

Evaluation of Illinois Energy Now Public Sector Natural Gas Boiler System Efficiency Program

June 2014 through May 2015

Prepared for:
Illinois Department of Commerce & Economic Opportunity

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Executive Summary

This report presents the results of the impact and process evaluations of the custom and standard incentive components of the Public Sector Natural Gas Boiler System Efficiency Program (Boiler System Efficiency Program) that the Illinois Department of Commerce & Economic Opportunity (hereinafter referred to as the “Department of Commerce”) offers to its non-residential customers. This report presents results for activity during natural gas program year 4 (GPY4), defined as the period from June 2014 through May 2015.

Data for the study were collected through review of program materials and interviews with Department of Commerce staff members, program implementation contractor staff members, program participants, and contractors. The main features of the approach used for the evaluation are as follows:

- An analytical review of program measures was performed to verify gross savings estimates.
- The estimation of free ridership and net program savings was based on participant decision maker survey responses.
- Relevant University of Illinois at Chicago Energy Resources Center (ERC) program implementation staff members were interviewed to obtain information for the process evaluation.

The gross ex post energy savings of the Boiler System Efficiency Program during GPY4 are summarized in Table ES-1. During this period, gross ex post energy savings totaled 800,185 therms and the realization rate is 126%. The net-to-gross ratio for the program is 76%, and net realized natural gas energy savings totaled 604,687 therms.

Table ES-1 Summary of Gross and Net Therm Savings for the Boiler System Efficiency Program

Utility	Ex Ante Therm Savings	TRM-Calculated		ADM-Calculated			
		Gross Ex Post Therm Savings	Net Ex Post Therm Savings	Gross Ex Post Therm Savings	Gross Realization Rate	Net Ex Post Therm Savings	Net-to-Gross Ratio
Ameren	272,348	202,070	174,868	253,782	93%	219,619	87%
Nicor	720,204	653,390	565,433	707,323	98%	612,106	87%
North Shore Peoples	16,806	13,299	11,509	14,842	88%	12,844	87%
Peoples	537,832	319,002	276,059	461,777	86%	399,614	87%
Total	1,547,190	1,187,761	1,027,869	1,437,724	93%	1,244,184	87%

The following presents a selection of key findings from the program evaluation:

- **Increased Program Savings:** The gross ex post therm savings for the program year was 1,437,724 therms compared to the previous year’s 800,185 therms. The program saw a larger share of therms saved from sites located in the Nicor service territories than was the case in the prior year. As was the case in GY3, K-12 schools and universities accounted for a large share of the total program savings.

- **Overall the program marketing and outreach effort is sufficient for the program to meet its natural gas savings goals.** Program staff report that much of the program participation is now be driven by participating contractors. Program participation in terms of number of projects and ex post energy savings is largely comprised of participants from K-12 schools, universities, and local government facilities. The types of participants are similar to prior program years and to participation in the Department of Commerce’s custom and standard programs. Program staff reports that public health care facilities are one market segment that has been targeted, but for which the program has seen little participation. The lack of participation from this segment may be due to the reluctance of financial decision makers to expend resources on longer term energy savings, a position that may be a function of constrained financial resources.
- **Participants largely reported satisfaction with the participation process and few identified significant concerns or difficulties with the participation process.** The timeliness of rebate payments continues to be the issue that most typically results in participant dissatisfaction. Participants that contacted staff with questions or concerns reported satisfaction with the thoroughness and timeliness of staff’s response. Overall program satisfaction remains high with most participants reporting that they are very satisfied with the program.
- **ERC and Department of Commerce staff report maintaining regular communication and both parties reported that program communication processes are effective.**
- **ADM staff noted two issues with the program tracking data:** 1) use of the numeric location identifier appeared to be inconsistently associated with street addresses, and 2) contacts for project managers were not included in the program tracking data.

The following recommendations based on the review of the program are offered for the Department of Commerce’s consideration.

- Develop a one page hand out that describes the key program participation steps to interested program participants. The handout may also be used to manage expectations for payment of program rebates.
- Include names and contact information for the participant project manager in the project tracking database. This information will facilitate the administration of interviews of program participants for the purposes of assessing net savings. Modifying the database design may facilitate entry of participant project manager information.
- Review procedures for assigning location identifiers to maintain consistency in how it is used.

1. Introduction

This report presents the results of the impact and process evaluation of the Boiler System Efficiency Program offered by the Illinois Department of Commerce during the period June 2014 through May 2015.

1.1 Description of Program

The Boiler System Efficiency Program generates natural gas savings through efficiency improvements to boilers (i.e., boiler tune-ups), installation of insulating pipe wrap, steam trap repair or replacement, boiler reset controls, and parallel positioning systems. The program is available to local governments, municipal corporations, public school districts, community college districts, public universities, and state and federal facilities. Incentives are only available for sites receiving natural gas service from Ameren Illinois, Nicor, Peoples, or North Shore.

The Department of Commerce partnered with the Energy Resources Center (ERC) at the University of Illinois at Chicago to administer the Boiler System Efficiency Program. The Boiler System Efficiency Program was piloted during GPY1 and has since been included in the Department of Commerce's energy efficiency program portfolio. Incentives are available to encourage owners of natural gas boilers to invest in efficiency improvements made by a qualified contractor. The incentives that were available during GPY4 are described below:

- Incentives for boiler tune-ups based on boiler capacity were set at \$0.50 per kBtu/h. Tune-up incentives are available every 36 months. Boiler output must be greater than 200,000 Btuh
- Incentives for boiler reset controls based on boiler capacity were set at \$0.75 per kBtu/h, up to a maximum of \$1,200 per boiler. Boiler output must be greater than 200,000 Btuh.
- Incentives for steam trap repair or replacement for traps that are leaking. Leak detection can be performed using a pyrometer, ultrasound, or a visual inspection. There is a \$30 incentive for each of these steam trap surveys with a maximum \$5,000 awarded. Steam trap replacements included under a scheduled maintenance program are not eligible for the incentives. The incentive levels range between \$200 and \$600 per steam trap and are dependent on the line pressure measured at the trap.
- Incentives for pipe insulation are available for missing or defective pipe insulation, but new pipes are not eligible. The level of the incentives depend on the pipe size and whether or not the insulation is standard or removable, specifically:
 - \$8 per foot for standard insulation or \$40 for removable insulation if pipes are less than 1 inch in diameter;
 - \$10 per foot for standard insulation or \$60 for removable insulation if pipes are 1 ¼ to 2 inches in diameter;
 - \$16 per foot for standard insulation or \$80 for removable insulation if pipes are 2 ½ to 5 inches in diameter; and

- \$20 per foot for standard insulation or \$100 for removable insulation if are pipes larger than 5 inches in diameter.
- Incentives of \$3.00 per therm saved for parallel positioning systems. Boiler output must be greater than 1,500,000 Btuh.

Applicants for large projects are required to receive preapproval prior to beginning the project. Preapproval is required if any of the following conditions are met:

- Total requested incentives exceed \$10,000;
- Total estimated number of failed steam traps exceeds 30;
- Total estimated pipe insulation exceeds 300 linear feet;
- Applicant expects any incentives for Parallel Positioning Control Systems; and/or
- Applicant wishes to receive an instant discount.

Participants may also seek preapproval if they wish to confirm that they are eligible for the program or reserve incentive funds.

1.2 Expected Therm Savings

Expected therm savings by utility are shown in Table 1-1. There were 76 projects according to the Illinois Energy Now database for the period June 2014 through May 2015, which were expected to provide savings of 1,547,190 therms.

Table 1-1 Expected Therm Savings for Boiler System Efficiency Program

<i>Utility</i>	<i>Expected Therm Savings</i>
Ameren	272,348
Nicor	720,204
North Shore	16,806
Peoples	537,832
Total	1,547,190

1.3 Overview of Evaluation Approach

The overall objective for the impact evaluation of the Boiler System Efficiency Program was to determine the gross and net energy savings resulting from the program's custom and standard projects during the period June 2014 through May 2015.

The approach for the impact evaluation was based on the following features:

- Available documentation (e.g., audit reports, invoices, savings calculation work papers, etc.) was reviewed for projects, with particular attention given to the calculation procedures and documentation for savings estimates.

- Gross savings were verified through analytical desk review.
- A sample of participants was surveyed to gather information on their decision making, opinions of the program, and factors determining net-to-gross savings ratios for the program.

1.4 Organization of Report

This report on the impact and process evaluation of the Boiler System Efficiency Program for the period June 2014 through May 2015 is organized as follows:

- Chapter 2 presents and discusses the analytical methods and results of estimating gross savings for measures implemented under the program.
- Chapter 3 presents and discusses the analytical methods and results of estimating program net savings.
- Chapter 4 presents and discusses the analytical methods and results of the process evaluation of the program.
- Appendix A provides a copy of the questionnaire used for the survey of participant decision makers.
- Appendix B presents the results of the survey of participant decision makers for participants that received incentives under the program.

2. Estimation of Gross Savings

This chapter addresses the estimation of gross ex post therm savings resulting from measures installed in facilities of customers that obtained incentives under the Boiler System Efficiency Program during the period June 2014 through May 2015. Section 2.1 describes the methodology used for estimating gross savings. Section 2.2 presents the program's gross realized natural gas energy savings.

2.1 Methodology for Estimating Gross Savings

The methodology used for estimating gross ex post savings is described in this section.

2.1.1 Review of Documentation

Department of Commerce's program implementation contractor, University of Illinois at Chicago Energy Resources Center, provided documentation for the projects completed during the program year. The first step in the evaluation effort was to review this documentation and other relevant program materials.

For each project, the available documentation (e.g., audit reports, savings calculation work papers, invoices, etc.) for each rebated measure was reviewed, with particular attention given to the calculation procedures and savings estimates. Documentation reviewed for all projects included program forms, databases, reports, billing system data, weather data, and any other potentially useful data.

2.1.2 Analytical Desk Review

ADM evaluation staff reviewed the natural gas energy savings algorithms to verify that the assumptions were reasonable, the algorithms were correct for assigning gross ex ante therm savings per measure, and the procedures used aligned with the methodologies outlined in the Illinois Statewide Technical Reference Manual (TRM) Version 3.0. In cases where project documentation was incomplete or unclear, evaluation staff contacted ERC to seek further information. This ensured the development of accurate realized natural gas energy savings estimates.

ADM calculated annual energy savings for each sampled measure per the formula given in the Illinois Statewide TRM. For measures where an engineering review determined that savings could be more accurately estimated using methodology not described in the TRM, an alternative savings (ADM Calculated) was also calculated. Table 2-1 displays each program measure, applicable section of the TRM, and the methodology that was used to estimate savings. No boiler reset controls or parallel positioning controls were implemented through the Boiler Program in GPY4.

Table 2-1 Savings Methodology

<i>Program Measure Name</i>	<i>TRM Measure Name</i>	<i>Section in Illinois TRM</i>	<i>Reported Savings</i>
Boiler Tune-Up	Space Heating Boiler Tune-up	4.4.2	TRM
Pipe Insulation	Pipe Insulation	4.4.14	TRM and ADM Calculated
Steam Trap Replacement of Retrofit	Steam Trap Replacement	4.4.16	TRM

For pipe insulation, ADM evaluation staff determined that additional data were available that would aid in providing a more accurate savings estimate than the TRM methodology. The TRM algorithm for pipe insulation was still employed, however, information regarding insulation material, insulation thickness, pipe diameter, and process temperature was used to generate heat loss inputs for sampled measures using 3E Plus v4.0 software. The TRM also used 3E Plus v4.0 software for heat loss inputs, but not on an individual pipe basis. These deemed heat loss inputs did not succeed in representing many of the pipe variations present within the program. For example, the TRM algorithm uses heat loss inputs developed from pipes with a diameter of 2” for all pipe insulation savings calculations, regardless of actual pipe diameter.¹

2.1.3 Sampling Plan

A sample of projects (as entered into the Illinois Energy Now database) was selected and an ex post savings calculation was performed for each measure within each project. A stratified random sampling approach was used. Samples of projects were developed with statistical precision levels sufficient enough to enable natural gas savings to be estimated with a better than $\pm 10\%$ statistical precision at a 90% confidence level.

2.2 Gross Ex Post Savings Estimation

To estimate program gross ex post therm savings, data were collected and analyzed for 41 projects. The data were analyzed using the methods described in Section 2.1 to determine project energy savings and to determine realization rates for the program. The results of that analysis are reported in this section.

2.2.1 Sampling

Data used to estimate the gross savings of the Boiler Program were collected through samples of projects completed during the June 2014 through May 2015 period. Strata boundaries, realization rates, gross ex post savings, and relative precision are reported Table 2-2. Gross ex post savings

¹ ADM submitted an item into the VEIC’s TRM Request Tracker on September 11, 2015, regarding updating the Illinois Statewide TRM to allow for heat loss estimates to be developed using 3E Plus v4.0 software for all pipe insulation projects. ADM also submitted an item into the VEIC’s TRM Deviation Tracker on the same date.

of the program totaled 1,437,724 therms. The relative precision of the gross ex post savings is $\pm 7\%$ at the 90% confidence level.

Table 2-2 Stratum-Level Savings

<i>Stratum</i>	<i>Strata Boundaries (Therms)</i>	<i>Number of Projects</i>	<i>Number of Projects Sampled</i>	<i>Ex Ante Therm Savings</i>	<i>Ex Post Therm Savings</i>	<i>Stratum Level Realization Rate</i>	<i>Relative Precision at 90% Confidence Level</i>
1	> 440,000	1	1	443,547	368,354	83%	NA
2	30,000-440,000	11	8	863,763	857,615	99%	10%
3	< 30,000	64	32	239,880	211,755	88%	21%
Total		76	41	1,547,190	1,437,724	93%	7%

Table 2-3 displays program savings by utility. Nicor Gas and Peoples Gas accounted for 49% and 32% of program savings, respectively. Ameren Gas accounted for 18% of therms saved by the program while North Shore Gas accounted for 1%.

Table 2-3 Savings by Utility

<i>Utility</i>	<i>Ex Ante Therm Savings</i>	<i>TRM-Calculated</i>		<i>ADM-Calculated</i>	
		<i>Gross Ex Post Therm Savings</i>	<i>Gross Ex Post Therm Savings</i>	<i>Gross Ex Post Therm Savings</i>	<i>Gross Realization Rate</i>
Ameren	272,348	202,070	253,782	93%	
Nicor	720,204	653,390	707,323	98%	
North Shore	16,806	13,299	14,842	88%	
Peoples	537,832	319,002	461,777	86%	
Total	1,547,190	1,187,761	1,437,724	93%	

Gross ex post natural gas energy savings are provided in Table 2-4. Savings are reported by utility and measure type. Pipe insulation accounted for 40% of program savings; a decrease of 8% from GPY3. Forty-percent of GPY4 savings were achieved through steam trap replacements; a 5% increase from the previous year. Boiler tune-ups accounted for 20% of savings. In GPY3, savings associated with this measure was less than 20% of the total therms saved.

Table 2-4 Realized Savings by Utility and Measure Type

<i>Utility</i>	<i>Boiler Tune-ups</i>	<i>Steam Traps</i>	<i>Pipe Insulation</i>	<i>Total</i>
Ameren	22,052	137,103	94,627	253,782
Nicor	264,157	266,420	176,746	707,323
North Shore	505	0	14,337	14,842
Peoples	3,127	167,149	291,500	461,777
Total	289,841	570,672	577,210	1,437,724

Table 2-5 displays the gross ex ante and ex post therm savings for the Boiler System Efficiency Program by measure type.

