prescriptive)

      2.   (Custom)

      3.   (Retro-Commissioning or Monitoring-based Commissioning)

      4.   (New Construction)

      5.   (Industrial Systems, which includes compressed air, process cooling, industrial refrigeration, and process refrigeration)

      6.   (Small Business Energy Savings, also known as SBES)

      7.   (Commercial Real Estate/Building Performance with ENERGY STAR)

      8.   (Business Instant Lighting Discounts or BILD)

      9.   (Data Centers)

      11.   (Nonprofits)

      12.   (Healthcare or Hospitality)

      13.   (Multi-Family Comprehensive Energy Efficiency, also known as MCEEP)

      14.   (Industrial Process Efficiency)

      00.   (Other, specify: _____)

      96.   (Not aware of other programs)

      98.   (Don't know)

      99.   (Refused)

[Create awareness variables to flag programs identified by respondent in <PartProg_all> variable or in UA2

UA1 = 1 or S3=1 OR STANDARD FLAG FROM SAMPLE=1 THEN Awar_Standard=1

UA1 = 2 or S3=2 OR CUSTOM FLAG FROM SAMPLE=1 THEN Awar_Custom=1

UA1 = 3 or S3=3 OR RCX FLAG FROM SAMPLE=1 THEN _Awar RCX=1

UA1 = 4 or S3=4 OR NEW CONSTRUCTION FLAG FROM SAMPLE=1 THEN Awar_NC=1

UA1 = 5 S3=5 OR INDUSTRIAL SYTEMS FLAG FROM SAMPLE=1 THEN Awar_IS=1

UA1 = 6 S3=6 OR SMALL BUSINESS FLAG FROM SAMPLE=1 THEN Awar_SBES=1

UA1 = 7 S3=7 OR COMMERCIAL REAL ESTATE FLAG FROM SAMPLE=1 THEN Awar_CRE=1

UA1 = 8 S3=8 OR BILD FLAG FROM SAMPLE=1 THEN Awar_BILD=1

UA1 = 9 S3=9 OR DATA CENTERS FLAG FROM SAMPLE=1 THEN Awar_DC=1

UA1 = 11 S3=11 OR NONPROFITS FLAG FROM SAMPLE=1 THEN Awar_NP=1

UA1 = 12 S3=12 OR HEALTH CENTER FLAG FROM SAMPLE=1 THEN Awar_Health=1

UA1 = 13 S3=13 OR MULTI-FAMILY FLAG FROM SAMPLE=1 THEN Awar_MCEEP=1

UA1 = 14 S3=14 OR INDUSTRIAL PROCESS FLAG FROM SAMPLE=1 THEN Awar_IP] =1

Aided Awareness

[SKIP IF ALL Aware Program flags =1]

AA1 . Have you heard of any of the following program offerings from ComEd? [1=YES, 2=NO, 98=DON'T KNOW, and 99=REFUSED, ROTATE]

[SKIP IF Awar_Standard = 1]

> AA1a. Standard Incentives (IF NEEDED: A program that offers a set incentive for energy efficiency projects based on the quantity and efficiency)

[SKIP IF Awar_Custom = 1]

> AA1b. Custom Incentives (IF NEEDED: A program that offers individualized incentives for energy efficiency projects based on the specific energy efficiency achieved by a given project)

[SKIP IF Awar_BILD = 1]

> AA1c. Business Instant Lighting Discounts (IF NEEDED: A program that provides discounts for lighting products to customers by providing reimbursement directly to lighting distributors)

[SKIP IF Awar_NC = 1]

> AA1d. New Construction (IF NEEDED: A program that provides incentives for energy efficient design for new construction)

[SKIP IF Awar_SBES = 1]

> AA1e. Small Business Energy Services (IF NEEDED: A program that provides the direct installation of energy efficiency equipment in small businesses)

[SKIP IF Awar_CRE = 1]

> AA1f. Building Performance with ENERY STAR /Commercial Real Estate (IF NEEDED: A program that provides specialized services to commercial real estate customers)

[SKIP IF Awar_DC = 1]

> AA1g. Data Centers (IF NEEDED: A program that provides specialized services to data centers)

[SKIP IF Awar_IS = 1]

> AA1h. Industrial Systems (IF NEEDED: A program that provides detailed engineering analysis of industrial systems)

[SKIP IF Awar_RCX = 1]

> AA1i. Retro-Commissioning (IF NEEDED: A program that provides engineering analysis of commercial building systems)

[SKIP IF Awar_IP = 1]

AA1j. Industrial Process Efficiency (IF NEEDED: A program that helps customers improve the energy intensity of their manufacturing processes)

[SKIP IF Awar_Health = 1]

AA1k. Healthcare (IF NEEDED: A program that offers facility assessments, where Hospitals can earn back part of their cost as they implement projects)

[SKIP IF Awar_MCEEP = 1]

AA1l. Multi-Family Comprehensive Energy Efficiency (IF NEEDED: A program that serves multi-family properties by providing by providing the education and assistance to overcome market barriers to greater energy efficiency)

[SKIP IF Awar_NP=1]

AA1m. Non-Profits ((IF NEEDED: A program that targets outreach to nonprofit organizations with an emphasis on mid-sized nonprofits)

TA View of Program

V1. On a scale of 0-10, where 0 is "not at all knowledgeable" and 10 is "extremely knowledgeable", how knowledgeable do you feel you are when talking to your customers about: [0-10, 98="Don't Know", 99="Refused," ROTATE]

v1a. Standard or Prescriptive Incentives [SKIP IF AA1A=2,8,]

V1b. Custom Incentives [SKIP IF AA1B=2,8,9]

V1c. Retro-Commissioning [SKIP IF AA1I=2,8,9]

V1d. New Construction Incentives [SKIP IF AA1D=2,8,]

V1e. Industrial Process offerings [SKIP IF AA1J=2,8,9]

V1f. Small Business Energy Services   [SKIP IF AA1E=2,8,9]

V1g. Building Performance with Energy Star or Commercial Real Estate [SKIP IF AA1F=2,8,9]

V1h. Data Centers offerings [SKIP IF AA1G=2,8,9]

V1i. Non-profits offerings [SKIP IF AA1M=2,8,9]

V1j. Healthcare offerings [SKIP IF AA1K=2,8,9]

V1k. Multi-Family Comprehensive Energy Efficiency offerings [SKIP AA1L=2,8,9]

V1l. Business Instant Lighting Discounts (BILD) incentives [SKIP IF AA1C=2,8,9]

V1m. Industrial Systems [SKIP IF AA1H=2,8,9]

V2. Have you heard the term "Smart Ideas for Your Business"?

1. (Yes)

2. (No) [SKIP TO TI1]

8. (Don't know)

9. (Refused)

[ASK IF V2= 1, ELSE SKIP]

V2a. How do you view the Smart Ideas program? Do you view it as:

01.   One program with multiple tracks or offerings
02.   Multiple distinct programs
00. (Other: specify)
98.   (Don't know)
99.   (Refused)

[ASK IF V2a=1]
V3.   Can you elaborate on why you see Smart Ideas as one program with multiple tracks or offerings? [OPEN-ENDED]
00.   (OPEN-END)
98.   (Don't know)
99.   (Refused)

[ASK IF V2a=2]
V4.   Can you elaborate on why you see Smart Ideas as multiple distinct programs? [OPEN-ENDED]
00.   (OPEN-END)
98.   (Don't know)
99.   (Refused)

Interaction with Program
TI1.   Since your involvement in the program began, how many staff people, including ComEd staff and staff from other companies working directly on the programs, have you interacted with?
1.   (1-2)
2.   (3-5)
3.   (6-10)
4.   (More than 10)
96.   (I did not interact with anyone) [SKIP TO TI3]
98.   (Don't know)
99.   (Refused)

