



Appendix 3

Utah Program Evaluations

Utah 2012 Evaluations

Program Evaluation Recommendations and Company Responses

Evaluation reports provide detailed information on the process and impact evaluations performed on each program, summarizing the methodology used to calculate the evaluated savings as well as providing recommendations for the Company to consider for improving the process or impact of the program, as well as customer satisfaction.

Outlined below is a list of the programs, the years that were evaluated during 2012 and the third party evaluator who completed the evaluation. Program evaluations are available for review at www.pacificorp.com/es/dsm/utah.html

Program	Years Evaluated	Evaluator
Cool Keeper	2009-2010	The Cadmus Group, Inc.
Home Energy Savings	2009-2010	The Cadmus Group, Inc.
See ya later, refrigerator	2009-2010	The Cadmus Group, Inc.
Cool Cash	2009-2010	The Cadmus Group, Inc.
New Homes	2009-2010	The Cadmus Group, Inc.

The third party evaluator’s recommendations and Company’s responses are provided in the below Tables:

Table 1
Cool Keeper Evaluation Recommendations

Evaluation Recommendation	Rocky Mountain Power Action Plan
Consider using different promotional items with Multi-Family buildings such as magnets so that the information stays with the apartment.	Continuing to market program to multi-family sector as suggested by contract administrator. Recruitment and customer acquisition based on contacting multi-family property management, not tenant.
Ensure contractor list on website is up-to-date. It appears the list of contractors presented on the Cool Keeper website may be out of date. Cadmus reached out to the four Cool Keeper contractors listed on the website and only one customer service representative said they worked with the program.	All participating contractors are updated on Website.

Evaluation Recommendation	Rocky Mountain Power Action Plan
Some companies did mention that they only removed DCUs. The Program Administrator should continue to follow up with their contractors periodically to make sure everyone has the most recent program information.	
Consider adding a share toolbar to the website to promote referrals. This web tool allows users to share content in a variety of ways helping to build traffic to the site.	Program website has not been modified with a share bar. Referrals account for a very low portion of recruitment. Marketing is primarily face-to-face and direct call to utility customer.
Consider leveraging existing Rocky Mountain Power social media channels. Currently Rocky Mountain Power uses Twitter, Facebook, and YouTube and has a blog. Promoting messaging, customer testimonials and adding web links can help drive traffic. Consider expanding into LinkedIn to reach business owners. This will also help provide two-way communication and better integrates this program into the overall Rocky Mountain Power social channels.	This form of media is currently done with the wattsmart outreach campaign. It starts in May and concludes in August.
Cadmus recommends Rocky Mountain Power collect tonnages for air conditioning units with missing values in the database. This could be accomplished when program administrator technicians perform annual site inspections of 20 percent of DCU units in participating homes and businesses. Rocky Mountain Power reports tonnage data collection is already underway.	Program collected missing tonnages prior to the start of 2012 program season.

Table 2
Home Energy Savings Evaluation Recommendations

Evaluation Recommendation	Rocky Mountain Power Action Plan
Due to lack of preparation by retailers, Rocky Mountain Power should consider providing educational point-of-purchase materials about EISA to lighting retailers, framed in the context of increased availability of utility-supported, high-efficiency lighting options. This will help retailers prepare customers for changes in lighting availability, and decrease customer frustration.	The Company developed an EISA communications plan in June 2011. Materials and messaging on EISA are already integrated into the program's marketing plans. Messaging doesn't focus on the specifics of EISA but rather on educating consumers on the meaning and difference for lumens and watts. Point-of-purchase marketing materials for lighting emphasize educating customers on how to choose the right light bulb for the right application with information on color rendering, lumens and related information.
Ensure lighting retailers have been trained to properly educate and prepare customers for EISA changes: specifically, the Lighting Facts label required to be displayed on all lighting packages. Supply retailers with point-of-purchase materials	See above response.