Table 2-5 Expected and Realized Gross Annual Savings by Measure Type

<i>Measure Type</i>	<i>Ex Ante Therm Savings</i>	<i>Gross Ex Post Therm Savings</i>	<i>Realization Rate</i>
Boiler Tune-Ups	304,744	289,841	95%
Pipe Insulation	670,702	577,210	86%
Steam Traps	571,745	570,672	100%
Total	1,547,190	1,437,724	93%

2.2.2 Discussion of Annual Gross Savings Results

The realization rate program-wide was 93%. Differences in inputs for both the boiler tune-up and pipe insulation algorithms accounted for the entirety of the discrepancy.

In several boiler tune-ups projects, the low-fire boiler combustion reports were used in calculating the savings factor input of the algorithm. Both ADM engineering staff and the ERC agreed that high-fire boiler combustion reports are the most accurate input for savings estimates. If low-fire and high-fire reports were available, ADM calculated the ex post savings with the high-fire report. If high-fire readings were unavailable, ADM would use the TRM default savings factor of 1.6%. These adjustments resulted in an ex post savings that was lower than ex ante.

The discrepancy between pipe insulation ex ante savings versus ex post savings was largely due to differences in selection of pipe location and hours of operation based on available documentation. In situations where documentation or ex ante inputs were unclear, the ERC was contacted for clarification.

2.2.3 Gross Lifetime Savings

Gross lifetime savings were estimated by multiplying gross annual savings for each measure by the appropriate EUL provided by the Illinois TRM. Table 2-6 displays gross lifetime therm savings by measure and utility.

Table 2-6 Gross Lifetime Therms Savings by Measure and Utility

<i>Utility</i>	<i>Boiler Tune-ups</i>	<i>Steam Traps</i>	<i>Pipe Insulation</i>	<i>Total</i>
Ameren	66,157	822,617	1,419,408	2,308,182
Nicor	792,470	1,598,522	2,651,188	5,042,180
North Shore	1,516	0	215,052	216,568
Peoples	9,381	1,002,895	4,372,506	5,384,782
Total	869,524	3,424,034	8,658,154	12,951,712

3. Estimation of Net Savings

This chapter presents the net impacts of the Public Sector Natural Gas Boiler System Efficiency Program during the period June 2014 through May 2015.

3.1 Procedures Used To Estimate Net Savings

Net savings are defined as the portion of gross savings that can be attributed to the effects of the program. The savings attributed to the program are comprised of two components, the program gross savings less any free ridership effects and spillover effects.

Free riders of a program are defined as those participants that would have implemented the same energy efficiency measures and achieved the observed energy changes, even in the absence of the program. That is, because the energy savings realized by free riders are not induced by the program, these savings should not be included in the estimates of the program's actual (net) impacts. Without an adjustment for free ridership, some savings that would have occurred naturally would be incorrectly attributed to the program.

Spillover effects occur when energy savings accrue that are not included in program gross energy savings but are attributable to the program. That is, spillover savings result from program induced measures implemented outside of the program.

ADM performed a net savings analysis to estimate the impacts of the energy efficiency measures attributable to the Boiler System Efficiency Program that were net of free ridership and inclusive of participant spillover using a self-report methodology. Information on the program's impact on the participants' decision making was collected from a sample of program participants through a decision-maker survey. Appendix A provides a copy of the survey instrument. The following sections describe the procedures used to estimate net savings.

3.1.1 Free-Ridership

The following subsections describe the procedures used to develop participant free-ridership scores.

3.1.1.1 Free-Ridership Component Scores

Three component scores to estimate the likelihood that a participant would have implemented the project in the absence of the program were calculated to estimate free ridership.

The No-Program Score is the numeric response to the following question:

"Using a scale from 0 to 10, where 0 is 'Not at all likely' and 10 is 'Extremely likely', if the Department of Commerce's program had not been available, what is the likelihood that you would have implemented exactly the same quantity of [MEASURE] at exactly the time that you implemented it?"

The Program Components Score is based on ratings of the importance of various factors related to the decision to implement the project. Participants rate the importance of program and non-program factors. The Program Components Score is calculated as 10 - on the highest rating of the following program factors:

- Availability of the program incentive;
- Technical assistance from program staff;
- Program staff recommendation;
- Program administrator marketing materials; and
- Endorsement or recommendation by program partner staff.

The Program Influence Score is based on the relative importance of program and non-program factors to the decision to implement the measure. After rating the program and non-program factors, survey respondents were asked to allocate 10 points to program and non-program factors that reflected the importance of the program and other considerations to their decision to implement the project. Specifically, respondents were asked the following:

“You could consider those factors you just rated to be either program factors or non-program factors that affected the decision to implement the [MEASURE]. Consider anything related to the program to be a single thing called the “program factor.” Consider anything unrelated to the program to be a single thing called the “non-program factor.” If you were given a total of 10 points to allocate between the program factor and the non-program factor, where a score of “0” means that the factor had no impact on the decision to implement the energy efficiency project, and a score of “10” means that the factor had DECISIVE impact on the decision to the implement the energy efficiency project, how many points would you give to the program factor?”

The Program Influence Score is equal to 10 minus the points allocated to the program factor.

The respondents overall free-ridership score for the participant is calculated as the average of the No-Program, Program Components, and Program Influence scores.

3.1.1.2. Application of Free Ridership Scores to Additional Projects

The questions used to calculate free ridership were asked in regards to a single project, defined as a measure implemented at a single location. In several instances, participants implemented additional projects. Responses to survey questions were used to determine if the decision making for the additional projects was similar to the decision making for the focal project, suggesting that the free ridership score for the focal project is also applicable to the additional projects implemented by the respondent.

Participants who implemented the same measure as the focal measure at other locations were asked the following question:

Our records show that [ORGANIZATION] also received an incentive from the Department of Commerce's [PROGRAM] for other [MEASURE] projects. Was it a single decision to complete all of those [MEASURE] projects for which you received an incentive from the program or did each project go through its own decision process?

Free ridership scores calculated for the focal project were applied to additional implementations of the measure at other locations for respondents stating that it was a single decision.

Participants who implemented additional measures at the same location as the target location were asked the following question:

Our records show that [ORGANIZATION] also received an incentive from the Department of Commerce's [PROGRAM] for a [ADDITIONAL MEASURES] project at [LOCATION]. Was the decision making process for that project the same as for the [MEASURE] project we have been talking about?

Free ridership scores calculated for the focal project were applied to the additional measures for respondents stating that it was the same decision making process.

3.1.1.3. Consistency Checks

Various checks of the consistency of responses provided by respondents were incorporated into the survey design. Additional questions were asked of respondents who provided responses to two or more questions that could imply that the program is both influential and not influential. In most cases the survey subsequently provided respondents an opportunity to revise their original numeric response, but in some cases, the respondents were asked to explain the why the responses differed. The survey instrument in Appendix A provides additional information about the specific consistency check questions and conditions under which they were asked.

Survey responses were reviewed by two analysts for cases where (1) the calculated free ridership, component scores, or other survey responses suggest inconsistencies that may imply that the scored free-ridership was inaccurate, and (2) the respondent provided clear information on how the implemented project might have differed if the program had not been available that would imply that scores should be adjusted to account for partial free ridership effects.

3.1.2 Participant Spillover

To assess whether or not spillover savings were associated with program participants, survey respondents were asked questions about energy saving projects implemented outside of the program.

Respondents that reported installing additional measures were asked to provide information on the project. To determine whether or not the savings associated with measures are attributable to the program respondents were asked the following two questions:

- 1) “How important was your experience in the <PROGRAM> in your decision to implement this Measure, using a scale of 0 to 10, where 0 is not at all important and 10 is extremely important?”
- 2) “If you had not participated in the <PROGRAM>, how likely is it that your organization would still have implemented this measure, using a 0 to 10, scale where 0 means you definitely WOULD NOT have implemented this measure and 10 means you definitely WOULD have implemented this measure?”

Based on responses to these two questions, a program attribution score is calculated as follows:

$$\text{(Rating of Program Importance + (10 - Likelihood of Implementing without Participation))} / 2$$

Savings are considered attributable to the program if the score is equal to 8 or greater.

3.1.3 Survey Administration

EPY7/GPY4 program participants were surveyed by telephone. The sample was developed from data reported in the program-tracking database. Data were reviewed for missing or incomplete information. Additionally, participants were crosschecked across participation records from other programs in order to prevent the administration of multiple surveys to the same participant.

Program projects were defined as the installation of a measure at a single location. In total there were 51 unique decision-makers who completed through the program. Nine participants also completed projects under other Department of Commerce programs. Additionally, several participants completed projects involving multiple program measures or completed projects at other locations. In total 170 projects were completed through the program.

Program participants were contacted up to five times to complete the survey. In total 24 decision-makers completed the survey. Table 3-1 displays final response and cooperation rates for the survey.

Table 3-1 Final Dispositions and Response and Cooperation Rates

	<i>Percent of Contacts</i>
Interview	
Complete	47%
Partial	2%
Eligible, non-interview	8%
Unknown eligibility, non-interview	43%
Not eligible	0%
Response Rate*	47%
Cooperation Rate*	96%

**AAPOR Cooperation Rate 3 and Response Rate 3 were used for the purpose of calculating response and cooperation rates.*

3.2 Results of Net Savings Estimation

The procedures described in the preceding section were used to estimate free ridership, spillover and net-to-gross ratios for the Boiler System Efficiency Program for the period June 2014 through May 2015.

3.2.1 Free Ridership

Program level free ridership estimates were weighted by ex post gross energy savings. A two-step procedure was used to develop the weighted estimate.

- Weighted ex post gross energy savings for the measures were developed by applying sample stratum energy weights to the ex post gross energy savings.
- Program level free ridership was calculated by weighting free ridership scores for measures by the weighted ex post gross energy savings.

Table 3-2 summarizes the free ridership scores for the sample of program participants. Overall program level free ridership is .13.

Table 3-2 Summary of Free Ridership Scores and Precision

Stratum	Sample Frame		Survey Respondents			Average Free Ridership	Absolute Precision at 90% Confidence Level
	Number of Projects	Therm Savings	Number of Respondents	Number of Applicable Projects*	Therm Savings		
1	28	1,244,882	6	9	445,439	0.13	0.01
2	55	162,113	8	14	32,682	0.19	0.05
3	87	30,729	10	46	15,329	0.14	0.07
Total	170	1,437,724	24	69	493,451	0.13	0.09

* Applicable projects include the focal project asked about in the free ridership battery, plus additional projects for which decisions were made using the same process.

Table 3-3 summarizes the measure-level free ridership estimates and the 90% confidence intervals. Variance in free ridership across measure types may be accounted for by sampling error.

Table 3-3 Measure-Level Free Ridership Scores and Confidence Intervals

Measure	Average FR	90% Confidence Interval	
		Lower Bound	Upper Bound
Steam Trap Replacement Or Repair	0.12	0.10	0.14
Boiler Tune-Up	0.16	0.09	0.23
Pipe Insulation	0.14	0.12	0.15

Figure 3-1 displays free-ridership scores by stratum. As shown, the variation in scores is similar across strata.

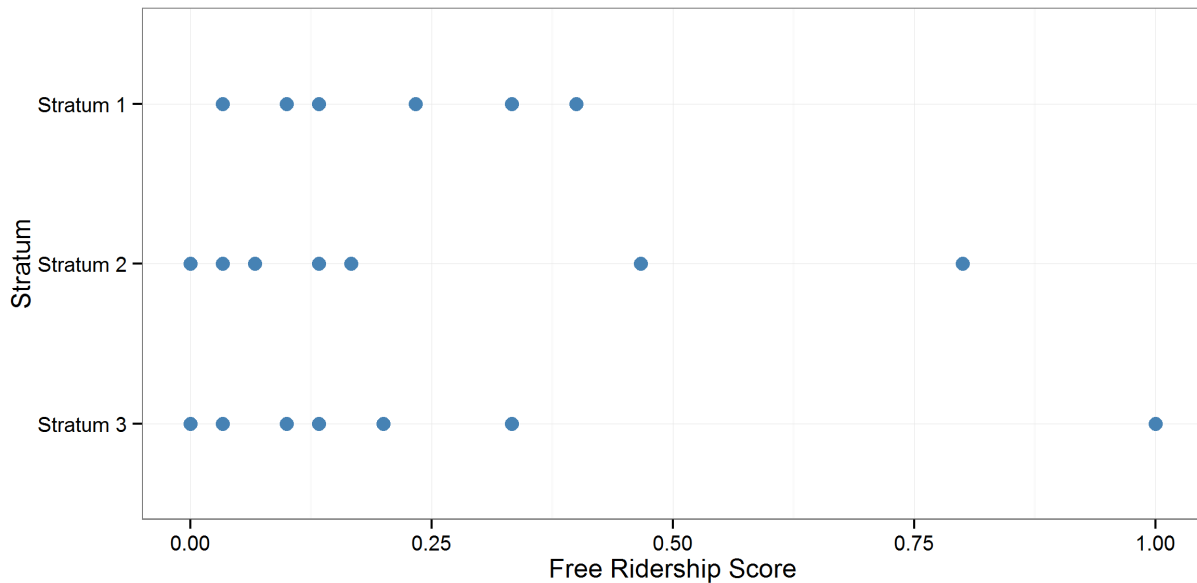


Figure 3-1 Free-Ridership Scores by Stratum

3.2.2 Participant Spillover

None of the survey respondents identified any projects that qualified as program spillover.

3.2.3 Net Therm Savings

Table 3-2 summarizes the net savings of the Boiler System Efficiency Program for GPY4. The net ex post natural gas savings for the period are 1,244,184 therms and equal 87% of gross ex post savings.

Table 3-4 Summary of Net Savings

Utility	Ex Ante Therm Savings	Gross Ex Post Therm Savings	Net Ex Post Therm Savings	Net-to-Gross Ratio
Ameren	272,348	253,782	219,619	0.87
Nicor	720,204	707,323	612,106	0.87
North Shore	16,806	14,842	12,844	0.87
Peoples	537,832	461,777	399,614	0.87
Total	1,547,190	1,437,724	1,244,184	0.87

4. Process Evaluation

This chapter presents the results of the process evaluation for the Public Sector Natural Gas Boiler System Efficiency Program during natural gas program year four (GPY4). Because no significant changes have occurred in program operations, this chapter is limited to a discussion current and planned program operations and select responses to the participant survey.

4.1 Methodology for Process Evaluation

The purpose of the process evaluation will be to examine program operations and results throughout the program operating year, and to identify potential program improvements that may prospectively increase program efficiency or effectiveness in terms of participation and satisfaction levels. Key research questions addressed by this evaluation include:

- Does the program meet the needs of various public sector market segments?
- How effective are the outreach efforts?
- How effective is the participation processes?
- How effective are internal communications and administrative processes?
- Do the documentation and project tracking systems and procedures support reporting, monitoring, and evaluation needs?
- How satisfied are participants?

The research activities to be undertaken to answer the research questions are described below.

4.1.1 Review of Program Documentation

ADM staff reviewed available program documentation including materials on the website such as applications, informational notices, and marketing collateral; grant awards to program partners; any available program manuals or implementation plans; and filed program plans. The purpose of the review will be to identify the key activities undertaken by the program, determine which entity is engaged in the activity, and to identify purposes and objectives of the activities.

4.1.2 Interviews with Program Staff

Interviews with Department of Commerce and program partner staff provided an opportunity to clarify our understanding of the key activities used to deliver the program and its intended objectives. Topics of discussion included changes made to program processes and materials during GPY4 and key program successes and challenges.

4.1.3 Program Participant Surveys

Surveys of program participants were performed to assess participants experience with implementing projects through the program. The objective of the survey is to identify aspects of the program that are performing sub – optimally with the intent of developing actionable feedback to program staff. The topics to be covered include:

- Participants’ assessment of the application process.
- Participants’ interactions with program staff.
- Participant’s suggestions for program improvement.
- Program satisfaction.