TI2.   How many staff people, including ComEd staff and staff from other companies working directly on the Smart Ideas programs, would you say you interact with on a regular basis?
1.   (1-2)
2.   (3-5)
3.   (6-10)
4.   (More than 10)
96.   (I did not interact with anyone)
98.   (Don't know)
99.   (Refused)

TI3.   In general, when you have a question about ComEd's energy efficiency programs, where do you typically go for an answer? [MULTIPLE RESPONSE OF THREE]
1.   (Website)
2.   (A person that works on the program/ Program implementers like KEMA, Nexant etc.)
3.   (ComEd program manager)
4.   (Call the program hotline)
00.   (Other, specify: _____)
98.   (Don't know)
99.   (Refused)

TI4.   How easy or difficult has it been to work as a trade ally on the program? Would you say it has been:
1.   Very difficult
2.   Difficult
3.   Neither difficult nor easy
4.   Easy
5.   Very easy
8.   (Don't know)
9.   (Refused)

TI5.   Have you experienced any difficulties or problems in completing projects through the program?
1.   (Yes)
2.   (No)
8.   (Don't know)
9.   (Refused)

[ASK IF TI5=1]
TI5a.   Can you tell me about the difficulties you have faced in completing or coordinating projects through the program? (INTERVIWER NOTE: PROBE for problems with other implementers or trade allies)
00.   (OPEN-END)
98.   (Don't know)
99.   (Refused)

Customer Awareness

CA1.   On a scale of 0-10, where 0 is "not at all aware" and 10 is "extremely aware", how aware do you think **your customers** are of ComEd's energy efficiency programs overall? [0-10, 98 "Don't know", 99 "Refused"]

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[FOR THIS SERIES ONLY ASK OF THE PROGRAMS THAT THEY MENTIONED THEY ARE
    AWARE OF IN S3, VERIFIED SAMPLE FLAGS, AA1 series, UA1 series]
 CA2. On a scale of 0-10, where 0 is "not at all aware" and 10 is "extremely aware", how aware
    do you think your customers are of the following program elements?

[0-10, 98 "Don't know", 99 "Refused," ROTATE]

        CA2a. Standard or Prescriptive Incentives
        CA2b. Custom Incentives
        CA2c. Retro-Commissioning
        CA2d. New Construction
        CA2e. Industrial Systems (compressed air, process cooling, industrial refrigeration,
                process refrigeration)
        CA2f. Small Business Energy Services
        CA2g. Commercial Real Estate or Building Performance with ENERGY STAR
        CA2i. Healthcare
        CA2j. Industrial Process
        CA2k. Business Instant Lighting Discounts (BILD)
        CA2l. Multi-Family Comprehensive Energy Efficiency
        CA2m. Data Center Efficiency

CA2aa. Do you think your customers understand which program elements and incentives they
        qualify for?
        1.   (Yes)
        2.   (No)
        8.   (Don't know)
        9.   (Refused)

CA2bb. Do you think your customers know how to find out which program elements and
        incentives they qualify for?
        1.   (Yes)
        2.   (No)
        8.   (Don't know)
        9.   (Refused)

CA3.   How do you think your customers view the program? Do they view it as:
        01.   One program with multiple tracks or offerings
        02.   Multiple distinct programs
        00. Other: specify
        98.   (Don't know)
        99.   (Refused)

CA4. On a scale of 0-10, where 0 is "not at all satisfied", and 10 is "extremely satisfied," how satisfied are your customers with ComEd's energy efficiency programs? [0-10, 98 "Don't know", 99 "Refused"]

[ASK IF CA5<=4]
CA4a. Why would you say your customers are not very satisfied with the program?

CA5. How frequently do you promote the program to your customers? Would you say you promote it:
1. Always
2. Most of the time
3. Sometimes
4. Rarely, or
5. Never
8. (Don't know)
9. (Refused)

[Ask if CA5 = 4 or 5]
CA5a. Can you explain why you aren't able to promote the program more often?
00. (OPEN-END)
98. (Don't know)
99. (Refused)

CA6. What do you view as the main barriers to customer participation in the Smart Ideas for Your Business program?
1. (Paperwork/Application process)
2. (Lack of awareness)
3. (Project cost)
4. (Customer lack of understanding efficiency)
00. (Other, please describe:_____)
96. (No barriers to participation)
98. (Don't know)
99. (Refused)

CA7. In the last year, have you ever seen a customer decide to complete an eligible project but not go through the ComEd program?
1. (Yes)
2. (No)
8. (Don't know)
9. (Refused)

[ASK IF CA7=1, ELSE SKIP to CA10]
CA8. How many projects have you seen this happen to in the last year?

[OPEN END NUMERIC]

CA9. Why do you think those customers chose not to participate in the program?
[OPEN END]

CA10. What, if anything, could be done to encourage these customers to complete their project through the program?
00. (OPEN-END)
98. (Don't know)
99. (Refused)

Spillover-Stocking behavior

SO1. As a result of your experiences with the ComEd programs, do you now offer your customers more energy efficiency options than you did before you were involved with the programs?
1. (Yes)
2. (No)
8. (Don't know)
9. (Refused)

SO2. Before your involvement in ComEd's programs, what percentage of your sales was high efficiency equipment that ComEd now incentivizes? [Numeric 0-100, 998=Don't know, 999=Refused]

SO3. Since your involvement in ComEd's programs, what percentage of your sales is now high efficiency equipment that qualifies for an incentive from ComEd? [Numeric 0-100, 998=Don't know, 999=Refused]

S04. Thinking about your sales of equipment that qualifies for a ComEd incentive, in what percentage of those sales, would you say customers actually receive an incentive from ComEd? [Numeric 0-100, 998=Don't know, 999=Refused]

[CREATE VARIABLE: 100-SO4=No_Inc]

[SKIP F1 IF SO4=998 or 999 or 100]
SO5. So does this mean then that <No_Inc>% of your customers purchase equipment that qualifies for the program but don't receive an incentive from ComEd?
1. (Yes)
2. (No)
3. (Don't know)
4. (Refused)

SO6.   To the best of your knowledge, on a scale of 0-10, where 0 means "no influence" and 10 means "greatly influenced," how much did ComEd's programs influence your sales of qualifying equipment to these non-participating customers ? [Numeric 0-10, 98=Don't know, 99=Refused]

Firmographics

Last, I have a few general questions about your company.

F1.   What is your business category? (Probe for: contractor, engineer, ESCO, equipment vendor, architect)
    1.   (Contractor)
    2.   (Engineering)
    3.   (ESCO or Energy Service Company)
    4.   (Equipment Vendor)
    5.   (Architect)
    6. (Manufacturer)
    00.   (Other, please specify: _____)
    98.   (Don't know)
    99.   (Refused)

F2.   What type of equipment, if any, would you say is your company's area of expertise? [MULTIPLE RESPONSE]
    1.   (Lighting)
    2.   (HVAC)
    3.   (Refrigeration)
    4.   (Motors)
    5.   (Food service)
    00.   (Other: please specify)
    98.   (Don't know) [SKIP TO F3]
    99.   (Refused) [SKIP TO F3]

F2a.   [ASK IF NUMBER OF RESPONSES IN F2>1] What is the MAIN area? → [RECORD THIS AREA AS "ENDUSE"]
    1.   (Lighting)
    2.   (HVAC)
    3.   (Refrigeration)
    4.   (Motors)
    5.   (Food service)
    00.   (Other: please specify)
    98.   (Don't know) [SKIP TO F3]
    99.   (Refused) [SKIP TO F3]

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F2b.   Approximately how many total commercial or industrial [ENDUSE] projects does your
        company implement in a typical year? [NUMERIC, 1-9999]

F3.   Would you consider your company to be local, regional, national, or international in
        size?
        1.   (Local)
        2.   (Regional)
        3.   (National)
        4.   (International)
        8.   (Don't know)
        9.   (Refused)

