

National Fuel Gas Distribution Corporation, New York Division, Conservation Incentive Program: Process Evaluation Executive Summary

National Fuel retained Cadmus to conduct a process evaluation of the Conservation Incentive Program's (CIP's) four components:

- Low-Income Usage Reduction Program (LIURP)
- Residential Rebates
- Nonresidential Rebates
- Outreach and Education

This process evaluation was completed in December 2011, and sought to assess program processes and provide recommendations for improving program operations. This executive summary provides an overview of key findings and recommendations from the process evaluation report for each component.

LIURP

Through the Low-Income Usage Reduction Program (LIURP), implemented by NYSEDA, National Fuel provides eligible low-income customers with energy education, an energy audit (including a blower-door test), and installation of appropriate conservation measures in their homes.

Cadmus' process evaluation found that, overall, LIURP's Year 4 operated smoothly, reflecting improvements made over the previous three implementation years. Communication has proved effective between National Fuel, NYSEDA, and Honeywell in implementing the program and addressing customer recruitment. Opportunities remain for further streamlining program implementation processes, particularly in data tracking. Based on these findings, Cadmus recommended the following actions:

- Investigate adopting a tracking system to allow real-time or near-real time project tracking and shared access by NYSEDA, Honeywell, and National Fuel. This would allow National Fuel to better respond to customer inquiries and reduce data entry errors.
- Investigate the feasibility of designating project completion for individual funding organizations, indicating when all measures funded by one organization have been completed. This would eliminate delays in National Fuel's ability to record savings for LIURP jobs with outstanding work funded by other groups.
- Consider increasing targeted outreach to rental property owners and tenants to address lower participation among these customers.



Residential Rebates

Through Residential Rebates, National Fuel offers prescriptive rebates to residential customers for purchases of high-efficiency gas appliances. The process evaluation found this well-established program ran smoothly. Participation met expectations, and program and spending goals were achieved or surpassed annually. Trade allies and customers expressed high satisfaction with the program. Communication and coordination works well between National Fuel, CSG, and EFI. Although efforts to improve processing time are always advisable, rebate processing runs smoothly, with over 98 percent of customers satisfied with the time required to receive their rebates. Additionally, the QA system in place has worked well, with minimal quality issues reported from CSG and EFI. Incentive levels presented the primary concern about the program. About half of the trade allies expressed frustration over reduced incentives from Year 3 to Year 4. Cadmus recommended National Fuel should consider the following:

- Continuing to reach out to trade allies through mass mailings and e-mail blasts, prior to incentive level or measure changes, so trade allies have sufficient time to prepare for the changes.
- Holding meetings in addition to mailing out letters; so trade allies have an opportunity to ask questions and fully understand the reasoning behind program changes. Although this did occur in past program years an annual meeting was not held in Year 4. Based on feedback from trade allies this was a valuable activity, especially in years when incentive levels are adjusted, and should be reinstated.
- Reassessing incentive levels for Year 5. The slow economy and loss of federal incentives may compound effects of reduced incentives levels in Year 4, potentially leading to lower participation levels in Year 5.

Nonresidential Rebates

Through Nonresidential Rebates, implemented by NYSERDA, National Fuel offers rebates for high-efficiency gas equipment to small commercial customers, with annual usage of 12,000 Mcf or less. The program offers two participation avenues: a custom path and a prequalified path. The process evaluation found the program's prequalified portion has been a valuable addition, bringing large numbers of customers into the program. The custom program has experienced a slow launch, due to the weak economy and the hard-to-reach nature of the small commercial sector. Cadmus offered the following recommendations:

- National Fuel should consider partnering with a few trade allies serving small commercial customers to assist customers with the application process, including project design, savings calculations, and rebate forms.
- Communication between NYSERDA and National Fuel works well. Establishing a primary contact for TAs at National Fuel could be useful, increasing the efficiency of communication.
- Inconsistent analysis among the three TAs could cause variations in the types of projects approved through the program. This has not caused problems in program implementation, but NYSERDA should continue to work with TAs to standardize this process as much as possible.

- The application process can be cumbersome for customers. National Fuel and NYSERDA should consider revamping the application, making it shorter and more concise, and the application should be branded with National Fuel’s logo to minimize customer confusion.
- National Fuel should focus on marketing the program’s custom portion. Developing marketing collateral could potentially help draw more customers to the program. Specifically, Cadmus recommended National Fuel consider one or both of the following activities:
 - Provide case studies to highlight technical assistance, types of upgrades customers can make through the program, and resulting cost savings. These should be provided in print and through National Fuel and National Fuel for Thought Websites.
 - Better targeting of customer outreach by profiling energy usage and business types of existing customers and program participants. Partnering with trade allies to conduct direct outreach to top-priority customers.

Outreach and Education

Outreach and Education is a broad-based program that promotes energy efficiency through various efforts including the NEED Energy Detectives Program, the distribution of CIP Kits, and the Savings Card program. Based on the evaluation’s findings, Cadmus offered the following recommendations:

- National Fuel should continue exploring options for NEED program expansion, particularly in low-income communities.
- National Fuel should consider providing additional guidance to prospective retail partners in the Savings Card program, encouraging them to offer discounts on measures conferring greater gas savings.
- Given the popularity of CIP Kits, National Fuel should continue kit distributions wherever possible, and consider expanding kit offerings to further promote conservation. For example, National Fuel could develop a CIP Kit targeting to small business customers for distribution at trade shows or other business-oriented events.
- Investigate opportunities to expand online outreach, including:
 - Updating the National Fuel for Thought Website to improve navigation and include relatable content. This could include testimonials from participant customers, and may help build awareness and understanding of program offerings.
 - Tracking Website traffic on a regular basis to inform marketing efforts.
 - Explore adding social media outreach or expanding online outreach initiatives, such as creating and updating a Facebook page for the CIP. This would allow, for example, announcement of CIP kit distribution events, or promotions of rebate programs.



Final Report

THE
CADMUS
GROUP, INC.

National Fuel Gas Distribution
Corporation, New York Division,
Conservation Incentive Program:
Process Evaluation

December 22, 2011

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- Appendix A: CIP Logic Model Tables
- Appendix B: Program Staff Interview Guides
- Appendix C: Implementation Contractor Interview Guides
- Appendix D: Residential Rebate Program Trade Ally Survey
- Appendix E: Residential Rebate Program Participant Survey

1. Introduction

National Fuel is a gas-only utility, operating in Western New York that offers the Conservation Incentive Program (CIP), an overarching, energy-efficiency program, composed of four main components:

- Low-Income Usage Reduction Program (LIURP)
- Residential Rebates
- Nonresidential Rebates
- Outreach and Education

National Fuel retained The Cadmus Group, Inc. (Cadmus) to assist with the CIP's evaluation, measurement, and verification (EM&V). Cadmus assisted National Fuel in preparing an EM&V plan, which was approved by Public Service Commission (PSC) staff in early 2011. In July 2011, Cadmus also conducted an impact analysis review of the CIP. This process evaluation sought to assess program processes and provide recommendations for improving program operations.

The New York State Department of Public Service and the Evaluation Advisory Group jointly established the New York Evaluation Plan Guidance for EEPS Program Administrators, which is published on the Department of Public Service website. Cadmus and National Fuel Gas Distribution Corporation recognize the evaluation guidance prepared for EEPS Program Administrators, and utilized this guidance when completing the process evaluation of the Conservation Incentive Program.

The remainder of this report is organized in six sections. The Process Evaluation Methodology section outlines the research activities Cadmus conducted for the process evaluation. The CIP Management Review section provides an overview of National Fuel's portfolio management structure. The four subsequent sections focus on each of the CIP's main program components, and contain findings, conclusions, and recommendations resulting from program-specific process evaluation activities.

2. Process Evaluation Methodology

The CIP contains four components:

- **Low-Income Usage Reduction Program (LIURP)**, implemented by NYSERDA, through which National Fuel provides eligible low-income customers with energy education, an energy audit (including a blower-door test), and installation of appropriate conservation measures in their homes.
- **Residential Rebates**, through which National Fuel offers prescriptive rebates to residential customers for purchases of high-efficiency gas appliances.
- **Nonresidential Rebates**, implemented by NYSERDA, through which National Fuel offers rebates for high-efficiency gas equipment to small commercial customers, with annual usage of 12,000 Mcf or less. The program offers two participation avenues: a custom path and a prequalified path.
- **Outreach and Education**, a broad-based outreach and education program that promotes energy efficiency through various efforts including the NEED Energy Detectives Program, the distribution of CIP Kits, and the Savings Card program.

Through the process evaluation, Cadmus addressed the CIP overall and each of its components separately. This allowed us to evaluate issues unique to each component, delivery method, and sector. The main process evaluation areas included:

- Process efficiency;
- Delivery infrastructure; and
- Customer response (including adoption of measures).

Cadmus tailored these process issues to each specific component and CIP target market. As detailed below, we collected data using surveys and interviews. Data collection activities included involvement from participant customers, trade allies, program staff, and implementation staff, detailed as follows:

- **Participants:** Residential National Fuel customers who purchased equipment eligible for a rebate under the program, and submitted a rebate application approved for payment. Cadmus identified participants through tracking records provided by National Fuel and created a random sample of those who participated during Year 4 of the program. Out of the total 3,360 customers who participated in Year 4, Cadmus surveyed 70, resulting in a 90 percent confidence interval with a 9.8 percent precision level.
- **Trade Allies:** Those delivering program services or otherwise associated with the program, including: retailers and installation contractors. Cadmus identified trade allies through customer applications and records maintained by National Fuel and created a sample of trade allies who participated during Year 4 of the Residential Rebate program. The sample was stratified by the number of rebates associated with the trade allies, ensuring that both small and large retailers/contractors were able to provide feedback about the program. The stratification and number of completed interviews is detailed in Table 1.

Table 1. Trade Ally Sample Stratification

| Number of Rebates in Year 4 | Trade Allies | Total Completes |
|-----------------------------|--------------|-----------------|
| 100+ | 11 | 3 |
| 99 to 50 | 15 | 3 |
| 49 to 25 | 23 | 3 |
| 24 to 10 | 58 | 2 |
| 9 to 5 | 64 | 2 |
| 4 to 1 | 242 | 2 |

- **Key Program and Implementation Staff:** This group included:
 - National Fuel program staff;
 - New York State Energy Research and Development Authority (NYSERDA) staff involved in implementing the LIURP and nonresidential components;
 - National Energy Education Development Project (NEED) implementation staff involved in the Energy Detectives Program;
 - Residential Rebate Program implementation staff at Energy Federation, Inc. (EFI) and Conservation Services Group (CSG); and
 - Technical assistance (TA) contractors involved in reviewing nonresidential program applications.

Table 2 shows the number of surveys or interviews completed for each respondent group.

Table 2. Survey Respondent Groups by Program

| Program | Respondent Group | Completed Interviews/Surveys |
|-------------------------------|---|---|
| CIP Portfolio | National Fuel Staff | 3 |
| LIURP | National Fuel Staff | 3 |
| | NYSERDA Staff | 1 |
| Residential Rebate Program | National Fuel Staff | 2 |
| | EFI Staff | 1 |
| | CSG Staff | 3 |
| | Trade Allies | 15 (5 CIP card participants 10 non-CIP card participants) |
| | Participants | 70 |
| Nonresidential Rebate Program | National Fuel Staff | 2 |
| | NYSERDA Staff | 1 |
| | Technical Assistance Contractors (TAs) | 2 |
| Outreach and Education | National Fuel Staff | 3 |
| | NEED Staff | 1 |
| | CIP Card Participants (Trade Allies) | 5 |
| | Savings Kit Recipients | Ongoing |
| | Energy Detective Participating Households | Ongoing |

Through the process evaluation, Cadmus examined the following issues, addressing overall CIP operations:¹

- Program theory and logic model;
- Administrative and operational structure; and
- Program status and modifications.

For the process evaluation, we also reviewed, to the extent possible, the following items for each CIP component:

- Program roles and responsibilities;
- Program implementation processes; and

¹ On September 20, 2007, the Commission issued an order directing National Fuel Gas Distribution Corporation to implement a Conservation Incentive Program. Once this program was implemented and was operational, the program was considered to be a stand-alone, outside of the Energy Efficiency Portfolio Standard (EEPS). Distribution's stand-alone Conservation Incentive Program has a number of goals for day-to-day program administration and for overall program effectiveness. In addition, the Commission has provided annual budgetary guidance for the Conservation Incentive Program. On January 1, 2012, the Conservation Incentive Program officially became part of EEPS, based on Commission order. Distribution received energy-savings targets for the Conservation Incentive Program, as part of EEPS. This process evaluation encompasses activity for program years one through four, before the company became part of EEPS. As a result, this process evaluation does not contain a discussion of formalized energy savings targets.

- Quality assurance and quality control.

Finally, Cadmus summarized key findings and provided recommendations (included in this report). We conducted the process evaluation concurrent with the program's fourth year. These results are intended for incorporation into program delivery.

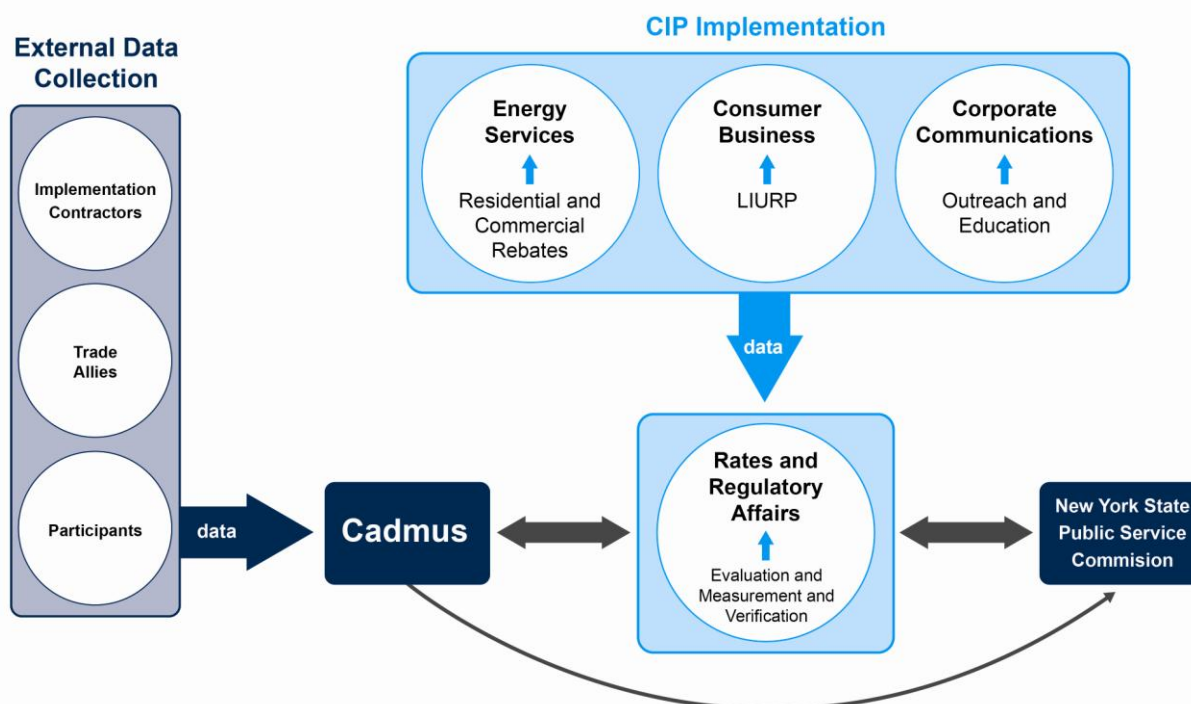
3. CIP Management Review

Given National Fuel is a gas-only utility, it has a smaller energy-efficiency portfolio of programs than those of combination gas and electric utilities and statewide program administrators. Therefore, National Fuel did not need to create a separate energy-efficiency department within the company. Rather, four distinct groups within National Fuel's organization are responsible for the CIP. These four groups maintain distinctions between those responsible for program implementation or administration, and those responsible for EM&V. Group divisions, as follow, intend to provide participating customers with the best service possible:

- The Consumer Business group administers the LIURP, to maintain continuity with other programs serving low-income customers.
- Energy Services administers nonresidential and residential rebates, utilizing account representatives' knowledge and customer relationships.
- The Corporate Communications Department implements Outreach and Education to maintain consistency with (and gain efficiencies from) other marketing and communication efforts.
- The Rates and Regulatory Affairs Department performs measurement and verification, including cost-effectiveness and billing analyses.

Though communication maintained across the groups seeks to establish efficiencies and transparency, and to respond quickly to trade ally and customer feedback, and regulatory concerns, none of the groups report to each other. Each group reports to a different vice president; this maintains an organizational separation between the program administrators in three different operating departments and the evaluation function in Rates and Regulatory Affairs. The benefits offered by this structure include efficient use of existing resources, and consistency between energy efficiency and associated services.

As noted, National Fuel engaged Cadmus to review and assist with the program evaluation, including evaluating the extent that CIP administrative and evaluation efforts remain separate. Figure 1 illustrates this division, as Cadmus understands it.

Figure 1. Organization of CIP Implementation and EM&V Processes

The CIP Implementation group, as described above, provides program data to the Rates and Regulatory Affairs team responsible for EM&V. These data include: participation records; results of customer surveys; and records of program expenditures.

The EM&V group collects additional information from sources external to National Fuel, including data collected through ongoing evaluation activities provided by Cadmus. Cadmus has an interactive relationship with the EM&V team, with both parties providing feedback on proposed evaluation methods and activities. As an independent evaluation contractor, Cadmus can collect data from implementation staff and participating customers with minimal risk of receiving biased reports.

