National Grid
New York Upstate Energy Initiative Program
Process Evaluation Report--Final
June 7, 2012
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1. **EXECUTIVE SUMMARY**

This report presents the findings and recommendations resulting from the 2010–2011 process evaluation of National Grid’s Energy Initiative Programs in upstate New York. This report is one of a series of process evaluation reports of National Grid’s energy efficiency programs in New York. Preliminary results, from the initial in-depth interviews with program and implementation staff (including trade allies), were provided to National Grid in memo format in January 2011. The memo also included preliminary recommendations based on the early evaluation activities.

1.1 PROGRAM AND EVALUATION OVERVIEW

The Energy-Initiative programs target nonresidential electric and gas customers in the Company’s upstate New York service territory (Niagara Mohawk d/b/a National Grid) that meet certain electric demand or annual natural gas consumption levels. The Energy Initiative programs provide technical assistance (if appropriate) and incentives to facilities to encourage the installation of energy efficiency measures. Incentives are available for both prescriptive and custom measures. The programs are set up so that participants are able to select their own contractor to work with.

Program implementation plans were filed with the New York State Department of Public Service (DPS) in late 2009 for the 2010 and 2011 program years. The Upstate Energy Initiative programs are filed and reported as four individual programs:

- Energy Initiative—Mid-sized Electric program
- Energy Initiative—Mid-sized Gas program
- Energy Initiative—Large Industrial Electric program
- Energy Initiative—Large Industrial Gas program

The Mid-sized Electric program targets nonresidential customers with electric demand of less than 2 MW while the Mid-sized Gas program is targeted to nonresidential customers with annual consumption levels of less than 10,000 dekatherms. The Large Industrial Electric program targets large industrial customers that have an electric load of 2 MW or greater, and the Large Industrial Gas program targets industrial customers that use 10,000 dekatherms of natural gas or more annually.

The programs are delivered by National Grid technical staff, account managers, and Commercial Energy Consultants, as well as third-party technical service suppliers. In addition, National Grid leverages the trade ally infrastructure to also promote the programs to customers.

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1 Preliminary results memo was delivered to National Grid in January 2011 based on feedback from program and implementation staff. Participant survey evaluation activities began in March 2011 while the nonparticipant survey effort did not start until September 2011 while waiting for study approval. The draft final report was delivered to National Grid on November 30, 2011. Final comments on the draft report were received by the evaluation team in May 2012.
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The evaluation team conducted a coordinated process evaluation across all four programs because the programs utilize the same delivery infrastructure and program processes. The evaluation was conducted in 2011 and included those customers who participated in the program in 2010. Additionally, participation numbers were low in some of the programs in 2010 which makes it difficult to report each program individually. Therefore, the evaluation team is reporting the results in this combined report. We report results overall and broken down by program where possible.

As part of this process evaluation, we interviewed a number of different groups: 15 National Grid programs staff (internal staff), two technical assistance firms, six trade allies, four rebate processing staff from EFI (external staff), 76 participating customers (participants), and 59 customers who had not participated in the Energy Initiative program (nonparticipants).

1.2  SUMMARY OF KEY FINDINGS

Overall, feedback from staff interviewees and customers involved with the Energy Initiative programs indicate the program processes are working well. Trade allies and participants have been very satisfied and report positive feedback about the program and their interactions with program staff. However, participation in the programs in 2010 was lower than expected due to a number of different factors: (1) delay in getting the program started with marketing efforts first rolling out in August 2010, (2) availability of similar programs offered within the same geographic territory, and (3) an overlap of National Grid programs (Energy Initiative - Mid-sized programs with the Small Business Services and the Commercial High-Efficiency Heating and Water Heating programs). The evaluation research also found prominent market barriers to the program that are limiting participation as well.

1.2.1  Areas that are working well

Both staff and participating customers report high satisfaction with the program.

Internal and external staff report high customer satisfaction with the program. “The customers that have gone through the program love it!” Trade allies also noted specific recent improvements in the prescriptive lighting offerings that are well received by customers and trade allies alike. Staff’s perceived satisfaction with the program is supported by the majority of participating respondents who indicated that they were very satisfied with their experiences with the program (86 percent), with another eight percent reporting that they were somewhat satisfied.

National Grid has strong customer relationships. National Grid account managers are often a cited source of program information. Both internal and external staff report that National Grid has strong customer relationships through their account management structure, which has helped in reaching customers. Large participating customers also indicated they are hearing about the program through their account managers.

Mid-sized customers also reported hearing about the programs from internal National Grid staff. Specifically, 18 out of 63 mid-sized electric participating customers indicated they heard about the program from an account manager. While these customers may have an account manager, they may be referring to a Commercial Energy Consultant (CEC). Another seven mid-sized electric participating customers mentioned hearing about the program from National Grid staff other than an account manager.
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Several program processes are reported as pluses including a simple and clear application process, the customer commitment letter, and quick rebate processing. Internal and external staff reported that the National Grid application process is smooth and straight-forward, which makes National Grid easy to work with. In addition, staff report that the project approval has been fairly efficient, resulting in a timely commitment letter to customers, and customers get their checks faster than they do through other organization’s programs. As participation increases, National Grid will need to evaluate the how much time is needed for this activity and if additional resources will be needed. Trade allies reported that the commitment letter is a positive as it provides security of incentive level payment to customers.

Internal program staff are experienced and committed, and have established ongoing communication vehicles. Overall, the interviewed internal staff have longevity with National Grid and/or significant prior experience in the energy efficiency field. This expertise was recognized by contractors and commented on specifically. Internal staff meet weekly regarding the program, which fosters strong communication. There is also a SharePoint site with program information and updates.

The program is building trade ally relationships. Internal staff reported trade allies have been bringing projects to the program. Several trade allies reported they appreciate how they are able to reach and contact a National Grid representative if they have any questions or concerns. Trade allies also like that National Grid staff complete the paperwork for the program. “When we contact them [National Grid program staff], they give 110%.” However, there is also confusion among trade allies about National Grid’s offerings which is discussed under Program Challenges below. Mid-sized participating customers are finding out about the program through independent contractors so additional outreach to contractors may be necessary if they will continue to be the primary means of promoting the program to these types of customers. To complement outreach from the trade allies, CECs are aware of the programs and are able to promote them through discussions with customers.

1.2.2 Challenges to Program Success

National Grid has been out of the energy efficiency market in New York for 15 years. During this time, other companies and organizations have been offering programs to National Grid customers. These other companies have built relationships with the same customers and trade allies who are comfortable working with them and utilizing their programs. National Grid is facing some barriers to getting back into the market after such a long time. To address this, National Grid has sought to build on customer relationships using a systematic approach. A team has been put together to proactively serve their customers through direct marketing efforts.