Evaluation Recommendation	Rocky Mountain Power Action Plan
that show customers how to interpret the label and easily find the Rocky Mountain Power-incented bulbs they need. Although this will not produce directly measureable savings impacts, increased customer satisfaction could indirectly increase customers' willingness to participate in other HES Program components.	
Given changes in the evolving lighting industry, explore which higher-efficiency lighting options (e.g., LEDs) garner the most savings per unit. Align marketing messages with the preferred lighting option to heighten awareness using market transformation tactics.	LEDs were added to the program in November 2012.
The evolving lighting market can provide a platform to clarify marketing messages about lighting options and bulbs best for each customer's intended use. Continue to enhance marketing collateral comparing prices of various lighting options with expected lifetime savings associated with the options, demonstrating the long-term value of higher-efficiency options. Potential long-term savings attributed to qualifying measures serve as the primary purchasing motivator for appliance and weatherization participants. These same marketing tactics should be considered for the lighting market, given elimination of traditional, inexpensive options. Messaging should also highlight lighting quality comparisons and other factors consumers tend to focus on in satisfaction surveys.	Point-of-purchase marketing materials for lighting emphasize educating customers on how to choose the right light bulb for the right application with information on color rendering, lumens and related information.
EISA informational materials should highlight the increased variety of discounted lighting options offered by Rocky Mountain Power's HES Program, including specialty CFLs.	Lighting marketing materials cover the full range of discounted bulbs, including specialty CFLs.
More than three-quarters of surveyed CFL owners threw a CFL bulb in the trash during the past 12 months. While there are strategies in place to communicate proper disposal methods online; very few lighting customers reported visiting Rocky Mountain Power's CFL disposal Webpage.	Expanded messaging continues to emphasize proper disposal of CFLs.
Continue with plans to provide recycling centers at all participating retail locations; so customers can simply bring in spent bulbs when purchasing replacements. Recycling centers could convey a positive public image to enhance Rocky Mountain Power's reputation within the community, and to add public relations value to the program, particularly with interveners. Rocky Mountain Power should raise awareness of the availability of recycling centers through bill inserts, training for	10 lighting displays incorporating prepaid recycling boxes were distributed to small retailers in mid to late 2011 throughout Pacific Power and Rocky Mountain Power service territory. It was very difficult to get retailers to accept the displays and set them up on the sales floor. The effort yielded no noticeable increase in savings and didn't generate any additional benefits for the retailers. The effort has been discontinued.

Evaluation Recommendation	Rocky Mountain Power Action Plan
retail staff, and other outreach tactics.	
Baseline wattage assumptions will need to be updated to account for the new EISA standards. The EISA standard established an equivalent baseline by rated lamp lumens. If the actual baseline wattage replaced is not known (i.e. no surveys were conducted), the recommended approach uses the CFL rated lumens and equivalent lumens in EISA to determine baseline wattage. This approach can be used for program evaluations in 2012 and beyond.	The Company has updated baselines to incorporate the new EISA standards and will continue do so.
The WHF is an adjustment representing the interactive effects of lighting measures on heating and cooling equipment operation. Cadmus did not apply the WHF adjustment to lighting savings estimates as Rocky Mountain Power did not include it in their initial planning estimates. However, Cadmus recommends using the approach outlined in Appendix L and including this adjustment for future planning estimates and evaluations.	The Company has incorporated a WHF into lighting savings.
As the baseline for lighting savings changes, non-lighting savings achieved through the HES Program may accrue increased significance. If needed, continue to recruit new trade allies to broaden program awareness throughout the service territory. Though the HES program has an effective trade ally presence, an increased trade ally network could lead to heightened incentive awareness, and increased program participation.	The Company constantly is recruiting new trade allies, as well focusing on retaining current trade allies.
To ensure trade allies find it easy to participate and continue to promote the HES program, carry on with plans to offer them online application access.	The Company has not developed online application for trade ally projects. The Company has developed online incentive applications for appliances, light fixtures, electric water heaters and room air conditioners.
Continue with plans to provide trade ally-focused marketing collateral for download within the trade ally section of the program Web pages. Offer customizable co-marketing options for trade ally promotion. If necessary, these materials can be offered within a password-protected area of the Website.	The Company continues to use a face-to-face, telephone, email and webinar contract strategies for engaging trade allies for all activities. The volume of trade ally materials does not warrant developing a Web-based ordering system. The Company has rolled out a more formal communication and relationship strategy with trade allies. Webinars, a home improvement pocket guide, frequent communications and site visits, inspection feedback, trade ally newsletters, contractor briefs and other tools are being used to provide more value to trade allies and to engage them more thoroughly and consistently.
Test innovative trade ally outreach methods in the	The Company continues to test new tactics such as