Finally, the EM&V team interacts with PSC staff, soliciting feedback on evaluation activities, including those performed by Cadmus.

Along with the management of EM&V within Rates and Regulatory Affairs, the external involvement from Cadmus and PSC allow National Fuel's EM&V group bolster the independence and impartiality of the EM&V activities carried out.

4. Low-Income Usage Reduction Program

Program Description

Through the LIURP, National Fuel provides eligible low-income customers with energy education, an energy audit (including a blower-door test), and installation of appropriate conservation measures in their homes. Measures commonly installed through the LIURP include: wall and ceiling insulation, air sealing, thermostat setbacks, low-flow showerheads, hot water pipe insulation, and heating system repairs or replacements. In addition to gas-saving measures, the LIURP funds some health and safety measures, such as equipment checks and carbon monoxide detectors.

To qualify for participation, a customer must: be eligible for the Home Energy Assistance Program (HEAP), have had a heating account for one year, have active service, and have an annual consumption of 132 Mcf or more. Low-Income Customer Affordability Assistance Program (LICAAP) participants receive priority for LIURP participation.

NYSERDA implements the program through its EmPOWER New York program, with the assistance of two subcontractors, Honeywell Inc. and Conservation Services Group (CSG). Honeywell coordinates with weatherization contractors, which perform audits and installations, and CSG provides quality assurance. NYSERDA periodically engages evaluation contractors to perform impact and process evaluations of its programs, including EmPOWER. Recent EmPOWER process evaluations were released in 2007 and 2010. Both of those evaluations included a detailed review of program activities carried out by NYSERDA and its subcontractors. However, this evaluation focuses instead on the particularities of National Fuel's program.

Process Evaluation Activities

Cadmus' process evaluation examined whether the program operates efficiently and effectively, relying primarily on interviews with program and implementation staff. Cadmus conducted interviews with program staff at National Fuel and NYSERDA to collect information addressing the following topics:

- Program structure:
 - Logic model
 - Objectives
 - Changes
- Outreach and marketing
- Participant experience and satisfaction
- Communication between National Fuel, NYSERDA, Honeywell, and CSG
- Data collection and reporting
- Quality assurance
- Implementation barriers
- Program strengths and areas for improvement

Cadmus conducted in-depth interviews in person and by telephone, using a structured interview guide, and obtained follow-up information and clarifications via telephone or e-mail, as necessary.

Process Evaluation Findings

Program Structure

National Fuel had 15 years of experience implementing the LIURP in its Pennsylvania territory before implementing the program in New York as part of the CIP. The LIURP logic model (included in Appendix A) describes program inputs, activities, and desired outcomes. No major program changes occurred during Year 4.

The LIURP operates as part of NYSERDA's EmPOWER New York program, and provides weatherization and energy education services to its participants. Multiple funding sources support the EmPOWER program, and similar services are offered through the Weatherization Assistance Program (WAP), the statewide weatherization program funded by the federal government.

In late 2007, when National Fuel began implementing the LIURP in New York, it contracted with NYSERDA to act as the program implementer. NYSERDA implements the statewide EmPOWER New York program, combining funds from gas and electric utilities to ensure customers' homes receive comprehensive treatment. National Fuel recognized the benefit of leveraging NYSERDA's existing infrastructure and relationships. NYSERDA also engages two subcontractors that aid in implementing the LIURP:

- Honeywell, Inc., coordinates with the weatherization contractors; and
- As the quality assurance (QA) contractor, CSG performs post-installation inspections.

NYSERDA and Honeywell jointly assembled the contractor work force and handled paperwork and training. Approximately 15 contractors perform home energy audits and measure installations for National Fuel customers. These contractors must be Building Performance Institute (BPI) certified, and NYSERDA and CSG score and document contractor performance during post-installation inspections.

Outreach and Marketing

Outreach to customers eligible for LIURP participation serves as a key program component. National Fuel and NYSERDA interviewees reported some difficulty with recruitment, not an uncommon experience for low-income programs. Customers typically do not know they are eligible to participate in the program until they receive notification from National Fuel.

To facilitate recruitment, National Fuel produces weekly reports from its customer information system (CIS) to identify customers receiving support from LICAAP; these reports are provided to Honeywell. In addition to these reports, National Fuel provides Honeywell with two years of customers' usage data, which Honeywell uses to prioritize the referral list. Honeywell then sends postcards that notify customers they are eligible for program services. Two weeks later, Honeywell sends out a program application. Highest-use customers receive priority, with LICAAP customers being referred prior to other high-use HEAP recipients. National Fuel reported recent discussions about developing a new referral system, using community

organizations and similar resources, which local organizations could use to contact customers, notifying them of their eligibility. No plans have been implemented to develop this new system.

Customers can qualify for the program whether they rent or own their home. Rental tenants provide Honeywell with their landlord's contact information, and Honeywell sends forms for landlords to complete before the project begins. Implementation staff reported low response rates from landlords, and noted difficulty in reaching landlords, particularly when working through a property management company. To improve response rates and better reach rental tenants, Honeywell follows up telephone calls to landlords. Staff reported these telephone calls have been effective, noting telephone calls to landlords typically cause an influx of new applications.

NYSERDA reported the number of referrals have been sufficient to yield the desired number of participants. NYSERDA and National Fuel coordinate to ensure a sufficient number of customers are referred, while avoiding enrolling too many customers and risking overspending the annual budget. According to NYSERDA, approximately 10 percent of the customers signing up to participate later withdraw their application or decide not to have work performed in their home. NYSERDA reported these customers sometimes simply changed their minds about participating or did not want contractors returning to install measures in their homes.

During LIURP's first few implementation years, the program experienced slower participation ramp-up than National Fuel and NYSERDA expected. At the close of the first implementation year, NYSERDA conducted local focus groups to determine why response rates were low among customers receiving notice of their eligibility. Following these focus groups, NYSERDA adopted the postcard approach, and emphasized the program's affiliation with National Fuel, as NYSERDA and Honeywell were not well known to customers.

NYSERDA reported that due to the slow response in the program's early years, they have been more aggressive with outreach to National Fuel customers than other participating utilities, using National Fuel branding and various approaches to inform eligible customers of program services. At the program's beginning, few prospective participants were aware of the CIP or NYSERDA. This lack of awareness caused customers to be skeptical of services being offered. Customers perceived that contractors were trying to sell them something, or trick them into signing up for a program that would later cost money. NYSERDA's outreach approach, which sought to counteract customer wariness and increase program awareness, included:

- Phone calls to homeowners;
- Phone calls to landlords;
- Door-to-door outreach;
- Letters and postcards; and
- Community meetings.

NYSERDA reported sending contractors door-to-door to meet referred customers and to explain program services proved effective, but the method was too expensive to apply on a large scale. Telephone calls offered mixed results, and were also somewhat costly, due to staff time required. Community meetings proved ineffective, as they were not well attended.

Outreach through letters and postcards have been the most consistently employed, providing the lowest-cost approach for reaching a large number of eligible customers. To maximize the

effectiveness of written outreach materials, NYSERDA reported improving on materials during Year 3, based on feedback from early mailings, and using a more colorful and eye-catching presentation.

Participant Experience and Satisfaction

Once a customer applies to participate in the LIURP, Honeywell assigns them a BPI-certified contractor. This contractor schedules a home energy audit, including a blower door test, to determine the most cost-efficient energy upgrades that can be safely completed. Before contractors complete a project, it must pass parameters in the EmPOWER New York Calculator (EmPCalc), a NYSERDA calculator estimating energy savings associated with measures installed in a particular home. If a project does not pass the EmPCalc-defined parameters, contractors contact NYSERDA for permission to proceed. Contractors also provide energy-saving information to customers during audits and installation.

The EmPOWER New York program combines gas and electric measures into a comprehensive package, and NYSERDA reported customers appreciated electric measures, such as new refrigerators and improved lighting, while appreciating gas-saving measures less (as these are often less noticeable). Although weatherization and insulation measures often increase home comfort, customers reportedly express less excitement about these “invisible” improvements.

Communication and Data Reporting

All interviewees reported effective communication between National Fuel, NYSERDA, and Honeywell. The three parties meet biweekly, and engage in informal communications, as needed. The regular meetings focus on ensuring jobs are being completed. Honeywell compiles a production report for review during the meetings, and NYSERDA discusses issues or problems, and addresses progress toward the goals. NYSERDA emphasized National Fuel has been a very good partner in implementing this program, showing a high involvement level and dedication to customer service. National Fuel reported both NYSERDA and Honeywell have been very responsive.

NYSERDA reports progress data to National Fuel on a quarterly basis. Per NYSERDA, the data collection process works very well, and they are collecting a robust set of data. NYSERDA enters collected data into its Comprehensive Residential Information System (CRIS) database, which tracks funding sources for each measure, allowing reports to be created for each funder. To obtain a complete set of quarterly data, National Fuel requests information on jobs where LIURP-funded measures have been completed, but which may have outstanding work from other funding sources.

NYSERDA and the other organizations cooperatively and responsively transfer and share data, though the systems themselves do not always work perfectly. Each organization tracks data using its own system, and National Fuel cannot access all data tracked by Honeywell and NYSERDA. Information on a job’s progress cannot be entered in National Fuel’s CIS until contractors have submitted invoices to NYSERDA. This timing hampers National Fuel’s ability to respond to customer calls and track customer progress. When a customer contacts National Fuel with a question about work to their home, National Fuel may require a few hours to a day to respond, after requesting information from Honeywell.

Additionally, National Fuel reported jobs are not designated as complete within the tracking systems until installation and completion of all measures supported by all funding sources. This sometimes delays National Fuel's ability to record completed measure installations. National Fuel staff noted an option to designate completion of projects by funding organization would be advantageous, preventing LIURP jobs from being held up by outstanding work funded by other groups.

Quality Assurance

NYSERDA contracts with CSG for QA services. As the QA contractor, CSG visits 20 percent of participant homes after the work has been completed. CSG scores contractors on a scale of 0 to 6, based on the quality of their work, and NYSERDA tracks contractors' performance closely. Major, recurring quality issues were not identified during Year 4. NYSERDA mentioned two quality issues requiring attention. The first is an inattention to procedural details, such as leaving a furnace inspection tag or putting a cover on a furnace filter. The second is small gas leaks requiring repair. NYSERDA noted that even when contractors are doing good work, there are still instances where a small leak will be left over, which must be repaired. Although these quality issues are minor, and do not put customers at risk from a safety perspective, NYSERDA does not ignore the issues that arise and they spend time making sure all issues are resolved before moving on to the next job.

Implementation Barriers

No major implementation barriers were identified for Year 4. Interviewees discussed some implementation barriers occurring earlier in the program's history; these have largely been addressed:

1. In the first few implementation years, NYSERDA and Honeywell experienced difficulty in obtaining BPI-certified contractors and queuing up LIURP jobs. These difficulties have been resolved: NYSERDA brought in new contractors, and implemented a thorough process for monitoring new contractors. NYSERDA currently pays 75 percent of BPI training costs for contractors. Customers have not complained about contractors.
2. The job completion progress proved slow during the first two implementation years. In Year 2, the "pipeline" became full, and new referrals could not be served by the program in a timely manner. The issue partially arose due to an influx of low-income weatherization funding from the American Reinvestment and Recovery Act of 2009 (ARRA). WAP primarily received ARRA funding, and contractors working on both WAP and LIURP jobs became overwhelmed with WAP work. As ARRA funding has ended, the supply of contractors has not been perceived as an issue in Year 4.
3. Particularly in the program early implementation years, customers unfamiliar with CIP and NYSERDA sometimes did not trust the legitimacy of the LIURP, contributing to lower-than-expected participation among eligible customers. NYSERDA and National Fuel worked to build awareness, and added National Fuel branding to program materials to achieve better recognition of the program's legitimacy.
4. Implementation staff reported some difficulties in facilitating participation of rental properties, partly due to difficulty in contacting landlords. Honeywell addressed this issue

by performing follow-up telephone calls to landlords, and NYSERDA reported increased participation resulting from the telephone calls.

Program Strengths and Areas for Improvement

LIURP's Year 4 showed strong participation, with NYSERDA reporting being on track to spend the year's allocated budget. This shows significant improvement over LIURP's earlier years, and reflects improvements made to implementation processes. NYSERDA has assembled trained contractors to meet program needs, and issues with contractor availability due to ARRA funding have been resolved. Furthermore, program staff reported that, over the four years of implementation, communication among parties has strengthened, becoming very effective.

Conclusions and Recommendations

Cadmus' process evaluation found that, overall, LIURP's Year 4 operated smoothly, reflecting improvements made over the previous three implementation years. Communication has proved effective between National Fuel, NYSERDA, and Honeywell in implementing the program and addressing customer recruitment. Opportunities remain for further streamlining program implementation processes, particularly in data tracking. Based on these findings, Cadmus recommends the following actions:

- Investigate adopting a tracking system to allow real-time or near-real time project tracking and shared access by NYSERDA, Honeywell, and National Fuel. This would allow National Fuel to better respond to customer inquiries and reduce data entry errors.
- Investigate the feasibility of designating project completion for individual funding organizations, indicating when all measures funded by one organization have been completed. This would eliminate delays in National Fuel's ability to record savings for LIURP jobs with outstanding work funded by other groups.
- Consider increasing targeted outreach to rental property owners and tenants to address lower participation among these customers.

5. Residential Rebate Program

Program Description

The Residential Rebate Program offers prescriptive rebates to residential customers for purchases of high-efficiency gas appliances. Customers in single-family, multifamily and manufactured homes qualify for the program, though new construction does not.² Since the start of the Conservation Incentive Program, National Fuel's eligible market for residential rebates has been all residential customers (existing customers and newly converting customers) who are replacing space heating and water heating equipment. These replacements include equipment that has failed and can no longer be repaired, equipment that has reached the end of its useful life, or equipment installed when the customer's fuel source is being switched to natural gas from another fuel, such as oil, propane or electricity. Table 3 shows measures rebated through the program, and their Year 3 and Year 4 incentive levels.

Table 3. Residential Rebate Program Measures and Incentives

| Measure | Eligibility Rating | PY3 Incentive | PY4 Incentive |
|----------------------------------|----------------------|---------------|---------------|
| High-Efficiency Furnace | Minimum AFUE 90% | \$300 | \$250 |
| High-Efficiency Furnace with ECM | Minimum AFUE 90% | \$400 | \$350 |
| High-Efficiency Hot Water Boiler | Minimum AFUE 85% | \$400 | \$350 |
| High-Efficiency Steam Boiler | Minimum AFUE 81% | \$200 | \$200 |
| Programmable Thermostat | Contractor installed | \$25 | \$25 |
| Indirect Water Heater | | \$300 | \$250 |

Process Evaluation Activities

Cadmus' process evaluation examined whether the program operates efficiently and effectively, relying on interviews with program and implementation staff at National Fuel, EFI, and CSG to collect information on the following topics:

- Program structure:
 - Logic model
 - Objectives
 - Changes
- Outreach and marketing;
- Participant experience and satisfaction;
- Communication between National Fuel, EFI, and CSG;
- Data collection and reporting;
- Quality assurance;
- Implementation barriers; and
- Program strengths and areas for improvement.

² NYSEERDA offers new construction programs in National Fuel's service territory, and National Fuel did not believe there was a need for overlapping and competing programs which could confuse customers.

Cadmus conducted in-depth interviews in person and by the telephone, using a structured interview guide, and obtaining follow-up information and clarifications via telephone or e-mail, as necessary.

Surveys also addressed participating trade allies (retailers and contractors) and participating customers. Topics covered during surveys with 15 trade allies included:

- Program awareness;
- Program delivery and implementation;
- Coordination with program staff;
- Reasons for participation;
- Marketing to customers;
- Reasons for customer participation;
- Market barriers and barriers to participation;
- Satisfaction; and
- Identification of potential areas for improvements.

Topics covered during the 70 participant surveys included:

- How customers learned of the program;
- Reasons for participation;
- Value of the program;
- Program delivery;
- Interaction with trade allies;
- Satisfaction levels; and
- Suggestions for program improvements.

Process Evaluation Findings

Program Structure

In 2007, the Residential Rebate program began with a large marketing push by National Fuel, resulting in an immediate response by customers, and participation exceeding or meeting expectations every program year. According to program staff, enrollment remains high, though less robust than in the past.

National Fuel handles all program marketing, and has conducted several mass media campaigns as well as direct mailings to promote the program. National Fuel relies on a network of trade allies as primary contact points between the program and its customers. Given the program's success, National Fuel ramped down its marketing campaign during each program year.