The evaluation research documented the following additional challenges for the program:

There are very prominent external market barriers to the program—most notably customer lack of capital and short project payback requirements. The largest barrier to customers moving forward with energy efficient projects reported by internal and external staff as well as nonparticipating customers is the lack of capital. In the current economy, customers do not have access to capital to make improvements. While a recommended financing option for the Energy Initiative program was not approved during the regulatory
approval process, it was repeatedly mentioned as needed for the Energy Initiative program in this economy by both internal and external staff interviewees. About one-quarter of participating respondents and about 30 percent of nonparticipating respondents indicated they would use financing either from National Grid or through a third-party if it were available. Another 20 percent of participating respondents and 40 percent of nonparticipating respondents indicated that it would depend on a number of different factors including the fact that the decision falls to others within the company (management, board of directors, owners, etc.), the size of the project, and the interest rate of the loan.

In addition, staff reported that many corporate entities are requiring project paybacks to be 2 years or less. This payback requirement results in the need for large incentives to move forward with projects and also limits the range of projects that firms will move forward with. Most specifically and relevant for National Grid, the current low natural gas price is making it very difficult for gas projects to meet this payback criteria.

**There are multiple offerings in the energy efficiency marketplace.** Another primary challenge mentioned by internal staff is that National Grid has been out of the energy efficiency market in New York for 15 years. Furthermore, initial marketing efforts of the Energy Initiative program were generic in nature and only lasted three months. During the time National Grid was not offering energy efficient projects, other companies and organizations, such as NYSERDA have been offering programs to National Grid customers and have established relationships with these customers. Most internal staff reported consistently competing with NYSERDA for customer energy efficiency projects. These staff report that the multiple state program administrator offerings as well as federal offerings confuse customers. According to internal staff, NYSERDA in particular is difficult to compete with because this organization has continuously been in the New York marketplace and both customers and trade allies are more familiar with them and their programs. Internal staff also reported that the statewide program administrator can offer larger incentives than National Grid because of the way their incentives are calculated (using statewide avoided costs instead of territory-specific avoided costs). When talking with program participants, nine out of 48 respondents indicated confusion between National Grid and other program administrators. Nonparticipants were slightly more likely to be confused with the different offerings with 12 out of 27 respondents indicating confusion between National Grid offerings and other program administrator offerings.

**The program’s limited prescriptive offerings may be a participation barrier.** There are currently only two prescriptive offerings available (lighting and compressed air), resulting in many projects being run through the custom program. This creates additional time and investment for some projects that could be included in a prescriptive program (i.e., motors and variable frequency drives (VFDs), Heating, Ventilation and Air Conditioning (HVAC) equipment). A reported positive of running programs through the custom track is that it often results in a larger customer incentive, but staff working with customers consistently voiced a desire to have more prescriptive offerings as they are easier for the customer and involve less paperwork. These staff also reported that prescriptive incentives from other program administrators are used in trade allies’ project proposals to customers because they are known ahead of time unlike custom incentives (this was substantiated in trade ally interviews). This suggests the program may be losing some participants because of the lack of prescriptive projects. Furthermore, customers may turn to the Small Business Services
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program as an alternative to the Energy Initiative program because of the more streamlined program approach.

Another concern voiced is that the custom approval process can take longer than the prescriptive track, which could negatively affect participant satisfaction. However, participant feedback shows that those that participated in the program either through a prescriptive project or a custom project have been equally satisfied with their program experience. One of the reasons for the equal level of satisfaction may be that internal program staff and trade allies have tried to review calculations and complete paperwork expeditiously. The quick turnaround of custom projects could be harder to maintain as project volume increases.

The 2010 program marketing campaigns started late and ended early and marketing materials were reported as being too generic. National Grid marketing staff ran several marketing campaigns for the program from August through October, 2010. These included direct mailings, email blasts, Internet page searches, and telemarketing. Staff believe the marketing campaigns should have started sooner and could have been more effective if they had lasted longer. Several staff also felt the marketing messages were too general to appeal to customers.

Nonparticipating customers were also asked about where they go when looking for information on energy efficiency programs and services. The internet was the most common resource customers use with most mentioning the National Grid website (mentioned by 16 of 59 respondents), followed by the NYSERDA website (11 out of 59 respondents).

Furthermore, nonparticipants indicate more communication is needed to increase the likelihood of their participation in the Energy Initiative programs. Almost half of the nonparticipating respondents mentioned that they would need additional information to be able to make the determination whether or not to participate in the program in the future. This includes having a staff member come to the facility, more promotional material containing the offerings that can be left behind, and case studies showing recent examples.

Additional training on effective sales techniques could improve Account Managers and CECs ability to sell the program. Account managers are now faced with selling energy efficiency programs to their customers. While they feel this is a new opportunity to talk with their customers about something positive, it also presents a challenge if they are not properly trained. Since National Grid staff was commonly mentioned as a place to go to hear about the program or as a resource if a customer has questions, National Grid staff will need to be familiar with the programs and be able to answer customer questions accurately and in a timely manner.

1.3 CONCLUSION AND RECOMMENDATIONS

Based on the process evaluation results, we offer the following recommendations for National Grid’s consideration.

Review other program administrators’ offerings to better position National Grid’s Energy Initiative programs. To be able to ‘sell’ the Energy Initiative program, many staff feel they and trade allies need to understand the difference in programs and how to differentiate the National Grid Energy Initiative program. In addition, many staff reported that other
program administrators offer more comprehensive offerings, more prescriptive offerings, and higher incentives. Many staff expressed the need for a review of all New York energy efficiency offerings to provide valuable information for improving National Grid’s offerings. Both participating and nonparticipating customers report confusion in offerings between the different entities. National Grid has recognized this need and has funded an additional research task as part of the overall process evaluation to review other program administrators’ commercial and industrial offerings in New York. The challenge will be to use this information to make program improvements and enhancements and keep program staff and partners abreast of the changes to the offerings and how best to position the Energy Initiative program.

Explore the possibility of offering financing options (e.g., low interest loans). The primary barrier to customers moving forward with energy efficient projects is the lack of capital. The incentive is essential to overcome this barrier, but significant portion of interviewees (internal and external staff and participating and nonparticipating customers) also thought the Energy Initiative program would benefit from offering some type of financing to customers.

Consider expanding the prescriptive offerings. National Grid currently only offers lighting and compressed air measures as part of their prescriptive offerings; all others are run as custom projects. Given the ease of using prescriptive versus custom measures, both internal staff and contractors offered suggestions for expanding the prescriptive programs. Motors, VFDs, boilers and heat pumps were some suggestions for prescriptive measures. As program participation increases, the need for additional prescriptive offerings may be greater.