4.1.4 Review of Program Tracking Data and System

ADM will perform an assessment of the program tracking data and system. This assessment included a review of the fields collected and an assessment of missing data / inaccurate data. In addition to this review, ADM will review staff’s use of the data system in terms of its effectiveness as a tool for program delivery and management.

4.2 Summary of Findings and Recommendations

- Overall the program marketing and outreach effort is sufficient for the program to meet its natural gas savings goals. Program staff report that much of the program participation is now be driven by participating contractors. Program participation in terms of number of projects and ex post energy savings is largely comprised of participants from K-12 schools, universities, and local government facilities. The types of participants are similar to prior program years and to participation in the Department of Commerce’s custom and standard programs. Program staff reports that public health care facilities are one market segment that has been targeted, but for which the program has seen little participation. The lack of participation from this segment may be due to the reluctance of financial decision makers to expend resources on longer term energy savings, a position that may be a function of constrained financial resources.
- Participants largely reported satisfaction with the participation process and few identified significant concerns or difficulties with the participation process. The timeliness of rebate payments continues to be the issue that most typically results in participant dissatisfaction. Participants that contacted staff with questions or concerns reported satisfaction with the thoroughness and timeliness of staff’s response. Overall program satisfaction remains high with most participants reporting that they are very satisfied with the program.
- ERC and Department of Commerce staff report maintaining regular communication and both parties reported that program communication processes are effective.

- ADM staff noted two issues with the program tracking data: 1) use of the numeric location identifier appeared to be inconsistently associated with street addresses, and 2) contacts for project managers were not included in the program tracking data.

The following recommendations based on the review of the program are offered for the Department of Commerce's consideration.

- Develop a one page hand out that describes the key program participation steps to interested program participants. The handout may also be used to manage expectations for payment of program rebates.
- Include names and contact information for the participant project manager in the project tracking database. This information will facilitate the administration of interviews of program participants for the purposes of assessing net savings. Modifying the database design may facilitate entry of participant project manager information.
- Review procedures for assigning location identifiers to maintain consistency in how it is used.

Review the assignment of location identifiers to project locations and consider assigning a single location identifier to each site address. This change will facilitate long term tracking of repeated site program participation.

4.3 Detailed Findings

4.3.1 Public Sector Boiler System Efficiency Program Participant Profile

Figure 4-1 presents the number of projects, defined as an application, by type completed during GPY4. The largest number of projects, 53, involved boiler tune-ups. Smaller numbers of projects involved steam traps (11), pipe insulation (10). This is consistent with program activity in prior years. K-12 schools accounted for 60% of the projects completed, while universities accounted for 9% of projects.

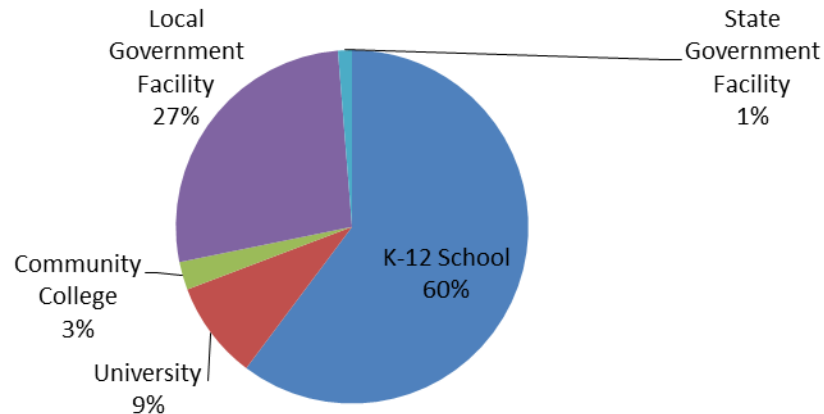


Figure 4-1 Number of Projects by Participant Type

Figure 4-2 displays the share of gross ex post therm savings by participant type. Universities accounted for a disproportionately large share of the savings relative to the number of projects completed. Although universities accounted for 9% of the projects completed, they accounted for 47% of the gross ex post savings. K-12 schools accounted for 36% of the gross ex post savings.

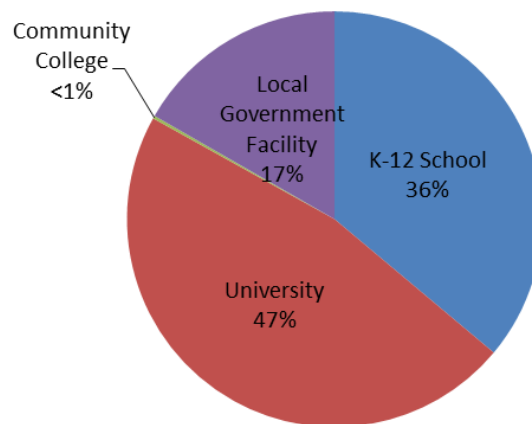


Figure 4-2 Distribution of Gross Ex Post Therm Savings by Participant Type

Figure 4-3 displays the cumulative gross ex post therm savings for the projects completed during GPY4. As shown, ten projects accounted for more than 80% of the program natural gas savings. As noted by program staff, annual energy savings is dependent on a small number of large projects.

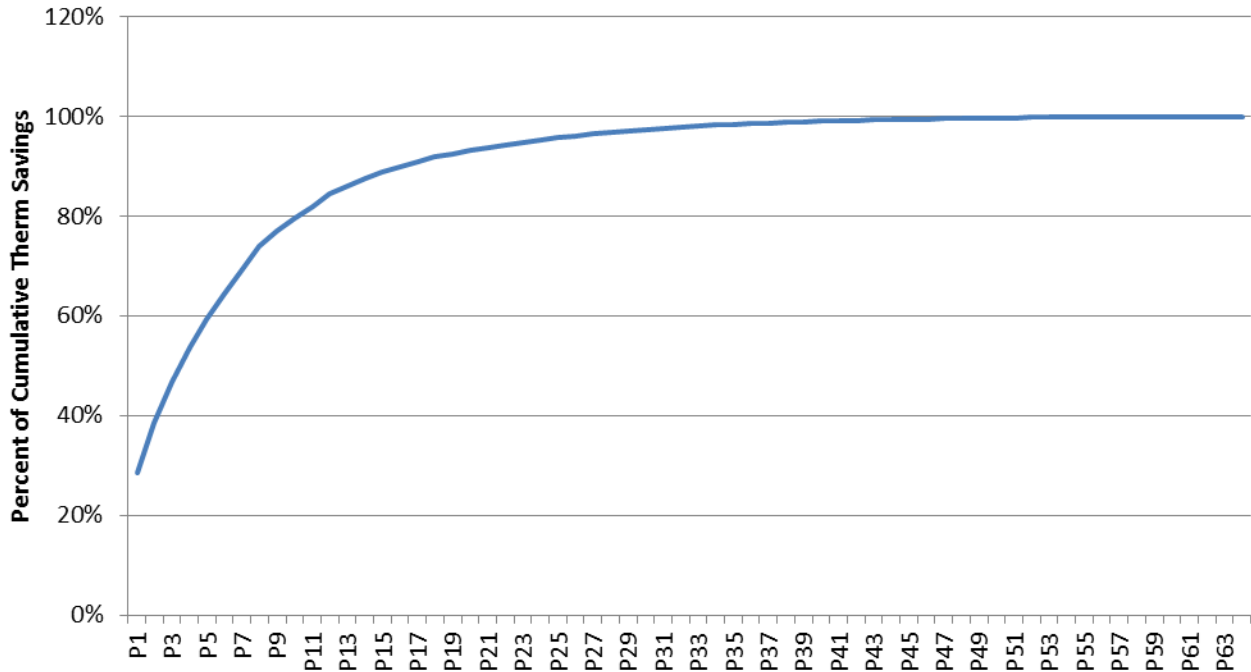


Figure 4-3 Cumulative Project Gross Ex Post Therm Savings

4.3.2 Participant Outcomes

A telephone survey was conducted to collect data about participant decision-making, preferences, and opinions of the Boiler System Efficiency Program. During GPY4, the program offered incentives for boiler tune-ups, steam trap replacement or repair, pipe insulation, boiler reset controls, and parallel positioning control systems. In total, 24 participants who implemented a project through the program completed the survey.

Table 4-1 through Table 4-3 display the firmographic characteristics of survey respondents.

Table 4-1 Survey Respondent Facility Type

<i>Facility</i>	<i>Percent of Respondents (n=24)</i>
K-12 School	58%
Correctional Facility	8%
Community College	8%
Other	8%
Public Library	4%
State University	4%
Maintenance Shop	4%
Recreational Facility	4%

Table 4-2 Payment of Utilities

<i>Organization Pays Full Cost of Utility Service</i>	<i>Percent of Respondents (n=24)</i>
Natural Gas	92%
Electricity	92%

Table 4-3 Facility Ownership

<i>Ownership of Facility</i>	<i>Percent of Respondents (n=24)</i>
Own and Occupy	96%
Own and Rent to Someone	
Else	4%
Rent	0%

4.3.2.1. Source of Program Awareness and Preferred Outreach Methods

Table 4-4 displays the ways in which survey respondents reported learning about the Public Sector Boiler System Efficiency Program. Similar to last year, vendors, contractors, and other external energy specialists such as energy consultants were the source of awareness about the program for approximately one-half of the participants.

Table 4-4 How Participant Decision Makers Learned about the Program

<i>Source of Program Awareness</i>	<i>Percent Respondents (n=24)</i>
From a trade ally/contractor/ energy consultant	33%
Previous experience	17%
The program website	13%
Through an internet search	13%
A presentation at a conference or workshop	8%
Email	8%
SEDAC	4%
ERC	4%
Word of mouth	4%
SEDAC/Energy 360	4%

As shown in Table 4-5, survey respondents most frequently stated that the best ways to provide program updates is through email, followed by presentations at events or conferences, through trade allies or contractors, and through website updates.

Table 4-5 Best Ways to Receive Program Information

<i>Best Ways to Receive Program Information</i>	<i>Percent of Respondents (n=23)</i>
Email	70%
Presentations at events or conferences	26%
Through trade allies/vendors/contractors	26%
Website updates	26%
Direct mailings	9%
Telephone	4%

4.3.2.2. Clarity of Application Process

Respondents reported that the application process was clear, as summarized in Table 4-6.

Table 4-6 Clarity of Application Process

Clarity of Application Process*	Percent of Respondents (n = 13)
Percent Favorable (> 6)	85%
Percent Unfavorable (<4)	0%
Percent Don't Know	15%
Average	8.9

*Responses rated from 0 to 10 where 10 means completely clear and 0 means completely unclear.

4.3.2.3. Participant Satisfaction with the Program

Survey respondents were asked to rate their level of satisfaction with the program. Figure 4-4 displays responses to questions regarding satisfaction with aspects of the program. The responses indicate that respondents were satisfied with all aspects of the program. The amount of time to receive the rebate was the aspect of program that respondents were least satisfied with, although 50% of respondents gave this aspect the highest satisfaction rating. This is consistent with prior evaluations of the program. Staff has made efforts to reduce the time to pay the rebate.

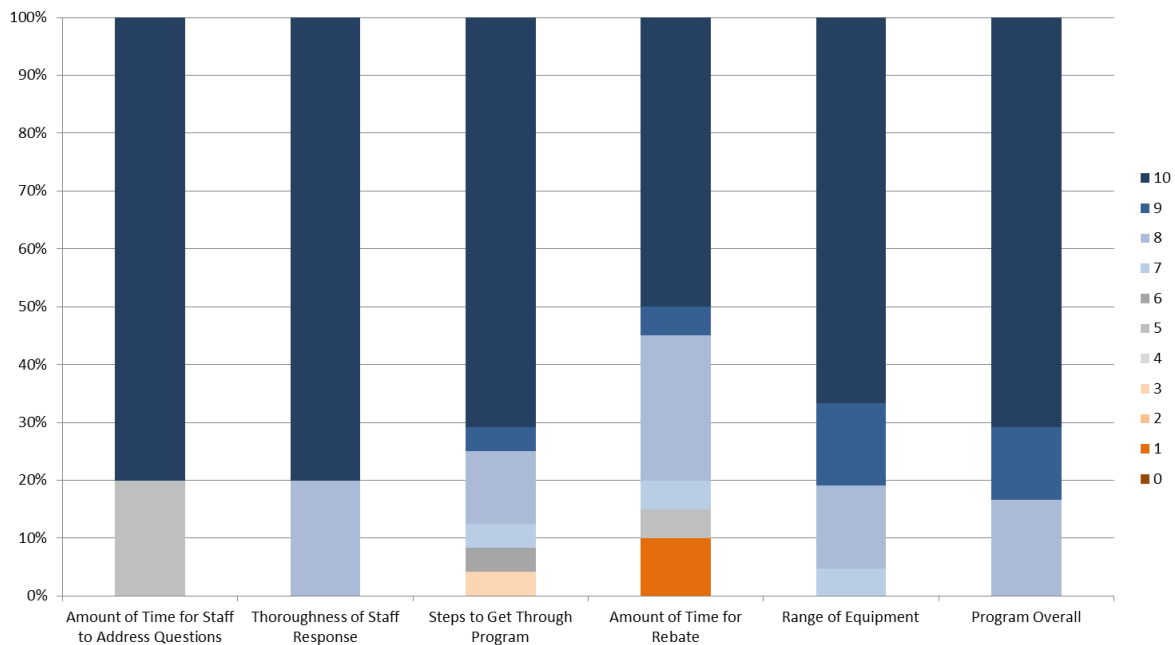


Figure 4-4 Satisfaction with Selected Aspects of the Program

4.3.3 Program Operations

This section summarizes the core findings of the assessment of the Boiler System Efficiency Program operations. This assessment is primarily informed by interviews completed with the ERC and Department of Commerce program manager.

No significant changes to the program design during the program year. The most significant change to program administration was the use of the Department of Commerce's program database to track program activity. Prior to the use of this database, program implementation staff tracked activity in spreadsheets. Program staff began reporting project information in the database at the end of the program year.

The following summarizes points of discussion raised during interviews.

4.3.3.1. Program Objectives

The Boiler System Efficiency Program targets completing around 60 to 70 projects a program year. The program has also made efforts to promote other boiler system measures in addition to tune-ups such as the pipe insulation and steam traps. Few applicants have implemented controls systems since these were introduced by the program, but staff continue to promote these as a measure. Additionally, the program tries to see that a mix of small and large projects are completed each year, but note that annual savings are usually largely dependent on the completion of a few larger projects.

4.3.3.2. Program Outreach and Marketing

Staff stated that much of the program activity is now driven by service providers. To supplement their promotional efforts, program staff engages in direct outreach with larger organizations that have participated in the past to encourage participation from other facilities. Additionally, some participants enter the program through referrals from the Department of Commerce or from the Smart Energy Design Assistance Center (SEDAC). SEDAC may identify opportunities for boiler system improvements when completing energy assessments of public sector facilities.

The program has made an effort to target public health care facilities but has had difficulty in getting participation from this market segment. Staff reported that they have seen some interest from facility staff at health care facilities, but that financial decision makers have not been interested in projects despite efforts by staff to demonstrate the financial benefits of participation.

During the last program year, the Department of Commerce and its partners have made an effort to create more unified branding for all programs offered, regardless of the specific program partner managing it. This effort has impacted the Boiler System Efficiency Program's marketing collateral. Specifically, a handout that originally focused on the Boiler System Efficiency Program measures now includes information on all standard gas measures.

4.3.3.3. Communications

The program manager at ERC maintains regular communications with the Department of Commerce manager. The two primary formal means of maintaining communications are through a monthly meeting and through a quarterly report that provides information on current program status including number of projects completed and funding utilized. The Department of Commerce program manager also has regular conversations with other ERC staff. Both ERC and

Department of Commerce staff thought that the communication processes between the two parties have remained effective and meet program administration needs.