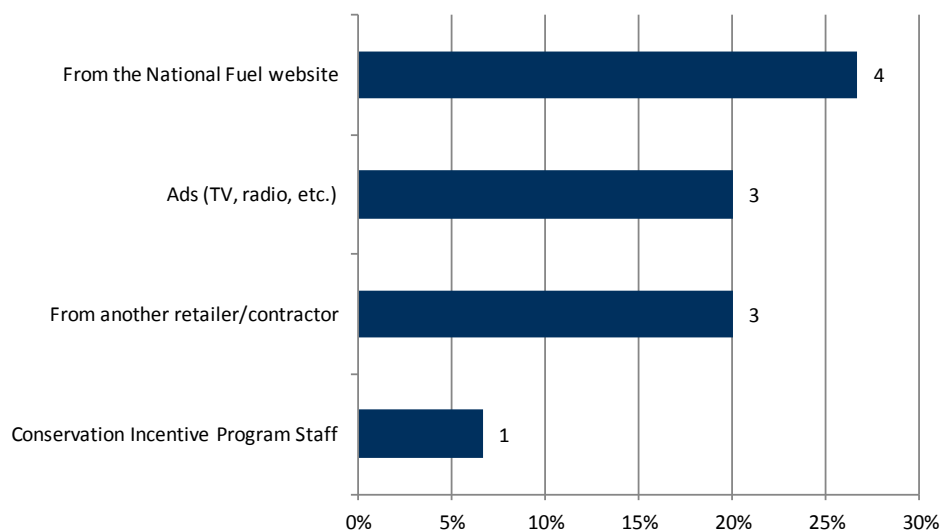
Over the program's course, primary changes have been associated with qualifying equipment and rebate levels. Before the beginning of Year 3, National Fuel, as mandated by the PSC through EEPS, discontinued the water heater rebate, and added rebates for indirect water heaters. However, according to program staff, indirect water heaters have not been popular in National

Fuel's service territory. In Year 3, hot air furnaces with ECM were also added to the program. Furthermore, as shown in Table 3, four of the program's incentives were reduced in PY4, despite National Fuel's petition to maintain PY3 rebate levels in PY4. The New York State Public Service Commission issued an Order Approving the Continuation of National Fuel Gas Distribution Corporation's Conservation Incentive Program with Modifications on November 22, 2010. This Order reduced the incentive for four of the heating and water heating equipment measures in order to bring the rebate amounts more in line with the rebates for other upstate residential gas HVAC programs. EFI handles day-to-day program administration, with its responsibilities including: staffing the rebate call center, processing applications, tracking program data, and fulfilling rebate payments. EFI contracts with CSG to conduct on-site verification activities as part of the QA process.

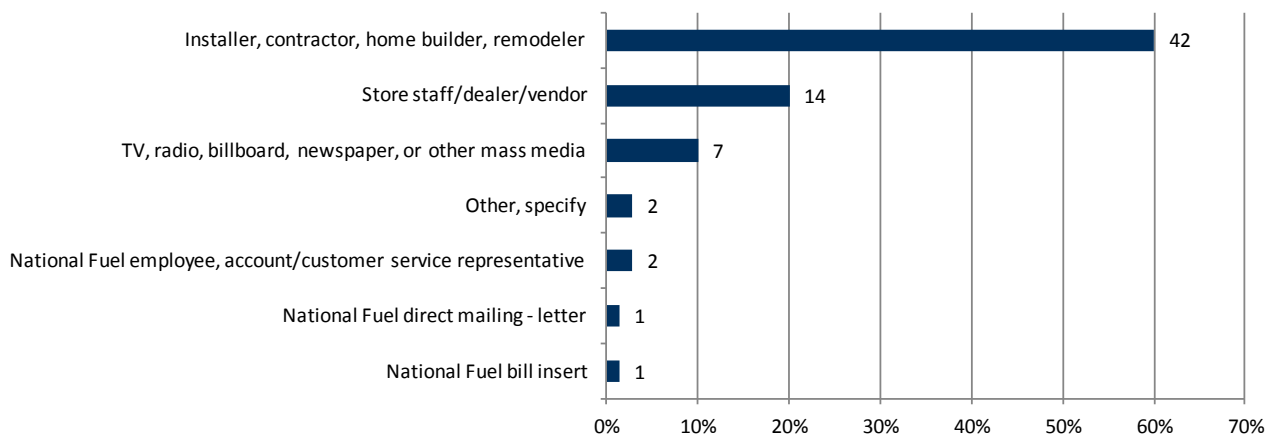
Outreach and Marketing

National Fuel administers all outreach and marketing for the Residential Rebate Program. Currently, National Fuel conducts print, radio, and TV ads, and engages in trade ally outreach through e-mail blasts and a series of meetings. In Year 4, National Fuel, which views contractors as main drivers of customer participation, relied on a mass mailing to inform trade allies about the program and changes to rebate amounts.

Although one trade ally learned of the program through National Fuel staff, many trade allies learned about the program through marketing channels not employed by National Fuel for purposes of trade ally outreach. For example, TV and radio ads and word of mouth served as common sources of program information for many trade allies (see Figure 2). Additionally, four trade allies (27 percent), having participated in the program for several years, could not remember where they initially heard about the program.

Figure 2. Trade Allies' Initial Source of Program Information (n=15)³

Participant surveys confirmed National Fuel's assumption that trade allies served as the main program information sources for customers. As shown in Figure 3, 80 percent (n=70) of participants reported hearing about the program from a contractor, retailer, or other trade ally. Additionally, trade allies appeared to be well informed about the program, with 90 percent (n=70) of participants saying they were very satisfied with their retailer/contractor's knowledge of the program.

Figure 3. Participants' Initial Source of Program Information (n=70)

National Fuel facilitates contractor referrals by offering program materials for trade allies' usage during customer sales. According to trade allies, just under half received promotional materials from National Fuel. Additionally, 42 percent (n=70) of residential participants claimed they noticed promotional displays while in stores. Trade allies cited applications for customers and lists of qualified products as being the most helpful, in terms of marketing.

³ Trade allies who responded "don't know" have been removed from this graph.

Consumers' understanding of the program and benefits associated with high-efficiency purchases largely have been based on their contractor's individual presentations, an important note as the program's success primarily depends on those selling the equipment. The majority of trade allies (86 percent (n=15)) promote high-efficiency equipment as part of their business practices. Additionally, 73 percent (n=15) indicated they mention the rebate when assisting customers, with the remainder of trade allies mentioning the program only when customers mention high-efficiency appliances. One contractor stands as an exception, indicating a majority of his customers know about the program before he even mentions it.

Fifty-three percent of participants (n=70) said that their contractor or retailer emphasized particular features of the measure they purchased. The majority of these indicated efficiency and savings served as strong selling points by contractors and retailers. Trade allies reported the rebate and cost savings as the two most common selling points for high-efficiency equipment.

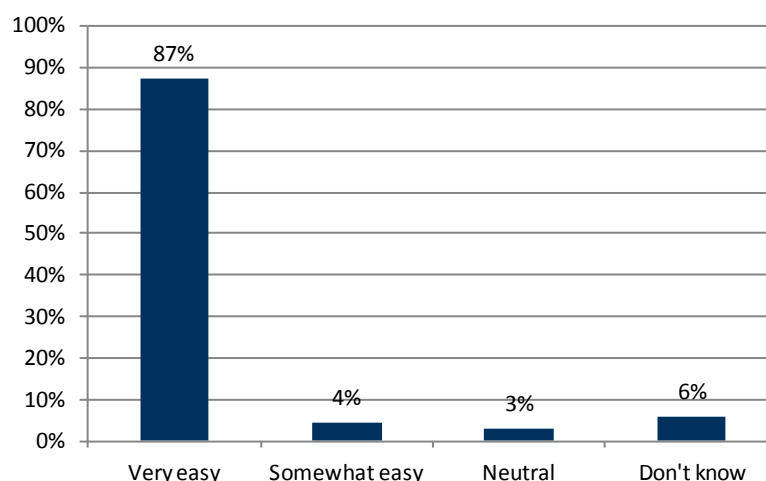
Participant Experience and Satisfaction

The participant experience remains fairly limited for this program. A typical customer works with a trade ally to select their equipment. Once installation has been completed, they fill out their application, and send it to EFI for processing. Rebate processing takes about six to eight weeks, and, once the application has been approved, the customer receives their rebate check.

Questions addressed trade allies' and participants' experiences with the program's enrollment process. Of 15 trade allies surveyed, 13 offered some form of assistance to customers in filling out program applications, and 70 percent of customers (n=70) reported receiving assistance from their contractor/retailer. When asked what type of assistance they offered to customers, answers covered a range of responses, with some trade-allies going so far as to complete whole applications for customers, and others only filling out relevant product information.

Over 90 percent (n=70) of residential respondents found the application easy or somewhat easy to complete (as shown in Figure 4). Additionally, customers expressed satisfaction with the length of time required to receive their rebate. Only one respondent out of 70 thought the rebate was processed in an unreasonable amount of time.

Figure 4. Participant Satisfaction with the Application Process (n=70)



Participating customers and trade allies also expressed very high satisfaction. Ninety percent of customers (n=70) said they were satisfied with the program (79 percent were very satisfied and 14 percent were somewhat satisfied). One-hundred percent of trade allies (n=15) expressed satisfaction with their overall program experience (with 80 percent very satisfied and 20 percent somewhat satisfied).

Communication and Data Reporting

Cadmus found communication appears to work very well between all program staff. National Fuel reported being pleased with their relationship with EFI, and EFI has been very responsive. EFI expressed similar responses, and CSG cited the Residential Rebate Program as one of its smoothest-running programs. Currently, EFI and National Fuel communicate on an as-needed basis (typically, a few times each a week via e-mail). EFI and CSG also reported positive communication levels. EFI reported working more closely with CSG on the program than with National Fuel due to CSG's role in the verification process.

Reporting also runs smoothly. Almost all reports occur as part of a standard workflow, and the majority of data transfers have been automated. Currently, EFI provides National Fuel with a report two times per month, along with a rebate payment invoice. On occasion, National Fuel asks for *ad hoc* reports, and EFI has not had problems fulfilling these requests.

Quality Assurance

QA has been integrated into several stages of the application and rebate payment process. EFI has established protocols for checking participant data, including daily batch reviews and biweekly electronic QCs. EFI also contracts with CSG to perform on-site verification for five percent of participants (down from ten percent in early program years, a testament to the small number of issues reported since program inception).

CSG receives a file from EFI every two weeks, detailing the number of site visits required. Site visits are distributed proportionally, based on the number of measures rebated during the two-week period; so, if furnaces are the most commonly rebated measure, CSG devotes most of its visits to homes with furnaces. On site, CSG confirms equipment listed on the application has been installed in the home, and checks carbon monoxide levels. CSG then sends a monthly report to EFI, showing sites passing or failing, and if CSG could not reach any customers.

EFI and CSG have reported very few quality issues, estimating less than one percent of sites inspected evidence problems. Issues program staff have most commonly encountered include programmable thermostats not being installed and slight differences between installed products and those listed on applications (although both of these have been extremely rare). During these rare occurrences, EFI reports back to National Fuel, and they address the issue case-by-case.

Implementation Barriers

The very successful Residential Rebates Program has consistently met its spending goals over the past four years. Therefore, very few implementation barriers exist:

- National Fuel noted the requirement of contactors to install certain equipment, such as programmable thermostats, poses something of a barrier, albeit for a small number of potential customers.

- The majority of trade allies (10 of 15) believe customers choosing not to participate do so due to cheaper alternatives to high-efficiency equipment.

Program Strengths and Areas for Improvement

Again, per the program's success, trade allies and program participants offered minimal suggestions for improvements. Trade allies and contractors expressed some concerns about incentive levels. Six out of 15 trade allies surveyed indicated they thought an increased incentive level would be appropriate, primarily for two reasons: (1) many experienced higher sales volumes during the previous year, attributing this to higher incentives levels in Year 3; and (2) increasing incentive levels could compensate for the elimination or reduction of federal tax credits for efficiency upgrades.

Only about one-quarter of program participants offered suggestions for program improvements, many of which did not directly pertain to the program (e.g., lowering rates and providing incentives for CFLs). However, one customer suggested rebating water heaters. Several customers also requested National Fuel increase program awareness, presumably due to their positive experiences with the program and excitement for others to benefit from it.

Conclusions and Recommendations

- This well-established program runs smoothly. Participation has met expectations, and program and spending goals have been achieved or surpassed annually. National Fuel should continue to implement the program as designed, given its success and positive reception by customers and trade allies.
- Trade allies and customers expressed high satisfaction with the program. National Fuel should continue to market the program using a variety of channels to maintain high awareness levels and engaged trade allies. National Fuel should also maintain the straightforward and simple application process.
- Communication and coordination works well between National Fuel, CSG, and EFI. Although efforts to improve processing time are always advisable, rebate processing runs smoothly, with over 98 percent of customers satisfied with the time required to receive their rebates. Additionally, the QA system in place has worked well, with minimal quality issues reported from CSG and EFI.
- Incentive levels presented the primary concern about the program. About half of the trade allies expressed frustration over reduced incentives from Year 3 to Year 4. National Fuel should consider the following:
 - Continuing to reach out to trade allies through mass mailings and e-mail blasts, prior to incentive level or measure changes, so trade allies have sufficient time to prepare for the changes.
 - Holding meetings in addition to mailing out letters; so trade allies have an opportunity to ask questions and fully understand the reasoning behind program changes. Although this did occur in past program years an annual meeting was not held in Year 4. Based on feedback from trade allies this was a valuable activity, especially in years when incentive levels are adjusted, and should be reinstated.

- Reassessing incentive levels for Year 5. The slow economy and loss of federal incentives may compound effects of reduced incentives levels in Year 4, potentially leading to lower participation levels in Year 5.

6. Nonresidential Rebate Program

Program Description

The Nonresidential Rebate Program offers rebates for high-efficiency gas equipment to small commercial customers, with annual usage of 12,000 Mcf or less. The program offers two participation avenues: a custom path and a prequalified path. The custom option allows customers to design their own projects, and receive rebates of \$15 per Mcf, with a cap of \$25,000. The prequalified option enables customers to purchase qualifying equipment and receive a rebate with a set dollar value.

The custom program offers rebates for a range of measures, including furnaces, boilers, water heaters, process heating equipment, boiler control systems, flue gas economizers, and heat recovery. The prequalified option offers incentives for boilers, water heaters, space heating, and cooking equipment, with incentives ranging from \$25 for programmable thermostats to \$1,000 for hot water boilers (300,000 btu or less).

The custom option requires a project review by a technical assistance contractor prior to installation as well as a pre- and post-site inspection before rebate approval. The prequalified option requires filling out a standard application, which is reviewed by NYSERDA, the third-party administrator, and then is processed for payment. For quality purposes, NYSERDA conducts site inspections on 10 to 15 percent of prequalified projects.

For the custom option, rebates are determined on a case-by-case basis, based on the estimated incremental installed cost of the new high-efficiency equipment (versus standard-efficiency equipment), and the estimated Mcf and dollar savings the equipment replacement will generate. National Fuel performs a technical engineering analysis in order to confirm the energy savings.

National Fuel recognized that very small customers, such as retail stores, restaurants and office buildings, would be installing standard heating and water heating equipment, and as a result developed prequalified rebates for these applications. These smaller business owners are often very time constrained and focused on running their business, and therefore do not wish to pursue a technical engineering analysis in order to receive a rebate for installing high-efficiency equipment.

National Fuel coordinated with NYSERDA on setting both the custom and prequalified rebate amounts based on NYSERDA's rebates already being offered to customers.

New construction is not eligible to participate in this program, as the program was established for equipment replacements. These replacements include equipment that has failed and can no longer be repaired, equipment that has reached the end of its useful life, or equipment installed when the customer's fuel source is being switched to natural gas from another fuel, such as oil, propane or electricity.

Process Evaluation Activities

Cadmus' process evaluation examined whether the program operates efficiently and effectively, primarily relying on interviews with program and implementation staff at National Fuel, NYSERDA, and two technical assistance contractors, collecting information about the following topics:

- Program structure:
 - Logic model
 - Objectives
 - Changes
- Outreach and marketing;
- Participant experience and satisfaction;
- Communication between National Fuel, NYSERDA, and the technical assistance contractors;
- Data collection and reporting;
- Quality assurance;
- Implementation barriers; and
- Program strengths and areas for improvement.

Cadmus conducted in-depth interviews in person and by telephone, using structured interview guides, and obtained follow-up information and clarification via telephone or e-mail, as necessary.

Process Evaluation Findings

Program Structure

National Fuel has offered the Nonresidential Rebate Program for four years. NYSERDA administers the program, and several TA contractors help NYSERDA with day-to-day activities for National Fuel's program and other statewide programs. The program's logic model, included in Appendix A, describes program inputs, activities, and desired outcomes. Since its inception, the Nonresidential Rebate Program has undergone several changes due to the complexity and hard-to-reach nature of the small commercial market.

In Year 1, National Fuel only offered a custom option; participation, however, proved much lower than expected. To address this issue, National Fuel worked with NYSERDA to assess Buffalo's commercial market. Based on this market characterization, National Fuel added the prequalified option to the program. This addition helped engage a larger portion of the commercial market, but participation rates remained low for the custom option.

In Year 4, National Fuel made additional changes to the program, including adjusting incentive levels and providing more program materials to customers, attempting to increase the number of customers choosing the custom option. In Year 3, the custom option included a rebate equal to the lesser of \$40 or 50 percent of a project's incremental cost. Program staff deemed this too confusing, as many customers applying for the custom rebate had difficulty determining incremental costs of their project, and thus had difficulty understanding associated rebate levels. Therefore, the incremental cost criterion was dropped and the incentive levels changed to \$15 per Mcf in Year 4. Additionally, National Fuel created tools to help customers with the application process, including a template showing contractors and customers how to compute savings.

NYSERDA primarily enrolls customers in the program, providing customer support and processing rebates. The TAs' duties include: reviewing applications; validating savings and incentive values for custom projects; conducting pre- and post-installation site inspections for custom projects; and conducting site verifications for a sample of prequalified participants. National Fuel's main role in the program has been to provide outreach and marketing.

Outreach and Marketing

National Fuel conducts the majority of Nonresidential Rebate Program outreach and marketing. Throughout the program's duration, marketing efforts have included:

- Print ads in business publications;
- Radio ads;
- Television ads;
- Direct mailings to small commercial customers; and
- Meetings/presentations to contractors.