One recommendation is to roll the Commercial High-Efficiency Heating and Water heating to the Energy Initiative program as a prescriptive offering. By incorporating the program into a prescriptive offering within Energy Initiative, it may be a good introduction to gas projects that get customers thinking about energy efficiency and additional projects that could result in higher savings. If the Energy Initiative program included the Commercial High-Efficiency Heating and Water Heating program, we recommend the offering retain a straight-forward prescriptive track for the current Commercial High-Efficiency Heating and Water Heating program offerings in addition to a separate custom track that could allow more comprehensive measures to be installed.

Continue to keep program processes as streamlined as possible and assess the need for internal process improvements. The program’s streamlined application and rebate processing was mentioned as an important advantage of the program over other organizations’ programs. At the same time, there is some concern that the requirement of pre- and post-inspections for all projects, including prescriptive, is overly burdensome. In addition, external staff reported that depending on the type of project a customer has (custom vs. prescriptive), they are passed around among National Grid contacts.

Continue internal program trainings and communications. While internal staff’s experience and communication was reported as a program success, some internal staff did indicate a desire for more internal trainings such as field trips to observe measures and projects. In addition to training on sales techniques, internal staff felt providing tools and resources to Account Managers and CECs would be helpful. It was also reported by some that a clearer prioritization of program needs and actions is needed and should be
communicated in weekly meetings. Since customers mention National Grid staff as a resource, it will be important to make sure they have the necessary information and tools to help customers make decisions. This will both increase customer satisfaction and move more customers through the program.

**Expand outreach to trade allies.** Staff reported that being available to trade allies allows projects to move forward in a timely manner. Keeping this one-on-one interaction allows for account managers and other National Grid staff to keep building trade ally relationships. 'Relationship building' was reported as a necessity with trade allies as they place the highest value on their customer relationship. Other reported barriers to trade ally participation is a lack of understanding of the program requirements and incentives. There are also some misconceptions about National Grid’s programs reported above, specifically in relation to the SBS program, which have been a hurdle to overcome with trade allies. In general, trade allies said they like to receive program information via email, internet websites, and Energy Expos or conferences. On-site visits were also reported as helpful. Participating customers also report hearing about the programs from the contractors so it will be vital to keep growing the contractor base.

Also, as mentioned earlier, with different program administrator offering options for energy efficiency programs, there has been confusion among customers about the programs available, who is offering them, and which is the best fit for their business. Customers report that the confusion was typically resolved by reviewing paperwork for the different programs and talking with different people and asking questions. It will be important for trade allies to be kept aware of the different options and any changes made to the programs to be able to answer customer questions.

**Continue improvements to the InDemand system to capture valuable program information and streamline data entry.** A designated internal staff person collects feedback on InDemand from those working with it in the field and prioritizes improvements needed to support the program. For example, at the time of interviews, a feature was being added to track customer leads (as opposed to just participants) through InDemand. Another identified improvement mentioned in interviews was the need to have the system look the same for both gas and electric offerings. Staff thought this improvement would allow for more timely and accurate input of application data. The InDemand system is seen as a good tool to have all information recorded centrally and accessible throughout National Grid. Additionally, some interviewees would like the InDemand system to tie in with the customer information system to automatically populate certain information such as address.

**Increase and tailor the marketing of the programs.** The Energy Initiative programs did not meet their participation goals in 2010. Staff interviews indicate the need for an expanded and targeted marketing approach. Most staff would also like more marketing collateral and tools to use with customers to demonstrate how they would benefit (e.g., by doing X, you will be able to reduce your bottom line by Y). Staff are also in favor of specific case studies showing real life examples of the work that was done, the available incentives, and what the savings were. While labor intensive, many interviewees said cold calling and on-site visits are the most effective way to reach customers. As discussed above, the other most effective mean reported was working through trade allies. Customers who have not participated in the program also indicate they research National Grid’s website for information, so making sure this information is readily available may increase the likelihood of customers’ awareness and
use of the program. One big barrier the program faces is the awareness of the programs so the more that can be done to get the word out about the programs, the more likely customers will be to utilize the program.

Compared to the initial marketing material used to promote the program, in 2011, National Grid launched an aggressive marketing campaign to promote the Energy Initiative programs. The campaign included direct mail, website banner ads, and articles in newsletters. Additional strategies included email blasts to customers and trade allies and telemarketing. Some specific activities performed in 2011 included:

- Paid search campaign including placing ads on various websites that business owners visit (March 2011 – June 2011)
- Hosting the Upstate New York Energy Efficiency Conference and Expo (April 7, 2011 in Verona, New York), an event geared towards commercial customers from Buffalo to Albany interested in implementing energy efficiency measures in their business operations
- Marketing effort geared towards engaging trade allies in promoting National Grid’s energy efficiency programs, including trainings on the programs, new technologies (the Energy Solutions Partner program)
- Breakfast seminars for large industrial customers, in Syracuse and Albany, where combustion controls, thermal blanket insulation and steam systems were discussed.

The additional marketing efforts may have been effective in increasing participation. Program savings targets for 2011 were exceeded for the Large Industrial Electric program (188 percent), the Mid-sized Electric program (180 percent) and the Large Industrial Gas program (344 percent). Savings targets for the Mid-sized Gas program achieved 73 percent of target.

**Review the adequacy of engineering study incentives.** External staff mentioned that the 50 percent program funding of the engineering study may not be enough. “Customers have a hard time spending money on a study when they are unsure what the outcome is going to be.” Supporting the need for setting an appropriate incentive for engineering studies, nonparticipating customers who received technical assistance indicated they were interested in the review because it was available at a discounted rate (mentioned by 4 out of 11 respondents).

**Review incentive levels and payback periods.** Respondents who received technical assistance but did not install equipment indicated that increasing incentive levels and decreasing payback periods will increase their likelihood of installing the recommended equipment. Incentive levels also had the lowest satisfaction rating among participating customers.
2. INTRODUCTION

This report presents the results of the 2010 program year process evaluation of National Grid’s Energy Initiative programs in upstate New York. This report is one of a series of process evaluation reports of National Grid’s energy efficiency programs in New York. Preliminary results of the process evaluation from the initial in-depth interviews with program and implementation staff (including trade allies) were provided to National Grid in a memorandum in January 2011. The memorandum also included preliminary recommendations based on the early evaluation activities.

2.1 PROGRAM BACKGROUND

The Energy Initiative programs target nonresidential electric and gas customers in the Company’s upstate New York service territory (Niagara Mohawk d/b/a/ National Grid) that meet certain electric demand or annual natural gas consumption levels. The Energy Initiative programs provide technical assistance (if appropriate) and incentives to existing facilities to encourage the installation of energy efficiency measures. The program allows participants to select their own contractor to install equipment, and incentives are available for both prescriptive and custom measures. Program implementation plans were filed with the New York State Department of Public Service (DPS) in late 2009 for the 2010 and 2011 program years. The Upstate Energy Initiative programs are filed and reported as four individual programs:

- Energy Initiative—Mid-sized Electric program
- Energy Initiative—Mid-sized Gas program
- Energy Initiative—Large Industrial Electric program
- Energy Initiative—Large Industrial Gas program

The programs are delivered by National Grid technical staff, account managers, and Commercial Energy Consultants, as well as third-party technical service suppliers. In addition, National Grid is leveraging the trade ally infrastructure to promote the programs to customers.