F4.   What are the key business sectors your company serves? (Probe for light/heavy industry,
        retail, office, restaurant, etc.)
        1.   (K-12 School)
        2.   (College/University)
        3.   (Grocery)
        4.   (Medical)
        5.   (Hotel/Motel)
        6.   (Light Industry)
        7.   (Heavy Industry)
        8.   (Office)
        9.   (Restaurant)
        10.   (Retail/Service)
        11.   (Warehouse)
        15.   (Property Management/Real Estate)
        16.   (Government)
        17.   (Commercial)
        00.   (Other, specify)
        98.   (Don't know)
        99.   (Refused)

F5.   How aware, would you say, are your customers of energy efficiency and options
        available to make their facilities more energy efficient?
        1.   Not at all aware
        2.   Slightly aware
        3.   Somewhat aware
        4.   Moderately aware
        5.   Extremely aware

F6.   How interested are they in energy efficiency and options available to make their
        facilities more efficient?
        1.   Not at all interested
        2.   Slightly interested

3.   Somewhat interested
4.   Moderately interested
5.   Extremely interested

F7.   Finally, do you have any recommendations for ways in which the Smart Ideas for Your
        Business Program could be improved?
00.   (OPEN-END)
98.   (Don't know)
99.   (Refused)

Thank you for your participation in this survey!

NAVIGANT

ComEd Participant Customer Survey for the ComEd Cross-Cutting Evaluation

Sample Variables

<Programs>/< PartProg_[Prog]> Codes:
1 = Standard/Prescriptive
2 = Custom
3 = Retro-Commissioning
4 = New Construction
5 = Industrial Systems
6 = Small Business Energy Savings
7 = Commercial Real Estate
8 = Business Instant Lighting Discount
9 = Data Centers
10 = Nonprofits
11 = Healthcare/Hospitality
12 = Multi-family Comprehensive Energy Efficiency
13 = Industrial Process Efficiency
14= Industial Study

Introduction

Hello, this is _____ from Opinion Dynamics calling on behalf of ComEd. THIS IS NOT A SALES CALL. May I please speak with <PARTICIPANT NAME>?

Our records show that <COMPANY> participated in ComEd's energy efficiency program for businesses. We are interested in hearing about your experience with the program and any feedback you may have about the program. ComEd will use this information to improve the energy efficiency programs and services it offers to its business customers. I was told you are the most knowledgeable person about your involvement in the Smart Ideas Program. Is this correct? [IF NOT, ASK TO BE TRANSFERRED TO MOST KNOWLEDGEABLE PERSON OR RECORD NAME & NUMBER.]

Alert interviewee that the call will be recorded.
Note that responses will remain confidential and only be reported in aggregate with other responses.

C1.   Are you currently talking to me on a regular landline phone or a cell phone?
    1.   Regular landline phone
    2.   Cell phone
    8.   (Don't know)
    9.   (Refused)

[ASK IF C1 = 2, ELSE GO TO SURVEY START]

C2.   Are you currently in a place where you can talk safely and answer my questions?
    1.   Yes
    2.   No [Schedule call back]
    3.   No [DO NOT CALL BACK]
    8.   (Don't know) [Schedule call back]
    9.   (Refused) [Schedule call back]

Screening
[REPEAT FOR EACH PROGRAM FLAGGED IN SAMPLE]
[NOTE INDUSTRIAL STUDY IS ASKED HERE IN S1 BUT THAT DOESN'T MEAN YOU ARE FLAGGED ASK INDUSTRIAL SYSTEM OR INDUSTRIAL PROCESS SO YOU STILL GET ALL FOLLOW-UPS LIKE AA1 ON THOSE]
S1.   Just to confirm, do you recall that your company completed a project as a part of ComEd's <PROGRAMS> program? (IF NEEDED: This project would have been completed in support of upgrading your facility either through capitol measures or other facility adjustments and updates and you likely would have received an incentive from ComEd.)
    1.   (Yes)
    2.   (No)
    98.   (DK)
99.   (Refused) [THANK & TERMINATE]

[TERMINATE IF NO PROGRAM FLAGGED IN SAMPLE IS VERIFIED]
S2.   Have you applied for incentives through any other ComEd energy efficiency program?
    1.   (Yes)
    2.   (No)
    98.   (DK)
    99.   (Refused)

[ASK IF S2 = 1, else skip]
S3.   In what other ComEd programs, have you applied for incentives? [DO NOT READ LIST; MULTIPLE RESPONSE up to 5] [ELIMINATE THOSE VERIFIED IN S1]
    1.   (Standard also known as Prescriptive)
    2.   (Custom)
    3.   (Retro-Commissioning or Monitoring-based Commissioning)
    4.   (New Construction)
    5.   (Industrial Systems, also known as., compressed air, process cooling, industrial refrigeration, process refrigeration)
    6.   (Small Business Energy Savings also known as SBES)
    7.   (Commercial Real Estate/Building Performance with ENERGY STAR)
    8.   (Business Instant Lighting Discounts or BILD)
    9.   (Data Centers)
    10.   (Nonprofits)

11. (Healthcare or Hospitality)
12. (Multi-Family Comprehensive Energy Efficiency also known as MCEEP)
13. (Industrial Process Efficiency)
00. (Other specify: _____)
98. (Don't know)
99. (Refused) [THANK & TERMINATE]

[Create variable "PartProg_all" for the answers from S3 and the read-ins from S1. For instance, if <PROGRAM NAME> equals "Standard" and the respondent says that they have also applied for incentives for Custom and BILD projects, then <PartProg> should read as "Standard, Custom, and BILD"]
[Create variable "PartProg_[Prog]" for each program flagged for participation verified in S1 and S3. THESE FLAGS WITH THE VERIFIED FLAGS WILL BE USED FOR LOOPS]

Unaided Awareness

UA1. On a scale of 0-10, with 0 being "not at all familiar" and 10 being "extremely familiar," how familiar are you with ComEd's energy efficiency offerings? [0-10, 98=Don't know, 99=Refused]

UA2. Aside from the <PartProg_all> program(s), are you aware of any other energy efficiency programs that ComEd offers its business customers? [MULTIPLE RESPONSE up to 5-DO NOT READ] [ELIMINATE THOSE VERIFIED IN S1]
1. (Standard also known as Prescriptive)
2. (Custom)
3. (Retro-Commissioning or Monitoring-based Commissioning)
4. (New Construction)
5. (Industrial Systems, also known as compressed air, process cooling, industrial refrigeration, and process refrigeration)
6. (Small Business Energy Savings also known as SBES)
7. (Commercial Real Estate/Building Performance with ENERGY STAR)
8. (Business Instant Lighting Discounts or BILD)
9. (Data Centers)
10. (Nonprofits)
11. (Healthcare or Hospitality)
12. (Multi-Family Comprehensive Energy Efficiency also known as MCEEP)
13. (Industrial Process Efficiency)
00. (Other specify: _____)
96. (No other programs)
98. (Don't know)
99. (Refused)

NAVIGANT

[Create awareness variables to flag programs NOT identified by respondent in <PartProg> variable or in UA2