NYSERDA does not perform direct outreach to customers; however, one TA explained his responsibility for helping market National Fuel's (as well as several other utility and statewide) programs to commercial customers. This TA's main outreach activity has been meeting one-on-one with commercial customers, and walking them through different options for energy-efficiency upgrades and the rebate programs for which they are eligible. He also reported making cold calls and presenting program options to larger groups of customers and trade allies.

National Fuel also relies on trade allies, such as retailers and contractors, to interface with customers regarding the program. National Fuel has held several meetings to discuss program offerings with trade allies, and has created program materials, such as brochures and handouts, that trade allies can utilize. Overall, National Fuel believes trade allies have successfully promoted the prequalified portion of the program to customers, while the custom program has proved more challenging. However, one large contractor has enrolled several participants in the custom program, and their expertise in navigating the program process has helped increase participation in the program's custom portion.

Overall, Nonresidential Rebate program marketing has worked well: none of the program staff Cadmus interviewed cited awareness as a participation barrier. National Fuel uses several marketing channels, including direct media and contractor interactions to attract customers to the program. Trade allies appear to market the prequalified portion of the program well, but, as the custom program can be difficult for trade allies to explain, it has been a challenge for them to promote this portion of the program to customers.

Participant Experience and Satisfaction

Participant experiences varied by program option. For the prequalified option, customers submit applications, which are reviewed by TAs. If applications are approved, NYSERDA processes rebates for payment. Similarly, if customers enroll in the custom program, TAs review submitted applications to verify savings and incentives. Before rebates can be processed, however, TAs conduct pre-installation site visits to confirm condition of equipment and other variables affecting savings. Once site visits have been completed, applications are approved, and

customers can install the efficient equipment. TAs conduct a final post-installation inspection before rebate processing.

Currently, the six-page application is used for both custom and prescriptive program options. Although many customers receive help filling out applications from their contractors, the application's overall size, which, according to program staff can appear daunting to some customers, can pose a barrier to those considering enrollment. For those applying, the application process has gone relatively smoothly. According to TAs, the prequalified applications have been processed easily, and following up with customers to address missing information has not been challenging.

For the custom option, the application requires much more detailed information. TAs reported that, on many occasions, information was missing or applicants needed help calculating items, such as incremental costs. This is not uncommon for custom programs, and does not appear to be a bottleneck in program implementation. One TA mentioned the current application only has NYSERDA's logo on it, which has confused some customers, looking to enroll in the National Fuel program.

According to both National Fuel and the TAs, participants have expressed satisfaction with the program, with a very few complaints about delays in rebate payments or other program components. Both TAs cited some frustration from customers this summer, when statewide funding for the gas portion of NYSERDA's program ended ahead of schedule. Although this was not related to National Fuel's program, a lack of communication about programs affected resulted in TAs confirming with NYSERDA that, in fact, the National Fuel program still accepted applications. This did not turn any customers away, but caused some confusion among TAs and customers.

Communication and Data Reporting

Excepting confusion about the lack of funding, discussed above, all parties interviewed reported communication worked well. National Fuel and NYSERDA worked very closely during the program's first years. As the program matured and processes became established, communication has continued on an as-needed basis, with program managers from NYSERDA and National Fuel speaking every couple weeks. National Fuel explained NYSERDA has been very responsive to their needs, especially considering the small size of the Nonresidential Rebate Program.

TAs also reported good communication levels with NYSERDA. Both TAs have established a workflow with NYSERDA, their communication conducted on an as-needed basis. Most commonly, TAs contact NYSERDA to discuss missing application materials or information. TAs also communicate with National Fuel, though on a more limited basis. One TA stated it would be helpful to identify a single program contact at National Fuel, as, many times, he has been unsure he is contacting the correct person.

Quality Assurance

The program's prequalified portion has quality checks built into program processes. TAs review each application, which is then approved or denied. TAs noted missing information as the biggest issue with prequalified applications, but this can be easily obtained by contacting the customer. NYSERDA spot checks a sample of applications throughout the program year, and has

TAs complete verification site inspections with 10 to 15 percent of participant customers. Quality issues have not been reported with the program's prequalified portion of the program.

The program's custom portion has a high level of quality assurance built into the program approval process. TAs review applications, verify savings and incentive calculations, and conduct pre- and post-installation site visits. TAs reported minimal quality issues with the program's custom portion; however, many times, TAs' savings, incentives, and/or incremental cost calculations differ from participants'. These differences mainly result from customers' lack of technical expertise, reaffirming the need for TA reviews.

Three TAs review National Fuel's custom applications. Although each has been trained on the application review and verification process, the two TAs interviewed by Cadmus expressed concern that there may be occasional inconsistencies between one TA's calculations (savings, incentive, incremental cost, etc.) and another TA's calculations for similar projects. Inconsistent analysis among the three TAs could cause variations in the types of projects approved through the program. This has not caused problems in program implementation, but NYSERDA should continue to work with TAs to standardize this process as much as possible.

Implementation Barriers

Program staff cited several barriers, including:

1. Customers may perceive enrolling in the program burdensome. With the substantial application and complex calculations required for the custom path, many customers can be overwhelmed by application requirements. Additionally, following the downturn in the economy, many small businesses have laid off support staff, making it harder for businesses to find time to dedicate to additional paperwork.
2. On many occasions, customers do not think the program is real. Some express skepticism about receiving "free" money, where others are certain there is a catch.
3. In larger facilities, convincing upper management that investment in energy efficiency is a smart and fiscally responsible choice can be difficult. According to one TA, facility managers or staff directly involved with purchasing equipment may be interested in the program, but cannot achieve support from upper management.
4. Initial costs serve as one of the largest participation barriers. Many customers are unwilling to make big upfront investments, especially if payback periods are greater than two or three years. Additionally, gas measures typically have a much higher upfront costs compared to electric measures; when trying to improve efficiency, small businesses often prefer to invest in lower-cost electric measures, such as lighting.
5. According to anecdotal reports from customers and TAs, the economy presents a participation barrier. Many small businesses are reluctant to enroll in the program as they are not sure they will be in business in two or three years.

Several of these barriers could potentially be addressed through increased incentive levels, however, since incentives were decreased through the New York State PSC's November 22, 2010 Order, National Fuel did not immediately request increased incentives. Instead, Cadmus recommends several alternative ways in which National Fuel can overcome barriers without increasing incentives. If these alternatives (described below in Conclusions and

Recommendations) do not prove effective in increasing participation, National Fuel may reconsider a request for increased incentive levels.

Program Strengths and Areas for Improvement

Very few suggestions emerged for program changes, other than the ones previously noted. Both TAs suggested adding measures to the program, including radiant heat and more complex technologies, such as steam traps. One TA suggested a list of qualified equipment would be helpful as customers often have difficulty finding equipment matching specifications outlined in the program application.

Conclusions and Recommendations

- The program's prequalified portion has been a valuable addition, bringing large numbers of customers into the program.
- The custom program has experienced a slow launch, due to the weak economy and the hard-to-reach nature of the small commercial sector. National Fuel should consider partnering with a few trade allies serving small commercial customers to assist customers with the application process, including project design, savings calculations, and rebate forms.
- Communication between NYSERDA and National Fuel works well. Establishing a primary contact for TAs at National Fuel could be useful, increasing the efficiency of communication.
- Inconsistent analysis among the three TAs could cause variations in the types of projects approved through the program. This has not caused problems in program implementation, but NYSERDA should continue to work with TAs to standardize this process as much as possible.
- The application process can be cumbersome for customers. National Fuel and NYSERA should consider revamping the application, making it shorter and more concise. Creating two applications, one for the prequalified option and one for the custom option, could be a solution to this problem, effectively reducing the number of pages for each application and the number of irrelevant fields.
 - Additionally, customers may not understand National Fuel and NYSERDA's programs are one in the same. The application should be branded with National Fuel's logo to minimize customer confusion.
- National Fuel should focus on marketing the program's custom portion. Developing marketing collateral could potentially help draw more customers to the program. Specifically, we recommend National Fuel consider one or both of the following activities:
 - Provide case studies to highlight technical assistance, types of upgrades customers can make through the program, and resulting cost savings. These should be provided in print and through National Fuel and National Fuel for Thought Websites.

- Better targeting of customer outreach by profiling energy usage and business types of existing customers and program participants. Partnering with trade allies to conduct direct outreach to top-priority customers.

7. Outreach and Education Program

Program Description

The Outreach and Education Program seeks to stimulate strong participation in the CIP rebate and low-income programs by promoting benefits and affordability of energy-efficiency in homes and businesses in Western New York. The program, launched in fall 2007, uses strategies such as paid advertising, mass media, and community engagement. Community outreach events include giveaways of energy-saving kits, which contain simple weatherization and water-heating measures. National Fuel also developed a Savings Card promotion, which allows participating vendors to offer discounts on energy-saving products and services. This broad-based outreach and education program has included specific conservation initiatives for school classroom programs, community outreach at popular area events, and partnering with community group education forums and leadership meetings.

NEED Energy Detectives Program

Implemented by the National Energy Education Development (NEED) program, National Fuel's Energy Detectives Program, started in 2008, offers Western New York schools an energy education program for fifth through twelfth grade teachers. The program includes hands-on classroom materials and take-home kits for participating students and their families. Materials include: information on National Fuel's Conservation Incentive Program; brochures with energy-savings tips; electric outlet and switch draft stoppers; window insulation kits; weather strip caulking cords; faucet aerators; and water-saving showerheads. As part of the program, formal lesson plans integrate educational activities and community outreach projects.

CIP Conservation Kits

National Fuel staff distributes conservation kits and program materials to customers at community events, and through heating and cooling appliance dealers, area not-for-profit organizations, health and human service agencies, and offices of local elected officials. Along with starter-materials to help customers weatherize their homes and a flyer on programs and services for customers, the conservation kits include:

- Program brochures, describing rebate program features for residential and nonresidential customers;
- A Conservation Tip Sheet, including tips and facts about energy conservation and Websites that contain conservation information; and
- Online Energy Analysis Flyer, including tips and facts about energy conservation and Websites that contain conservation information.

Savings Card

The Savings Card program offers local contractors and retailers an option of promoting special discounts through a card available free of charge to National Fuel customers. The card is downloadable from the National Fuel for Thought Website. Participating contractors tend to be heating contractors, and responsible for deciding types of discounts they will offer. A predecessor to the CIP, this program originally was put in place to promote conservation through

local contractors. Offers available to National Fuel customers through the card include discounts of varying amounts on:

- Energy-efficient natural gas furnaces;
- Furnace clean and tune-up;
- ENERGY STAR® thermostats;
- Humidifiers;
- Natural gas fireplaces and accessories;
- Duct cleaning;
- Window replacements; and
- Central air conditioning systems.

Process Evaluation Activities

For the process evaluation, Cadmus examined whether the program operates efficiently and effectively, primarily relying on interviews with program staff, implementation staff, and trade allies. Main Outreach and Education Program components examined in this process evaluation include:

- Savings card;
- CIP kit distributions; and
- NEED Energy Detectives Program.

During interviews with program staff at National Fuel and implementation staff for the NEED Energy Detectives Program, we examined the following topics:

- Program structure:
 - Logic model
 - Objectives
 - Changes
- Participant experience and satisfaction;
- Communication;
- Implementation barriers; and
- Program strengths and areas for improvements.

Cadmus conducted in-depth interviews in person and by telephone using a structured interview guide, and obtained follow-up information and clarifications via telephone or e-mail, as necessary.

Cadmus also conducted trade ally interviews with five contractors and retailers participating in the program's Savings Card portion. Through these interviews, we sought to answer the following questions:

- Why do trade allies participate?
- How do trade allies decide what discount to offer?

- Why are customers using the Savings Cards?

Additional data collection activities are underway, which will inform the Outreach and Education program's impact evaluation. These include a NEED Energy Detectives participant survey, and a CIP kit recipient survey.

Process Evaluation Findings

Program Structure

Now in its fourth year, the CIP program has used its multifaceted Outreach and Education Program to establish considerable brand identity among National Fuel customers and the greater community, particularly through the National Fuel for Thought campaign. Activities contributing to brand awareness include the following:

- **Mass media campaign.** The widespread awareness of the CIP program has been bolstered by a mass media campaign, headed by the Western New York Public Relations firm, Eric Mower and Associates, which also conducted market research studies on the CIP program. This mass media effort helped establish CIP awareness in all 11 counties of National Fuel's service territory.
- **Sports partnerships.** National Fuel brought about further regional exposure through associations with professional sports teams in Western New York. Through a co-sponsored campaign, known as the Green Team, National Fuel and the Buffalo Sabres, a National Hockey League franchise, engaged in a community outreach effort that provided Sabre fans with prizes, t-shirts, and quarterly newsletters about conservation for becoming a member of the Green Team. This program had a strong focus on National Fuel branding, with arena and jumbo-tron messaging about conservation played throughout games.
- **National Fuel and National Fuel for Thought Websites.** Primary interaction with customers has occurred through the National Fuel and National Fuel for Thought Websites. Customers use the Websites in many ways, most often to pay bills online. When customers log in, they immediately see the CIP offers, and are referred to National Fuel for Thought. An additional campaign, bolstered by increasing participation in online bill-paying, has been the paperless bill campaign, where customers can receive monthly bills by e-mail or by logging into their accounts. National Fuel hopes to improve e-mail communications with customers, and, eventually, promote its programs through four e-mail blasts a year, at least two of which would regard the CIP and HEAP programs.
- **NEED Energy Detectives Program.** This school-based energy education program provides Western New York teachers and students with teacher training workshops, and hands-on classroom curriculum and kits. National Fuel's program has nearly 27,000 participating students and 270 participating teachers, with expansion efforts underway for areas of Buffalo with low or no NEED participation in their school systems.
- **CIP kit distributions and community events.** Since its inception, the CIP kit distribution effort has grown rapidly, now providing 16,000 kits per year. As the program has evolved; so have the kits, which now have an increased emphasis on weatherization

measures. Community open-houses have provided a strong opportunity for CIP kit distribution and outreach. Program staff reported kit distribution events also enable additional outreach, such as distributing brochures on gas safety and CIP savings cards, as well as information about the HEAP program.

- ***Savings Card.*** The Savings Card is a discount program, featured on the National Fuel and Fuel for Thought Websites. The cards are accepted by a list of vendors providing gas-savings services and products. The Websites list the vendors as recognized partners of the program. This program also affords vendors added exposure and customer leads. The Savings Card, a popular discount program offered by National Fuel to its customers, has yielded high participation.

Although the mass media and sports partnerships have been crucial to building the National Fuel for Thought brand, this evaluation focused on the NEED program, CIP kits, and Savings Card. In addition to conducting a process evaluation, Cadmus is reviewing these programs—each of which aims to deliver gas-saving measures to customers—for impact evaluability. Findings related to impact evaluation will be presented in a subsequent report.

Participant Experience and Satisfaction

All three Outreach and Education program components that Cadmus evaluated showed strong customer satisfaction.

According to the NEED program coordinator, teachers and students in National Fuel's territory receive this program very enthusiastically. Teachers have been thrilled to have access to teaching resources and curriculum, and students tend to be pleased with interactive and hands-on program components. The coordinator noted some teachers used program material in their classrooms, and often requested additional resources, such as more NEED kits.

The CIP kits have also been strongly appreciated by customers. At a recent community open-house, 1,000 kits were distributed in a two-hour timeframe, a figure underlining the kits' immense popularity, which has become so widespread that community organizations often contact National Fuel to request they attend and distribute kits at their events.

Retailers and contractors participating in the Savings Card program reported high program satisfaction levels. Four respondents indicated they were very satisfied with the program, with one business being somewhat satisfied. Participants also reported the signup process is easy, and all five were very or somewhat likely to participate in future years. Among notable changes in the Outreach and Education program is that National Fuel no longer offers cooperative advertising for CIP. Though a small general budget for cooperative advertising exists, potential retail partners are now directed primarily to the Savings Card promotion.

Savings Card participating retailers do not track data on customers taking advantage of their offers; so Cadmus could not collect primary data on end-use customer satisfaction with the Savings Card program. However, retailers reported most customers used the Savings Card due to discounts offered, rather than to save energy. This may indicate the Savings Card causes some customers to take energy-saving actions they otherwise would not have taken. When asked why they thought customers would not choose to participate in this program, one respondent said was because the card was not necessary for the customer to receive a rebate from National Fuel; so

there may be some confusion regarding how this program differs from National Fuel's other rebate programs.

Communication

Strong lines of communication exist internally and with the partner organizations contributing to the Outreach and Education program. Internal communications prove critical to the function of these programs, and Outreach and Education staff estimate they communicate with other CIP program managers over a dozen times a day for various reasons.

Externally, communication is also strong. The NEED program serves as an important element of National Fuel's outreach mission, with coordination and communication with NEED staff occurring frequently. National Fuel staff estimate at least four annual meetings and numerous telephone calls with the regional NEED coordinator. NEED staff corroborated this, and noted National Fuel has communicated very effectively to support implementation of the NEED program.

Implementation Barriers

Targeting nonresidential customers has proved to be a challenge. On the National Fuel Website, energy analysis tools available for nonresidential customers are seldom used. Mass media campaigns and the Website, though successful at the residential level, do not necessarily impact businesses and corporate decision makers toward gas-savings practices in their workplaces. Effective nonresidential outreach must be done through target mailings or one-on-one, direct contacts with business decision makers. National Fuel is working on expanding its outreach and education efforts toward nonresidential customers. New brochures geared to nonresidential customers have been produced, as has a separate Website for nonresidential customers, with separate sections for large and small businesses.