For the 2010 evaluation period, the Mid-sized Electric Program targeted nonresidential customers with electric demand of less than 2 MW while the Mid-sized Gas program targeted nonresidential customers with annual consumption levels of less than 10,000 dekatherms. The Large Industrial Electric program targeted large industrial customers that have an electric load of 2 MW or greater, and the Large Industrial Gas program targeted industrial customers that use 10,000 dekatherms or more of natural gas annually.

In 2010, National Grid petitioned regulators to lower the maximum gas consumption level for the Mid-sized program to 7,000 dekatherms and the Large Industrial Gas program to consumption levels of 7,000 dekatherms or more annually. In October 2011, National Grid received approval to combine the gas programs (Mid-sized Gas, Large Industrial Gas and Commercial High Efficiency Heating and Water Heating). These gas programs were not officially combined until 2012 program year. The electric programs (Mid-sized Electric and Large Industrial Electric) are still in the process of being combined.

The mid-sized programs focus on retrofitting opportunities for mechanical and electrical systems in commercial, industrial, agricultural, governmental, and institutional buildings.
The large industrial gas program targets process applications, pipe insulation, envelope improvements, steam traps, heat exchangers, boiler controls, and custom heating and water heating applications. The large industrial electric program targets lighting, compressed air, motors and variable speed drives, and other industrial electric uses.

The Energy Initiative programs have two program managers within National Grid; one who is focused on the electric programs and one who is focused on the gas programs. These two managers work jointly on program design, management, and delivery of the programs throughout National Grid’s upstate territory.

Many other internal staff members are instrumental in the delivery of the program. These include:

- Account executives/managers, recently titled ‘Large Business Solutions Representatives’, are assigned to National Grid’s largest customers. They handle approximately 50 customers each and are the main point of contact for designated customers. They participate in customer meetings regarding the program and help customers throughout the program process.

- Commercial Energy Consultants (CECs), also referred to as ‘sales reps’, have a similar role as the account managers in conducting program outreach and answering questions for National Grid’s smaller commercial customers that are not assigned to an account manager.

- Technical representatives provide technical support to internal customers (account executives and CECs). Their main role is to review energy efficiency measures to see if they economically make sense or whether the program can incentivize a particular measure (which mostly deals with the custom measures). Technical representatives work with the account executive to prepare the program’s offer to the customer. They also follow-up to make sure incentives are applied correctly.

- Delivery managers oversee a staff of account managers, CECs, and technical representatives, and are responsible for their division’s goals. Additionally, they work on getting the word out about the program in whatever way they can.

- Analysts work with and improve the InDemand system, which is National Grid’s internal data tracking system where all the application and program efforts are captured.

2.1.1 Program objectives and achievements to-date

The program goals for each of the four Energy Initiative programs can be found in the table below.
2. Introduction...

Table 2-1. Program Participation and Savings for 2010

<table>
<thead>
<tr>
<th>Program</th>
<th>Planned Participation for 2010</th>
<th>Actual Projects Through 2010</th>
<th>Savings Target for 2010</th>
<th>Actual Savings Through 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-sized Electric Program</td>
<td>793</td>
<td>140</td>
<td>101,083,000 net kWh</td>
<td>15,092,237 net kWh</td>
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<tr>
<td>Mid-sized Gas Program</td>
<td>340</td>
<td>35</td>
<td>340,900 net therms</td>
<td>295,041 net therms</td>
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<tr>
<td>Large Industrial Electric Program</td>
<td>79</td>
<td>12</td>
<td>22,930,043 net kWh</td>
<td>4,502,977 net kWh</td>
</tr>
<tr>
<td>Large Industrial Gas Program</td>
<td>11</td>
<td>0</td>
<td>176,180 net therms</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td>1,223</td>
<td>187</td>
<td>124,013,043 net kWh</td>
<td>19,595,214 net kWh</td>
</tr>
</tbody>
</table>

Actual 2010 participation was lower than anticipated for a number of different reasons identified in the process evaluation:

- There was a delay in getting the program started in 2010. Marketing efforts did not start until August so staff was trying to meet a years’ worth of goals in a six month period. This marketing material was also generic in nature and only lasted until October. Furthermore, because the sales cycle for medium and large customers is longer, when the program is late getting started it is difficult to get customers to participate in a shortened period of time.

- There is competition from other program administrator programs. While the Energy Initiative program has been up and running in other National Grid companies, the situation in New York presents unique circumstances that may not have been accounted for. New York has other organizations that are able to offer energy efficiency programs to National Grid customers (e.g., NYSERDA, NYPA).

- Overlap of National Grid programs. There is overlap in customers between the Small Business Services, the Commercial High-Efficiency Heating and Water Heating programs, and the mid-sized Energy Initiative programs. There has also been negative feedback in regards to the Small Business Services program which may have affected customers considering National Grid for any other energy efficiency programs (mentioned by internal program staff as well as at least one contractor).

A May 24, 2011 commission order has provided relief to the 100 kW floor between the Small Business Service program and the Mid-sized Energy Initiative program. This allows customers to be able to utilize their own implementation staff (as allowed through the Small Business Service program) and install equipment that was not previously part of the program (but available through the Energy Initiative program).
As a result of the slow startup, National Grid was authorized to combine 2010 and 2011 targets, with the approval of the commission. Three of the four programs exceeded savings targets in 2011 (Large Industrial Electric program (188 percent), Mid-sized Electric program (180 percent), and the Large Industrial Gas program (344 percent)). The Mid-sized Gas program achieved 73 percent of its 2011 savings target.

2.1.2 Program Logic Model

A program logic model is a visual representation of the program’s theory\(^2\) that illustrates a set of interrelated program activities that combine to produce a variety of outputs that lead to key short-, mid- and long-term outcomes. A program logic model can lead to a cost-effective determination of program effectiveness.

Logic models can be linked to performance indicators in order to provide on-going feedback to program managers. The models flow top to bottom and are typically organized according to five basic categories:

- **Program resources**: Financial, staffing, and infrastructure resources that support the activity
- **Program activities**: Overarching activities that describe what the program is doing. Examples include marketing, rebate processing, etc.
- **Outputs**: Metrics resulting from the activities. These tend to be measurable “bean counting” results (e.g., provide outreach events at 5 community fairs)
- **Short- to medium-term outcomes**: Expected outcomes resulting from program activities, with goals attached to those outcomes when possible. Examples include: target energy savings, recruitment into the program, etc.
- **Long-term outcomes**: Ideal, sustainable outcomes resulting from program activities, such as “all eligible customers participate in program” and “increase customer awareness of program offerings.”