Regarding communications with applicants and service providers, staff reported that inquiries about the participation process is one of the more frequent inquiries received from prospective participants. Some new participants are uncertain about what paperwork is required for the program and what the participation steps are. Staff indicated that it may be useful to develop written document that articulates the process that can be sent to interested parties. Another issue is that technicians working on projects may not submit the correct paperwork. These instances are identified during standard reviews of application materials.

4.3.3.4. Tracking Data

GPY4 marked the first year that the program tracked activity was tracked in the Department of Commerce Illinois Energy Now Information Management System. Through this system, ex ante savings are calculated based on measure level inputs provided by the staff. Program staff did not report any specific difficulties using the system.

A review of the system reporting found few issues with the data provided. Two potential areas for improvement is the use of the location identifier and identification of a participant project manager. Most program activity has one location number per site address, but some Boiler System Efficiency Program projects completed at large facilities utilized multiple location numbers for different locations at the same site address or for different projects with the same site address. Consistent procedures for use of the location number will facilitate long term program participation.

Additionally, entered data only contained contact information for signature authorities and not for project managers. Although in many cases these are the same individual, in some cases the signature authority may have little knowledge of the program project. Not having a contact for the project manager for these cases presents challenges to identifying the correct decision maker to interview for the net savings assessment.

Appendix A: Questionnaire for Decision Maker Survey

Definitions of Variables Used in Survey

Variable	Variable Definition
<NTG>	B=Basic Rigor level, E= Enhanced Rigor level.
<PROGRAM>	Name of energy efficiency program.
<PROGRAM ADMINISTRATOR>	Name of program administrator.
<UTILITIES>	A custom field for all of the IOU utilities i.e., [ComEd's, Ameren's, Nicor's, Peoples', or North Shore]
<ADMINSTAFF>	A custom field naming program administrator or allied organization staff that may interact with program participants. For IOU programs, this would typically be "utility account manager," while for public sector programs, this might name organizations working with the Department of Commerce to facilitate program implementation UIC ERC, SEDAC, etc..
<ENDUSE>	From the program tracking data. Refers to either a control system, equipment tune-up, removal of equipment, or to a single measure or group of measures for a single use that are likely to be associated with a single decision making process. Multi-measure <ENDUSE> must be defined such that Q9=1 OR Q9=2; <ENDUSE> may not be defined such that Q9=1 AND Q9=2. For cases of Q9=1, variable is constructed so as to distinguish the measures from equivalent standard efficiency equipment, e.g., prefacing with words "energy efficient. Examples of <ENDUSE> include "energy efficient lighting," "energy efficient motor," "HVAC tune-up," "lighting delamp," etc.
<ENDUSE2>	Equals <ENDUSE>, except in cases where Q9=1, in which case, the efficiency level of the equipment is not referenced.
<ADDRESS>	Address at which <ENDUSE> was implemented.
<MONTH/YEAR >	The month and year during which the <ENDUSE> was implemented.
<IMPLEMENTED>	Variable describes implementation of <ENDUSE> in past tense. With <ENDUSE> italicized and <IMPLEMENTATION> in caps, examples of <IMPLEMENTATION> include <i>INSTALLED energy efficient lighting</i> , <i>COMPLETED the HVAC tune-up</i> .
<IMPLEMENT>	Variable describes implementation of <ENDUSE> in present tense. With <ENDUSE> italicized and <IMPLEMENTATION> in caps, examples of <IMPLEMENTATION> include <i>INSTALL energy efficient lighting</i> , <i>COMPLETE the HVAC tune-up</i> .
<IMPLEMENTING>	Variable describes implementation of <ENDUSE> in progressive tense. With <ENDUSE> italicized and <IMPLEMENTATION> in caps, examples of <IMPLEMENTATION> include <i>INSTALLING energy efficient lighting</i> , <i>COMPLETEING the HVAC tune-up</i> .
<ORGANIZATION>	Name of program participant organization.
<PUBLIC>	Equals 1 if participant is a public sector entity; equals 0 otherwise.
<VEND1>	Contractor who installed or otherwise deployed energy efficiency measure - from program tracking database.
<TECH_ASSIST>	Equals 1 if participant conducted Feasibility Study, Audit, or received Technical Assistance through the program; from program tracking database, or other sources; equals 0 otherwise.

Variable	Variable Definition
<OTHERPTS>	Variable to be calculated based on responses. Equals 10 minus response to Q72.
<PROGRAM_PTS>	Variable to be calculated based on responses. IF [[NOPROGRAM_PTS=8,9,10] AND [Q33=0,1,2]] OR [[NOPROGRAM_PTS=0,1,2] AND [Q33=8,9,10]], 10 - [Q51 RESPONSE]; ELSE, 10 - [Q33 RESPONSE].
<NOPROGRAM_PTS>	Variable to be calculated as equal to 10 minus the response to either Q43, Q44, Q45, Q46, Q47, Q48, Q49, and Q50, of which only one is administered to a single respondent.
<VMAX>	Variable to be calculated as maximum of response to Q136 and [10-response to Q137]. / 10
<MSAME>	Equals 1 if same customer had more than one project of the same measure type - from program tracking database; equals 0 otherwise.
<NSAME>	Number of additional projects of the same measure type implemented by the same customer; from program tracking database.
<FSAME>	Equals 1 if same customer also had a project of a different measure type at the same facility - from program tracking database; equals 0 otherwise.
<FDESC>	Type of project of a different measure type at the same facility - from program tracking database.

1. What is your job title or role?
 - 1 (Facilities Manager)
 - 2 (Energy Manager)
 - 3 (Other facilities management/maintenance position)
 - 4 (Chief Financial Officer)
 - 5 (Other financial/administrative position)
 - 6 (Proprietor/Owner)
 - 7 (President/CEO)
 - 8 (Manager)
 - 97 (Other (Specify))
 - 98 (Don't know)
 - 99 (Refused)

2. How did you learn about the incentives for energy saving improvements provided through the [PROGRAM]?
 - 1 (At a Department of Commerce Trade Ally Rally)
 - 2 (The program website)
 - 3 (Through an internet search)
 - 4 (From a Department of Commerce Program representative)
 - 5 (From a friend or colleague)
 - 6 (A presentation at a conference or workshop)
 - 7 (The Department of Commerce Illinois Energy Now Newsletter)
 - 8 (From a professional group or association that you are a member of)
 - 9 (From a Trade Ally/contractor/equipment vendor/energy consultant)
 - 97 (Other – please describe:)
 - 98 (Don't know)

99 (Refused)

VENDOR INFORMATION BATTERY

3. I would like to get some information on the vendors or contractors that may have helped you <IMPLEMENT> the <ENDUSE>. Did you work with a contractor or vendor that helped you decide to <IMPLEMENT> the <END USE>?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q4 IF [Q3=1]

4. Did the vendor or contractor encourage you to participate in the <PROGRAM>?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q5 [IF Q3=1]

5. Did the vendor or contractor display or show you any materials with the <PROGRAM> logo?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q6 IF [Q3=1]

6. Did you also use a DESIGN or CONSULTING engineer?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q7 IF [<PUBLIC>=0]

7. Did <ADMINSTAFF> assist you with the project that you implemented through the <PROGRAM ADMINISTRATOR> <PROGRAM>?

- 1 Yes
- 2 No, don't have <ADMINSTAFF>
- 3 No, have <ADMINSTAFF>but they weren't involved
- 98 (Don't know)

99 (Refused)

ASK Q8 IF [<PUBLIC>=1]

8. Did <ADMINSTAFF> assist you with the project that you implemented through the <PROGRAM ADMINISTRATOR> <PROGRAM>?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

EARLY REPLACEMENT BATTERY

I'd now like to ask a few questions about the <ENDUSE> you <IMPLEMENTED> through the program.

9. Did this new <ENDUSE> that you implemented through the program...

- 1 Replace existing equipment
- 2 Control, tune up, or work directly with existing equipment
- 3 Remove existing equipment and add no new equipment
- 4 Change scheduled operation times, settings, or otherwise optimized equipment operations
- 5 Involve newly installed energy-using equipment that did not replace existing equipment
- 00 (Other) [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

10. In deciding to do a project of this type, there are usually a number of reasons why it may be undertaken. In your own words, can you tell me why this project was implemented? IF NEEDED: Were there any other reasons? MULTIPLE RESPONSE OF THREE

DO NOT READ

- 1 To replace old or outdated equipment
- 2 As part of a planned remodeling, build-out, or expansion
- 3 To gain more control over how the equipment was used
- 4 The maintenance downtime and associated expenses for the old equipment were too high
- 5 Had process problems and were seeking a solution
- 6 To improve equipment performance
- 7 To improve the product quality
- 8 To comply with codes set by regulatory agencies
- 9 To comply with organizational policies regarding regular/normal maintenance/replacement policy
- 10 To get a rebate from the program
- 11 To protect the environment
- 12 To reduce energy costs
- 13 To reduce energy use/power outages
- 14 To update to the latest technology
- 00 (Other) [RECORD VERBATIM]
- 98 (Don't know)

99 (Refused)

READ Q11 IF [Q10= 1,2,3,4,5,7,8,9]

11. I understand that your decision to implement the project was affected by the following issues: [READ LIST OF ISSUES MENTIONED IN Q10].

Now I would like to ask some follow up questions regarding the responses you just gave me.

ASK Q12 IF [Q10=1] AND [Q9=1]

12. Approximately how old was the existing equipment, in years?

___ Estimated Age (Years)

98 (Don't know)

99 (Refused)

ASK Q13 IF [Q12=98] AND [Q10=1] AND [Q9=1]

13. Approximately in what year was the existing equipment purchased?

___ Estimated Year of Purchase

98 (Don't know)

99 (Refused)

ASK Q14 IF [Q10=1] AND [Q9=1] AND [NTG = E]

14. Would it be possible to obtain a copy of the original invoice for this equipment?

1 Yes [ARRANGE FOR DELIVERY]

2 No

98 (Don't know)

99 (Refused)

ASK Q15 IF [Q14=1] AND [Q10=1] AND [Q9=1]

15. Can you please provide your email address so that we might contact you and obtain the invoice? [OPEN END]

ASK Q16 IF [Q10=2]

16. Can you please describe the remodeling, build out or capacity expansion that you did and the role the project played in it?

00 [RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q17 IF [Q10=3]

17. Can you please describe how the existing equipment had operated before you upgraded it, and why you sought increased control over it?

00 [RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q18 IF [Q10=4]

18. What percentage of downtime did you experience during the year immediately prior to replacing the old equipment?

_____ Downtime Estimate

98 (Don't know)

99 (Refused)

ASK Q19 IF [Q10=4]

19. On average, what percentage of downtime did you experience during the lifetime of the old equipment?

_____ Previous Year Downtime Estimate

98 (Don't know)

99 (Refused)

ASK Q20 IF [Q10=4]

20. During the last 5 years have maintenance costs been increasing, decreasing or staying about the same?

1 Increasing

2 Decreasing

3 Staying the same

98 (Don't know)

99 (Refused)

ASK Q21 IF [Q9=1]

21. In your opinion, for how many more years could you have kept this equipment functioning?

_____ Estimate of Remaining Useful Life (Years)

98 (Don't know)

99 (Refused)

ASK Q22 IF [Q10=5]

22. Can you briefly describe the process problems that you experienced prior to this project?

00 [RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q23 IF [Q10=5]

23. Was it critical that these process problems be resolved as soon as possible?

- 1. Yes
- 2. No
- 98 (Don't know)
- 99 (Refused)

ASK Q24 IF [Q9=1]

24. Which of the following statements best describes the performance and operating condition of the equipment you replaced through the <PROGRAM ADMINISTRATOR> <PROGRAM>?

- 01 Existing equipment was fully functional, and without significant issues
- 02 Existing equipment was fully functioning, but with significant issues
- 03 Existing equipment had failed or did not function.
- 04 Existing equipment was obsolete
- 05 Existing equipment was fully functioning with minor issues
- 00 (Other) [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q25 IF [Q10=7] AND [<PUBLIC>=0]

25. Can you briefly describe these product quality improvements that this project provided?]

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q26 IF [Q10=7] AND [<PUBLIC>=0]

26. Was it critical that these product quality improvements be made as soon as possible?

- 1. Yes
- 2. No
- 98 (Don't know)
- 99 (Refused)

ASK Q27 IF [Q10=8]

27. Can you briefly describe the specific code/regulatory requirements that this project addressed?

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q28 IF [Q10=8]

28. Was it critical that your organization comply with this code/regulatory requirement as soon as possible?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q29 IF [Q10=9]

29. Can you briefly describe the specific organizational policies regarding regular/normal maintenance/replacement policy(ies) that were relevant to this project?

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q30 IF [Q10=9]

30. Was it critical that your organization comply with these policies as soon as possible?

- 1. Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

NET-TO-GROSS BATTERY

31. When did you first learn about the <PROGRAM ADMINISTRATOR> <PROGRAM>? Was it BEFORE or AFTER you first began to THINK about implementing the <ENDUSE>?

- 1 Before
- 2 After
- 98 (Don't know)
- 99 (Refused)

ASK Q32 IF [Q31=2, 8, 9]

32. Did you learn about the <PROGRAM ADMINISTRATOR> program BEFORE or AFTER you DECIDED to implement the <ENDUSE>?

- 1 Before
- 2 After
- 98 (Don't know)
- 99 (Refused)

Now I would like you to think about the action you might have taken with regard to the <ENDUSE> if the <PROGRAM ADMINISTRATOR> program had not been available.

33. Using a scale from 0 to 10, where 0 is “Not at all likely” and 10 is “Extremely likely”, if the <PROGRAM ADMINISTRATOR>’s program had not been available, what is the likelihood that you would have <IMPLEMENTED> exactly the same quantity of <ENDUSE> at exactly the time that you <IMPLEMENTED> it?

[RECORD 0 to 10]

98 (Don’t know)

99 (Refused)

[CALCULATE VARIABLE <PROGRAM_PTS> AS 10 MINUS Q33 RESPONSE; IF Q33=98, 99, SET OTHERPTS=BLANK]

34. Do you agree that the implication of the answer you just gave is that there is a <PROGRAM_PTS> in 10 likelihood that, without the program, you would NOT have <IMPLEMENTED> exactly the same <ENDUSE> in the same quantity at exactly the time that you <IMPLEMENTED> it?

01 Yes

02 No

98 (Don’t know)

99 (Refused)

GO BACK TO Q33 IF [Q33=2]

ASK Q35 IF [Q33<10] AND [Q9=1,5]]

35. You indicated that, there is a <Q33 ANSWER> in 10 likelihood that WITHOUT the program you would have <IMPLEMENTED > exactly the same quantity of <ENDUSE2> at exactly the time that you <IMPLEMENTED >. This suggests that there is a <PROGRAM_PTS> in 10 likelihood that you would have done something differently without the program. NOW, I’m going to ask some questions about what you would have done without the program; specifically, how project timing, <ENDUSE2> efficiency, and amount of equipment installed might have differed from what you actually did. Without the program, would you have, at some point in time, <IMPLEMENTED > the exact same quantity of <ENDUSE2> measures, regardless of the efficiency level of the equipment you would have selected?

1 Yes

2 No

98 (Don’t know)

99 (Refused)

ASK Q35 IF [Q33<10] AND [Q9<>1,5]

36. You indicated that, without the program, there is a <Q33 ANSWER> in 10 likelihood that you would have <IMPLEMENTED > exactly the same quantity of <ENDUSE> at exactly the time that you <IMPLEMENTED >. This suggests that there is a <PROGRAM_PTS> in 10 likelihood that you would have done something differently

without the program. NOW, I'm going to ask some questions about what you would have done, without the program; specifically, how project timing and amount of <ENDUSE> <IMPLEMENTED > might have differed from what you actually did. Without the program, would you have, at some point in time, <IMPLEMENTED> the exact same quantity of <ENDUSE>?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q37 IF [Q33<10] AND [[Q35=2] OR [Q36=2]

37. Without the program, how would the number of measures identical or similar to <ENDUSE> you <IMPLEMENTED> differ from what was actually <IMPLEMENTED>?