National Fuel also encountered challenges in outreach and message delivery to customers eligible for LIURP. In the CIP's Year 2, National Fuel notified eligible LIURP program customers, using a postcard informing customers they were considered high-use customers. This message, no longer in use, may have contributed to customers' perceptions that mail from National Fuel usually brings bad news. National Fuel representatives believe they must work more closely with community groups to tailor messaging and promote recognition of LIURP mailers.

Some community groups, most notably People for United Sustainable Housing (PUSH), have expressed concerns over National Fuel's funding of the CIP program. PUSH has criticized National Fuel for its spending on CIP outreach efforts, and advocated reallocation of funding toward low income programs. National Fuel has worked to maintain its positive relationships with many community groups, including those representing low-income populations, such as the Urban League and AmeriCorps. CIP outreach staff communicates with these groups to inform them of potential benefits CIP may bring to their constituents.

Program Strengths and Areas for Improvement

Cadmus reviewed the program's main outreach channels, finding National Fuel currently pursues many best practice marketing channels, but could expand outreach, as shown in Table 4.

Table 4. Best Practice Marketing Channels Pursued and Recommended

| Best Practice Marketing Channels | Pursued | Not Pursued—Recommended |
|----------------------------------|---------|-------------------------|
| Direct Mail | Yes | |
| Newspaper Ads /articles | Yes | |
| Radio/TV Ads | Yes | |
| Online Advertising | Limited | Yes |
| Website | Yes | |
| Customer Information Sheets | Some | Yes |
| Contractor Information Sheets | | |
| Bill Inserts | Yes | |
| Brochures | Yes | |
| Presentations/Meetings | Yes | |
| Events | Yes | |
| Referrals/Retail Partnerships | Some | |
| Point of Purchase | No | |
| Tests/Demonstrations | No | Yes |
| Social Media Outreach | No | Yes |

National Fuel’s online outreach currently includes information on the National Fuel for Thought Website, but does not include social media marketing, such as outreach through Facebook or Twitter. Many utilities are successfully expanding their social media outreach, and social media and other online marketing channels allow direct referrals to program Websites and rebate application forms.

One challenge for any outreach campaign is measuring quantifiable program impacts. National Fuel has engaged Cadmus to evaluate the energy impacts these activities have, and this work is ongoing. Other measurements utilized include the rate of rebate usage. When rebates are redeemed, it is believed the Outreach and Education program fulfills its mission. Generally, the program targets 95 percent awareness, and efforts are being made continually to gauge whether program awareness increases or declines. During Year 4, outreach efforts were considered successful, and National Fuel staff noted the marketing budget may be reduced in future years if CIP awareness is supported by the campaign’s success to date.

National Fuel representatives noted a sizable number of charter schools do not participate in the NEED program, which could provide a focus for outreach, capturing potential growth, as these schools are easy to contact. National Fuel representatives believe the NEED Program should use different approaches for urban and rural students (not their current practice). Notable demographic factors, such as high poverty rates in some urban areas, are important socioeconomic differences presenting challenges when using uniform approaches across urban and rural school-level outreach.

Conclusions and Recommendations

National Fuel’s outreach and education efforts include diverse approaches to raising awareness of CIP offerings and energy conservation in general. Drawn from this evaluation’s findings, we offered the following recommendations:

- Continue exploring options for NEED program expansion, particularly in low-income communities.

- Consider providing additional guidance to prospective retail partners in the Savings Card program, encouraging them to offer discounts on measures conferring greater gas savings.
- Given the popularity of CIP Kits, National Fuel should continue kit distributions wherever possible, and consider expanding kit offerings to further promote conservation. For example, National Fuel could develop a CIP Kit targeting to small business customers for distribution at trade shows or other business-oriented events.
- Investigate opportunities to expand online outreach, including:
 - Updating the National Fuel for Thought Website to improve navigation and include relatable content. This could include testimonials from participant customers, and may help build awareness and understanding of program offerings.
 - Tracking Website traffic on a regular basis to inform marketing efforts.
 - Explore adding social media outreach or expanding online outreach initiatives, such as creating and updating a Facebook page for the CIP. This would allow, for example, announcement of CIP kit distribution events, or promotions of rebate programs.

Appendix A. CIP Logic Model Tables

Low-Income Usage Reduction Program

| Resources | Activities | Short- and Long-Term Outcomes | Key Performance Indicators |
|--|---|---|---|
| <p><i>To accomplish program activities, National Fuel uses the following resources:</i></p> <ul style="list-style-type: none"> • LIURP funding from the CIP • National Fuel LIURP staff • NYSERDA EmPOWER New York staff • Honeywell (program implementer) staff • CSG (QA contractor) staff • Weatherization contractors • Low-income customers consuming at least 132 Mcf annually, living in single family homes and duplexes • CRIS (online tracking system), EmPCalc software and online contractor portal • EmPOWER and distribution-specific forms | <p><i>To address the goals of the CIP, National Fuel performs the following activities:</i></p> <ul style="list-style-type: none"> • Provide funding to NYSERDA • Monitor and oversee NYSERDA administration of EmPOWER • Generate referrals from LICAAP, HEAP, and outside agencies • Participate in national Green and Healthy Homes Initiative • Screen referrals for high consumption • Track job status in EmPOWER database • Perform measurement and verification analysis | <p><i>Program activities are expected to lead to the following changes within six years:</i></p> <ul style="list-style-type: none"> • Customer awareness of program • Customer participation • Weatherization of participant homes • High levels of program satisfaction • Reduced gas consumption • Bill savings • Increased prevalence of weatherized low-income homes • Health, safety, and quality of life benefits for participants • Long-term environmental benefits • Market transformation • Customer/word-of-mouth program promotion (long term) | <p><i>Program activities and outcomes are expected to produce the following evidence of performance:</i></p> <ul style="list-style-type: none"> • Gas savings achieved through measure installation • Rating of program satisfaction • Rating of customers' perceptions of the value of the program • Length of customer wait list • Number of arrearages on participant accounts • Number of fraudulent claims |

Residential Rebate Program

| Resources | Activities | Short- and Long-Term Outcomes | Key Performance Indicators |
|---|--|--|---|
| <p><i>To accomplish program activities, National Fuel uses the following resources:</i></p> | <p><i>To address the goals of the CIP, National Fuel performs the following activities:</i></p> | <p><i>Program activities are expected to lead to the following changes within six years:</i></p> | <p><i>Program activities and outcomes are expected to produce the following evidence of performance:</i></p> |
| <ul style="list-style-type: none"> • Funding • National Fuel staff • EFI staff • CSG staff • Single family, multifamily and mobile home customers living in existing construction • Marketing materials • Advertising and promotion • Energy Partners list • Application materials | <ul style="list-style-type: none"> • Provide incentives for energy-efficient appliances • Conduct print, radio, and TV advertising • Provide program information on the CIP Website • Distribute bill inserts • Conduct trade ally outreach, including the Energy Partner letters and e-mails • Distribute fact sheets and program brochures to trade allies • Staff program hotline with EFI personnel • Process rebate payments within four to six weeks • Conduct on-site verification for 5% of rebates • Conduct follow-up surveys with 5% of customers | <ul style="list-style-type: none"> • Trade ally and customer awareness • Customer participation • Trade ally program promotion • Improved perception of energy-efficient products • Increased sales of energy-efficient products • High levels of program satisfaction • Increase in overall customer satisfaction • Reduced gas consumption • Bill savings • Customer/word-of-mouth program promotion • Increased presence of energy-efficient equipment on stores shelves and in stock • Long-term environmental benefits • Market transformation • Job creation in Western New York | <ul style="list-style-type: none"> • Achievement of program goals • Recognition of marketing materials • Rating of program satisfaction • Rating of customers' perceptions of the value of the program • Number of call center referrals • Program freeridership score • Distribution of rebate applications to customers • Number of energy-efficient measures in stock at participating retailers • Percent of energy-efficient measures sold compared to standard models • Occurrence of customers requesting energy-efficient appliances • Number of fraudulent claims • Customer satisfaction rating |

Nonresidential Rebate Program

| Resources | Activities | Short- and Long-Term Outcomes | Key Performance Indicators |
|--|--|--|--|
| <i>To accomplish program activities, National Fuel uses the following resources:</i> | <i>To address the goals of the CIP, National Fuel performs the following activities:</i> | <i>Program activities are expected to lead to the following changes within six years:</i> | <i>Program activities and outcomes are expected to produce the following evidence of performance:</i> |
| <ul style="list-style-type: none"> • Funding • National Fuel staff • NYSERDA staff • Energy-Efficiency Technical Assistance contractors • Small commercial customers • Energy Partners list • Marketing materials • Application materials • NYSERDA's Building Portal Database • Advertising and promotion | <ul style="list-style-type: none"> • Provide incentives for energy-efficient measures/projects • Conduct print, radio, and TV advertising • Provide program information on the CIP Website • Distribute bill inserts • Leverage trade ally participation in the Residential Rebate Program • Distribute fact sheets and program brochures to customers and trade allies • Provide training for contractors on the program and rebate structure • Staff program hotline with NYSERDA personnel • Conduct application review for custom project • Conduct pre- and post-installation site visits for custom projects • Enter custom projects into Building Portal Database • Process rebate payments • Conduct on-site verification for 5% of rebates | <ul style="list-style-type: none"> • Trade ally and customer awareness • Customer participation in both the prescriptive and custom paths • Trade ally program promotion (prescriptive path) • Improved perception of energy-efficient products • Increased sales of energy-efficient products • High levels of program satisfaction • Increase in overall customer satisfaction • Reduced gas consumption • Bill savings • Customer/word-of-mouth program promotion • Increased presence of energy-efficient equipment on stores shelves and in stock (prescriptive path) • Long-term environmental benefits • Market transformation • Job creation in Western New York | <ul style="list-style-type: none"> • Achievement of program goals • Percent of customer participating in the custom path • Recognition of marketing materials • Rating of program satisfaction • Rating of customers' perceptions of the value of the program • Number of call center referrals • Program freeridership score • Number of energy-efficient measures in stock at participating retailers • Percent of energy-efficient measures sold compared to standard models • Occurrence of customers requesting energy-efficient appliances |

Outreach and Education Program Logic Model

| Resources | Activities | Short- and Long-Term Outcomes | Key Performance Indicators |
|--|--|---|--|
| <i>To accomplish program activities, National Fuel uses the following resources:</i> | <i>To address the goals of the CIP, National Fuel performs the following activities:</i> | <i>Program activities are expected to lead to the following changes within six years:</i> | <i>Program activities and outcomes are expected to produce the following evidence of performance:</i> |
| <ul style="list-style-type: none"> • CIP funding • National Fuel outreach and education staff • NEED staff • NEED curriculum • Western New York Energy Detectives participating schools and teachers • Savings Card participating Energy Partners (retailers) • Community events and organizations for conservation kit distribution • Conservation kit measures • Residential customers • Eric Mower & Associates staff | <ul style="list-style-type: none"> • Develop written, print, and digital materials for marketing and outreach • Conduct print, radio, and TV advertising • Conduct outreach to NEED schools and Savings Card retailers • Conduct community outreach events • Identify opportunities for kit distribution • Procure kit measures and assemble kits • Distribute conservation kits to customers • Partner with Eric Mower & Associates to conduct campaign surveys | <ul style="list-style-type: none"> • Students receive energy conservation education through NEED • Customers receive and install conservation kit measures • Customers use Savings Cards to make energy-saving home improvements • Customer and trade ally awareness of rebate program increases • Reduced gas consumption • Bill savings • Customer/word-of-mouth promotion of rebate program • Long-term environmental benefits | <ul style="list-style-type: none"> • Customer recognition of marketing materials • Customer awareness of gas conservation methods • Number of students reached through NEED • Rating of program satisfaction with NEED program • Number of conservation kits distributed • Installation rate of conservation kit measures • Level of participation reported by Savings Card retailers • Gas savings achieved through Outreach and Education Program activities |

Appendix B. Program Staff Interview Guides

Program Staff Interview Guide – CIP Portfolio

Introduction

1. To begin, could you please explain your roles in the company and your involvement in the CIP programs?
2. Can you describe the regulatory process related to the CIP? In particular:
 - How are the programs submitted for approval to the PSC?
 - Does National Fuel have savings, participation and/or cost effectiveness goals set either internally or by the PSC? (informal or formal goals)
 - Who makes up National Fuel's stakeholder group?
 - How has EEPS influenced the design and implementation of the program?

Portfolio Administration and Staffing

3. Are there any other individuals or organizations involved in delivering the CIP, such as implementers, rebate processors, or outreach specialists?
 - What are their affiliations, titles, and roles?
 - How did National Fuel choose to contract with them?
 - How do you coordinate and communicate with them?
 - Are there any challenges that have arisen when working with outside organizations?
 - How have you resolved these challenges?
4. Overall, how adequate is the staffing level for the CIP? How effective is the organization of the program? How effective is the overall administration of the program?
5. Do you communicate with any other utilities about implementation strategies or best practices?
 - How does the coordination process work?
 - Are there discussions around measures and program rebates?
6. Are there any improvements that could be made in the administration of the CIP?

Program Data Collection

7. How effective and accurate is the data-tracking and data collection system?
 - Who has responsibility for data collection (National Fuel, EFI, NYSERDA)?
 - Are data entered and reported in a timely fashion?
 - Have there been any difficulties with the data tracking systems?
 - Does the data transfer with outside organizations (EFI/NYSERDA) pose any difficulties for National Fuel?
 - Is the data format useful to National Fuel? Is it standardized?

8. What problems, if any, have there been with meeting the tracking and reporting requirements for the CIP?
 - Has EFI/NYSERDA had difficulty supplying the data?
 - If so, how have these issues been addressed?
9. Would you recommend any changes to the data tracking and collection procedures?

Customer Surveys

10. Please describe the customer research, such as surveys, focus groups, or interviews, which is currently conducted to inform CIP activities.
 - What entities conduct this research?
 - When are they fielded and how many completes are targeted?
 - What are the goals of this customer research? What types of data are collected?
 - Who sees the results?
 - How are the results used?
11. What customer research, if any, is planned for the future?

Quality Control

12. What quality control procedures are in place for each program?
 - Who implements your quality control processes?
 - How are they enforced?
 - How effective is the quality control process at identifying potential issues?
13. How frequently are there quality issues?
 - What types of issues are most common?
 - How have quality issues been addressed?
 - How quickly have quality issues been addressed?
14. How has the quality assurance process changed over time?
 - Have you seen improvements in the process?
 - Have steps been taken to change the programs based on quality issues?

Savings Estimation Techniques

15. How are savings estimated in the programs?
 - Are the estimations generally believed to be accurate? Is there way to improve the way savings are calculated?
 - How do billing analysis results influence planning?
 - What impact do technical manual results have on planning and deemed savings calculations?
 - Are there issues with the technical manual that need to be addressed?
 - How are net-to-gross ratios calculated?

Closing

16. Finally, what would you say are the CIP's strengths? Weaknesses?
17. What are the most important improvements that should be made to make the programs more effective?
18. What information can this evaluation deliver to help National Fuel? What would make this evaluation a success? Why?

Program Staff Interview Guide – Low-Income Usage Reduction Program

Introduction

1. To begin, could you please explain your roles in the company and your involvement in the program?

Program Overview

2. Now we have a few questions about how LIURP operates.
 - How long has National Fuel partnered with EmPower?
 - What is the relationship between National Fuel, other SBC participating utilities, NYSERDA, Honeywell, CSG, and the weatherization and community action agencies?
 - What is the relationship (if any) with New York State Division of Housing and Community Renewal's WAP?
 - What are National Fuel's key objectives in partnering with NYSERDA's EmPower program?
 - What measures are offered, and which are most commonly installed?
 - Does National Fuel have goals or targets for participation or savings?
3. Have there been any significant changes to the way the program operates since National Fuel became involved?
 - Are any changes planned?
4. Does this program tend to be a cost-effective way to reduce consumption for low-income customers?

Outreach & Marketing

5. What outreach activities are being conducted for this program?
 - Who are the target audiences for marketing efforts, and how do you reach each of them?
 - How effective would you say these efforts have been in reaching customers and getting them to participate?
 - What methods would you say have worked best?
 - What messages have been most effective?
 - What, if anything, needs to be done to improve outreach to customers?
6. Does National Fuel collaborate with NYSERDA, Honeywell, or any other parties on outreach or marketing?

Participant Experience and Satisfaction

Now I'd like you to walk me through all the steps in the program, beginning with how customers become aware of the program.

7. How can potential participants learn about the program?
 - How aware are customers of National Fuel's support of the program?
8. What is the process a customer goes through to participate in the program?
 - How does the referral and screening process work?
 - What forms do they have to fill out and how are they submitted?
 - Who receives and processes the forms?
9. What aspects of the program do participants seem to be most interested in or most satisfied with?
 - What has been used to gauge program satisfaction?
10. Is there a waiting list, and if so, how long do customers typically wait to participate?
11. Has the level of program participation been consistent with your expectations?
 - Why do you think this has been the case?
 - Do you foresee any challenges in the future?
12. Is there any information that you would like to gather from program participants – through a survey or on-site data collection?