The main activities identified in the Energy Initiative programs were to (1) develop program infrastructure, (2) outreach to trade allies and customers, (3) perform audits (as needed), (4) install measures, and (5) rebate the measures. These activities are defined by their inputs and outcomes in the logic model in Figure 2-1 below.

\(^2\) A program’s theory articulates what the program is designed to accomplish and through what means.
2. Introduction...

**Figure 2-1. National Grid New York State Energy Initiative Program Logic Model (upstate)**

<table>
<thead>
<tr>
<th>Inputs/ Resources</th>
<th>Marketing materials and communications to trade allies and customers</th>
<th>National Grid program team (internal staff, contractors, etc)</th>
<th>National Grid program team (internal staff, contractors, etc)</th>
<th>Incentive coordination and processing (EFI)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sufficient budget is allocated</td>
<td>National Grid Program Team (internal staff, EFM)</td>
<td>Audit forms</td>
<td>Rebate forms</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activities</th>
<th>Develop Program Infrastructure</th>
<th>Outreach to Trade Allies and Customers</th>
<th>Perform Audits</th>
<th>Install Measures</th>
<th>Rebate Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outputs</td>
<td>Energy Initiative program implementation plan is developed and approved</td>
<td>Provide training, information and marketing support to contractors and other retailers of approved equipment</td>
<td>Audits are performed for custom projects</td>
<td>Equipment is installed through either the prescriptive lighting, prescriptive compressed air or custom program</td>
<td>EFI validates customer applications and processes rebates within 4-6 weeks of receipt</td>
</tr>
<tr>
<td></td>
<td>The program is launched to National Grid customers in 2010</td>
<td>Hold meetings with HVAC distributors and key trade associates and events with contractors and trade allies</td>
<td>Customers sign contract to proceed with program</td>
<td>Application forms are completed by either the contractor or the customer</td>
<td>EFI uploads project data into InDemand and invoices National Grid monthly</td>
</tr>
<tr>
<td></td>
<td>Program measures, rebates, marketing strategy and technical assumptions developed, refined and documented</td>
<td>Account executives and commercial energy consultants talk with their customers about the program</td>
<td>Information is entered into InDemand by National Grid staff</td>
<td>Application forms are sent to EFI to be entered</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tracking system developed and appropriate information is requested, captured and entered</td>
<td>Target direct communications to commercial customers and other outreach such as newsletters, website</td>
<td>Post inspections are completed on custom projects</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Short to medium term outcomes | Improved energy efficiency program awareness and participation | Contractors are knowledgeable about available rebates and program guidelines and have appropriate marketing collateral | Contractors identify areas customers can save money by making energy-saving improvements | Customers gain savings benefits from installing high-efficient equipment | Rebates are accurate and fully processed to ensure customers receive rebates within 45 days |
|                              | Refine EI product offerings and incentives structure annually | Contractors regularly communicate with customers and leverage rebates in sales efforts | Proposals are provided to clients with recommended energy-saving technologies and possible rebates | Customers experience a smooth, straight-forward process and are encouraged to participate in other National Grid programs |
|                              | Consumer demand is stimulated by education on the savings benefits emphasizing financial incentives Commercial customers' awareness of and participation in the program increases, and they go to Power of Action website for energy efficiency information |

| Long term outcomes | Program passes total resource cost test | A network of well informed and educated contractors is developed (who will promote high efficiency even without program) | Customers understand areas of inefficiency and make necessary changes | Insure that incentivized equipment meets program requirements | Energy saving goals of the program are achieved within budgetary constraints |
|                   | Budget is secured | Contractors recommend and successfully upsell high-efficiency equipment to commercial customers | The demand for energy-efficient equipment increases | Enlist 18 Large Gas, 157 Large Electric, 680 Mid-sized Gas, and 1586 Mid-sized Electric customers to rebate program-qualifying equipment from 2010-2011 | Achieve 281,880 therms (large gas), 45,860 MWh (large electric), 81752 Dekatherm (mid-sized gas), 202,166 MWh (mid-sized electric) savings from 2010-2011 |

2.2 EVALUATION METHODOLOGY

The evaluation team conducted a coordinated process evaluation across all four Energy Initiative programs because the programs utilize the same delivery infrastructure and program processes. Additionally, participation numbers were low in some of the programs which makes it difficult to report each program individually. Therefore, the evaluation team is reporting the results in this combined report. We report results overall and broken down by program where possible.

The researchable issues identified for the process evaluation are contained in the table below and organized around main areas. These researchable issues were refined in interviews with program managers.

<table>
<thead>
<tr>
<th>Area</th>
<th>Researchable Question</th>
<th>Activity to Support Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Administration and Processes</td>
<td>How effective is the collaboration between all parties (i.e., National Grid, account managers, energy efficiency consultants, contractors, vendors, etc.)?</td>
<td>Program staff interviews&lt;br&gt;Trade ally interviews&lt;br&gt;Programs staff interviews&lt;br&gt;Trade ally interviews&lt;br&gt;Participant survey</td>
</tr>
<tr>
<td></td>
<td>Is the training to National Grid staff, vendor staff, and trade allies sufficient? If not, what additional training and education support can be provided?</td>
<td>Program staff interviews&lt;br&gt;Trade ally interviews&lt;br&gt;Program staff interviews&lt;br&gt;Trade ally interviews</td>
</tr>
<tr>
<td></td>
<td>Do program managers and trade allies feel they have sufficient staffing resources to deliver the program? What additional information or resources are needed?</td>
<td>Program staff interviews&lt;br&gt;Trade ally interviews&lt;br&gt;Participant survey</td>
</tr>
<tr>
<td></td>
<td>Are there areas the program could increase cost-effectiveness through shared strategies and partnerships with other utilities and organizations in New York?</td>
<td>Program staff interviews&lt;br&gt;Trade ally interviews&lt;br&gt;Participant survey&lt;br&gt;Nonparticipant survey</td>
</tr>
<tr>
<td>Program Satisfaction</td>
<td>How is the program working? How could it be improved? What enhancements are needed in the design and delivery of the program?</td>
<td>Program staff interviews&lt;br&gt;Trade ally interviews&lt;br&gt;Participant survey&lt;br&gt;Nonparticipant survey</td>
</tr>
<tr>
<td></td>
<td>Are customers satisfied with the program? What do they believe could be offered to improve program services?</td>
<td>Trade ally interviews&lt;br&gt;Participant survey</td>
</tr>
<tr>
<td></td>
<td>Does participation affect participants’ perception of the utility and, if so, how?</td>
<td>Participant survey</td>
</tr>
<tr>
<td></td>
<td>Is the program delivering the intended benefits to participants and are they achieving planned energy impacts?</td>
<td>Program staff interviews&lt;br&gt;Trade ally interviews&lt;br&gt;Participant survey</td>
</tr>
</tbody>
</table>
## Area