UA2 = 1 or S3=1 OR STANDARD FLAG FROM SAMPLE=1 THEN = Awar_Standard
UA2 = 2 or S3=2 OR CUSTOM FLAG FROM SAMPLE=1 THEN = Awar_Custom
UA2 = 3 or S3=3 OR RCX FLAG FROM SAMPLE=1 THEN = Awar_RCX
UA2 = 4 or S3=4 OR NEW CONSTRUCTION FLAG FROM SAMPLE=1 THEN = Awar_NC
UA2 = 5 or S3=5 OR INDUSTRIAL SYSTEMS FLAG FROM SAMPLE=1 THEN = Awar_IS
UA2 = 6 or S3=6 OR SMALL BUSINESS FLAG FROM SAMPLE=1 THEN = Awar_SBES
UA2 = 7 or S3=7 OR COMMERCIAL REAL ESTATE FLAG FROM SAMPLE=1 THEN = Awar_CRE
UA2 = 8 or S3=8 OR BILD FLAG FROM SAMPLE=1 THEN = Awar_BILD
UA2 = 9 or S3=9 OR DATA CENTERS FLAG FROM SAMPLE=1 THEN = Awar_DC
UA2 = 10 or S3=10 OR NONPROFITS FLAG FROM SAMPLE=1 THEN = Awar_NP
UA2 = 11 or S3=11 OR HEALTH CENTER FLAG FROM SAMPLE=1 THEN = Awar_Health
UA2 = 12 or S3=12 OR MULTI-FAMILY FLAG FROM SAMPLE=1 THEN = Awar_MCEEP
UA2 = 13 or S3=13 OR INDUSTRIAL PROCESS FLAG FROM SAMPLE=1 THEN = Awar_IP]

Aided Awareness

AA1 . Have you heard of any of the following program offerings from ComEd? [1=YES, 2=NO, 98=DON'T KNOW, and 99=REFUSED, ROTATE]

[SKIP IF Awar_Standard = 1]
  AA1a. Standard or Prescriptive Incentives (IF NEEDED: A program that offers a set incentive for energy efficiency projects based on the quantity and efficiency)

[SKIP IF Awar_Custom = 1]
  AA1b. Custom Incentives (IF NEEDED: A program that offers individualized incentives for energy efficiency projects based on the specific energy efficiency achieved by a given project)

[SKIP IF Awar_BILD = 1]
  AA1c. Business Instant Lighting Discounts (IF NEEDED: A program that provides discounts for lighting products to customers by providing reimbursement directly to lighting distributors)

[SKIP IF Awar_NC = 1]
  AA1d. New Construction (IF NEEDED: A program that provides incentives for energy efficient design for new construction)

[SKIP IF Awar_SBES = 1]
  AA1e. Small Business Energy Services (IF NEEDED: A program that provides the direct installation of energy efficiency equipment in small businesses)

NAVIGANT

[SKIP IF Awar_CRE = 1]

AA1f. Building Performance with ENERY STAR /Commercial Real Estate (IF NEEDED: A program that provides specialized services to commercial real estate customers)

[SKIP IF Awar_DC = 1]

AA1g. Data Centers (IF NEEDED: A program that provides specialized services to data centers)

[SKIP IF Awar_IS = 1]

AA1h. Industrial Systems (IF NEEDED: A program that provides detailed engineering analysis of industrial systems)

[SKIP IF Awar_RCX = 1]

AA1i. Retro-Commissioning (IF NEEDED: A program that provides engineering analysis of commercial building systems)

[SKIP IF Awar_IP = 1]

AA1j. Industrial Process Efficiency (IF NEEDED: A program that helps customers improve the energy intensity of their manufacturing processes)

[SKIP IF Awar_Health = 1]

AA1k. Healthcare (IF NEEDED: A program that offers facility assessments, where Hospitals can earn back part of their cost as they implement projects)

[SKIP IF Awar_MCEEP = 1]

AA1l. Multi-Family Comprehensive Energy Efficiency (IF NEEDED: A program that serves multi-family properties by providing by providing the education and assistance to overcome market barriers to greater energy efficiency)

[SKIP IF Awar_NP = 1]

AA1m. Non-Profits (IF NEEDED: A program that targets outreach to nonprofit organizations with an emphasis on mid-sized nonprofits)

AA2. Have you ever heard of "ComEd's Smart Ideas for your Business"?
1. (Yes)
2. (No)
8. (Don't know)
9. (Refused)

[ASK IF AA2=1, ELSE SKIP TO P1]

AA3. Are you aware that the that all of ComEd's energy efficiency incentive offerings for business are a part of the Smart Ideas for your Business Program?
1. (Yes)
2. (No)

8.   (Don't know)
9.   (Refused)

AA4. How do you view Smart Ideas program? Do you view it as:
1.   One program with multiple tracks or offerings
2.   Multiple distinct programs
00.   (Other_Specify)
98.   (Don't know)
99.   (Refused)

[ASK IF AA4=1]
AA4a. Can you elaborate on why you see Smart Ideas as one program with multiple tracks or offerings? [OPEN-ENDED]
00. (OPEN-END)
98. (Don't know)
99. (Refused)

[ASK IF AA4=2]
AA4b. Can you elaborate on why you see Smart Ideas as multiple distinct programs? [OPEN-ENDED]
00. (OPEN-END)
98. (Don't know)
99. (Refused)

Customer Participation
P1.   We understand that you have previously submitted applications with the < PartProg_all > programs. Now, I'd like to ask you about the programs where you have NOT participated. Why haven't you submitted an application in the… [MULTIPLE RESPONSE; UP TO 3; SKIP PROGRAMS IN < PartProg_[Prog]>]

[SKIP IF PartProg_Standard =1 OR AA1A=2]
a. Standard also known as Prescriptive Program

[SKIP IF PartProg_Custom =1 OR AA1B=2]
b. Custom Program

[SKIP IF PartProg_RCX =1 OR AA1i=2]
c. Retro-Commissioning or Monitoring-based Commissioning Program

[SKIP IF PartProg_NC =1 OR AA1D=2]
d. New Construction Program

[SKIP IF PartProg_BILD =1 OR AA1C=2]
e. Business Instant Lighting Discounts also known as BILD Program

1.   (Paperwork too burdensome)
2.   (Don't have a project that fits that program now)
3.   (Incentives not high enough/not worth the effort)
4.   (Program is too complicated)
5.   (Cost of equipment)
6.   (No drawbacks)
7.   (Poor Communication)
8.   (Time Consuming)
00.   (Other, specify)
96.   (Not Applicable)
98.   (Don't know)
99.   (Refused)

P2.   How likely are you to participate in ComEd's energy efficiency programs in the future?
        Would you say…
        1.   Very likely
        2.   Somewhat likely
        3.   Not very likely
        4.   Not at all likely
        8.   (Don't know)
        9.   (Refused)

P3.   What do you think are reasons that companies like yours do not participate in the Smart
        Ideas program? [MULTIPLE RESPONSE, UP TO 3]
        1.   (Lack of awareness of the program)
        2.   (Financial reasons)
        4.   (Not aware of savings/don't realize the savings)
        5.   (Difficulty of Application/Paperwork)
        6.   (Don't have eligible projects)
        00.   (Other, specify)
        96.   (None/no reasons)
        98.   (Don't know)
        99.   (Refused)

Interaction with Program

IP1.   Since your involvement in the program began, how many staff people, including
        ComEd staff and staff from other companies, working directly on the Smart Ideas
        programs, have you interacted with? [IF NEEDED: This should be a total count.]
        [NUMERIC 1-20]
        96.   (I did not interact with anyone)

98.   (Don't know)
99.   (Refused)

[SKIP IF IP1=96, 98, or 99]
IP2.   How many staff people, including ComEd staff and staff from other companies,
        working directly on the Smart Ideas programs, would you say you interact with on a
        regular basis? [NUMERIC 1-20]
        96.   (I did not interact with anyone)
        98.   (Don't know)
        99.   (Refused)

IP3.   In general, when you have a question about the ComEd's energy efficiency program,
        where do you go for an answer? [MULTIPLE RESPONSE OF THREE]
        1.   (ComEd website)
        2.   (A person that works on the program/ Program implementers like KEMA,
              Nexant, etc.)
        3.   (ComEd program manager)
        4.   (ComEd account manager)
        5.   (Call the ComEd program hotline)
        6.   (Gas Utility website – NiCor, People's Gas, or Integrys)
        7.   (Trade Ally or Service Provider website)
        8.   (Other website)
        00.   (Other, specify: _____)
        98.   (Don't know)
        99.   (Refused)