Coordination with NYSERDA and Data Collection

13. How often do you communicate with NYSERDA and/or Honeywell?
 - Do you participate in any regular meetings (phone, in person)?
 - Does informal communication take place (e.g., email, *ad hoc* phone calls)?
14. Have you had any particular challenges in working with the other parties involved in this program?
 - How are problems dealt with?
15. How effective and accurate is the data-tracking and data collection system?
 - Who has responsibility for data collection (National Fuel, NYSERDA, Honeywell, CSG)?
 - Are data entered and reported in a timely fashion?
 - Have there been any difficulties with the data tracking systems?
 - Does the data transfer with outside organizations (NYSERDA, etc.) pose any difficulties for National Fuel?
 - Is the data format useful to National Fuel? Is it standardized?
16. Have there been any problems meeting the tracking and reporting requirements?
 - Has NYSERDA and its subcontractors had difficulty supplying the data?
 - If so, how have these issues been addressed?

17. Would you recommend any changes to the procedures?

Implementation Barriers

18. Over the past few years, has the program encountered any obstacles or bottlenecks in implementation? How have you managed them?

- Have there been any changes to the program implementation approach and strategy?

19. Have there been any quality assurance issues with this program, and if so, what role has National Fuel played in resolving them?

20. Have any challenges resulted from negative perceptions or attitudes about the value of the program among customers (low-income or standard income)?

- How have these been dealt with?

Close

21. What would you say are the program's strongest points? What are its weakest points?

22. What improvements could be made in the administration of the programs?

23. What information can the evaluation deliver to inform program processes?

- Is there anything we should be sure to ask NYSERDA, Honeywell, or the agencies when we speak to them as part of this evaluation?

Program Staff Interview Guide – Residential Rebate Program

Introduction

1. To begin, could you please explain your role in the company and your involvement in the program?

Program Overview

2. Now we have a few questions about how the program operates:
 - How long has the program been operating?
 - What measures are currently offered and what are the incentives for each measure?
 - What are the program objectives?
 - How do you expect the program to change the way that residential customers behave with respect to energy efficiency?
 - What are program goals or targets?
3. How well has program performance met expectations?
 - How does the future look for the program in terms of meeting its goals?
 - How often do you receive reports on program progress/program metrics?
 - How is this data used?
4. To your knowledge, were there any changes to the program from year three to year four?
 - Are any changes planned in the future?

Marketing

5. What marketing activities are being conducted for this program?
 - Who are the target audiences for marketing efforts, and how do you market to each of them?
 - How effective would you say the marketing has been in reaching customers and getting them to participate?
 - What methods would you say have worked best?
 - What messages have been most effective?
 - What, if anything, needs to be done to improve marketing to customers?

Trade Allies

6. What trade allies are involved with the program and how do you work with them?
[retailers, contractors]
 - Does National Fuel keep a list of qualified retailers/contractors for customers? Are the Western New York Energy Partners list and the Energy Partners list the main sources of trade ally information? Who developed these lists?
 - What criteria do trade allies have to meet to participate in the program?
 - What strategies do you use to recruit trade allies? How well are these strategies working?

7. Overall, how effectively do you feel the program works with its trade allies?
 - ❑ How frequently do you communicate with trade allies and through what means? How effective do you feel the communication is with them?
 - ❑ What marketing materials, if any, do you provide to trade allies? What feedback do you have from trade allies, if any, about how well these materials support their efforts with the program?
 - ❑ How effective are your trade allies in promoting the program to customers? What tactics are they using? How might their promotional activities be improved?
 - ❑ What, if anything, would you like to improve about your working relationships with trade allies?

8. What type of training, if any, do you provide to retailers? To contractors?
 - ❑ What feedback have you received on the training you provide?

Customer Experience and Satisfaction

Now I'd like you to walk me through all the steps in the program, beginning with how customers become aware of the program.

9. How can potential participants learn about the program?
 - ❑ Do you know what methods are most popular with your customers (website, customer service call center)?

10. What is the process a customer goes through to sign up for the program?
 - ❑ What forms do they have to fill out and how are they submitted?
 - ❑ Can customers easily provide the retailer/contractor details required for the application (tax ID, etc.)
 - ❑ Who receives and processes the forms?
 - ❑ How long does it typically take from when a customer first signs up to receive the rebate check?
 - ❑ What are your processing time goals?
 - ❑ Are there any issues with the application and eligibility process?

11. Where can customers go if they have questions/problems with the rebate process or with a trade ally?

12. What steps, if any, have you taken to gauge program satisfaction?
 - ❑ How often are surveys fielded?

13. What aspects of the programs do participants seem to be most interested in or most satisfied with?
 - ❑ How are survey results used? Changes to program design or implementation? Changes to marketing?

Rebate Processing Subcontractor (EFI)

14. What do you see as the primary benefits of implementing this program in-house (aside from rebate processing) as opposed to going through a third party implementer?
15. How does coordination/communication with EFI work?
 - Are they meeting processing goals?
 - Are there any challenges that have arisen when working with EFI?
 - How have you resolved these challenges?

Implementation Barriers

16. Has the program encountered any obstacles or bottlenecks in implementation?
 - How have you managed them?
 - Have there been any changes to the program implementation approach and strategy?
17. What do you think are common reasons for participation and non-participation?
 - Are there any challenges resulting from perceptions or attitudes about the value of the program/appliances among customers? Among trade allies?
 - How have these been dealt with?

Close

18. What would you say are the program's strongest points? What areas need to be improved?
19. What information can the evaluation deliver to inform program processes?
20. Are there any other staff members you would recommend we speak with regarding the Residential Prescriptive Program? If so, what are their names and contact information?

Program Staff Interview Guide – Nonresidential Rebate Program

Introduction

1. To begin, could you please explain your role in the company and your involvement in the program?

Program Overview

1. Now we have a few questions about how the program operates:
 - How long has the program been operating?
 - What measures are currently offered and what are the incentives for each measure?
 - What are the program objectives?
 - How do you expect the program to change the way that residential customers behave with respect to energy efficiency?
 - What are program goals or targets?
2. How well has program performance met expectations?
 - How does the future look for the program in terms of meeting its goals?
 - How often do you receive reports on program progress/program metrics?
 - How is this data used?
3. Can you describe the difference between the prescriptive and the custom path?
 - How do customers choose their path?
 - Do they work with NYSERDA for both the custom and prescriptive path?
 - Do prescriptive customers interface with residential program/staff?
4. To your knowledge, were there any changes to the program from year three to year four?
 - Are any changes planned in the future?

Coordination with NYSERDA

5. How do you coordinate program delivery with NYSERDA?
 - What are your respective roles and responsibilities?
 - How effective would you say coordination is with NYSERDA for delivering the program?
6. What would you like to see improved, if anything, about coordination with NYSERDA?
 - Are there any challenges that have arisen when working with NYSERDA?
 - How have you resolved these challenges?

Marketing

Now I'd like to know more specifically about how marketing is handled for this program.

7. Generally, what does National Fuel do and what does NYSERDA do to promote the program?

8. Who are the target audiences for the program?
9. Do marketing efforts differ by prescriptive and custom paths? How?
10. What marketing activities do you think work the best to attract the target audiences to the program?
11. What do you think needs to be improved about marketing efforts?

Trade Allies – Communication

12. Who are the trade allies associated with the program? [retailers, contractors, TA staff]?
 - ❑ Describe the relationship between your organization and these parties.
 - ❑ Are trade allies actively recruited for the prescriptive path or are residential contacts leveraged for promotion?
 - i. What strategies are used for trade ally recruitment?
 - ii. How frequently do you contact trade allies, and how is the communication carried out?
 - iii. Do you provide trade allies with marketing materials?
 - iv. What criteria do trade allies have to meet to participate in the program?
 - v. Does National Fuel have a list of qualified retailers/contractors for customers?
 - ❑ How are NYSERDA's TAs selected?
 - i. How many TAs are involved in the program?
 - ii. Please elaborate on their role.
 - iii. Do they help support customers or only review applications and conduct on-site visits?
13. Overall, how effectively do you feel the program works with its trade allies?
 - ❑ How frequently do you communicate with trade allies and through what means? How effective do you feel the communication is with them?
 - ❑ What marketing materials, if any, do you provide to trade allies? What feedback do you have from trade allies, if any, about how well these materials support their efforts with the program?
 - ❑ How effective are your trade allies in promoting the program to customers? What tactics are they using? How might their promotional activities be improved?
 - ❑ What, if anything, would you like to improve about your working relationships with trade allies?
14. What type of training, if any, do you provide to retailers? To contractors?
 - ❑ What feedback have you received on the training you provide?

Participant Experience and Satisfaction

Now I'd like you to walk me through all the steps in the program, beginning with how customers become aware of the program.

15. How can potential participants learn about the program?
 - Do you know what methods are most popular with your customers (website, customer service call center)?
 - Where can customers go if they have questions/problems with the rebate process or with a trade ally?

16. What is the process a customer goes through to sign up for the program?
 - What forms do they have to fill out and how are they submitted?
 - Can customers easily provide the retailer/contractor details required for the application (tax ID, etc.)
 - Are customers responsible for designing custom projects themselves?
 - How do the TAs and custom path customers coordinate with each other?
 - Describe the site visit process.

17. Please describe the rebate process.
 - Who receives and processes the forms?
 - How long does it typically take from when a customer first signs up to receive the rebate check?
 - What are your processing time goals?
 - Are there differences between the prescriptive and custom path?
 - Are there any issues with the application and eligibility process?

18. What aspects of the programs do participants seem to be most interested in or most satisfied with?
 - More interest in prescriptive or custom path?
 - What has been used to gauge program satisfaction?

19. Is a participant survey planned for commercial customers, and if so what is the timeline for fielding?

20. Has the level of program participation been consistent with your expectations?
 - Prescriptive vs. custom?
 - Why do you think this has been the case?
 - Do you foresee any challenges in the future?

Implementation Barriers

21. Has the program encountered any obstacles or bottlenecks in implementation?
 - How have you managed them?
 - Have there been any changes to the program implementation approach and strategy?

22. What do you think are common reasons for non-participation?
- ❑ Are there any challenges resulting from perceptions or attitudes about the value of the program/appliances among customers? Among trade allies?
 - ❑ How have these been dealt with?

Closing

23. What would you say are the program's strongest points? What are its weakest points?
24. Other than what we've discussed above, what would you change about the program?
25. What information can the evaluation deliver to inform program processes?
26. Are there any other staff members you would recommend we speak with regarding the Commercial Rebate Program? If so, what are their names and contact information?

Program Staff Interview Guide – Outreach and Education Program

Introduction

1. To begin, could you please explain your role in the company and your involvement in the program?

Program Overview

1. Can you provide a brief overview of how National Fuel's outreach & education activities operate within the CIP?
 - What parties are involved in implementation of each component of the outreach & education program?
 - What are National Fuel's key objectives for each component?
 - What are the expected outcomes of each component?
 - Does National Fuel have goals or targets for participation or savings?
 - Behavior change?
 - How long has National Fuel been engaging in these three outreach & education activities?
2. What was the impetus behind establishing each component?
3. Have there been any significant changes to the way the program operates since National Fuel became involved?
 - Are any changes planned?

Messaging and Target Audiences

4. What are the main messages delivered through O&E?
 - Who is involved in developing messages/branding?
5. Please describe the major marketing activities used to maintain and raise awareness of the rebate programs.
 - What channels have been most effective?
 - What messages have been most effective?
6. Is there effort to guide people into the other CIP programs (rebates) through all outreach activities or only some?
 - Is the success of that effort tracked?
7. Who is targeted in each component?
 - In the NEED program, is there a different approach for urban and rural schools? Why?
 - Are there any market segments that are particularly challenging to reach?

8. What collaboration takes place between National Fuel and NYSERDA on outreach or marketing?

Communication

9. For each element of the O&E program, what communication is necessary?
 - Are there regular internal meetings (phone, in person)?
 - What informal communication takes place (e.g., email, *ad hoc* phone calls)?
10. Have you had any particular challenges in working with the other parties involved in outreach & education?
 - How are problems dealt with?

Participant Interaction and Satisfaction

11. What aspects of the programs do participants seem to be most interested in or most satisfied with?
 - What has been used to gauge program satisfaction?
12. Has the level of program participation been consistent with your expectations?
 - Why do you think this has been the case?
 - Do you foresee any challenges in the future?
13. Is there any information that you would like to gather from program participants?

Trade Allies and Implementation Partners

14. Who are the third-party actors involved in implementing O&E activities?
 - Are there regular meetings with any Trade Allies or partners?
15. How do you recruit trade allies?
 - Retailers to participate in the Savings Card program?
 - Organizations & events for kit giveaways?
16. We intend to interview Savings Card retailers. Is there anything specific you'd like us to ask them?

Implementation Barriers

17. Has the program encountered any obstacles or bottlenecks in implementation?
 - How have you managed them?
 - Have there been any changes to the program implementation approach and strategy?
18. Have any challenges resulted from negative perceptions or attitudes about the value of the program among customers or trade allies?
 - How have these been dealt with?

Close

19. What would you say are the program's strongest points? What are its weakest points?
20. Do you have any ideas for the future of outreach and education in the CIP?
21. What information can the evaluation deliver to inform program processes?

Appendix C. Implementation Contractor Interview Guides

Low-Income Usage Reduction Program Implementer Interview Guide- NYSERDA

Introduction

1. To begin, could you please explain what your role is in the company and your involvement in National Fuel's Low Income program?
2. Can you please describe, from your perspective, what NYSERDA's role and primary responsibilities are in the program?

Program Overview

3. Can you please give a brief overview of the program?
 - What are the program objectives?
 - What are program goals or targets?
 - What is the relationship between National Fuel, NYSERDA, Honeywell, CSG, and the weatherization and community action agencies?
4. What evaluation activities does NYSERDA perform for this program?
 - Process? Impact?
 - Is each utility program evaluated separately?
 - Would you be able to provide us with a copy of the 2010 evaluation?

Outreach & Marketing

5. What types of outreach activities does NYSERDA conduct for this program?
 - Who are the target audiences for marketing efforts, and how do you reach each of them?
 - How effective would you say these efforts have been in reaching customers and getting them to participate?
 - What methods would you say have worked best?
 - What messages have been most effective?
 - What, if anything, needs to be done to improve outreach to customers?

Application & Eligibility

6. How can potential participants learn about the program?
 - How aware are customers of NYSERDA's support of the program?
7. What aspects of the program do participants seem to be most interested in or most satisfied with?
 - What has been used to gauge program satisfaction?

8. Is there a waiting list, and if so, how long do customers typically wait to participate?
9. Has the level of program participation been consistent with your expectations?
 - Why do you think this has been the case?
 - Do you foresee any challenges in the future?

Coordination with National Fuel and Data Collection

10. How often do you communicate with National Fuel? Honeywell? CSG?
 - Do you participate in any regular meetings (phone, in person)?
 - Does informal communication take place (e.g., email, *ad hoc* phone calls)?
 - Are there standardized deliverables you provide to them? Do they provide any to you?
11. Have you had any particular challenges in working with the other parties involved in this program?
 - How are problems dealt with?
12. How effective and accurate is the data-tracking and data collection system?
 - Who has responsibility for data collection (National Fuel, NYSERDA, Honeywell, CSG)?
 - Are data entered and reported in a timely fashion?
 - Have there been any difficulties with the data tracking systems?
 - Does the data transfer with outside organizations (National Fuel, CSG, etc.) pose any difficulties for NYSERDA?
13. Have there been any problems meeting the tracking and reporting requirements?
 - If so, how have these issues been addressed?
14. Would you recommend any changes to the procedures?

Quality Control

15. What quality control procedures are in place for application processing, installations and data tracking for the program?
 - Who implements your quality control processes?
 - How are they enforced?
 - How effective is the quality control process at identifying potential issues?
16. How frequently are there quality issues?
 - What types of issues are most common?
 - How are persistent quality issues addressed?
 - How do you address issues of quality?

Implementation Barriers

17. Has the program encountered any obstacles or bottlenecks in implementation?
 - How have you managed them?
 - Have there been any changes to the program implementation approach and strategy?

18. What do you think are common reasons for non-participation?
 - Are there any challenges resulting from perceptions or attitudes about the value of the program/appliances among customers?
 - How have these been dealt with?

Closing

19. Have the programs encountered any obstacles or bottlenecks from your perspective?
 - How have you managed them?
 - Do there continue to be obstacles or challenges?

20. What would you say are the strongest points of NYSERDA's administration of the program?

21. Other than what we've discussed above, is there anything you would you change about the program?

22. Any processes that can be improved?

23. What information can the evaluation deliver to inform program processes?

Residential Rebate Program Implementer Interview Guide- EFI and CSG

Introduction

1. To begin, could you please explain what your role is in the company and your involvement in National Fuel's Residential program?
2. Can you please describe, from your perspective, what EFI and CSG's role and primary responsibilities are in the program?

Application, Eligibility & the Customer Service Call Center

4. What is the process a customer goes through to sign up for the programs?
 - ❑ What forms do they have to fill out and how are they submitted?
 - ❑ Who receives and processes the forms?
 - ❑ What is the review process for the applications? How are errors or incomplete information detected?
 - ❑ Describe the steps taken if an application is incorrect or has missing information.
 - ❑ Have there been any issues with the application process?
5. Can you provide us with some details on the call center?
 - ❑ How do customers hear about the call center?
 - ❑ What types of information do you provide to customers over the phone?
 - i. Program information (residential program only, or other programs as well?)
 - ii. Directing customers to the best program for them to participate in
 - iii. Application assistance
 - iv. Trade ally assistance
 - v. Customer issues/complaints (application process, rebate payments, trade ally concerns)
 - ❑ What is the process for escalating issues (e.g., to a manager, to National Fuel), and has that process been effective?
6. Have there been any issues with the call center?
 - ❑ Do you feel there is enough staff on hand?
 - ❑ Is there anything you would do to improve the call center's effectiveness?