### Ease of Participation

<table>
<thead>
<tr>
<th>Researchable Question</th>
<th>Activity to Support Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>What barriers exist for customers’ participation in the program?</td>
<td>• Program staff interviews&lt;br&gt;• Participant survey&lt;br&gt;• Nonparticipant survey</td>
</tr>
<tr>
<td>How important was the technical assistance in their decision to participate? The program incentive?</td>
<td>• Participant survey</td>
</tr>
<tr>
<td>How much outside technical assistance is used for more complex jobs, by outside firms (compared to internal resources)? What level/kind of tech review is done for each custom (not prescriptive) application?</td>
<td>• Participant survey</td>
</tr>
<tr>
<td>Why do customers decide not to install measures after receiving technical assistance?</td>
<td>• Nonparticipant survey</td>
</tr>
</tbody>
</table>

### Customer Awareness and Marketing

<table>
<thead>
<tr>
<th>Researchable Question</th>
<th>Activity to Support Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>How is the program promotion working? What improvements can be made? What are the differences by sector (medium vs. large customers)? What tools are most effective?</td>
<td>• Program staff interviews&lt;br&gt;• Trade ally interviews&lt;br&gt;• Participant survey</td>
</tr>
<tr>
<td>How do participants most commonly hear about and become involved in the program?</td>
<td>• Participant survey</td>
</tr>
<tr>
<td>What marketing and outreach efforts are most successful in generating customer leads?</td>
<td>• Program staff interviews&lt;br&gt;• Participant survey&lt;br&gt;• Nonparticipant survey</td>
</tr>
<tr>
<td>Is there confusion between National Grid’s programs and NYSERDA’s programs?</td>
<td>• Program staff interviews&lt;br&gt;• Participant survey&lt;br&gt;• Nonparticipant survey</td>
</tr>
</tbody>
</table>

### Customer Characteristics and Decision Making Processes

<table>
<thead>
<tr>
<th>Researchable Question</th>
<th>Activity to Support Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the characteristics of the participating customer population and how does that compare to the eligible population? Are there any groups not reached by the program that also have financial and efficiency needs?</td>
<td>• Program staff interviews&lt;br&gt;• Trade ally interviews&lt;br&gt;• Participant survey&lt;br&gt;• Nonparticipant survey</td>
</tr>
<tr>
<td>Which measures have been installed and what type of equipment did it replace? How are they accepted and valued by the customer?</td>
<td>• Participant survey</td>
</tr>
<tr>
<td>Do measures remain installed and, if not, why not?</td>
<td>• Participant survey</td>
</tr>
<tr>
<td>Are there differences in participation by technology? If so, what is driving those differences?</td>
<td>• Participant survey&lt;br&gt;• Trade ally interviews</td>
</tr>
</tbody>
</table>

### Trade Ally Participation

<table>
<thead>
<tr>
<th>Researchable Question</th>
<th>Activity to Support Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are there any internal or external barriers to trade allies effectively delivering the program? Are program requirements clearly understood and correctly implemented?</td>
<td>• Program staff interviews&lt;br&gt;• Trade ally interviews</td>
</tr>
</tbody>
</table>

### Program Impact

<table>
<thead>
<tr>
<th>Researchable Question</th>
<th>Activity to Support Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will the program be on target to reach its savings and spending goals? Why or why not?</td>
<td>• Program staff interviews</td>
</tr>
<tr>
<td>Is the appropriate information being collected to support future evaluation activities (i.e., impact evaluation)?</td>
<td>• Program staff interviews</td>
</tr>
<tr>
<td>Are program goals set appropriately?</td>
<td>• Program staff interviews</td>
</tr>
<tr>
<td>Did the technical assistance provide additional information which prompted additional measures or behavior changes?</td>
<td>• Participant survey</td>
</tr>
</tbody>
</table>
2. Introduction.

2.2.1 Data Collection

As part of this process evaluation, Tetra Tech conducted 20 in-depth interviews with 27 different interviewees—11 interviews with 15 internal Energy Initiative program staff and 9 interviews with 12 external staff. National Grid provided a list of internal staff to Tetra Tech to be interviewed. Identified interviewees were those who had key responsibilities with the program in a variety of different roles as follows:

- 15 internal National Grid staff included 1 statewide manager, 2 program managers, 2 account managers, 2 technical representatives, 2 commercial energy consultants, 2 delivery managers, 1 marketing staff, and 3 analysts
- 12 external staff interviews included 6 trade allies (both active and inactive), 2 technical assistance staff from outside firms, and 4 rebate processing staff from EFI.

The in-depth interviews covered a variety of topics depending on each interviewee’s role within the program. Topics covered included roles and responsibilities, customer outreach and interaction, trade ally outreach and interaction, and satisfaction with the program.

Results from the initial in-depth interviews were provided to National Grid in a preliminary memorandum in January 2011. The memorandum also included preliminary recommendations based on the early evaluation activities.

The process evaluation also included quantitative surveys with participating customers who had installed measures through the program to capture customers’ perceptions of and experiences with the program, awareness of and attitudes towards energy efficiency, and participation in other organizations’ and utility’s programs. We attempted to survey a census of the 155 unique customers who participated in the Energy Initiative programs in 2010, and completed interviews with 76 participating customers.

In addition to customers participating in the program, the evaluation team also conducted interviews with customers who had not participated in the program in 2010. In total, 59 interviews were completed with nonparticipants out of a goal of 140 completes. A detailed response rate for the nonparticipant effort can be found in Appendix E.

The nonparticipant survey followed the participant survey by a few months as the evaluation team waited for regulatory guidance on the nonparticipant survey effort. While the nonparticipant effort was originally prohibited in New York due to privacy issues, the

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3 Tetra Tech conducted interviews between November 3rd 2010 and Dec 22nd 2010. Interviews ranged in duration from twenty to ninety minutes, depending on the interviewee’s role. We do not identify interviewees by name, nor do we identify them by role when discussing specific findings as a means of protecting interviewees’ confidentiality.

4 Tetra Tech conducted participant surveys between March 24, 2011 and June 29, 2011. Interviews averaged 19 minutes in length.

5 Nonparticipant surveys were conducted by Tetra Tech between September 7, 2011 and October 12, 2011 and averaged 19 minutes in length. The delays in approval for conducting nonparticipant surveys in the state due to privacy issues led to delays in conducting the nonparticipant survey effort.
Evaluation Advisory Group (EAG) received approval to allow evaluators to conduct nonparticipant surveys in May 2011 (this approval letter can be found in Appendix A).