IP4.   How did you first learn about the program?
        1.   (ComED Website)
        2.   (Other website/internet search)
        3.   (Radio)
        4.   (Program Staff)
        5.   (ComEd account manager)
        6.   (Trade ally, contractor)
        7.   (Direct mail)
        00.   (Other, specify: _____)
        98.   (Don't know)
        99.   (Refused)

Customer Satisfaction

CS1.   Overall, how would you rate the program participation process so far? Please use a scale
        of 0 to 10, where 0 is "extremely difficult" and 10 is "extremely easy". [SCALE 0-10;
        98=Don't know, 99=Refused]

[ASK IF CS1<4]

CS2.   Why did you rate it that way?
>   1.   (Difficult to understand)
>   2.   (Long process)
>   00.   (Other, specify)
>   98.   (Don't know)
>   99.   (Refused)

CALL CENTER SATISFACTION

CS3.   During the course of your participation in the program, did you place any calls to the program Call Center?
>   1.   (Yes)
>   2.   (No)
>   8.   (Don't know)
>   9.   (Refused)

[ASK IF CS3=1. ELSE SKIP TO CS6]

CS4.   On a scale of 0 to 10, where 0 is "extremely dissatisfied" and 10 is "extremely satisfied," how satisfied are you with the Call Center's ability to answer your questions? [SCALE 0-10; 98=Don't know, 99=Refused]

[ASK IF CS4<4]

CS5.   Why did you rate it that way?
>   1.   (Provided inconsistent information)
>   2.   (Didn't understand the question)
>   3.   (Hard to reach the right person/person with the answer)
>   00.   (Other, specify)
>   98.   (Don't know)
>   99.   (Refused)

WEBSITE SATISFACTION

CS6.   During the course of your participation in the program, did you visit ComEd's website for information on the energy efficiency programs?
>   1.   (Yes)
>   2.   (No)
>   8.   (Don't know)
>   9.   (Refused)

[ASK IF CS6=1, ELSE SKIP TO CS9]

CS7.   On a scale of 0 to 10, where 0 is "extremely dissatisfied" and 10 is "extremely satisfied," how satisfied are you with the website's ability to provide information about the program? [SCALE 0-10; 98=Don't know, 99=Refused]

[ASK IF CS7<4]

CS8. Why did you rate it that way?

1. (Provided inconsistent information)
2. (Didn't provide the information I needed)
3. (Hard to find information I needed)
00. (Other, specify)
98. (Don't know)
99. (Refused)

FACILITY ASSESSMENT SATISFACTION

CS9. As a part of your participation in the program, did you have a facility assessment or audit completed of your facility?

1. (Yes)
2. (No)
8. (Don't know)
9. (Refused)

[ASK IF CS9=1, ELSE SKIP to CS14]

CS10. Did the audit provide you with information about additional opportunities for energy efficiency at your facility?

1. (Yes)
2. (No)
8. (Don't know)
9. (Refused)

[ASK IF CS10=1, ELSE SKIP to CS14]

CS11. Were you aware of these opportunities before the assessment?

1. (Yes)
2. (No)
8. (Don't know)
9. (Refused)

CS12. On a scale of 0 to 10, where 0 is "definitely not interested" and 10 is "extremely interested," how interested are you in pursuing some of the other energy efficiency projects identified by your assessment? [SCALE 0-10; 98=Don't know, 99=Refused]

PROJECT COMPLETION

[ASK IF CS12>6]

CS13. It sounds like you are interested in pursuing additional energy efficiency projects. On a scale of 0 to 10, where 0 is "not at all likely" and 10 is "extremely likely," how likely is it that you will complete these additional projects through the program?

[ASK IF CS13<4]

CS13a. Why do you think you are unlikely to complete the project?

      00.   [OPEN-END]
      98.   (Don't know)
      99.   (Refused)

[ASK IF CS13>6]

CS13b. Do you know how to start the incentive process for the projects found during the assessment that you are interested in completing through the program?

      1.   (Yes)
      2.   (No)
      8.   (Don't know)
      9.   (Refused)

PROCESS SATISFACTION

[ASK CS14 – CS15_DO for each <PartProg_[Prog]">, ROTATE]

CS14. Did you fill out the application forms for your <PROGRAMS> project?

      1.   (Yes)
      2.   (No)
      8.   (Don't know)
      9.   (Refused)

[ASK IF CS14=1]

CS14a. On a scale of 0 to 10, where 0 is "extremely difficult" and 10 is "extremely easy," how would you rate the process of completing the <PROGRAMS> program application? [SCALE 0-10; 98=Don't know, 99=Refused]

[ASK IF CS14a<4]

CS14b. Why did you rate it that way?

      1.   (Difficult to understand)
      2.   (Long process)
      00.   (Other, specify)
      98.   (Don't know)
      99.   (Refused)

CS16_DO. On a scale of 0 to 10, where 0 is "extremely dissatisfied" and 10 is "extremely satisfied," how would you rate your overall satisfaction with ComEd's <PartProg_[Prog]> program? [SCALE 0-10; 96=not applicable, 98=Don't know, 99=Refused; ROTATE]

[ASK IF CS16_DO<4]

CS15_DO. You indicated some dissatisfaction with ComEd's <PartProg_[Prog]> program, why did you rate it this way?

    1.   (Too expensive to complete project)
    2.   (Poor customer service)
    3.   (Not enough information about programs)
    4.   (Too hard to get information about programs)
  00.   (Other, specify)
  98.   (Don't know)
  99.   (Refused)

CS15. On a scale of 0 to 10, where 0 is "extremely dissatisfied" and 10 is "extremely satisfied," how would you rate your satisfaction with… [SCALE 0-10; 96=not applicable, 98=Don't know, 99=Refused;]

    a.   the incentive amount
    b.   the communication you had with the Smart Ideas program staff
    c.   the equipment and services offered by the program
    d.   ComEd's energy efficient program overall
    e.   ComEd overall

[ASK IF CS15a<4]

CS16a. You indicated some dissatisfaction with the incentive amount, why did you rate it this way? [MULTIPLE RESPONSE; UP TO 3]

    1.   (Better rebates in other states)
    2.   (Too small)
    3.   (Equipment didn't qualify)
  00.   (Other, specify)
  98.   (Don't know)
  99.   (Refused)

[ASK IF CS15b<4]

CS16b. You indicated some dissatisfaction with the communication you had with the <PROGRAM>staff, why did you rate it this way?

    1.   (Provided inconsistent information)
    2.   (Didn't understand the question)
    3.   (Hard to reach the right person/person with the answer)
  00.   (Other, specify)
  98.   (Don't know)
  99.   (Refused)

[ASK IF CS15c<4]

CS16c. You indicated some dissatisfaction with the equipment and services offered by
<PROGRAM> program, why did you rate it this way? [OPEN END; 98=Don't know,
99=Refused]

[ASK IF CS15d<4]
CS16d. You indicated some dissatisfaction with ComEd's energy efficiency program overall,
why did you rate it this way?
1. (Not as easy as other states)
2. (No clear guidance)
00. (Other, specify)
98. (Don't know)
99. (Refused)

[ASK IF CS15e<4]
CS16e. You indicated some dissatisfaction with ComEd overall, why did you rate it this way?
1. (Rates are too high)
2. (Took too long to get rebate)
3. (Poor customer service)
4. (Poor power supply/service)
00. (Other, specify)
98. (Don't know)
99. (Refused)

OVERALL SATISFACTION
CS17. Do you plan to participate in the program again in the future?
1. (Yes)
2. (No)
3. (Maybe)
8. (Don't know)
9. (Refused)

[ASK IF CS17=2, ELSE SKIP TO CS18]
CS17a. Why not? [OPEN END]
00. (OPEN END)
98. (Don't know)
99. (Refused)

CS18. Do you have any suggestions for how ComEd's Smart Ideas for Your Business Program
be improved? [MULTIPLE RESPONSE, UP TO 4]
1. (Higher incentives)
2. (More measures)
3. (Greater publicity)
4. (Better Communication/Improve Program Information)

5.   (Simplify application process)
6.   (Quicker processing times)
00.   (Other, specify)
96.   (No recommendations)
98.   (Don't know)
99.   (Refused)

Firmographics

Last, I have a few general questions about your company.