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q38 IF [Q33<10] AND [Q9=1,5]

38. Without the program, at some point in time, would you have...

- 1 Installed equipment with the same efficiency level as what you actually installed.
- 2 Installed equipment with the efficiency level required by standard.
- 3 Installed equipment more efficient than standard AND LESS EFFICIENT than what you actually installed.
- 5 Kept the existing equipment.
- 6 Something else specify what _____
- 98 (Don't know)
- 99 (Refused)

ASK Q39 IF [Q33<10] AND [Q38=3]

39. Can you please describe the equipment you would have installed without the program, and the associated efficiency level?

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q40 IF [Q33<10]

40. Without the program, when do you think you would have implemented the <ENDUSE2> project?

- 1 At the same time the <ENDUSE2> was actually <IMPLEMENTED >
- 2 After the time the <ENDUSE2> was actually <IMPLEMENTED>

- 3 Never
- 98 (Don't know)
- 99 (Refused)

ASK Q41 IF [Q33<10] AND [Q40=2]

41. How much later would you have <IMPLEMENTED> the <ENDUSE2> without the program?

DO NOT READ

- 1 0 to 6 months
- 2 7 months to 1 year
- 3 more than 1 year up to 2 years
- 4 more than 2 years up to 3 years
- 5 more than 3 years up to 4 years
- 6 Over 4 years
- 98 (Don't know)
- 99 (Refused)

ASK Q42 IF [Q33<10]

42. Why do you think you would have <IMPLEMENTED > the <ENDUSE2> in <Q41 RESPONSE>?

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q43 IF [Q33<10] AND [Q40=2] AND [Q36=1] AND [Q9<>1,5] Same quantity, later, no-standard

43. Based on your responses, I understand that, without the program, you would have IMPLEMENTED > the same quantity of <ENDUSE> as was actually <IMPLEMENTED > under the program, and that you would have done so <Q41 ANSWER> after it was actually <IMPLEMENTED_PAST >. Using a scale from 0 to 10, where 0 is "Not at all likely" and 10 is "Extremely likely", if the <PROGRAM ADMINISTRATOR>'s efficiency program had not been available, what is the likelihood that this would have occurred in the absence of the program?

[RECORD 0 to 10]

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

[CALCULATE VARIABLE <NOPROGRAM_PTS> AS 10 MINUS Q43 RESPONSE; IF Q43=98, 99, SET NOPROGRAM_PTS=BLANK]

ASK Q44 IF [Q33<10] AND [Q40=2] AND [Q36=2] AND [Q9<>1,5] Different quantity, later, no-standard

44. Based on your responses, I understand that, without the program, you would have <IMPLEMENTED> a different quantity of <ENDUSE> than was actually <IMPLEMENTED> under the program, and that you would have done so <Q41 ANSWER> after it was actually <IMPLEMENTED_PAST>. Using a scale from 0 to 10, where 0 is “Not at all likely” and 10 is “Extremely likely”, if the <PROGRAM ADMINISTRATOR>’s efficiency program had not been available, what is the likelihood that this would have occurred in the absence of the program?

[RECORD 0 to 10]

98 (Don’t know)

99 (Refused)

[CALCULATE VARIABLE <NOPROGRAM_PTS> AS 10 MINUS Q44 RESPONSE; IF Q44=98, 99, SET NOPROGRAM_PTS=BLANK]

ASK Q45 IF [Q33<10] AND [Q40=1] AND [Q35=1] AND [Q9<>1,5] Same quantity, same time, no-standard

45. Based on your responses, I understand that, without the program, you would have <IMPLEMENTED> the same quantity of <ENDUSE> as was actually <IMPLEMENTED> under the program, and that you would have done so at the same time as it was actually <IMPLEMENTED_PAST>. Using a scale from 0 to 10, where 0 is “Not at all likely” and 10 is “Extremely likely”, if the <PROGRAM ADMINISTRATOR>’s efficiency program had not been available, what is the likelihood that this would have occurred in the absence of the program?

[RECORD 0 to 10]

98 (Don’t know)

99 (Refused)

[CALCULATE VARIABLE <NOPROGRAM_PTS> AS 10 MINUS Q45 RESPONSE; IF Q45=98, 99, SET NOPROGRAM_PTS=BLANK]

ASK Q46 IF [Q33<10] AND [Q40=1] AND [Q36=2] AND [Q9<>1,5] Different quantity, same time, no-standard

46. Based on your responses, I understand that, without the program, you would have <IMPLEMENTED> a different quantity of <ENDUSE> than was actually <IMPLEMENTED> under the program, and that you would have done so at the same time as it was actually <IMPLEMENTED>. Using a scale from 0 to 10, where 0 is “Not at all likely” and 10 is “Extremely likely”, if the <PROGRAM ADMINISTRATOR>’s efficiency program had not been available, what is the likelihood that this would have occurred in the absence of the program?

[RECORD 0 to 10]

98 (Don’t know)

99 (Refused)

[CALCULATE VARIABLE <NOPROGRAM_PTS> AS 10 MINUS Q46 RESPONSE; IF Q46=98, 99, SET NOPROGRAM_PTS=BLANK]

ASK Q47 IF [Q33<10] AND [Q40=2] AND [Q35=1] AND [Q9=1,5] Same quantity, later, standard

47. Based on your responses, I understand that, without the program, you would have <IMPLEMENTED> the same quantity of <ENDUSE> as was actually <IMPLEMENTED> under the program, that you would have done so <Q41 ANSWER> after it was actually <IMPLEMENTED IMPLEMENTED>, and that you would have <Q38 ANSWER>. Using a scale from 0 to 10, where 0 is “Not at all likely” and 10 is “Extremely likely”, if the <PROGRAM ADMINISTRATOR>’s efficiency program had not been available, what is the likelihood that this would have occurred in the absence of the program?

[RECORD 0 to 10]

98 (Don’t know)

99 (Refused)

[CALCULATE VARIABLE <NOPROGRAM_PTS> AS 10 MINUS Q47 RESPONSE; IF Q47=98, 99, SET NOPROGRAM_PTS=BLANK]

ASK Q48 IF [Q33<10] AND [Q40=2] AND [Q35=2] AND [Q9=1,5] Different quantity, later, standard

48. Based on your responses, I understand that, without the program, you would have <IMPLEMENTATION IMPLEMENTED> a different quantity of <ENDUSE> than was actually <IMPLEMENTATION IMPLEMENTED> under the program, that you would have done so <Q41 ANSWER> after it was actually <IMPLEMENTED>, and that you would have <Q38 ANSWER>. Using a scale from 0 to 10, where 0 is “Not at all likely” and 10 is “Extremely likely”, if the <PROGRAM ADMINISTRATOR>’s efficiency program had not been available, what is the likelihood that this would have occurred in the absence of the program?

[RECORD 0 to 10]

98 (Don’t know)

99 (Refused)

[CALCULATE VARIABLE <NOPROGRAM_PTS> AS 10 MINUS Q48 RESPONSE; IF Q48=98, 99, SET NOPROGRAM_PTS=BLANK]

ASK Q49 IF [Q33<10] AND [Q40=1] AND [Q35=1] AND [Q9=1,5] Same quantity, same time, standard

49. Based on your responses, I understand that, without the program, you would have <IMPLEMENTED> the same quantity of <ENDUSE> as was actually <IMPLEMENTED> under the program, that you would have done so at the same time as it was actually <IMPLEMENTED>, and that you would have <Q38 ANSWER>. Using a scale from 0 to 10, where 0 is “Not at all likely” and 10 is “Extremely likely”, if the <PROGRAM ADMINISTRATOR>’s efficiency program had not been available, what is the likelihood that this would have occurred in the absence of the program?

[RECORD 0 to 10]

98 (Don't know)

99 (Refused)

[CALCULATE VARIABLE <NOPROGRAM_PTS> AS 10 MINUS Q49 RESPONSE; IF Q49=98, 99, SET NOPROGRAM_PTS=BLANK]

ASK Q50 IF [Q33<10] AND [Q40=1] AND [Q35=1] AND [Q9=1,5] Different quantity, same time, standard

50. Based on your responses, I understand that, without the program, you would have < IMPLEMENTED> a different quantity of <ENDUSE> than was actually < IMPLEMENTED> under the program, that you would have done so at the same time as it was actually < IMPLEMENTED>, and that you would have <Q38 ANSWER>. Using a scale from 0 to 10, where 0 is "Not at all likely" and 10 is "Extremely likely", if the <PROGRAM ADMINISTRATOR>'s efficiency program had not been available, what is the likelihood that this would have occurred in the absence of the program?

[RECORD 0 to 10]

98 (Don't know)

99 (Refused)

[CALCULATE VARIABLE <NOPROGRAM_PTS> AS 10 MINUS Q50 RESPONSE; IF Q50=98, 99, SET NOPROGRAM_PTS=BLANK]

ASK Q51 IF [[NOPROGRAM_PTS=8,9,10] AND [Q33=0,1,2]] OR [[NOPROGRAM_PTS=0,1,2] AND [Q33=8,9,10]]

51. You just indicated a <NOPROGRAM_PTS> in 10 likelihood of implementing the project I just summarized, without the program. Earlier, you indicated a <Q33 RESPONSE> in 10 likelihood that, without the program, you would have actually < IMPLEMENTED> exactly the same <ENDUSE> you actually < IMPLEMENTED> in the same quantity at exactly the time that you < IMPLEMENTED> it. To be sure that I properly recorded your earlier response: using a scale from 0 to 10, where 0 is "Not at all likely" and 10 is "Extremely likely", if the <PROGRAM ADMINISTRATOR>'s efficiency program had not been available, what is the likelihood that you would have < IMPLEMENTED> exactly the same quantity of <ENDUSE> at exactly the time that you <IMPLEMENTED> it?

[RECORD 0 to 10]

98 (Don't know)

99 (Refused)

[RECALCULATE VARIABLE <PROGRAM_PTS> AS 10 MINUS Q51 RESPONSE; IF Q51=98, 99, SET OTHERPTS=BLANK]

52. Next, I'm going to ask you to rate the impact of various factors that might have affected your decision to <IMPLEMENT> the <ENDUSE> through the <PROGRAM>.

Please rate the impact each had on your decision using a scale where a score of "0" means that the factor had no impact on the decision to implement the <ENDUSE>, and a score of

“10” means that the factor had DECISIVE impact on the decision to the implement the <ENDUSE>, please rate the impact of each of the following in your decision to <IMPLEMENT> the <ENDUSE> at this time.

[RECORD 0 to 10]

96 Not Applicable

98 (Don't know)

99 (Refused)

[If needed: Please rate the impact of [FACTOR] in your decision to <IMPLEMENT> the <ENDUSE> at this time.]

ASK Q53 IF [Q9=1]

53. The impact of the age or condition of the existing equipment

54. The impact of the availability of the <PROGRAM> incentive

ASK Q55 IF [Q54=8,9,10]

55. Why do you give it this rating?

[RECORD VERBATIM]

98 (Don't know);

99 (Refused)

ASK Q56 IF [NTG=E]

56. The impact of technical assistance you received from program staff

ASK Q57 IF [Q56=8,9,10]

57. Why do you give it this rating?

[RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q58 IF [Q3=1]

58. The impact of a recommendation from an equipment vendor or contractor that helped you with the choice of the <ENDUSE>

59. The impact of previous experience with implementing <ENDUSE>

60. The impact of a recommendation from <PROGRAM ADMINISTRATOR> program staff

ASK Q61 IF [NTG=E] AND [Q60=8,9,10]

61. Why do you give it this rating?

[RECORD VERBATIM]

98 (Don't know)

99 (Refused)

62. The impact of information from <PROGRAM ADMINISTRATOR> marketing materials

ASK Q63 IF [NTG=E] AND [Q62=8,9,10]

63. Why do you give it this rating?

[RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q64 IF [Q6=1]

64. The impact of a recommendation from a design or consulting engineer

ASK Q65 IF [NTG=E] AND [<PUBLIC>=0]

65. The impact of standard practice in your business/industry

ASK Q66 IF [Q7=1]

66. The impact of an endorsement or recommendation by <ADMINSTAFF>

ASK Q67 IF [NTG=E] AND [Q66=8, 9, 10]

67. Why do you give it this rating?

[RECORD VERBATIM]

98 (Don't know)

99 (Refused)

68. The impact of organizational policy or guidelines

69. Were there any other factors we haven't discussed that that might have affected your decision to <IMPLEMENT> <ENDUSE>?

00 [RECORD VERBATIM]

96 Nothing else influential

98 (Don't know)

99 (Refused)

ASK Q70 IF [Q69=00]

70. Using the same 0 to 10 scale, please rate the impact of this factor in your decision to <IMPLEMENT> the <ENDUSE> at this time?

[RECORD 0 to 10]

98 (Don't know)

99 (Refused)

71. [READ IF ANY OF Q53, Q58, Q59, Q64, Q65, Q68, Q69=8,9,10; ELSE SKIP TO Q72]

You just assigned the following factors a score of 8 or higher:

[READ ONLY ITEMS FOR WHICH RESPONDENT GAVE A RATING OF 8 OR HIGHER]

Q53 Age or condition of existing equipment

Q54 Availability of the program incentive

Q56 Technical assistance from program staff

Q58 Equipment Vendor recommendation

Q59 Previous experience with this measure

Q60 <PROGRAM ADMINISTRATOR> program staff recommendation

Q62 <PROGRAM ADMINISTRATOR> marketing materials

Q64 Recommendation from a design or consulting engineer

Q65 Standard practice in your business/industry

Q66 Endorsement or recommendation by <ADMINSTAFF>

Q68 Organizational policy or guidelines

Q69 Other factor

72. You could consider those factors you just rated to be either program factors or non-program factors that affected the decision to <IMPLEMENT> the <ENDUSE>.

Consider anything related to the program to be a single thing called the "program factor."

Consider anything unrelated to the program to be a single thing called the "non-program factor." If you were given a total of 10 points to allocate between the program factor and

the non-program factor, where a score of "0" means that the factor had no impact on the decision to implement the energy efficiency project, and a score of "10" means that the factor had DECISIVE impact on the decision to the implement the energy efficiency project, how many points would you give to the program factor?

[RECORD 0 to 10]

98 (Don't know)

99 (Refused)

[CALCULATE VARIABLE <OTHERPTS> AS 10 MINUS Q72 RESPONSE; IF Q72=98, 99, SET OTHERPTS=BLANK]

73. And how many points would you give to the non-program factor?

[RECORD 0 to 10]

98 (Don't know)

99 (Refused)

[Note: The response should be <OTHERPTS> because both numbers should equal 10. If response does not equal <OTHERPTS>, ask Q74]

ASK Q74 IF [Q73<><OTHERPTS>]

74. The last question asked you to divide a TOTAL of 10 points between the program factor and non-program factor. You just noted that you would give <Q72 RESPONSE> points

to the program. Does that mean you would give <OTHERPTS> points to the non-program factors?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

GO BACK TO Q72 IF [Q74=2] AND READ [OK LET ME ASK YOU THE QUESTION AGAIN]

CONSISTENCY CHECK ON PROGRAM IMPORTANCE

READ Q75 IF [Q72>6] AND [Q54<4] AND [Q56<4] AND [Q60<4] AND [Q62<4] AND [Q66<4]

75. You just scored the impact of the program on your decision to implement the <ENDUSE> with <Q72 RESPONSE> out of 10 possible points. You ALSO gave relatively lower scoring to the impact of individual elements of the program experience.