National Grid provided the evaluation team with the population of nonparticipants for each of the four Energy Initiative programs. Tetra Tech selected a random sample of records for each program and mailed an advance letter explaining the study to each business. Attempts were made to locate company, address, and phone numbers for sampled records if none were provided. This effort was later halted given the large amount of missing information. These cases were put on hold and only cases with full contact information (name, address and phone number) were contacted. This may have systematically removed a certain type of nonparticipant (e.g., excluded small businesses, or other hard to reach customers), so the results may not be representative of the nonparticipant population.

Extensive efforts were made to complete interviews. Interviews were conducted during normal business hours, local time, and attempts were also made on weekends and early evening to try to reach additional respondents with varying business hours and at less-busy times. Additional efforts to help increase response to the survey effort were to ask nonparticipant respondents if they would like a faxed copy of the advance letter to show National Grid sponsorship of the program. Tetra Tech also revised the introduction to the survey to emphasize the importance of the study and how the results would be used and met frequently with interviewers to discuss which techniques were successful in getting past gatekeepers.

2.3 REPORT ORGANIZATION

Section 3 of this report presents the detailed results of the process evaluation. Section 4 discusses key conclusions and recommendations. The technical appendices contain the EAG nonparticipant approval letter, the evaluation data collection instruments, and detailed survey response rates.
3. PROCESS EVALUATION FINDINGS

This section presents the findings of the 2010 process evaluation of the Energy Initiative programs. First we highlight key findings from the process evaluation. These are followed by detailed findings in the following categories:

- Program administration and processes
- Program satisfaction
- Ease of participation
- Customer awareness and marketing
- Customer characteristics and decision-making processes
- Trade ally participation
- Program impact.

3.1 SUMMARY OF KEY FINDINGS

Overall, feedback from staff interviewees and customers involved with the Energy Initiative programs indicate the program processes in the first year are working well. Trade allies and participants have been very satisfied and report positive feedback about the program and their interactions with program staff. Despite this positive feedback, participation in the programs was lower than anticipated due to a number of different factors: (1) delay in getting the program started with marketing efforts first rolling out in August 2010, (2) availability of similar programs offered by other program administrators, and (3) a perceived overlap of National Grid programs (Energy Initiative - Mid-sized programs with the Small Business Services and the Commercial High-Efficiency Heating and Water Heating programs). The evaluation research also found prominent market barriers to the program that limited participation as well.

3.1.1 Areas that are working well

Both staff and participating customers report high satisfaction with the program. Internal and external staff report high customer satisfaction with the program. "The customers that have gone through the program love it!" Trade allies also noted specific recent improvements in the prescriptive lighting offerings that are well received by customers and trade allies alike. Staff’s perceived satisfaction with the program is supported by the majority of participating respondents who indicated that they were very satisfied with their experiences with the program (86 percent), with another eight percent reporting that they were somewhat satisfied.

National Grid has strong customer relationships. National Grid account managers are a often cited source of program information. Both internal and external staff report that National Grid has strong customer relationships through their account management structure, which has helped in reaching customers. Large participating customers also indicated they are hearing about the program through their account managers.

Mid-sized customers also reported hearing about the programs from internal National Grid staff. Specifically, 18 out of 63 mid-sized electric participating customers indicated they heard
3. Process Evaluation Findings

about the program from an account manager. While these customers may have an account manager, they may be referring to a Commercial Energy Consultant (CEC). Another seven mid-sized electric participating customers mentioned hearing about the program from National Grid staff other than an account manager.

Several program processes are reported as pluses including a simple and clear application process, the customer commitment letter, and quick rebate processing. Internal and external staff reported that the National Grid application process is smooth and straightforward, which makes National Grid easy to work with. In addition, staff report that the project approval has been fairly efficient, resulting in a timely commitment letter to customers, and customers get their checks faster than they do through other organization’s programs. As participation increases, National Grid will need to evaluate how much time is needed for this activity and if additional resources will be needed. Trade allies reported that the commitment letter is a positive as it provides security of incentive level payment to customers.

Internal program staff are experienced and committed, and have established ongoing communication vehicles. Overall, the interviewed internal staff have longevity with National Grid and/or significant prior experience in the energy efficiency field. This expertise was recognized by contractors and commented on specifically. Internal staff meet weekly regarding the program, which fosters strong communication. There is also a SharePoint site with program information and updates.

The program is building trade ally relationships. Internal staff reported trade allies have been bringing projects to the program. Several trade allies reported they appreciate how they are able to reach and contact a National Grid representative if they have any questions or concerns. Trade allies also like that National Grid staff complete the paperwork for the program. “When we contact them [National Grid program staff], they give 110%.” However, there is also confusion among trade allies about National Grid’s offerings which is discussed under Program Challenges below. Mid-sized participating customers are finding out about the program through independent contractors so additional outreach to contractors may be necessary if they will continue to be the primary means of promoting the program to these types of customers. To complement outreach from the trade allies, CECs are aware of the programs and are able to promote them through discussions with customers.

3.1.2 Challenges to Program Success

National Grid has been out of the energy efficiency market in New York for 15 years. During this time, other companies and organizations have been offering programs to National Grid customers. These other companies have built relationships with the same customers and trade allies who are comfortable working with them and utilizing their programs. National Grid is facing some barriers to getting back into the market after such a long time. To address this, National Grid has sought to build on customer relationships using a systematic approach. A team has been put together to proactively serve their customers through direct marketing efforts.

The evaluation research documented the following additional challenges for the program:

There are very prominent external market barriers to the program—most notably customer lack of capital and short project payback requirements. The largest barrier to customers moving forward with energy efficient projects reported by internal and external staff as well as nonparticipating customers is the lack of capital. In the current economy,
customers do not have access to capital to make improvements. While a recommended financing option for the Energy Initiative program was not approved during the regulatory approval process, it was repeatedly mentioned as needed for the Energy Initiative program in this economy by both internal and external staff interviewees. About one-quarter of participating respondents and about 30 percent of nonparticipating respondents also indicated they would use financing either from National Grid or through a third-party, if available. Another 20 percent of participating respondents and 40 percent of nonparticipating respondents indicated that it would depend on a number of different factors including the fact that the decision falls to others within the company (management, board of directors, owners, etc.), the size of the project, and the interest rate of the loan. The evaluation only measured the amount of interest from customers and not at the feasibility of providing such financing.

**There are competing offerings in the energy efficiency marketplace.** Another primary challenge mentioned by internal staff is that National Grid has been out of the energy efficiency market in New York for 15 years. Furthermore, initial marketing efforts of the Energy Initiative program were generic in nature and only lasted three months. During the time National Grid was not offering energy efficient projects, other companies and organizations, such as NYSERDA have been offering programs to National Grid customers and have established relationships with these customers. Most internal staff reported consistently competing with NYSERDA for customer energy efficiency projects. These staff report that the multiple state program administrator offerings as well as federal offerings confuse customers. According to internal staff, NYSERDA in particular is difficult to compete with because this organization has continuously been in the New York marketplace and both customers and trade allies are more familiar with them and their programs. Internal staff also reported that the statewide program administrator can offer larger incentives than National Grid because of the way their incentives are calculated (using statewide avoided costs instead of territory-specific avoided costs). When talking with program participants, nine out of 48 respondents indicated confusion between National Grid and other program administrators. Nonparticipants were slightly more likely to be confused with the different offerings with 12 out of 27 respondents indicating confusion between National Grid offerings and other program administrator offerings.