F1.   What is your company's business type? (PROBE IF NEEDED; IF MANUFACTURING,
       PROBE IF IT IS LIGHT OR HEAVY INDUSTRY] [MULTIPLE RESPONSE UP TO 3]
       1.   (K-12 School)
       2.   (College/University)
       3.   (Grocery)
       4.   (Medical)
       5.   (Hotel/Motel)
       6.   (Light Industry)
       7.   (Heavy Industry)
       8.   (Office)
       9.   (Restaurant)
       10.   (Retail/Service)
       11.   (Warehouse)
       12.   (Property Management/Real Estate)
       00.   (Other, specify)
       98.   (Don't know)
       99.   (Refused)

F2.   Would you consider your company to be local, regional, national or international in
       size?
       1.   (Local)
       2.   (Regional)
       3.   (National)
       4.   (International)
       8.   (Don't know)
       9.   (Refused)

F3.   Which of the following best describes the ownership of this facility?
       1.   (Company owns and occupies this facility)
       2.   (Company owns this facility, but it is rented to someone else)
       3.   (Company rents this facility)

8.   (Don't know)
9.   (Refused)

F4.   Which of the following best describes the facility? This facility is…
1.   This is my company's only location
2.   This is one of several locations owned by my company
3.   This is the headquarters location of my company with several locations
8.   (Don't know)
9.   (Refused)

Thank you for your participation in this survey!

NΛVIGANT

ComEd Drop-Out Participant Customer Survey for the ComEd Cross-Cutting Evaluation

Sample Variables

<Program/< PartProg_[Prog]> Codes:
1 = Standard/Prescriptive
2 = Custom
3 = Retro-Commissioning
4 = New Construction
5 = Industrial -Systems
6 = Small Business Energy Savings
7 = Commercial Real Estate
8 = Business Instant Lighting Discount
9 = Data Centers
10 = Nonprofits
11 = Healthcare/Hospitality
12 = Multi-family Comprehensive Energy Efficiency
13 = Industrial Process Efficiency
14 = Incentive (IF NEEDED: Standard/Prescriptive/Custom)

Introduction

Hi, may I please speak with <Contact Name>?

Hello, this is _____ from Opinion Dynamics, and independent research company, calling on behalf of ComEd. THIS IS NOT A SALES CALL. We are conducting a short survey of businesses who started an energy efficiency project through ComEd's energy efficiency program, but did NOT complete the project.

I was told you are the most knowledgeable person about your involvement in ComEd's energy efficiency program. Is this correct? [IF NOT, ASK TO BE TRANSFERRED TO MOST KNOWLEDGEABLE PERSON OR RECORD NAME & NUMBER.]

[IF NEEDED: This survey will take about 15 minutes.]

Alert interviewee that the call will be recorded.
Note that responses will remain confidential and only be reported in aggregate with other responses.

C1.   Are you currently talking to me on a regular landline phone or a cell phone?
    1.   Regular landline phone
    2.   Cell Phone
    8.   (Don't know)

9. (Refused)

[ASK IF C1 = 2; ELSE GO TO SURVEY START]
C2.   Are you currently in a place where you can talk safely and answer my questions?
    1.   Yes
    2.   No [Schedule call back]
    3.   No (DO NOT CALL BACK)
    8.   (Don't know) [Schedule call back]
    9.   (Refused) [Schedule call back]

Screening
I have a few questions about the steps in the program process that you completed.
[REPEAT S1 to S5B FOR EACH PROGRAM FLAG]

S1.   Just to confirm, our records show that your company submitted an application for ComEd's <PROGRAM> program. (IF NEEDED: This application would have been placed in support of upgrading your facility either through capital measures or other facility adjustments and updates.) Is this correct?
    1.   (Yes)
    2.   (No) [SKIP TO NEXT LOOP]
    98.   (DK) [SKIP TO NEXT LOOP]
    99.   (Refused) [SKIP TO NEXT LOOP]

S2.   When you initially applied to the program had you already obtained quotes from a contractor?
    1.   (Yes)
    2.   (No)
    98.   (DK)
    99.   (Refused) [SKIP TO NEXT LOOP]

S3.   Was your <PROGRAM> project pre-approved by ComEd?
    1.   (Yes)
    2.   (No)
    98.   (DK)
    99.   (Refused) [SKIP TO NEXT LOOP]

[ASK IF S3=2]
S4.   While waiting for your <PROGRAM> application to be pre-approved by ComEd, had you already begun some of the work on the project?
    1.   (Yes)
    2.   (No)
    98.   (DK)
    99.   (Refused) [SKIP TO NEXT LOOP]

NAVIGANT

S5.   Did you complete this <PROGRAM > project?
    1.   (Yes)
    2.   (No)
    98.   (DK) [SKIP TO NEXT LOOP]
    99.   (Refused) [SKIP TO NEXT LOOP]

[ASK IF S5=1]
S5a.   Did you receive an incentive from ComEd for this project?
    1.   (Yes) [TERMINATE]
    2.   (No)
    98.   (DK)
    99.   (Refused)

[ASK IF S5a=2]
S5b.   Why did you complete the project without receiving an incentive? [OPEN END]
    00.   (OPEN_END)
    98.   (Don't know)
    99.   (Refused)

S6.   Have you applied for an incentive from any other ComEd energy efficiency program?
    1.   (Yes)
    2.   (No)
    98.   (DK)
    99.   (Refused)

[ASK IF S6 = 1]
S7.   In what other ComEd programs, have you applied for incentives? [DO NOT READ LIST] [MULTIPLE RESPONSE UP TO 4]
    1.   (Standard also known as Prescriptive)
    2.   (Custom)
    3.   (Retro-Commissioning or Monitoring-based Commissioning)
    4.   (New Construction)
    5.   (Industrial Systems, also known as., compressed air, process cooling, industrial refrigeration, process refrigeration)
    6.   (Small Business Energy Savings also known as SBES)
    7.   (Commercial Real Estate/Building Performance with ENERGY STAR)
    8.   (Business Instant Lighting Discounts or BILD)
    9.   (Data Centers)
    10.   (Nonprofits)
    11.   (Healthcare or Hospitality)
    12.   (Multi-Family Comprehensive Energy Efficiency also known as MCEEP)
    13.   (Industrial Process)

00. (Other specify: _____)
98. (Don't know)
99. (Refused) [THANK & TERMINATE]

[Create variable "PartProg_all" for the answers from S7 and the read-ins from S1. For instance, if <PROGRAM NAME> equals "Standard" and the respondent says that they have also applied for incentives for Custom and BILD projects, then <PartProg> should read as "Standard, Custom, and BILD"]
[Create variable "PartProg_[Prog]" for each program flagged for participation.]