ASK Q76 IF [Q72<4] AND [[Q54>6] OR [Q56>6] OR [Q60>6] OR [Q62>6] OR [Q66>6]

76. You just scored the impact of the program on your decision to implement the <ENDUSE> with <Q72 RESPONSE> out of 10 possible points. You ALSO gave relatively higher scoring to the impact of individual elements of the program experience.

ASK Q77 IF [[Q72>6] AND [Q54<4] AND [Q56<4] AND [Q60<4] AND [Q62<4] AND [Q66<4]] OR [[Q72<4] AND [Q54>6]]

77. You scored the impact of THE AVAILABILITY OF THE PROGRAM INCENTIVE on your decision to implement the <ENDUSE> with <Q54 RESPONSE> out of 10 possible points, and scored the impact of the program overall with <Q72 RESPONSE> out of 10 possible points. Why is the impact of THE AVAILABILITY OF THE PROGRAM INCENTIVE different than the impact of the program overall?

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q78 IF [[Q72>6] AND [Q54<4] AND [Q56<4] AND [Q60<4] AND [Q62<4] AND [Q66<4]] OR [[Q72<4] AND [Q56>6]]

78. You scored the impact of the program TECHNICAL ASSISTANCE on your decision to implement the <ENDUSE> with <Q56 RESPONSE> out of 10 possible points, and scored the impact of the program overall with <Q72 RESPONSE> out of 10 possible

points. Why is the impact of the program TECHNICAL ASSISTANCE different than the impact of the program overall?

00 [RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q79 IF [[Q72>6] AND [Q54<4] AND [Q56<4] AND [Q60<4] AND [Q62<4] AND [Q66<4]] OR [[Q72<4] AND [Q60>6]]

79. You scored the impact of the THE RECOMMENDATION FROM <PROGRAM ADMINISTRATOR> <PROGRAM> STAFF PERSON on your decision to implement the <ENDUSE> with <Q60 RESPONSE> out of 10 possible points, and scored the impact of the program overall with <Q72 RESPONSE> out of 10 possible points. Why is the impact of the THE RECOMMENDATION FROM <PROGRAM ADMINISTRATOR> STAFF PERSON different than the impact of the program overall?

00 [RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q80 [IF [Q72>6] AND [Q54<4] AND [Q56<4] AND [Q60<4] AND [Q62<4] AND [Q66<4]] OR [[Q72<4] AND [Q62>6]]

80. You scored the impact of the THE INFORMATION from <PROGRAM ADMINISTRATOR>'s MARKETING MATERIALS on your decision to implement the <ENDUSE> with <Q60 RESPONSE> out of 10 possible points, and scored the impact of the program overall with <Q72 RESPONSE> out of 10 possible points. Why is the impact of the THE INFORMATION from <PROGRAM ADMINISTRATOR>'s MARKETING MATERIALS different than the impact of the program overall?

00 [RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q81 IF [[Q72>6] AND [Q54<4] AND [Q56<4] AND [Q60<4] AND [Q62<4] AND [Q66<4] AND [Q66<4] AND [Q7=1 OR Q8=1]] OR [[Q72<4] AND [Q66>6] AND [Q7=1 OR Q8=1]]

81. You scored the impact of the THE ENDORSEMENT or RECOMMENDATION by <ADMINSTAFF> on your decision to implement the <ENDUSE> with <Q66 RESPONSE> out of 10 possible points, and scored the impact of the program overall with <Q72 RESPONSE> out of 10 possible points. Why is the impact of the THE ENDORSEMENT or RECOMMENDATION by <ADMINSTAFF> different than the impact of the program overall?

00 [RECORD VERBATIM]

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

CONSISTENCY CHECKS

ASK Q82 IF [[Q54=8,9,10] AND [Q33=8,9,10]] OR [[Q54=0,1,2] AND [Q33=0,1,2]]

82. You scored the impact of the program incentive on your decision to implement the <ENDUSE> with <Q54 RESPONSE> out of 10 possible points. You ALSO scored the likelihood of <IMPLEMENTING> exactly the same quantity of <ENDUSE> at the same time that you <IMPLEMENTED> it without the incentive with <Q33 RESPONSE> out of 10 possible points. Can you please explain the role the incentive played in your decision to <IMPLEMENT> this <ENDUSE>?

- 00 Record VERBATIM
- 98 (Don't know)
- 99 (Refused)

ASK Q83 IF [[Q54=8,9,10] AND [Q33=8,9,10]] OR [[Q54=0,1,2] AND [Q33=0,1,2]]

83. Would you like to change your score of <Q54 RESPONSE> out of 10 possible points on the impact of the program incentive or change your score of <Q33 RESPONSE> out of 10 possible points on the likelihood of <IMPLEMENTING> exactly the same quantity of <ENDUSE> at exactly the same time that you <IMPLEMENTED> it without the incentive? You may change one score, both scores, or neither score. How would you like to proceed?

DO NOT READ

- 1 Change impact of incentive score
- 2 Change likelihood of <IMPLEMENTING> the same quantity of to the same <ENDUSE> at the same time score
- 3 Change both
- 4 Change neither
- 98 (Don't know)
- 99 (Refused)

ASK Q84 IF [[Q54=8,9,10] AND [Q33=8,9,10]] OR [[Q54=0,1,2] AND [Q33=0,1,2]] AND [Q83=1,3]

84. Please rate the impact of the PROGRAM incentive using a scale where a score of "0" means that the PROGRAM incentive had no impact on the decision to implement the energy efficiency project, and a score of "10" means that the PROGRAM incentive had DECISIVE impact on the decision to the implement the energy efficiency project.

- [RECORD 0 to 10]
- 98 (Don't know)
- 99 (Refused)

ASK Q85 IF [[Q54=8,9,10] AND [Q33=8,9,10]] OR [[Q54=0,1,2] AND [Q33=0,1,2]]

AND [Q83=2,3]

85. Using a scale from 0 to 10, where 0 is “Not at all likely” and 10 is “Extremely likely”, if the <PROGRAM ADMINISTRATOR>’s efficiency program had not been available, what is the likelihood that you would have <IMPLEMENTED> exactly the same quantity of <ENDUSE> at exactly the time that you <IMPLEMENTED> it?

[RECORD 0 to 10]

98 (Don’t know)

99 (Refused)

ASK Q86 IF [Q65>7] AND [<PUBLIC>=0]

86. In an earlier question, you rated the importance of STANDARD PRACTICE in your industry very highly in your decision making. Could you please rate the importance of the PROGRAM, relative to this standard industry practice, in affecting your decision to <IMPLEMENT> this <ENDUSE>? Would you say the program was much more important, somewhat more important, equally important, somewhat less important, or much less important than the industry’s standard practice?

1 Much more important

2 Somewhat more important

3 Equally important

4 Somewhat less important

5 Much less important

98 (Don’t know)

99 (Refused)

PAYBACK BATTERY

ASK Q87 IF [NTG=E]

87. Please rate the impact of PAYBACK ON THE INVESTMENT using a scale where a score of “0” means that the PAYBACK ON THE INVESTMENT had no impact on the decision to implement the energy efficiency project, and a score of “10” means that the PAYBACK ON THE INVESTMENT had DECISIVE impact on the decision to the implement the energy efficiency project.

[RECORD 0 to 10]

98 (Don’t know)

99 (Refused)

ASK Q88 IF [Q87=6,7,8,9,10] AND [NTG=E]

I’d like to find out more about the payback criteria <ORGANIZATION> uses for its investments and how it might have applied to the decision to <IMPLEMENT> the <ENDUSE>.

88. What financial calculations does <ORGANIZATION> make before proceeding with completion of a PROJECT like this one?

00 [RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q89 IF [Q87=6,7,8,9,10] AND [NTG=E]

89. What is the payback cut-off point <ORGANIZATION> uses before deciding to completing a project like this one?

[DO NOT READ. Prompt if necessary: in years and months.]

1 0 to 6 months

2 7 months to 1 year

3 more than 1 year up to 2 years

4 more than 2 years up to 3 years

5 more than 3 years up to 5 years

6 Over 5 years

98 (Don't know)

99 (Refused)

ASK Q90 IF [Q87=6,7,8,9,10] AND [NTG=E]

90. Does your organization always implement projects that meet the required payback cut-off point?

1 Yes

2 No

98 (Don't know)

99 (Refused)

ASK Q91 IF [Q87=6,7,8,9,10] AND [Q90=2] AND [NTG=E]

91. Why doesn't your organization always implement projects that meet the required financial cut-off point?

00 [RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q92 IF [Q87=6,7,8,9,10] AND [NTG=E]

92. Did you review payback calculations for the <ENDUSE> project with and without the <PROGRAM> incentive?

1 Yes

2 No

98 (Don't know)

99 (Refused)

ASK Q93 IF [Q87=6,7,8,9,10] AND [NTG=E]

93. Did the program incentive play an important role in moving your project within the acceptable payback cutoff point?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ORGANIZATIONAL/CORPORATE POLICY BATTERY

ASK Q94 IF [Q68=6,7,8,9,10]

94. Does your organization have an environmental policy or sustainability plan to reduce environmental emissions or energy use? Some examples would be to "buy green" or use sustainable approaches to business investments.

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q95 IF [Q68=6,7,8,9,10] AND [Q94=1]

95. What specific policy affected your decision to <IMPLEMENT> the <ENDUSE> through the <PROGRAM>?

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q96 IF [Q68=6,7,8,9,10] AND [Q94=1]

96. Prior to participating in the <PROGRAM ADMINISTRATOR> <PROGRAM>, had that policy caused you to <IMPLEMENT> <ENDUSE> at this facility without a program incentive?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q97 IF [Q68=6,7,8,9,10] AND [Q94=1]

97. Prior to participating in the <PROGRAM ADMINISTRATOR> <PROGRAM>, had that policy caused you to <IMPLEMENT> <ENDUSE> at OTHER facilities without a program incentive?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

98. Does your organization have the financial ability to implement its policy?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q99 IF [Q68=6,7,8,9,10] AND [Q96=1 OR Q97=1] AND [Q94=1]

99. Regarding the decision to <INSTALLATION> <ENDUSE> through the <PROGRAM>, I want to make sure I fully understand the impact of this policy as compared with the impact of the program. Can you please elaborate on that?

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

STANDARD PRACTICE BATTERY

ASK Q100 IF [Q65=6,7,8,9,10] AND [<PUBLIC>=0]

100. Approximately, how long has use of <ENDUSE> been standard practice in your industry?

- M [00 Record Number of Months; 98 (Don't know), 99 (Refused)]
- Y [00 Record Number of Years; 98 (Don't know), 99 (Refused)]

ASK Q101 IF [Q65=6,7,8,9,10] AND [<PUBLIC>=0]

101. Does <ORGANIZATION> ever deviate from the standard practice?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q102 IF [Q65=6,7,8,9,10] AND [Q101=1] AND [<PUBLIC>=0]

102. Please describe the conditions under which <ORGANIZATION> deviates from this standard

- 00 [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q103 IF [Q65=6,7,8,9,10] AND [<PUBLIC>=0]

103. How did this standard practice affect your decision to <IMPLEMENT> the <ENDUSE> through the <PROGRAM>?

- 00 [RECORD VERBATIM]

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

ASK Q104 IF [Q65=6,7,8,9,10] AND [<PUBLIC>=0]

104. Could you please rate the importance of the <PROGRAM> as compared with this standard industry practice in affecting your decision to <IMPLEMENT> the <ENDUSE>. Would you say the <PROGRAM> was...
- 1 Much more important
 - 2 Somewhat more important
 - 3 Equally important
 - 4 Somewhat less important
 - 5 Much less important
 - 98 (Don't know)
 - 99 (Refused)

ASK Q105 IF [Q65=6,7,8,9,10] AND [<PUBLIC>=0]

105. What industry group or trade organization do you look to establish standard practice for your industry?
- 00 [RECORD VERBATIM]
 - 98 (Don't know)
 - 99 (Refused)

ASK Q106 IF [Q65=6,7,8,9,10] AND [<PUBLIC>=0]

106. How do you and other firms in your industry receive information on updates to standard practice?
- 00 [RECORD VERBATIM]
 - 98 (Don't know)
 - 99 (Refused)

DESIGN ASSISTANCE

107. Did anyone from outside your organization such as a program representative or a consultant, designer, distributor, or contractor provide you with assistance in the design or specification of the <ENDUSE> you <IMPLEMENTATION> through the program?
- 1 Yes
 - 2 No
 - 3 (Don't know)
 - 4 (Refused)

ASK Q108 IF [Q107 = 1]

108. Who provided the most assistance in the design or specification of the <ENDUSE> you <IMPLEMENTED> through the program? If necessary, probe from the list below.

- 1 Designer
- 2 Consultant
- 3 Equipment distributor
- 4 Installer
- 5 <PROGRAM ADMINISTRATOR>/<ADMINSTAFF>
- 6 <PROGRAM> staff
- 000 (Other) [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q109 IF [Q107<98]

- 109. Please describe the type of assistance that they provided.
- 00 [Record verbatim]
- 98 (Don't know)
- 99 (Refused)

ADDITIONAL PROJECTS

ASK Q110 IF [MSAME=1]

- 110. Our records show that <ORGANIZATION> also received an incentive from <PROGRAM ADMINISTRATOR> <PROGRAM> for <NSAME> other <ENDUSE> projects completed at a different location. Was it a single decision to complete all of those <ENDUSE> projects for which you received an incentive from the program or did each project go through its own decision process?

[IF NEEDED: THESE ADDITIONAL [question("value"), id="8"] PROJECTS MAY HAVE BEEN IMPLEMENTED AT OTHER LOCATIONS]

- 1 Single Decision
- 2 Each project went through its own decision process
- 00 (Other) [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

ASK Q111 IF [FSAME=1]

- 111. Our records show that <ORGANIZATION> also received an incentive from <PROGRAM> for a <FDESC> project at <ADDRESS>. Was the decision making process for that project the same as for the <ENDUSE> project we have been talking about?
- 1 Same decision making process
- 2 Different decision making process
- 00 (Other) [RECORD VERBATIM]
- 98 (Don't know)
- 99 (Refused)

SPILLOVER MODULE

Thank you for discussing the new <ENDUSE> that you <IMPLEMENTED> through the <PROGRAM>. Next, I would like to discuss any energy efficient efficiency equipment you might have installed or other energy efficiency measures you might have undertaken OUTSIDE of the program.

112. Since your participation in the <PROGRAM>, did you implement any ADDITIONAL energy efficiency measures at this facility or at your other facilities within <UTILITIES>'s service territory that did NOT receive incentives through <PROGRAM ADMINISTRATOR>?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q113 IF [Q112=1]

113. What was the first measure that you implemented? IF RESPONSE IS GENERAL, E.G., "LIGHTING EQUIPMENT", PROBE FOR SPECIFIC MEASURE. PROBE FROM LIST, IF NECESSARY.

- 1 Lighting: T8 lamps
- 2 Lighting: T5 lamps
- 3 Lighting: Highbay Fixture Replacement
- 4 Lighting: CFLs
- 5 Lighting: Controls / Occupancy sensors
- 6 Lighting: LED lamps
- 7 Cooling: Unitary/Split Air Conditioning System
- 8 Cooling: Room air conditioners
- 9 Cooling: Variable Frequency Drives VFD/VSD on HVAC Motors
- 10 Motors: Efficient motors
- 11 Refrigeration: Strip curtains
- 12 Refrigeration: Anti-sweat controls
- 13 Refrigeration: EC motor for WALK-IN cooler/freezer
- 14 Refrigeration: EC motor for REACH-IN cooler/freezer
- 00 (Other) [RECORD VERBATIM]
- 96 (Didn't implement any measures)
- 98 (Don't know)
- 99 (Refused)

ASK Q114 IF [Q113<>96,98,99] AND [Q112=1]

114. What was the second measure? IF RESPONSE IS GENERAL, E.G., "LIGHTING EQUIPMENT", PROBE FOR SPECIFIC MEASURE. PROBE FROM LIST, IF NECESSARY.