Evaluation Recommendation	Rocky Mountain Power Action Plan
Utah service territory. Successful methods can be duplicated in other territories.	quarterly electronic newsletters, webinars and other means for training, recruiting and retaining trade allies.
Train lighting retailers to inform customers that incented lighting products have been discounted by Rocky Mountain Power.	Lighting retailers receive visits and training from program staff on a regular basis to ensure they inform customers the discounted lighting products are provided by Rocky Mountain.
Continue to leverage “one-to-many” opportunities. “Road shows” and event exposure can reach rural customers cost-effectively. Invitations to road shows and/or event sponsorships can offer effective marketing opportunities, outlining the program value proposition. Events targeting trade allies, a highly qualified and motivated audience base, can be particularly effective.	The Company continues to seek out event opportunities that generate projects and kWh savings and will create events to support trade allies and motivate potential participants.
Continue to leverage on and offline social networks to influence customer satisfaction levels. Social networks (such as stakeholder trade associations, community networks, Chambers of Commerce, LinkedIn groups, and e-mail networks) provide low-cost, high-volume information distribution vehicles. Continue to consider implementing innovative tactics, such as Living Social and/or Groupon coupon-focused lead generation.	The Company has expanded the use of social media (i.e. Twitter, Facebook, etc.) for promoting programs. Program staff is not engaged in local professional associations but relies on Company staff such customer and community managers to represent the program with local organizations.
Broaden promotion of the program’s URL. Only 3 percent of appliance and weatherization participants (and no trade allies) cite the Website as a referral source. Online marketing can be one of the most cost-effective tools to generate interest and leads in remote geographies. Rocky Mountain Power should emphasize its Website in marketing materials as a key tool for obtaining detailed program information. However, marketing channels should continue to focus on approaches reported most effective with customers: bill inserts and in-store displays.	Company marketing strategy has shifted from promoting specific energy efficiency program websites to promoting the overarching marketing brand of wattsmart. Nearly all program marketing materials include the wattsmart.com address instead of the program specific address. The Company continues to maintain its focus on bill inserts and in-store displays as the most effective marketing channels with customers.
Mirror segment-driven messages found within collateral and promotional events on the Website.	Marketing and messaging across channels is consistent.
Continue to leverage customer’s interest in saving energy by providing trade allies with materials focusing on potential energy cost savings associated with qualified measures. Information could include estimated annual and lifetime cost savings, compared to use of a standard-efficiency model, using accurate Rocky Mountain Power rates.	The Company has rolled out a more formal communication and relationship strategy with trade allies. Webinars, a home improvement pocket guide, frequent communications and site visits, inspection feedback, trade ally newsletters, contractor briefs and other tools are being used to provide more value to trade allies and to engage them more thoroughly and consistently.