Unaided Awareness

UA1. On a scale of 0-10, with 0 being "not at all familiar" and 10 being "extremely familiar," how familiar are you with ComEd's energy efficiency offerings? [0-10, 98=Don't know, 99=Refused]

UA2. Aside from the <PartProg_all> program, are you aware of any other energy efficiency programs that ComEd offers its business customers? [MULTIPLE RESPONSE- DO NOT READ]

1. (Standard also known as Prescriptive)
2. (Custom)
3. (Retro-Commissioning or Monitoring-based Commissioning)
4. (New Construction)
5. (Industrial Systems, also known as compressed air, process cooling, industrial refrigeration, and process refrigeration)
6. (Small Business Energy Savings also known as SBES)
7. (Commercial Real Estate/Building Performance with ENERGY STAR)
8. (Business Instant Lighting Discounts or BILD)
9. (Data Centers)
10. (Nonprofits)
11. (Healthcare or Hospitality)
12. (Multi-Family Comprehensive Energy Efficiency also known as MCEEP)
13. (Industrial Process)
00. (Other specify: _____)
96. (No other programs)
98. (Don't know)
99. (Refused)

Customer Participation [SKIP THIS SECTION IF all loops of S5=1; REPEAT P1-P2c FOR EACH PROGRAM FLAG where S5 <>1]

P1.   What was the primary reason you did not complete your <PROGRAM NAME> project
        through the ComEd energy efficiency program? [DO NOT READ!]
        1.   (The initial cost is too high)
        2.   (I did not think I would qualify for the incentives)
        3.   (The details of the program did not meet my needs)
        4.   (The program application paperwork was too long or complicated)
        5.   (I reconsidered based on the results from program assessment)
        6.   (I was dissatisfied with the program assessment or the contractor)
        7.   (Financial reasons unrelated to the project)
        8.   (I haven't had time)
        9.   (I haven't found a contractor that I want to work with for installations)
        10.   (I need more information)
        11.   (My building doesn't need any of the upgrades sponsored by the program)
        12.   (I cannot get financing to cover the project cost)
        13.   (My contractor recommended against the work)
        00.   (Other, specify)
        98.   (Don't know)
        99.   (Refused)

[ASK IF P1=1, ELSE SKIP to P2]
P1a.   Other than cost, are there any other reasons you have not moved forward with your
        project through ComEd energy efficiency program?
        1.   (I haven't had time to contact them)
        2.   (I haven't found a contractor yet)
        3.   (I need more information about the program)
        4.   (Financial reasons unrelated to the project)
        5.   (The details of the program did not meet my needs)
        00.   (Other, specify: _____)
        96.   (No other reasons)
        98.   (Don't know)
        99.   (Refused)

[ASK IF P1=13]
P1b. What did the contractor say about your project? [OPEN END, 98=Don't know, 99=Refused]

P2.   Have you decided whether you will continue with your < PROGRAM NAME > project?
        1.   (Yes)
        2. (No)
        3.   (I am considering continuing the project, but haven't decided yet)
        8.   (Don't know)
        9.   (Refused)

[ASK IF P2=1]

NAVIGANT

P2a.   Will you continue your <PROGRAM NAME> project with or without ComEd incentives?
    1.   (With ComEd incentives)
    2.   (without ComEd incentives)
    8.   (Don't know)
    9.   (Refused)

[ASK IF P2a=2]
P2aa.   What is the main reason that you will continue with the project without ComEd's <PROGRAM> program?
    1.   (The initial cost was too high through the program)
    2.   (Did not want to work with any of the participating contractors/trade allies/service providers)
    3.   (Wanted to work with a specific contractor/trade ally/service provider who was not affiliated with the program)
    4.   (Not enough information about the program)
    5.   (Planned/proposed upgrades did not qualify)
    00.   (Other, specify: _____)
    98.   (Don't know)
    99.   (Refused)

[ASK IF P2=3]
P2ab.   What information would have helped you complete your project through ComEd's <PROGRAM>? [OPEN END, 98=Don't know, 99=Refused]

[ASK IF P2aa=5]
P2ac.   What planned or proposed upgrades were you interested in but did not qualify for incentives through ComEd's < PROGRAM NAME > program? [OPEN END, 98=Don't know, 99=Refused]

P3.   How likely are you to participate in ComEd's energy efficiency programs in the future? Would you say…
    1.   Very likely
    2.   Somewhat likely
    3.   Not very likely
    4.   Not at all likely
    8.   (Don't know)
    9.   (Refused)
P4.   What do you think are the reasons that companies like yours do not participate in ComEd's efficiency programs?
    1.   (Lack of awareness of the program)
    2.   (Financial reasons)
    4.   (Not aware of savings/don't realize the savings)

5.   (Difficulty of Application/Paperwork)
00.   (Other, specify)
96.   (None/no reasons)
98.   (Don't know)
99.   (Refused)

Customer View of Program

V1.   Have you ever heard of the term "ComEd's Smart Ideas for Your Business"?
        1. (Yes)
        2. (No)
        3. (Don't know)
        4. (Refused)

[ASK IF V1=1, ELSE SKIP to V4]
V2.   Are you aware that all of ComEd's business incentive programs are elements of the
        Smart Ideas for Your Business Program?
        1. (Yes)
        2. (No)
        3. (Don't know)
        4. (Refused)

V3.   How do you view Smart Ideas program? Do you view it as:
        1. One program with multiple tracks or offerings
        2. Multiple distinct programs
        00. (Other: please specify)
        98. (Don't know)
        99. (Refused)

[ASK IF V3=1]
V3a.   Can you elaborate on why you see Smart Ideas as one program with multiple tracks or
        offerings? [OPEN-ENDED]
        00. (OPEN-END)
        98. (Don't know)
        99. (Refused)

[ASK IF V3=2]
V3b.   Can you elaborate on why you see Smart Ideas as multiple distinct programs? [OPEN-
ENDED]
        00. (OPEN-END)
        98. (Don't know)
        99. (Refused)

V4. In general, when you have had a question about ComEd's energy efficiency program, where do you go for an answer? [MULTIPLE RESPONSE UP TO 3]
   1. (ComEd website)
   2. (A person that works on the program/ Program implementers like KEMA, Nexant, etc.)
   3. (ComEd program manager)
   4. (ComEd account manager)
   5. (Call the ComEd program hotline)
   6. (Gas Utility website – NiCor, People's Gas, or Integrys)
   7. (Trade Ally or Service Provider website)
   8. (Other website)
   00. (Other.-specify: _____)
   98. (Don't know)
   99. (Refused)

V5. How did you first learn about the program?
   1. (ComEd Website)
   2. (Other website/internet search)
   3. (Radio)
   4. (Program Staff)
   5. (ComEd account manager)
   6. (Trade ally, contractor)
   7. (Direct mail)
   00. (Other, specify: _____)
   98. (Don't know)
   99. (Refused)

V6. Since your involvement in the program began, how many staff people, including ComEd staff and staff from other companies, working directly on the Smart Ideas programs, would you say you have you interacted with?
   1. (1-2)
   2. (3-5)
   3. (6-10)
   4. (More than 10)
   96. (I did not interact with anyone) [SKIP TO CS1]
   98. (Don't know)
   99. (Refused)

V7. How many staff people, including ComEd staff and staff from other companies, working directly on the Smart Ideas programs, would you say you interact with on a regular basis?
   1. (1-2)
   2. (3-5)

3.   (6-10)
4.   (More than 10)
96.   (I did not interact with anyone)
98.   (Don't know)
99.   (Refused)

Customer Satisfaction

CS1.   How would you rate the program participation process? Please use a scale of 0 to 10, where 0 is "extremely difficult" and 10 is "extremely easy". [SCALE 0-10; 98=Don't know, 99=Refused]

[ASK IF CS1<4]
CS2.   Why did you rate it that way?
        1.   (Difficult to understand)
        2.   (Long process)
        00.   (Other, specify)
        98.   (Don't know)
        99.   (Refused)

CALL CENTER SATISFACTION
CS3.   During the course of your participation in the program, did you place any calls to the program Call Center?
        1.   (Yes)
        2.   (No)
        8.   (Don't know)
        9.   (Refused)