- 1 Lighting: T8 lamps

- 2 Lighting: T5 lamps
- 3 Lighting: Highbay Fixture Replacement
- 4 Lighting: CFLs
- 5 Lighting: Controls / Occupancy sensors
- 6 Lighting: LED lamps
- 7 Cooling: Unitary/Split Air Conditioning System
- 8 Cooling: Room air conditioners
- 9 Cooling: Variable Frequency Drives VFD/VSD on HVAC Motors
- 10 Motors: Efficient motors
- 11 Refrigeration: Strip curtains
- 12 Refrigeration: Anti-sweat controls
- 13 Refrigeration: EC motor for WALK-IN cooler/freezer
- 14 Refrigeration: EC motor for REACH-IN cooler/freezer
- 00 (Other) [RECORD VERBATIM]
- 96 (Didn't implement any measures)
- 98 (Don't know)
- 99 (Refused)

ASK Q115 IF [Q114<>96,98,99] AND [Q113<>96,98,99] AND [Q112=1]

115. What was the third measure? IF RESPONSE IS GENERAL, E.G., "LIGHTING EQUIPMENT", PROBE FOR SPECIFIC MEASURE. PROBE FROM LIST, IF NECESSARY.

- 1 Lighting: T8 lamps
- 2 Lighting: T5 lamps
- 3 Lighting: Highbay Fixture Replacement
- 4 Lighting: CFLs
- 5 Lighting: Controls / Occupancy sensors
- 6 Lighting: LED lamps
- 7 Cooling: Unitary/Split Air Conditioning System
- 8 Cooling: Room air conditioners
- 9 Cooling: Variable Frequency Drives VFD/VSD on HVAC Motors
- 10 Motors: Efficient motors
- 11 Refrigeration: Strip curtains
- 12 Refrigeration: Anti-sweat controls
- 13 Refrigeration: EC motor for WALK-IN cooler/freezer
- 14 Refrigeration: EC motor for REACH-IN cooler/freezer
- 00 (Other) [RECORD VERBATIM]
- 96 (Didn't implement any measures)
- 98 (Don't know)
- 99 (Refused)

ASK Q116 IF [Q113<>96,98,99] AND [Q112=1]

116. I have a few questions about the FIRST measure that you implemented. If needed, read back measure: <Q113 RESPONSE> [OPEN END]

- a. Why did you not receive an incentive through <PROGRAM ADMINISTRATOR> for this measure?
- b. Please describe the SIZE, TYPE, and OTHER ATTRIBUTES of this measure.
- c. Please describe the EFFICIENCY of this measure.
- d. How many of this measure did you implement?

ASK Q117 IF [Q113<>96,98,99] AND [Q112=1]

117. Was this measure specifically recommended by a program related audit, report or program technical specialist?
- 1 Yes
 - 2 No
 - 98 (Don't know)
 - 99 (Refused)

ASK Q1) IF [Q113<>96,98,99] AND [Q112=1]

118. How important was your experience in the <PROGRAM> in your decision to implement this Measure, using a scale of 0 to 10, where 0 is not at all important and 10 is extremely important?
- [RECORD 0 TO 10]
- 98 (Don't know)
- 99 (Refused)

ASK Q119 IF [Q1]<>98, 99] AND [Q113<>96,98,99] AND [Q112=1]

119. Why do you give it this rating? [OPEN END]

ASK Q2) IF [Q113<>96,98,99] AND [Q112=1]

120. If you had not participated in the <PROGRAM>, how likely is it that your organization would still have implemented this measure, using a 0 to 10, scale where 0 means you definitely WOULD NOT have implemented this measure and 10 means you definitely WOULD have implemented this measure?
- [RECORD 0 TO 10]
- 98 (Don't know)
- 99 (Refused)

CONSISTENCY CHECK ON PROGRAM IMPORTANCE RATING VS. NO PROGRAM RATING MEASURE 1

ASK Q121 IF [[Q1)=0,1,2,3] AND [Q2)=0,1,2,3] AND [Q113<>96,98,99] AND [Q112=1]]
OR [[IF [Q1)=8,9,10] AND [Q2)=8,9,10] AND [Q113<>96,98,99] AND [Q112=1]]

121. You scored the importance of your program experience to your decision to implement this measure with <Q1) RESPONSE > out of 10 possible points. You ALSO

scored the likelihood of implementing this measure if your organization had not participated in the program with <Q2) RESPONSE> out of 10 possible points. Can you please explain the role the program made in your decision to implement this measure?

00 [RECORD VERBATIM]

98 (Don't know)

99 (Refused)

ASK Q122 IF [Q114<>96,98,99] AND [Q112=1]

122. I have a few questions about the SECOND measure that you implemented. If needed, read back measure: <Q114 RESPONSE> [OPEN END]
- Why did you not receive an incentive through <PROGRAM ADMINISTRATOR > for this measure?
 - Please describe the SIZE, TYPE, and OTHER ATTRIBUTES of this measure.
 - Please describe the EFFICIENCY of this measure.
 - How many of this measure did you implement?

ASK Q123 IF [Q114<>96,98,99] AND [Q112=1]

123. Was this measure specifically recommended by a program related audit, report or program technical specialist?
- Yes
 - No
- 98 (Don't know)
99 (Refused)

ASK Q124 IF [Q114<>96,98,99] AND [Q112=1]

124. How important was your experience in the <PROGRAM> in your decision to implement this Measure, using a scale of 0 to 10, where 0 is not at all important and 10 is extremely important?
- [RECORD 0 TO 10]
98 (Don't know)
99 (Refused)

ASK Q125 IF [Q124<>98, 99] AND [Q114<>96,98,99] AND [Q112=1]

125. Why do you give it this rating? [OPEN END]

ASK Q126 IF [Q114<>96,98,99] AND [Q112=1]

126. If you had not participated in the <PROGRAM>, how likely is it that your organization would still have implemented this measure, using a 0 to 10, scale where 0 means you definitely WOULD NOT have implemented this measure and 10 means you definitely WOULD have implemented this measure?
- [RECORD 0 TO 10]

98 (Don't know)
99 (Refused)

CONSISTENCY CHECK ON PROGRAM IMPORTANCE RATING VS. NO PROGRAM RATING MEASURE 2

ASK Q127 IF [[Q124=0,1,2,3] AND [Q126=0,1,2,3] AND [Q114<>96,98,99] AND [Q112=1]]
OR [[IF [Q124=8,9,10] AND [Q126=8,9,10] AND [Q114<>96,98,99] AND [Q112=1]]

127. You scored the importance of your program experience to your decision to implement this measure with <Q124 RESPONSE > out of 10 possible points. You ALSO scored the likelihood of implementing this measure if your organization had not participated in the program with <Q126 RESPONSE> out of 10 possible points. Can you please explain the role the program made in your decision to implement this measure?

00 [RECORD VERBATIM]

98 (Don't know)
99 (Refused)

ASK Q128 IF [Q115<>96,98,99] AND [Q112=1]

128. I have a few questions about the THIRD measure that you implemented. If needed, read back measure: <SP3 RESPONSE> [OPEN END]
a. Why did you not receive an incentive through a <PROGRAM ADMINISTRATOR > program for this measure?
b. Please describe the SIZE, TYPE, and OTHER ATTRIBUTES of this measure.
c. Please describe the EFFICIENCY of this measure.
d. How many of this measure did you implement?

ASK Q129 IF [Q115<>96,98,99] AND [Q112=1]

129. Was this measure specifically recommended by a program related audit, report or program technical specialist?

1 Yes
2 No
98 (Don't know)
99 (Refused)

ASK Q130 IF [Q115<>96,98,99] AND [Q112=1]

130. How important was your experience in the <PROGRAM> in your decision to implement this Measure, using a scale of 0 to 10, where 0 is not at all important and 10 is extremely important?

[RECORD 0 TO 10]
98 (Don't know)
99 (Refused)

ASK Q131 IF [Q130<>98, 99] AND [Q115<>96,98,99] AND [Q112=1]

131. Why do you give it this rating? [OPEN END]

ASK Q132 IF [Q115<>96,98,99] AND [Q112=1]

132. If you had not participated in the <PROGRAM>, how likely is it that your organization would still have implemented this measure, using a 0 to 10, scale where 0 means you definitely WOULD NOT have implemented this measure and 10 means you definitely WOULD have implemented this measure?

[RECORD 0 TO 10]

98 (Don't know)

99 (Refused)

CONSISTENCY CHECK ON PROGRAM IMPORTANCE RATING VS. NO PROGRAM RATING MEASURE 3

ASK Q133 IF [[Q130=0,1,2,3] AND [Q132=0,1,2,3] AND [Q115<>96,98,99] AND [Q112=1]]
OR [[IF [Q130=8,9,10] AND [Q132=8,9,10] AND [Q115<>96,98,99] AND [Q112=1]]

133. You scored the importance of your program experience to your decision to implement this measure with <Q130 RESPONSE > out of 10 possible points. You ALSO scored the likelihood of implementing this measure if your organization had not participated in the program with <Q132 RESPONSE> out of 10 possible points. Can you please explain the role the program made in your decision to implement this measure?

TRADE ALLY² FREE RIDERSHIP BATTERY

I have a few specific questions about your firm's recent involvement in <ORGANIZATION>'s installation of <ENDUSE> through the <PROGRAM ADMINISTRATOR> <PROGRAM> at <ADDRESS> in <month/year >.

134. A representative of <ORGANIZATION> indicated that your firm was involved in the implementation of this project. Is this correct? Are you the person that is most knowledgeable about your firm's involvement in this project?

[IF NO, PROBE TO IDENTIFY SOMEONE ELSE IN FIRM WHO MAY HAVE KNOWLEDGE OF THIS PROJECT – IF SO, TERMINATE INTERVIEW AND CONDUCT INTERVIEW WITH THIS INDIVIDUAL SO IDENTIFIED, IF NOT, SKIP TO Q138]

135. Can you please describe your firm's role in the selection and installation of <ENDUSE> at <ORGANIZATION>'s facility? Probe if firm merely supplied or installed

² Note that "trade allies" need not be members of established program trade ally networks; rather "trade allies" are understood to be vendors, contractors, engineers, architects, and energy services companies that may or may not affect program participation.

equipment or if firm had a role in selecting it. Probe about perceived level of influence firm's recommendation had on customers choice.

ASK Q136 IF Q135 INDICATES TRADE ALLY PLAYED A ROLE IN SELECTING THE EQUIPMENT

136. On a scale of 0 to 10 where 0 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important was the PROGRAM, including incentives as well as program services and information, in influencing your decision to recommend that <ORGANIZATION> install the <ENDUSE> at this time?

[RECORD 0 TO 10]

98 (Don't know)

99 (Refused)

ASK Q137 IF Q135 INDICATES TRADE ALLY PLAYED A ROLE IN SELECTING THE EQUIPMENT

137. And using a 0 to 10 likelihood scale where 0 is NOT AT ALL LIKELY and 10 is EXTREMELY LIKELY, if the PROGRAM, including incentives as well as program services and information, had not been available, what is the likelihood that you would have recommended this specific <ENDUSE> to <ORGANIZATION>?

[RECORD 0 TO 10]

98 (Don't know)

99 (Refused)

138. Do you know of any other vendors that worked with <ORGANIZATION> during their implementation and/or installation of <ENDUSE>, for example engineers or designers? If so, do you have their name and phone number?

PROGRAM FEEDBACK BATTERY

ASK Q139 IF [NTG=B]

139. Which of the following people worked on completing your application for the program incentives including gathering required documentation?

1 Yourself

2 Another member of your company

3 A contractor

4 An equipment vendor

5 A designer or architect

98 (Don't know)

99 (Refused)

ASK Q140 IF [Q139=1-5]

140. Did anyone else help complete the application?

- 1 Yes--Who?
- 2 No
- 98 (Don't know)
- 99 (Refused)

ASK Q141 IF [Q140=1]

141. Thinking back to the application process, please rate the clarity of information on how to complete the application using a scale where 0 means "not at all clear" and 10 means "completely clear".

- [RECORD 0 TO 10]
- 98 (Don't know)
- 99 (Refused)

ASK Q141 IF [Q142>9]

142. What information needs to be clarified?

ASK Q143 IF [Q139=1]

143. Did you have a clear sense of who you could go to for assistance with the application process?

- 1 Yes
- 2 No
- 98 (Don't know)
- 99 Refused

ASK Q144 IF [NTG=B]

144. The next questions are about program staff that you may have contacted during the completion of your project. Program staff are anyone that reviewed your application, conducted site visits, determined your incentive amount, or processed your incentive check. Program staff are not anyone hired by you

In the course of completing this project, did you contact any program staff with questions or concerns about your project?

- 1 Yes
- 2 No
- 98 Don't know
- 99 Refused

ASK Q145 and Q146 IF [Q144=1]

145. Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with how long it took program staff to address your questions or concerns.

[Record 0-10]
98 Don't know
99 Refused

146. Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with how thoroughly they addressed your question or concern
[Record 0-10]
98 Don't know
99 Refused

ASK Q147- Q150 IF [NTG=B]

147. Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with the steps you had to take to get through the program.
[Record 0-10]
98 Don't know
99 Refused
148. Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with the amount of time it took to get your rebate or incentive.
[Record 0-10]
98 Don't know
99 Refused
149. Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with the range of equipment that qualifies for incentives.
[Record 0-10]
98 Don't know
99 Refused
150. Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with the program, overall.
[Record 0-10]
98 Don't know
99 Refused

ASK Q 151 IF [Q147=0,1,2,3,4] OR [Q148=0,1,2,3,4] OR [Q149=0,1,2,3,4] OR [Q150=0,1,2,3,4]

151. Please describe the ways in which you were dissatisfied with the aspects of the program you mentioned.

ASK Q152 IF [NTG=B]

152. Do you have any suggestions for how the Department of Commerce could improve its Energy Efficiency programs?

ASK Q152 IF [NTG=B]

153. What do you think are the best ways to communicate information about the Department of Commerce's programs to organizations like yours?

- 1 (E-mail)
- 2 (Telephone)
- 3 (Presentations at events or contractors)
- 4 (Trade allies/Vendors/Contractors)
- 5 (Direct mailings)
- 6 Website updates
- 7 (Other (Please specify))
- 98 (Don't know)
- 99 (Refused)

154. What type facility is the facility located at [Facility]?

- 1 (Airport)
- 2 (Community College)
- 3 (Correctional Facility)
- 4 (K-12 School)
- 5 (Public Library)
- 6 (Medical Facility)
- 7 (Municipal Facility)
- 8 (Park District Facility)
- 9 (Police or Fire Station)
- 10 (Public Works Facility)
- 11 (State University)
- 12 (Wastewater Treatment Facility)
- 13 (Other (Please specify))
- 98 (Don't know)
- 99 (Refused)

155. Does [Organization] rent, own and occupy, or own and rent to someone else the facility at this location?

- 1 Rent
- 2 Own and occupy
- 3 Own and rent to someone else
- 98 Don't know
- 99 Refused

156. Does your organization pay the full cost of the natural gas bill for the facility located at [Location]?

- 1 Yes
- 2 No
- 3 Don't know
- 4 Refused

157. Does your organization pay the full cost of the electric bill for the facility located at [Location]?

- 1 Yes
- 2 No
- 3 Don't know
- 4 Refused

Appendix B: Decision Maker Survey Responses

As part of the evaluation, ADM administered a survey to a sample of decision makers representing facilities that received incentives under the Boiler System Efficiency Program. This survey provided the information used in Chapter 3 to estimate free ridership for projects in the Boiler System Efficiency. Additionally, the survey also provided more general information pertaining to the making of decisions to improve energy efficiency by program participants.