Rebate Processing

7. How are rebates processed for the residential program?
 - ❑ Can you describe the process?
 - ❑ How long does it typically take to process rebate payments?
 - ❑ What is your goal for rebate payment timing?

8. How does coordination/communication with National Fuel work when there are issues with rebates?
 - a. Is National Fuel involved when there are problems with applications/rebates?
 - b. Does National Fuel get calls about problems with applications/rebates?

Data Collection

9. How effective and accurate is the data-tracking and data collection system for the residential program?
 - How often are data entered and reported to National Fuel?
 - Have there been any difficulties with the data tracking systems?
 - Does the data transfer between EFI and National Fuel pose any difficulties for EFI?
10. Have there been any problems with the tracking and reporting requirements?
11. Would you recommend any changes to the procedures?

Quality Control

12. What quality control procedures are in place for rebate processing and data tracking for the prescriptive programs?
 - Who implements your quality control processes?
 - How are they enforced?
 - How effective is the quality control process at identifying potential issues?
13. Describe the site visit process?
 - Selection
 - Scheduling
 - Frequency
 - Number/%
 - Reporting
 - How are the results used?
14. How frequently are there quality issues? During site visits? Through other QA processes?
 - What types of issues are most common?
 - How are persistent quality issues addressed?
 - How do you address issues of quality?

Communication and Coordination

15. How does coordination/communication with the National Fuel work?
 - How frequently do you communicate?
 - Are there standardized deliverables you provide to them?
 - Are there any challenges that have arisen while working with National Fuel?

- How have you resolved these challenges?
16. How does coordination/communication between CSG and EFI work?
- How frequently do you communicate?
 - Are there standardized deliverables you provide to each other?
 - Have there been any challenges in coordination that you have had to work through?
 - How were those resolved?

Surveying

We are planning on conducting process surveys with customers and National Fuel recommended we discuss EFI's survey process. If possible we are hoping to use EFI's surveys as a platform for asking additional process questions for the evaluation.

17. When do you conduct the next round of surveys?
- How frequently do you conduct them? Quarterly?
 - What is the response rate?
 - Do you repeat attempt the same customers if they are unresponsive the first time?
 - Do you call during different times of the day/days of week?
 - How long does it take to complete a survey with a customer?
 - For one survey effort how long are you typically in the field?
18. Does EFI conduct the survey or do you subcontract out?
- How many staff make calls?
 - Do you use a CATI system?
 - What is your capacity for adding questions?
19. How do you create the sample?
- How is the sample selected?
 - What level of confidence and precision do you achieve?
 - Where does the data come from?
 - What contact information is used (rebate form, CIS)?
20. What do you do with the survey data after you collect it?
- What format is the data in?

Closing

21. Have the programs encountered any obstacles or bottlenecks from your perspective?
- How have you managed them?
 - Do there continue to be obstacles or challenges?

22. What would you say are the strongest points of EFI and CSG's administration of the program?
23. Other than what we've discussed above, is there anything you would you change about the program?
24. Any processes that can be improved?
25. What information can the evaluation deliver to inform program processes?

Nonresidential Rebate Program Implementer Interview Guide- NYSERDA

Introduction:

1. To begin, could you please explain what your role is in the company and your involvement in National Fuel's Small Commercial program?
2. Can you please describe, from your perspective, what NYSERDA's role and primary responsibilities are in the program?

Program Overview

3. Can you please give a brief overview of the program?
 - ❑ What are the program objectives?
 - ❑ What are program goals or targets?
 - ❑ What is the difference between prescriptive and custom?
 - ❑ How do customers choose their path?
 - ❑ Do they work with NYSERDA for both the custom and prescriptive path?
 - ❑ Do prescriptive customers interface with residential program/staff?

Application & Eligibility

4. How can potential participants learn about the program?
 - ❑ Do you know what methods are most popular with your customers (website, customer service call center)?
 - ❑ Where can customers go if they have questions/problems with the rebate process or with a trade ally?
5. What is the process a customer goes through to sign up for the programs?
 - ❑ What forms do they have to fill out and how are they submitted?
 - ❑ Who receives and processes the forms?
 - ❑ What is the review process for the applications? How are errors or incomplete information detected?
 - ❑ Describe the steps taken if an application is incorrect or has missing information.
 - ❑ Have there been any issues with the application process?

TAs (Technical Assistance Contracts) – Communication

6. Can you tell us more about the TAs associated with the program?
 - ❑ How are NYSERDA's TAs selected?
 - ❑ How many TAs are involved in the program?
 - ❑ Please elaborate on their role.
 - ❑ Do they help support customers or only review applications and conduct on-site visits?

Rebate Processing

7. How are rebates processed for the commercial program?
 - Can you describe the process?
 - How long to rebate payments typically take?
 - What is your goal for rebate payment timing?
8. How does coordination/communication with National Fuel work when there are issues with rebates?
 - c. Is National Fuel involved when there are problems with applications/rebates?
 - d. Does National Fuel get calls about problems with applications/rebates?

Data Collection

9. How effective and accurate is the data-tracking and data collection system for the residential program?
 - How often are data entered and reported to National Fuel?
 - Have there been any difficulties with the data tracking systems?
 - Does the data transfer between NYSERDA and National Fuel pose any difficulties for NYSERDA?
10. Have there been any problems with the tracking and reporting requirements?
11. Would you recommend any changes to the procedures?

Quality Control

12. What quality control procedures are in place for rebate processing and data tracking for the prescriptive programs?
 - Who implements your quality control processes?
 - How are they enforced?
 - How effective is the quality control process at identifying potential issues?
13. Describe the site visit process?
 - Selection
 - Scheduling
 - Frequency
 - Number/%
 - Reporting
 - How are the results used?
14. How frequently are there quality issues?
 - What types of issues are most common?
 - How are persistent quality issues addressed?
 - How do you address issues of quality?

Communication and Coordination

15. How does coordination/communication with the National Fuel work?
- How frequently do you communicate?
 - Are there standardized deliverables you provide to them?
 - Are there any challenges that have arisen when working with National Fuel?
 - How have you resolved these challenges?

Implementation Barriers

16. Has the program encountered any obstacles or bottlenecks in implementation?
- How have you managed them?
 - Have there been any changes to the program implementation approach and strategy?
17. What do you think are common reasons for non-participation?
- Are there any challenges resulting from perceptions or attitudes about the value of the program/appliances among customers? Among trade allies?
 - How have these been dealt with?

Closing

18. Have the programs encountered any obstacles or bottlenecks from your perspective?
- How have you managed them?
 - Do there continue to be obstacles or challenges?
19. What would you say are the strongest points of EFI and CSG's administration of the program?
20. Other than what we've discussed above, is there anything you would you change about the program?
21. Any processes that can be improved?
22. What information can the evaluation deliver to inform program processes?

Nonresidential Rebate Program Technical Assistance Contractor Interview Guide

Introduction

1. To begin, could you please explain a little more about what you and your company do in general?
2. Can you please describe your and your company's involvement in National Fuel's Small Commercial program?
 - What are your primary responsibilities in the program?
 - Are you involved in both the custom and prescriptive paths?
 - About what percentage of your time is spent on the program?
3. How long have you been working with NYSERDA and National Fuel through this program?
4. How did you first become involved with the program?
5. Do you deliver the same or similar services for other utility programs?
6. What type of communication have you had with program staff (NYSERDA or National Fuel) about this program?
 - Who do you typically communicate with?
 - How often do you communicate?
 - Does this level of communication work well?

Program Delivery

7. Can you walk me through the typical experience for a participant customer and focus on your involvement in this experience?
 - How do they hear about the program?
 - How do they sign up for the program?
 - What is the process for selecting their measures?
 - What sort of technical review do their proposed jobs have to undergo?
 - How does the installation process work?
 - What site inspections must they undergo?
 - What is the rebate process?

Marketing & Outreach

8. Did you receive any program information or marketing materials from the program staff?
9. Did the program materials provide enough information?

10. Does your company engage in any customer outreach activities for this program?
 - What types of outreach activities do you engage in?
11. What tends to be the main draw for customers to make higher efficiency upgrades to their facilities?
12. Why do think customers typically choose not to install high efficiency equipment?

Program Effectiveness

These final questions ask about program effectiveness.

13. Do you think the incentives for customers are currently set at the appropriate level?
 - What do you think the appropriate incentive levels should be for this program?
 - Why do you feel that the incentive amounts need to be adjusted?
14. Are there any measures that are not included in the program that you think should be?
15. From your experience, do you think the program influenced types or numbers of projects commercial customers install?

Implementation Barriers

23. Has the program encountered any obstacles or bottlenecks in implementation?
 - How have you/program staff managed them?
24. Have there been any changes to the program implementation approach and strategy?
 - What do you think are common reasons for non-participation
25. Are there any challenges resulting from perceptions or attitudes about the value of the program among customers?
 - How have these been dealt with?
26. Are there any changes you would recommend to improve the program?

Outreach and Education Program Implementer Interview Guide- NEED Program Coordinator

Introduction

1. To begin, could you please explain your role with NEED and your involvement in the program?

Program Overview

2. Can you provide a brief overview of how the NEED program operates in relation to National Fuel's CIP?
 - What parties are involved in implementation?
 - What are National Fuel's and NEED's key objectives?
 - What are the expected outcomes?
 - Does National Fuel have goals or targets for participation or savings?
 - Behavior change?
 - How long has National Fuel been working with the NEED program?
3. Have there been any significant changes to the way the program operates since National Fuel became involved?
 - Are any changes planned?

Messaging and Target Audiences

4. What are the main messages delivered through NEED?
 - Who is involved in developing messages?
5. Is information about other CIP programs (rebates) distributed through NEED?
 - Is the success of that effort tracked?
6. Who/which schools are targeted for participation?
 - Is there a different approach for urban and rural schools?
 - Are there any market segments that are particularly challenging to reach?

Communication

7. What communication is necessary for NEED program implementation?
 - Are there regular meetings (phone, in person)?
 - What informal communication takes place (e.g., email, *ad hoc* phone calls)?
8. Have you had any particular challenges in working with the other parties involved in implementing NEED?
 - How are problems dealt with?

Participant Interaction and Satisfaction

9. What aspects of the programs do participants (teachers or students) seem to be most interested in or most satisfied with?
 - What has been used to gauge program satisfaction?
10. Has the level of program participation been consistent with your expectations?
 - Why do you think this has been the case?
 - Do you foresee any challenges in the future?
11. Is there any information that you would like to gather from program participants?

Implementation Barriers

12. Has the program encountered any obstacles or bottlenecks in implementation?
 - How have you managed them?
 - Have there been any changes to the program implementation approach and strategy?
13. Have any challenges resulted from negative perceptions or attitudes about the value of the program among various stakeholders (e.g., schools, teachers, parents)?
 - How have these been dealt with?

Close

14. What would you say are the program's strongest points? What are its weakest points?
15. Do you have any ideas for the future of NEED in National Fuel's territory?
16. What information can the evaluation deliver to inform program processes?

Appendix D. Residential Rebate Program Trade Ally Survey

Introduction

Hello, my name is [NAME] from The Cadmus Group, calling on behalf of National Fuel. We are evaluating National Fuel's Conservation Incentive Program for residential [or commercial] customers. We were hoping to ask appliance contractors and installers a few questions about the program so we can make improvements to the program. Do you know who would be the appropriate person at your store to discuss the rebate program?

REINTRODUCE if necessary, or arrange callback

I would like to ask you some questions about National Fuel's Conservation Incentive Program. It should take 10 minutes. Is this a good time to talk? This is not a marketing call and your responses will be kept confidential.

Confirmation

16. Are you familiar with National Fuel's Conservation Incentive Program, which provides rebates to customers for the purchase of, furnaces, boilers, indirect water heaters and programmable thermostats?

1. Yes (**Skip to Q18**)
2. No (**Continue to Q17**)
98. Don't Know
99. Refused

17. Is there someone there who would be familiar with the Conservation Incentive Program?

1. Yes (**SCHEDULE CALL BACK**)
2. No (**TERMINATE**)
98. Don't Know
99. Refused

18. Does your business promote the Conservation Incentive Program to customers?

1. Yes (**Skip to Q6**)
2. No (**Continue to Q4**)
98. Don't Know (**Continue to Q4**)
99. Refused (**Continue to Q4**)

19. Do you currently talk to customers about or hand out rebate applications for energy efficiency equipment available through National Fuel?
1. Yes (**Skip to Q6**)
 2. No (**Continue to Q5**)
 98. Don't Know
 99. Refused
20. Could you please describe why you do not promote National Fuel's Conservation Incentive Program?
1. Yes (Specify) [**Thank and Terminate**]
 2. No (Thank and Terminate)
 98. Don't Know (Thank and Terminate)
 99. Refused (Thank and Terminate)

Interaction with Program / Program staff

21. How did you initially find out about the National Fuel Conservation Incentive Program? [**DO NOT READ**]
1. Conservation Incentive Program staff (**Skip to Q10**)
 2. Ads (TV, radio, etc.) (**Skip to Q12**)
 3. From the National Fuel website (National Fuel for Thought) (**Skip to Q12**)
 4. From another retailer/contractor(**Skip to Q12**)
 5. Already participating in the CIP Saving Card(**Skip to Q12**)
 6. At a presentation/meeting (**Skip to Q7**)
 - 97. Other (Skip to Q9)**
 98. Don't Know
 99. Refused
7. [**IF Q6 = At a presentation/meeting**] At which presentation did you initially find out about the Conservation Incentive Program?
8. [**If Q6=6**] Was the presentation informative and helpful?
1. Yes (SPECIFY)
 2. No (**SPECIFY**)
 98. Don't Know
 99. Refused

9. **[IF Q6 = Other]** Where did you initially find out about the Conservation Incentive Program?

10. **[If Q6=1]** Was the company representative informative and helpful?

3. Yes

4. No (**SPECIFY**)

100. Don't Know

101. Refused

11. Was there any information that they couldn't provide?

1. Yes

2. No (**SPECIFY**)

98. Don't Know

99. Refused

12. Did you receive any program information or marketing materials from program staff?

1. Yes

2. No (**Skip to Q17**)

98. Don't Know

99. Refused

13. Did the program materials provide enough information?

1. Yes (**Skip to Q15**)

2. No

98. Don't Know

99. Refused

14. What information were the materials lacking?

15. What type of program materials did you find most useful? **[DO NOT READ]**

1. FAQs

2. Applications to handout to customers

3. Posters

4. Product clings

5. List of qualified products

6. Other (**SPECIFY**): _____

98. Don't Know

99. Refused

16. Do you have any suggestions or requests about the marketing materials?

Marketing & Outreach

The next few questions focus on how you market energy-efficiency and the National Fuel Conservation Incentive Program.

17. Do you use the availability of high-efficiency appliances to attract customers to your business?

1. Yes
2. No
98. Don't Know
99. Refused

18. How do you typically inform your customers of the rebates available for energy-efficient appliances that qualify for the National Fuel program? **[DO NOT READ]**

1. Post posters on the retail floor
2. Product clings on qualifying appliances
3. Put out applications
4. I mention the program when I assist customers
5. I don't inform customers of the program
6. I only mention if they ask about energy efficient appliances
7. Don't need to inform, they already know about it
97. Other **(SPECIFY):** _____
98. Don't Know
99. Refused

19. What tends to be the "selling point" for the higher efficiency appliances (energy savings, the incentive, etc)? **[DO NOT READ]**

1. Cost saving on bill
2. Energy savings
3. Rebate Amount
4. Environmental benefits
97. Other **(SPECIFY):** _____
98. Don't Know
99. Refused

20. When you tell your typical customer about the energy savings from buying high-efficiency appliances covered under the National Fuel rebate program, how interested are they in upgrading to high-efficiency?

1. Very interested
2. Somewhat interested
3. (Neutral) [Do not read]
4. Not too interested
5. Not at all interested
98. Don't Know
99. Refused

Rebate Forms

21. Have you offered assistance to customers in filling out the rebate forms?

1. Yes (**Continue to Q22**)
2. No (**Skip to Q23**)
98. Don't Know
99. Refused

22. What type of assistance did you offer? (Specify)

23. Have any customers seemed hesitant to participate in the prescriptive rebate program because of the process of having to complete a rebate form?

1. Yes
2. No
98. Don't Know
99. Refused

Program Effectiveness

These final questions ask about program effectiveness...