[ASK IF CS3=1]
CS4.   On a scale of 0 to 10, where 0 is "extremely dissatisfied" and 10 is "extremely satisfied," how would satisfied are you with the Call Center's ability to answer your questions? [SCALE 0-10; 98=Don't know, 99=Refused]

[ASK IF CS4<4]
CS5.   Why did you rate it that way?
        1.   (Provided inconsistent information)
        2.   (Didn't understand the question)
        3.   (Hard to reach the right person/person with the answer)
        00.   (Other, specify)
        98.   (Don't know)
        99.   (Refused)

WEBSITE SATISFACTION

CS6. During the course of your participation in the program, did you visit ComEd's website?
    1. (Yes)
    2. (No)
    8. (Don't know)
    9. (Refused)

[ASK IF CS6=1]
CS7. On a scale of 0 to 10, where 0 is "extremely dissatisfied" and 10 is "extremely satisfied," how would satisfied are you with the website's ability to provide information about the program? [SCALE 0-10; 98=Don't know, 99=Refused]

[ASK IF CS7<4]
CS8. Why did you rate it that way?
    1. (Provided inconsistent information)
    2. (Didn't provide the information I needed)
    3. (Hard to find information I needed)
    00. (Other, specify)
    98. (Don't know)
    99. (Refused)

FACILITY ASSESSMENT SATISFACTION
CS9. As a part of your participation in the program, did you have a facility assessment or audit completed of your facility?
    1. (Yes)
    2. (No)
    8. (Don't know)
    9. (Refused)

[ASK IF CS9=1]
CS10. On a scale of 0 to 10, where 0 is "extremely dissatisfied" and 10 is "extremely satisfied," how satisfied were you with the results of your assessment? [SCALE 0-10; 98=Don't know, 99=Refused]

[ASK IF CS10<4]
CS11. Why did you rate it that way?
    1. (Provided inconsistent information)
    2. (Didn't understand the results)
    3. (Results were not what I expected)
    00. (Other, specify)
    98. (Don't know)
    99. (Refused)

PROCESS SATISFACTION

CS12. On a scale of 0 to 10, where 0 is "not at all clear" and 10 is "absolutely clear," how clear is the process for completing those projects through ComEd's energy efficiency programs?

[ASK IF CS12<4]
CS12a. What would make the process for completing projects through the program easier?
      00.   [OPEN-END]
      98.   (Don't know)
      99.   (Refused)

CS13. Did you fill out an application form for program incentives?
      1.   (Yes)
      2.   (No)
      8.   (Don't know)
      9.   (Refused)

[ASK IF CS13=1]
CS13a. On a scale of 0 to 10, where 0 is "extremely difficult" and 10 is "extremely easy," how would you rate the process of completing the program application(s)? [SCALE 0-10; 98=Don't know, 99=Refused]

[ASK IF CS13a<4]
CS13b. Why did you rate it that way?
      1.   (Difficult to understand)
      2.   (Long process)
      00.   (Other, specify)
      98.   (Don't know)
      99.   (Refused)

CS14. On a scale of 0 to 10, where 0 is "extremely dissatisfied" and 10 is "extremely satisfied," how would you rate your overall satisfaction with… [SCALE 0-10; 96=not applicable, 98=Don't know, 99=Refused; ROTATE]
      a.   the program incentive amounts
      b.   the communication you had with the Smart Ideas program staff
      c.   the equipment and services offered by the program
      d.   the Smart Ideas program overall
      e.   ComEd overall

[ASK IF CS14a<4]
CS15a. You indicated some dissatisfaction with the incentive amounts, why did you rate it this way? [MULTIPLE RESPONSE; UP TO 3]
      1.   (Better rebates in other states)

2. (Too small)
3. (Equipment didn't qualify)
00. (Other, specify)
98. (Don't know)
99. (Refused)

[ASK IF CS14b<4]
CS15b. You indicated some dissatisfaction with the communication you had with the Smart Ideas staff, why did you rate it this way?
1. (Provided inconsistent information)
2. (Didn't understand the question)
3. (Hard to reach the right person/person with the answer)
00. (Other, specify)
98. (Don't know)
99. (Refused)

[ASK IF CS14c<4]
CS15c. You indicated some dissatisfaction with the equipment and services offered by the Smart Ideas program, why did you rate it this way? [OPEN END; 98=Don't know, 99=Refused]

[ASK IF CS14d<4]
CS15d. You indicated some dissatisfaction with the Smart Ideas Program overall, why did you rate it this way?
1. (Not as easy as other states)
2. (No clear guidance)
00. (Other, specify)
98. (Don't know)
99. (Refused)

[ASK IF CS14e<4]
CS15e. You indicated some dissatisfaction with ComEd overall, why did you rate it this way?
1. (Rates are too high)
2. (Took too long to get rebate)
3. (Poor customer service)
4. (Poor power supply/service)
00. (Other, specify)
98. (Don't know)
99. (Refused)

[REPEAT FOR EACH <PartProg_[Prog]> FLAG]

CS16. On a scale of 0 to 10, where 0 is "extremely dissatisfied" and 10 is "extremely satisfied,"
how would you rate your overall satisfaction with ComEd's <PartProg_[Prog]>
program? [SCALE 0-10; 96=not applicable, 98=Don't know, 99=Refused; ROTATE]

[ASK IF CS16<4]
CS15e. You indicated some dissatisfaction with ComEd's <PartProg_[Prog]> program, why did
you rate it this way?
  1. (Too expensive to complete project)
  2. (Poor customer service)
  3. (Not enough information about programs)
  4. (Too hard to get information about programs)
  00. (Other, specify)
  98. (Don't know)
  99. (Refused)

OVERALL SATISFACTION
CS17. Do you plan to participate in the program in the future?
  1. Yes
  2. No
  3. Maybe
  8. (Don't know)
  9. (Refused)

[ASK IF CS17=2, ELSE SKIP TO CS18]
CS17a. Why not? [OPEN END]
  00. (OPEN END)
  98. (Don't know)
  99. (Refused)

CS18. Do you have any suggestions for how ComEd's energy efficiency program could be
improved? [MULTIPLE RESPONSE, UP TO 4]
  1. (Higher incentives)
  2. (More measures)
  3. (Greater publicity)
  4. (Better Communication/Improve Program Information)
  5. (Simplify application process)
  6. (Quicker processing times)
  00. (Other, specify)
  96. (No recommendations)
  98. (Don't know)
  99. (Refused)

NAVIGANT

Firmographics

Last, I have a few general questions about your company.

F1.   What is your company's business type? (PROBE IF NEEDED; IF MANUFACTURING, PROBE IF IT IS LIGHT OR HEAVY INDUSTRY]
      1.   (K-12 School)
      2.   (College/University)
      3.   (Grocery)
      4.   (Medical)
      5.   (Hotel/Motel)
      6.   (Light Industry)
      7.   (Heavy Industry)
      8.   (Office)
      9.   (Restaurant)
      10.   (Retail/Service)
      11.   (Warehouse)
      15.   (Property Management/Real Estate)
      00.   (Other, specify)
      98.   (Don't know)
      99.   (Refused)

F2.   Would you consider your company to be local, regional, national or international in size?
      1.   (Local)
      2.   (Regional)
      3.   (National)
      4.   (International)
      8.   (Don't know)
      9.   (Refused)

F3.   Which of the following best describes the ownership of this facility? (READ OPTIONS)
      1.   My company owns and occupies this facility
      2.   My company owns this facility, but it is rented to someone else, OR
      3.   My company rents this facility
      8.   (Don't know)
      9.   (Refused)

F4.   Which of the following best describes the facility? This facility is…
      1.   This is my company's only location
      2.   This is one of several locations owned by my company, or
      3.   This is the headquarters location of my company with several locations
      8.   (Don't know)
      9.   (Refused)

Thank you for your participation in this survey!