Table 3

[See ya later refrigerator Evaluation Recommendations](#)

Evaluation Recommendation	Rocky Mountain Power Action Plan
Rocky Mountain Power should continue implementing the SYLR program to achieve cost-effective energy savings.	The Company continues to offer the program.
Rocky Mountain Power should adjust its expected per-unit savings to reflect estimates calculated in this evaluation. Cadmus recommends tracking program savings using the evaluated per-unit gross savings values of 1,215 kWh for refrigerators and 882 kWh for freezers.	The Company has adjusted per-unit savings for 2012 reporting based on the evaluation results.
Although Rocky Mountain Power did not apply a Waste Heat Factor (WHF) adjustment to CFL savings estimates, the WHF should be applied to all future planning and evaluated CFL savings values. Cadmus recommends tracking program savings from energy-saving kits using the WHF-adjusted gross savings value of 79 kWh.	The Company has incorporated the Waste Heat Factor into the 2013 reporting value for CFL kits.
Per-unit savings can be greatly affected by changes in appliance characteristics, such as configuration, age, and size. The program administrator tracks these characteristics, and Rocky Mountain Power should closely monitor changes in participating units' characteristics. This could be achieved by summarizing participation data on an annual basis, and noting changes in average participant unit characteristics.	The Company now requires an annual summary of average participant unit characteristics.
The program administrator and Rocky Mountain Power should continue with plans to improve reporting processes to eliminate the possibility of reporting discrepancies and increase accuracy of reported results. Cadmus identified minor discrepancies in reported number of participant units, and Rocky Mountain Power has since worked with the program administrator to prevent discrepancies between program administrator and Rocky Mountain Power reporting by including additional documentation in monthly reports.	The Company has improved monthly reporting and invoicing to eliminate reporting errors and improve accuracy. Monthly invoices, monthly reports and data from the vendor are all compared each month for accuracy against each other.

Table 4
[Cool Cash Evaluation Recommendations](#)

Evaluation Recommendation	Rocky Mountain Power Action Plan
Rocky Mountain Power should increase its gross per-unit savings to reflect estimates calculated in	The Company has incorporated the revised per unit savings from the evaluations into program

Evaluation Recommendation	Rocky Mountain Power Action Plan
this evaluation	reporting.
The program administrator and Rocky Mountain Power should continue the program's updated marketing approach which emphasizes evaporative cooling equipment, as evaporative cooling equipment were found to have high, cost-effective, average per-unit energy savings.	The Company continues emphasize cost-effective evaporative coolers as an alternative to central air conditioners.
The program administrator and Rocky Mountain Power should develop a method to improve reporting processes and reduce reporting discrepancies. Cadmus recommends participation and savings should be reconciled monthly and with annual reports. Saving final program year participation records outside of the program tracking database may also help address any discrepancies that may arise at a later time.	The Company and program administrator reconcile participation and savings as needed throughout the year and at year-end.

Table 5
New Homes Evaluation Recommendations

Evaluation Recommendation	Rocky Mountain Power Action Plan
ENERGY STAR New Homes requirements should be revised to the ENERGY STAR for Homes Version 3.0 standard, thus improving program home performance, relative to nonparticipant homes.	ENERGY STAR for Homes Version 3.0 was implemented in 2012
For homes built before 2012, expected savings for single-family homes (built to ENERGY STAR requirements in place before Version 3.0) and Plus Measures should be revised to reflect these findings. Rocky Mountain Power should work with its program administrator to determine whether discounted savings for homes built in 2011 are warranted for reporting and filing purposes.	Program was redesigned in 2012 and these recommendations were completed
Include verification of participant and nonparticipant home size in future evaluations. Continue telephone surveys and consider site audits, especially for nonparticipant homes to check values recorded by other processes.	Future evaluations will ensure data collected accurately represents participants and non-participants.
To improve matching participants to utility billing data, require the program administrator to include the utility Site ID in the participant	Process started in Q2 2012

Evaluation Recommendation	Rocky Mountain Power Action Plan
database.	
To improve identification of single-family and multifamily customers, add a “home type” field to the utility account information collected from residential customers.	Dwelling type is currently available in the Company’s customer tracking system. The Company will work with future evaluators to ensure the information is transparent.