24. Do you think the incentives are currently set at the appropriate level?

1. Yes (**SKIP TO Q27**)
2. No
98. Don't Know
99. Refused

25. What do you think the appropriate levels should be for...?

1. Furnaces?
 2. Furnaces with ECM?
 3. Hot Water Boilers?
 4. Steam Boilers?
 5. Programmable Thermostats?
 6. Indirect Water Heaters?
 98. Don't Know
 99. Refused
26. Why do you feel that the incentive amounts need to be adjusted?
27. What do you think are the main reasons why customers decide not to participate? **[SELECT ALL THAT APPLY]**
1. There are cheaper alternatives
 2. They don't like the qualifying appliances
 3. The rebate form is hard to fill out
 4. The rebates values are not high enough
 97. Other **(SPECIFY):** _____
 98. Don't Know
 99. Refused
28. How aware do you think customers are about the benefits of purchasing energy-efficient appliances?
1. Very aware
 2. Somewhat aware
 3. (Neutral) [do not read]
 4. Not too aware
 5. Not at all aware
 98. Don't Know
 99. Refused
29. Are there any appliances that are not included in the program that you think should be?
1. Yes **(SPECIFY):** Energy efficient A/C units _____
 2. No
 98. Don't Know
 99. Refused

Program Satisfaction

30. Thinking about your overall experience with this program , how would you rate your satisfaction :

1. Very satisfied
2. Somewhat satisfied
3. (Neutral) [do not read]
4. Not too satisfied
5. Not at all satisfied
98. Don't Know
99. Refused

31. Are there any changes you would recommend to improve the program?

1. Yes **(SPECIFY)**: Thought it would be helpful if customers could complete their rebate forms online. _____
2. No
98. Don't Know
99. Refused

Savings Card Participation

32. Are you currently participating in the NFG Conservation Incentive Savings Card Program?

1. Yes **(Continue to Q19)**
2. No **(Thank and Terminate)**
98. Don't Know
99. Refused

33. What motivated you to participate in the savings card program?

(Specify) _____

34. How did you decide which discounts to offer?

(Specify) _____

35. How would you rate the sign up process?

1. Very easy
2. Somewhat easy
3. (Neutral) [do not read]
4. Not too easy
5. Not at all easy

98. Don't Know
99. Refused
36. Have you experienced any consumer participation in the NFG Conservation Incentive Savings Card Program?
1. Yes **(Continue to Q37)**
 2. No **(Skip to Q38)**
98. Don't Know
99. Refused
37. How much consumer participation will you experience in a typical week? **(Ask for participations level by discount type)**
- (Specify)** _____
38. What has been the most popular incentive?
- (Specify)** _____
39. Why do you think it has not appealed to some consumers?
1. Better deals/same deals available without Incentive card
 2. Not a well-known incentive program
97. Other **(SPECIFY)** _____
98. Don't Know
99. Refused
40. Are the customers using the NFG Conservation Incentive Savings Card Program generally more interested in your products/services that enhance their energy efficiency, or are they more specifically interested in the actual discount and how they can receive it and on what products?
1. More interested in enhancing efficiency/increasing energy savings
 2. More interested in the discount
 3. Customers do not seem to have a lot of knowledge of energy saving products or services
 4. Neither
97. Other (SPECIFY) _____
98. Don't know
99. Refused
41. This is a non-binding question: We are just interested in knowing how likely your business to participate in the Conservation Incentive Program again during the next program year?
1. Very likely
 2. Somewhat likely

- 3. Not likely
- 4. Will not participate
- 98. Don't know
- 99. Refused

42. Thinking about your overall experience with this program , how would you rate your satisfaction :

- 1. Very satisfied
- 2. Somewhat satisfied
- 3. (Neutral) [do not read]
- 4. Not too satisfied
- 5. Not at all satisfied
- 98. Don't Know
- 99. Refused

43. Are there any changes you would recommend to improve the program?

- 1. Yes (**SPECIFY**): _____
- 2. No
- 98. Don't Know
- 99. Refused

Those are all of the questions I have for you. Thank you for your time!

Appendix E. Residential Rebate Program Participant Survey

Introduction

Hello. I'm [INSERT NAME], calling on behalf of National Fuel. I'm trying to reach [RESPONDENT NAME] to talk with him/her about his/her recent purchase of energy efficient equipment that received a rebate through National Fuel's Residential Conservation Incentive Program.

(IF NEEDED)

National Fuel is conducting this survey to help them improve the Residential Conservation Incentive program.

- This is the program where households buy high efficiency furnaces, boilers, or programmable thermostats and submit a rebate application to receive a rebate.
- This phone call is designed to last no longer than **10** minutes.
- Let me assure you this is not a sales call.
- Your individual responses will be kept confidential.

S. Screeners

S1. Our records show that you received a rebate from National Fuel for [MEASURE 1] and [MEASURE 2]. Is that correct?

1. (Yes)
2. (No, Measure 1 is incorrect)
3. (No, Measure 2 is incorrect)
4. (No, both measures are incorrect)
98. (Don't Know) [TERMINATE]
99. (Refused) [TERMINATE]

[ASK IF S1=2, 3, 4, or 98]

S2.A. Please tell me what you applied for a rebate for? (PROBE FOR MEASURE AND QUANTITY) [OPEN END] [RECORD THEN THANK AND TERMINATE]

M. Program Awareness

M1. How did you first learn about the rebates being offered by National Fuel for energy saving appliances? (PROBE WITH: Were there any other ways?) [MULTIPLE RESPONSE, RANK UP TO 3]

1. (National Fuel direct mailing – letter)
2. (National Fuel website)
3. (National Fuel employee, account representative, customer service representative)
4. (Store staff/dealer/vendor)
5. (Installer, contractor, home builder, remodeler)

6. (National Fuel bill insert)
7. (TV, radio, billboard, newspaper, or other mass media)
97. (Other, specify)
98. (Don't Know)
99. (Refused)

MP. Purchase Patterns/Decision-Making/Information Sources

Now I'd like to know more about the process you went through when you bought the [MEASURE 1].

MP1. Where did you buy the [MEASURE 1]?

1. (From a retailer)
2. (From a contractor) [SKIP TO MP3]
3. (Other, specify) [SKIP TO MP3]
98. (Don't Know) [CONTINUE]
99. (Refused) [CONTINUE]

[IF MP1=1]

MP2. Did you notice any promotional materials for the National Fuel rebates while you were in the store?

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

MP2.A. What kinds of promotional materials did you notice? [OPEN END]

MP3. At the time you purchased your equipment, did the [INSERT RESPONSE FROM MP1] talk to you about the National Fuel rebate program?

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

MP3.A. If you recall, what role did the [INSERT RESPONSE FROM MP1: Retailer/Contractor/Distributor/Response given for "Other"] play in helping you select the measure? [OPEN END]

MP3.B. Did the [INSERT RESPONSE FROM MP1: Retailer/Contractor/Distributor/Response given for "Other"] emphasize any particular features about the measure?

1. (Yes) Please specify [OPEN END]
2. (No)
98. (Don't Know)

99. (Refused)

MP3.C. Did the [INSERT RESPONSE FROM MP1: Retailer/Contractor/Distributor/Response given for "Other"] provide you with multiple price quotes so that you could compare the cost of standard efficiency equipment with higher efficiency equipment?

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

MP4. How would you rate your satisfaction of the [INSERT RESPONSE FROM MP1]'s knowledge of program?

1. Very satisfied
2. Somewhat satisfied
3. (Neutral) [DO NOT READ]
4. Not too satisfied
5. Not at all Satisfied
98. (Don't know) [SKIP TO MP5]
99. (Refused) [SKIP TO MP5]

MP4.A. Why do you say that? [OPEN END]

[THIS QUESTION REFERS TO MEASURE 1]

MP5. What were the major reasons you bought the [MEASURE 1]? (PROBE WITH: Were there any other reasons?) [MULTIPLE RESPONSE, UP TO 3]

1. (To replace old or outdated equipment)
2. (To replace failed equipment)
3. (Remodeling/expanding)
4. (Reduce energy costs)
5. (To get a rebate from the program/National Fuel)
6. (To get latest technology)
7. (To protect the environment)
8. (Because the Program was sponsored by National Fuel)
9. (Previous experience with other National Fuel programs)
10. (To reduce maintenance and operational costs)
97. (Other, specify)
98. (Don't know)
99. (Refused)

MP6. Did you have any specific reasons for choosing the exact [MEASURE 1] model that you did? (PROBE WITH: Were there any other specific reasons or features for choosing that model?) [MULTIPLE RESPONSE, UP TO 3]

1. (Price)
2. (Size or Fit)
3. (Operating cost or monthly energy cost)
4. (Brand)
5. (Energy efficiency)
6. (Model that qualified for the rebate)
97. (Other, specify)
98. (Don't know)
99. (Refused)

MP7. How easy was it to find equipment that was eligible for National Fuel's rebate?

1. Very easy
2. Somewhat Easy
3. (Neutral) [DO NOT READ]
4. Not too easy
5. Not at all easy
98. (Don't know)
99. (Refused)

AP. Application Process

Now I'd like to know more about the application process for the rebates when you bought [MEASURE 1].

AP1. Did the [INSERT RESPONSE FROM MP1] assist you in completing the rebate application

1. (Yes)
2. (No) [SKIP TO AP2]
98. (Don't know) [SKIP TO AP2]
99. (Refused) [SKIP TO AP2]

AP1.A. What did the [INSERT RESPONSE FROM MP1] assist you with specifically? [OPEN END]

AP2. How would you rate the application process?

1. Very easy
2. Somewhat easy
3. (Neutral) [DO NOT READ]
4. Not too easy
5. Not at all easy
98. (Don't know)

99. (Refused)

AP3. Do you think the rebate amount you received through the program was a very good deal, a reasonable deal, or not a very good deal?

1. A very good deal
 2. A reasonable deal
 3. Not a very good deal
98. (Don't know)
99. (Refused)

AP4. After you submitted your rebate application for the [MEASURE 1], how long did it take to receive the rebate check from National Fuel?

1. (4weeks or less) [SKIP TO MS1]
 2. (More than 4 weeks)
 3. Have not received the rebate yet [SKIP TO MS1]
98. (Don't know)
99. (Refused)

AP5. Do you think this was a reasonable amount of time or an unreasonable amount of time, or was there an issue?

1. (Reasonable amount of time)
 2. (Neutral) [DO NOT READ]
 3. (Unreasonable amount of time)
 4. (There was an issue)
98. (Don't know)
99. (Refused)

[IF AP5=4]

AP5.A. What was the issue? [OPEN END]

MS. Measure Satisfaction

Now I'd like to know how satisfied you've been with the [MEASURE 1]. [READ IN: IF PARTICIPANT HAS MORE THAN 1 MEASURE "We will ask you to focus on just [MEASURE 1]."]

MS1. How would you rate your satisfaction with the [MEASURE 1] you purchased?

1. Very satisfied
2. Somewhat satisfied
3. (Neutral) [DO NOT READ]
4. Not too satisfied
5. Not at all Satisfied
98. (Don't know) [SKIP TO MS2]
99. (Refused) [SKIP TO MS2]

MS1.A. Why do you say that? [OPEN END]

MS2. Did the energy saving improvements make your home more comfortable to live in, less comfortable, or did not affect the comfort of your home?

1. More comfortable to live in
2. Didn't affect comfort
3. Less comfortable to live in
98. (Don't know)
99. (Refused)

MS3. Since you installed the new [MEASURE 1], would you say that your natural gas utility bills have been...?

1. More affordable
2. About the same
3. Less affordable
4. (Not applicable – Someone else in the household pays energy bills)
98. (Don't know)
99. (Refused)

MS4. What's the biggest benefit you noticed from installing the [MEASURE 1]? [OPEN END]

FR. Freeridership

I'd like to find out what your plans were for making energy-efficient improvements to your home before you found out about the National Fuel rebate program.

- FR1. Before learning about the National Fuel rebate program, were you already planning to buy a new [MEASURE 1]?
1. (Yes)
 2. (No) [SKIP TO FR7]
 98. (Don't Know)
 99. (Refused)

[IF FR1=1, 98 OR 99]

[INTERVIEWER NOTE: If customer indicates in FR1 that they had already bought the measure, answer 1 to FR2 and move to FR7.]

- FR2. Had you already purchased or installed the new [MEASURE 1] before you learned about the National Fuel rebate program?
1. (Yes) [SKIP TO FR7]
 2. (No)
 98. (Don't Know)
 99. (Refused)

- FR3. Were you planning to purchase a [MEASURE 1] with the same level of energy-efficiency?
1. (Yes)
 2. (No) [SKIP TO FR7]
 98. (Don't Know) [CONTINUE]
 99. (Refused) [CONTINUE]

- FR4. Would you have purchased the exact same [MEASURE 1] if the amount of the program rebate was less than the [TOTAL REBATE AMOUNT] rebate you received from National Fuel?
1. (Yes)
 2. (No) [SKIP TO FR7]
 98. (Don't Know) [CONTINUE]
 99. (Refused) [CONTINUE]

FR5. And would you have purchased the [MEASURE 1] ...

1. At the same time?
 2. Within the same year?
 3. Within one to two years?
 4. Within three to five years?
 5. In more than five years?
98. (Don't know)
99. (Refused)

FR6. Before participating in the program, had you ever installed any of the same type of [MEASURE 1] that you installed through the program?

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

FR7. In your own words, please tell me the influence National Fuel's incentive had on your decision to purchase [MEASURE 1]?

[Record Response]

SO. Spillover

Now I'd like to talk to you about any energy saving improvements you may have made since you received your rebate from National Fuel.

SO1. Since receiving the rebate from National Fuel, have you made any energy-efficiency improvements or installed any other energy-efficient products in your home that you did **NOT** receive a program rebate for? By energy-efficient products, I mean appliances such as ENERGY STAR clothes washers or refrigerators; high-efficiency water heaters, insulation or windows, ENERGY STAR lighting such as CFL light bulbs; heat pumps, etcetera.

1. (Yes)
 2. (No) [SKIP TO SO3]
98. (Don't know) [SKIP TO SO3]
99. (Refused) [SKIP TO SO3]

SO2. What were the energy-efficient improvements that you made or products that you installed without getting a rebate? [DO NOT READ TABLE LIST]

| Measure Names | SO2. [Measures mentioned that were installed. Record 1=YES for all measures mentioned.] | SO2b. How many ["of each", if multiple] did you install? [Record Quantity] | SO2c. On a scale from 1 to 4, with 1 meaning very influential, 2 somewhat influential, 3 not very influential, and 4 not at all influential, please rate how influential your experience with the National Fuel program was in your decision to install this/these energy-efficient products(s). [SCALE 1-4; 98=Don't know, 99=Refused] IF MORE THAN ONE MEASURE TYPE, READ: "Is this the same rating for ALL measures?" [INTERVIEWER NOTE: If respondent has multiple spillover measures, after reading full script 1x, read: "And can you please rate on the same 1-4 scale how influential the program was in your decision to install this/these?"] | SO2d. What year and month did you purchase this product? [NOTE: IF RESPONDENT CANNOT REMEMBER MONTH JUST RECORD YEAR]. | SO2e. Why didn't you apply for and receive a rebate for [MEASURE] [For each: 1= Did not know rebate was available, 2= product did not quality, 97=Other, Specify] |
|------------------------------------|--|---|---|--|---|
| Gas Boiler | | N/A – DO NOT ASK | | | |
| Gas Furnace | | N/A – DO NOT ASK | | | |
| Indirect Water Heater | | N/A – DO NOT ASK | | | |
| Gas Tank-less water heater | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Gas Storage water heater | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Electric Tank-less water heater | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Electric Storage water heater | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Insulation (Attic, Floor, Ceiling) | [SPECIFY TYPE: 1=Attic, 2=Floor, | ASK FOR SQUARE FEET | | | N/A – DO NOT ASK |

| | | | | | |
|---|--|----------------------------|--|--|-------------------------|
| | 3=Ceiling] | | | | |
| Air sealing | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Clothes Washer | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Dishwasher | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Windows | | ASK FOR SQUARE FEET | | | N/A – DO NOT ASK |
| Programmable thermostat | | N/A – DO NOT ASK | | | |
| Efficient lighting (CFL, LED, Fluorescent, fixtures) | [SPECIFY TYPE: 1=CFL, 2=LED, 3=Fluorescent, 4=Fixtures] | | | | N/A – DO NOT ASK |
| Refrigerator | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Heat pump water heater | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Room AC | | | | | N/A – DO NOT ASK |
| Central AC | | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| Heat Pump | [SPECIFY: 1=air source, 2=ground source] | N/A – DO NOT ASK | | | N/A – DO NOT ASK |
| General other, list | | | | | N/A – DO NOT ASK |

SO3. Since receiving the rebate from National Fuel, have you taken any other actions to reduce energy consumption? [If needed: “An energy efficiency action could be turning down the temperature on your thermostat or your water heater, or powering down appliances or computers.”]

1. (Yes)
2. (No) [SKIP TO NEXT SECTION]
98. (Don't know) [SKIP TO NEXT SECTION]
99. (Refused) [SKIP TO NEXT SECTION]

SO4. Specifically, what actions have you taken? [DO NOT READ TABLE LIST]

| Measure Names | SO4a. On a scale from 1 to 4, with 1 meaning very influential, 2 somewhat influential, 3 not very influential, and 4 not at all influential, please rate how influential your experience with the National Fuel program was in your decision to take this/these action(s). [SCALE 1-4; 98=Don't know, 99=Refused] IF MORE THAN ONE ACTION/HABIT READ: “Is this the same rating for ALL of the actions you took/habits you changed?” | SO4b. And, over time, have you continued to take these actions to save energy? [ANSWER OPTIONS: Yes, No, Don't Know, Refused] |
|---|--|---|
| Turned down temperature on water heater | | |
| Turned down temperature on furnace | | |
| Take shorter or fewer showers | | |
| Don't leave water running | | |
| Turn off appliances | | |
| Turn off computers | | |
| Turn off lights | | |
| Other | | |

PS. Program Satisfaction

Now I'd like to know more about your overall satisfaction with your participation in the Program.

PS1. Overall, how satisfied were you with participating in National Fuel's program?

1. Very satisfied
2. Somewhat satisfied
3. (Neutral) [DO NOT READ]
4. Not too satisfied
5. Not at all satisfied
- 98.(Don't know) [SKIP TO PS2]
- 99.(Refused) [SKIP TO PS2]

PS1.A. Why do you say [INSERT RATING FROM PS1] [OPEN END]

PS2. Do you have any suggestions on how to improve National Fuel's program?[OPEN END,
98=Don't know, 99=Refused]

Closing

Thank you for your participation in this survey and in National Fuel's Residential Program.