Each participant completed an online version of the survey instrument provided in Appendix A. Each participant was asked questions about (1) his or her general decision making regarding purchasing and installing energy efficient equipment, (2) his or her knowledge of and satisfaction with the Boiler System Efficiency Program, and (3) the influence that the Boiler System Efficiency Program had on his or her decision to make the energy efficiency improvements. The following tabulations summarize Department of Commerce customer survey responses. Three columns of data are presented. The first column presents the number of survey respondents (*n*). The second column presents the percentage of survey respondents.

	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
How did you learn about the incentives for energy saving improvements provided through the program?	At a Department of Commerce Trade Ally Rally	0	0%
	The program website	3	13%
	Through an internet search	1	4%
	From a Department of Commerce Program representative	0	0%
	From a friend or colleague	0	0%
	A presentation at a conference or workshop	1	4%
	The Department of Commerce Illinois Energy Now Newsletter	0	0%
	From a professional group or association that you are a member of	0	0%
	From a Trade Ally, contractor, equipment vendor, or energy consultant	3	13%
	Other	8	33%
	Don't know	0	0%
	Refused	0	0%

*Because participants could choose more than one answer, may equal more than 100%

	<i>Response</i>	<i>(n=13)</i>	<i>Percent of Respondents</i>
Did you work with a contractor or vendor that helped you decide to participate in the program?	Yes	11	85%
	No	2	15%
	Don't Know	0	0%

Did the vendor or contractor encourage you to participate in the program?	<i>Response</i>	<i>(n=11)</i>	<i>Percent of Respondents</i>
	Yes	10	91%
	No	1	9%
	Don't Know	0	0%

Did the vendor or contractor display or show you any materials with the program logo?	<i>Response</i>	<i>(n=11)</i>	<i>Percent of Respondents</i>
	Yes	3	27%
	No	3	27%
	Don't Know	5	45%

Did you also use a DESIGN or CONSULTING engineer?	<i>Response</i>	<i>(n=11)</i>	<i>Percent of Respondents</i>
	Yes	1	9%
	No	10	91%
	Don't Know	0	0%

Did program staff assist you with the project that you implemented through the program?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Yes	8	33%
	No	15	63%
	Don't Know	1	4%

Did this measure that you implemented through the program...	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Replace existing equipment	2	8%
	Control, tune up, or work directly with existing equipment	21	88%
	Remove existing equipment and add no new equipment	0	0%
	Change scheduled operating times, settings, or otherwise optimized equipment operation	0	0%
	Involve newly installed energy-using equipment that did not replace existing equipment	0	0%
	Don't Know	1	4%
	Refused	0	0%
	Other	0	0%

In deciding to do a project of this type, there are usually a number of reasons why it may be undertaken. In your own words, can you tell me why this project was implemented? (Could choose up to three options)	<i>Response</i>	<i>(n=17)</i>	<i>Percent of Respondents</i>
	To replace old or outdated equipment	1	4%
	As part of a planned remodeling, build-out, or expansion	0	0%
	To gain more control over how the equipment was used	0	0%
	The maintenance downtime and associated expenses for the old equipment were too high	0	0%
	Had process problems and were seeking a solution	0	0%
	To improve equipment performance	4	17%
	To improve the product quality	1	4%
	To comply with codes set by regulatory agencies	0	0%
	To comply with organizational policies regarding regular/normal maintenance/replacement policy	0	0%
	To get a rebate from the program	2	8%
	To protect the environment	1	4%
	To reduce energy costs	8	33%
	To reduce energy use/power outages	7	29%
	To update to the latest technology	0	0%
	Other	19	79%
	Don't know	0	0%
Refused	0	0%	

*Because participants could choose more than one answer, may equal more than 100%

Which of the following statements best describes the performance and operating condition of the equipment you replaced through the program?	<i>Response</i>	<i>(n=2)</i>	<i>Percent of Respondents</i>
	Existing equipment was fully functional, and without significant issues	0	0%
	Existing equipment was fully functioning, but with significant issues	2	100%
	Existing equipment had failed or did not function.	0	0%
	Existing equipment was obsolete	0	0%
	Existing equipment was fully functioning with minor issues	0	0%
	Don't know	0	0%
	Refused	0	0%
	Other	0	0%

When did you first learn about the program? Was it BEFORE or AFTER you first began to THINK about implementing the measure?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Before	16	67%
	After	8	33%
	Don't Know	0	0%

(If After) Did you learn about the program BEFORE or AFTER you DECIDED to implement the measure?	<i>Response</i>	<i>(n=8)</i>	<i>Percent of Respondents</i>
	Before	5	63%
	After	3	38%
	Don't Know	0	0%

Using a scale from 0 to 10, where 0 is "Not at all likely" and 10 is "Extremely likely", if the program had not been available, what is the likelihood that you would have implemented exactly the same quantity of measures at exactly the time that you implemented it?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	0 - Not at all likely	5	21%
	1	3	13%
	2	3	13%
	3	3	13%
	4	4	17%
	5	0	0%
	6	0	0%
	7	0	0%
	8	1	4%
	9	1	4%
	10 - Extremely Likely	4	17%

Do you agree that the implication of the answer you just gave is that there is a [REPNSE] in 10 likelihood that, without the program, you would NOT have implemented exactly the same [MEASURE] in the same quantity at exactly the time that you implemented it?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Yes	24	100%
	No	0	0%
	Don't Know	0	0%

Without the program, would you have, at some point in time, implemented the exact same quantity of measures, regardless of the efficiency level of the equipment you would have selected?	<i>Response</i>	<i>(n=18)</i>	<i>Percent of Respondents</i>
	Yes	9	50%
	No	8	44%
	Don't Know	1	6%

	<i>Response</i>	<i>(n=20)</i>	<i>Percent of Respondents</i>
Without the program, when do you think you would have implemented the project?	At the same time	2	10%
	After the time the measure was actually implemented	15	75%
	Never	3	15%
	Don't Know	0	0%
	Refused	0	0%

	<i>Response</i>	<i>(n=15)</i>	<i>Percent of Respondents</i>
(If after) How much later would you have implemented the measure without the program?	Up to 6 months	0	0%
	7 months to 1 year	2	13%
	more than 1 year up to 2 years	4	27%
	more than 2 years up to 3 years	2	13%
	more than 3 years up to 4 years	3	20%
	More than 4 years	2	13%
	Don't Know	2	13%
	Refused	0	0%

	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
Based on your responses, I understand that, without the program, you would have [DESCRIPTION OF COUNTERFACTUAL SCENARIO]. Using a scale from 0 to 10, where 0 is "Not at all likely" and 10 is "Extremely likely", if the Department of Commerce's efficiency program had not been available, what is the likelihood that this would have occurred in the absence of the program?	0	9	38%
	1	1	4%
	2	0	0%
	3	0	0%
	4	2	8%
	5	3	13%
	6	1	4%
	7	0	0%
	8	4	17%
	9	1	4%
	10	3	13%

The impact of the availability of the incentive	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	0	1	4%
	1	1	4%
	2	0	0%
	3	0	0%
	4	0	0%
	5	0	0%
	6	0	0%
	7	0	0%
	8	2	8%
	9	4	17%
	10	16	67%
	Not Applicable	0	0%

The impact of a recommendation from an equipment vendor or contractor that helped you with the choice of the measure	<i>Response</i>	<i>(n=11)</i>	<i>Percent of Respondents</i>
	0	0	0%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	0	0%
	6	0	0%
	7	1	9%
	8	2	18%
	9	1	9%
	10	6	55%
	Not Applicable	1	9%

The impact of previous experience with implementing the measure	<i>Response</i>	<i>(n=13)</i>	<i>Percent of Respondents</i>
	0	1	8%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	0	0%
	6	0	0%
	7	1	8%
	8	1	8%
	9	0	0%
	10	2	15%
	Not Applicable	8	62%

The impact of a recommendation from program staff	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	0	2	8%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	0	0%
	6	2	8%
	7	1	4%
	8	2	8%
	9	0	0%
	10	5	21%
	Not Applicable	12	50%

The impact of information from program marketing materials	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	0	3	13%
	1	0	0%
	2	2	8%
	3	0	0%
	4	0	0%
	5	1	4%
	6	2	8%
	7	0	0%
	8	1	4%
	9	1	4%
	10	5	21%
	Not Applicable	8	33%
Don't Know	1	4%	

The impact of an endorsement or recommendation	<i>Response</i>	<i>(n=8)</i>	<i>Percent of Respondents</i>
	0	0	0%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	0	0%
	6	0	0%
	7	1	13%
	8	1	13%
	9	0	0%
	10	5	63%
	Not Applicable	1	13%
Don't Know	0	0%	

The impact of organizational policy or guidelines	<i>Response</i>	<i>(n=13)</i>	<i>Percent of Respondents</i>
	0	1	8%
	1	0	0%
	2	0	0%
	3	0	0%
	4	1	8%
	5	0	0%
	6	0	0%
	7	1	8%
	8	1	8%
	9	0	0%
	10	2	15%
	Not Applicable	7	54%
	Don't Know	0	0%

If you were given a total of 10 points to allocate between the program factor and the non-program factor, where a score of "0" means that the factor had no impact on the decision to implement the energy efficiency project, and a score of "10" means that the factor had DECISIVE impact on the decision to the implement the energy efficiency project, how many points would you give to the program factor?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	0 - Factor had no impact	1	4%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	2	8%
	6	0	0%
	7	2	8%
	8	4	17%
	9	4	17%
	10 - Factor had a decisive impact	11	46%
	Don't Know	0	0%

And how many points would you give to the non-program factor?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	0 - Factor had no impact	11	46%
	1	4	17%
	2	4	17%
	3	2	8%
	4	0	0%
	5	2	8%
	6	0	0%
	7	0	0%
	8	0	0%
	9	0	0%
	10 - Factor had a decisive impact	1	4%
	Don't Know	0	0%

Did anyone from outside your organization such as a program representative or a consultant, designer, distributor, or contractor provide you with assistance in the design or specification of the measure through the program?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Yes	16	67%
	No	8	33%
	Don't Know	0	0%

Our records show that you also received an incentive for other projects of the same type. Was it a single decision to complete all of those projects for which you received an incentive from the program or did each project go through its own decision process?	<i>Response</i>	<i>(n=12)</i>	<i>Percent of Respondents</i>
	Single Decision	9	75%
	Each project went through its own decision process	2	17%
	Other	1	8%

Since your participation in the program, did you implement any ADDITIONAL energy efficiency measures at this facility or at your other facilities within the same service territory that did NOT receive incentives through this program?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Yes	3	13%
	No	20	83%
	Don't Know	1	4%

Which of the following people worked on completing your application for the program incentives including gathering required documentation?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents*</i>
	Yourself	13	54%
	Another member of your company	4	17%
	A contractor	20	83%
	An equipment vendor	0	0%
	A designer or architect	1	4%
	Don't Know	0	0%
	Refused	0	0%

*Because participants could choose more than one answer, may equal more than 100%

Did anyone else help complete the application?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Yes	8	33%
	No	16	67%
	Don't Know	0	0%

Thinking back to the application process, please rate the clarity of information on how to complete the application using a scale where 0 means "not at all clear" and 10 means "completely clear".	<i>Response</i>	<i>(n=13)</i>	<i>Percent of Respondents</i>
	0 - Not clear at all	0	0%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	0	0%
	6	0	0%
	7	1	8%
	8	4	31%
	9	1	8%
	10 - Completely Clear	5	38%
	Don't Know	2	15%

Did you have a clear sense of who you could go to for assistance with the application process?	<i>Response</i>	<i>(n=13)</i>	<i>Percent of Respondents</i>
	Yes	12	92%
	No	1	8%
	Don't Know	0	0%

Did you contact any program staff with questions or concerns about your project?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Yes	6	25%
	No	18	75%
	Don't Know	0	0%

Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with how long it took program staff to address your questions or concerns	<i>Response</i>	<i>(n=6)</i>	<i>Percent of Respondents</i>
	0 - Very Dissatisfied	0	0%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	1	17%
	6	0	0%
	7	0	0%
	8	0	0%
	9	0	0%
	10 - Very Satisfied	4	67%
	Don't Know	1	17%

Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with how thoroughly they addressed your question or concern	<i>Response</i>	<i>(n=6)</i>	<i>Percent of Respondents</i>
	0 - Very Dissatisfied	0	0%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	0	0%
	6	0	0%
	7	0	0%
	8	1	17%
	9	0	0%
	10 - Very Satisfied	4	67%
	Don't Know	1	17%

Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with the steps you had to take to get through the program	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	0 - Very Dissatisfied	0	0%
	1	0	0%
	2	0	0%
	3	1	4%
	4	0	0%
	5	0	0%
	6	1	4%
	7	1	4%
	8	3	13%
	9	1	4%
	10 - Very Satisfied	17	71%
	Don't Know	0	0%

Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with the amount of time it took to get your rebate or incentive	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	0 - Very Dissatisfied	0	0%
	1	2	8%
	2	0	0%
	3	0	0%
	4	0	0%
	5	1	4%
	6	0	0%
	7	1	4%
	8	5	21%
	9	1	4%
	10 - Very Satisfied	10	42%
	Don't Know	4	17%

	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with the range of equipment that qualifies for incentives	0 - Very Dissatisfied	0	0%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	0	0%
	6	0	0%
	7	1	4%
	8	3	13%
	9	3	13%
	10 - Very Satisfied	14	58%
	Don't Know	3	13%

	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
Using a scale of 0 to 10 where 0 means "very dissatisfied" and 10 means "very satisfied", how dissatisfied or satisfied you are with the program, overall	0 - Very Dissatisfied	0	0%
	1	0	0%
	2	0	0%
	3	0	0%
	4	0	0%
	5	0	0%
	6	0	0%
	7	0	0%
	8	4	17%
	9	3	13%
	10 - Very Satisfied	17	71%
	Don't Know	0	0%

	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents*</i>
In deciding to do a project of this type, there are usually a number of reasons why it may be undertaken. In your own words, can you tell me why this project was implemented? (Could choose up to three options)	E-mail	16	67%
	Telephone	1	4%
	Presentation	6	25%
	Trade Allies	6	25%
	Direct Mail	2	8%
	Website	6	25%
	Other	3	13%
	Don't Know	0	0%
	Refused	0	0%

*Because participants could choose more than one answer, may equal more than 100%

What type of facility is the facility that received the incentive?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Airport	0	0%
	Community College	2	8%
	Correctional Facility	2	8%
	K-12 School	12	50%
	Public Library	1	4%
	Medical Facility	0	0%
	Municipal Facility	0	0%
	Park District Facility	0	0%
	Police or Fire Station	0	0%
	Public Works Facility	0	0%
	State University	1	4%
	Wastewater Treatment Facility	0	0%
	Other	6	25%
	Don't know	0	0%
	Refused	0	0%

Does your organization rent, own and occupy, or own and rent to someone else the facility at this location?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Rent	0	0%
	Own and occupy	23	96%
	Own and rent to someone else	1	4%
	Don't know	0	0%
Refused	0	0%	

Does your organization pay the full cost of the natural gas bill for the facility receiving the incentive?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Yes	23	96%
	No	0	0%
Don't Know	1	4%	

Does your organization pay the full cost of the electric bill for the facility receiving the incentive?	<i>Response</i>	<i>(n=24)</i>	<i>Percent of Respondents</i>
	Yes	23	96%
	No	0	0%
Don't Know	1	4%	