**The program's limited prescriptive offerings may be a participation barrier.** There are currently only two prescriptive offerings available (lighting and compressed air), resulting in many projects being run through the custom program. This creates additional time and investment for some projects that could be included in a prescriptive program (i.e., motors and variable frequency drives (VFDs), Heating, Ventilation and Air Conditioning (HVAC) equipment). A reported positive of running programs through the custom track from participants and contractors is that it often results in a larger customer incentive. However, staff working with customers consistently voiced a desire to have more prescriptive offerings as they are easier for the customer and involve less paperwork. These staff also reported that prescriptive incentives from other program administrators are used in trade allies’ project proposals to customers because the incentive is known ahead of time unlike custom incentives (this was substantiated in trade ally interviews). This suggests the program may be losing some participants because of the lack of prescriptive projects. Furthermore, customers may turn to the Small Business Services program as an alternative to the Energy Initiative program because of the more streamlined program approach.

Another concern of staff members is that the custom approval process can take longer than the prescriptive track, which could negatively affect participant satisfaction. However, participant feedback shows that those that participated in the program either through a
Prescriptive track or a custom track were equally satisfied with their program experience. One of the reasons for the equal level of satisfaction may be that internal program staff and trade allies have tried to review calculations and complete paperwork expeditiously. The quick turnaround of custom projects could be harder to maintain as project volume increases.

The 2010 program marketing campaigns started late and ended early and marketing materials were reported as being too generic. National Grid marketing staff ran several marketing campaigns for the program from August through October, 2010. These included direct mailings, email blasts, Internet page searches, and telemarketing. Staff believe the marketing campaigns should have started sooner and could have been more effective if they had lasted longer. Several staff also felt the marketing messages were too general to appeal to customers.

Nonparticipating customers were also asked about where they go when looking for information on energy efficiency programs and services. The internet was the most common resource customers use with most mentioning the National Grid website (mentioned by 16 of 59 respondents), followed by the NYSERDA website (11 out of 59 respondents).

Feedback from nonparticipants confirms that more communication is needed to increase the likelihood of their participation in the Energy Initiative programs. Almost half of the nonparticipating respondents mentioned that they would need additional information to be able to make the determination of whether or not to participate in the program in the future. This includes having a staff member come to the facility, more promotional material containing the offerings that can be left behind, and case studies showing recent examples.

Additional training on effective sales techniques could improve Account Managers and CECs ability to sell the program. Account managers are now faced with selling energy efficiency programs to their customers. While they feel this is a new opportunity to talk with their customers about something positive, it also presents a challenge if they are not properly trained. Since National Grid staff was commonly mentioned as a place to go to hear about the program or as a resource if a customer has questions, National Grid staff will need to be familiar with the programs and be able to answer customer questions accurately and in a timely manner.

3.2 PROGRAM ADMINISTRATION AND PROCESSES

Internal program staff are experienced and committed to the program’s success. Contractors said that National Grid internal staff are committed to the program. National Grid staff is working face-to-face with their customers and trade allies and are doing what they can to answer questions by offering breakfast meetings as a way to reach out to both groups. Being available to customers and trade allies allows projects to move forward more swiftly and builds upon existing relationships while supporting others.

Internal National Grid staff also mentioned how committed they are to the success of the program. They acknowledge that the first year was challenging getting the program going and trying to meet program goals, but they remain optimistic about the upcoming year and the progress they have made. Staff, specifically account managers, continue to build upon existing relationships with customers which helps get the word out about the offerings.

Along with having staff that is committed to the program, the programs’ simple application process was also mentioned by almost all staff and trade ally interviewees as a positive. They
feel it is critical that this process is simple and straight-forward because the more complicated the process is, or even perceived to be, the fewer customers and trade allies will want to use or recommend it.

At the beginning of the program, internal staff had a program training to review the program materials, including the program offerings and the InDemand software. Account managers, for example, are now faced with selling energy efficiency program to their customers. While this is a new opportunity to talk to their customers about something positive, it also presents a challenge if they have not been properly trained. Providing tools and resources to account managers and CECs to assist them in talking with customers about the ability to help them reduce their expenses will better position staff to help sell the program.

Keeping internal staff aware of program priorities is also important. With a program that is just starting, priorities may shift frequently. Making sure staff is on board and feels free to offer suggestions will help keep internal staff involved and committed to delivering the best results. Internal staff indicated how most are involved in internal meetings where goals are discussed, but felt more focus could be put on how the goals will be met. For example, if it is decided that the focus should be put on the largest customers where savings would be the greatest, account executives will need to spend more time talking to their customers about the programs and other items may need to be delegated to other staff. Another option would be to look at the leads and where additional effort could best be spent. Reviewing projects by size, expected completion dates, or even looking at the likelihood of a customer moving forward with a project may help focus internal staff on priority cases which will help meet program goals.

External staff also indicated that depending on the type of project a customer has (custom vs. prescriptive), they are passed around among National Grid contacts. Ensuring internal staff is trained on the different types of projects will help ensure that customers are getting the information they need in a timely manner.

3.2.1 Turnkey versus existing approach

When asked their preference of the current structure of the Energy Initiative program to an “all-in-one” turnkey approach, participating customers generally preferred the current approach (73 percent) where they are able to select their own contractor. Eighteen percent said they would prefer a turnkey approach, while nine percent had no opinion. Of those who preferred the current program structure, most indicated that they preferred the ability to retain more control over the project (86 percent). Of those who preferred a turnkey approach (14 respondents), twelve said they preferred the ease of use of a turnkey approach.
Nonparticipants were asked the same question although responses were slightly different. Half of nonparticipating respondents indicated they prefer the current set-up of the Energy Initiative program, while 35 percent prefer a turnkey approach. Sixteen percent did not have a preference. Those who prefer the turnkey approach (15 respondents) indicated that it would be easier because it takes the pressure off the facility (less work and management time. Among nonparticipants who prefer the current approach, 14 mentioned wanting to select or use their own contactors as the reason for their selection.

Table 3-2. Nonparticipant Preference Between Turnkey and Existing Approaches

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turnkey approach</td>
<td>8</td>
<td>2</td>
<td>5</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>Existing approach</td>
<td>12</td>
<td>4</td>
<td>5</td>
<td>8</td>
<td>29</td>
</tr>
<tr>
<td>No preference</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>n=21</strong></td>
<td><strong>n=6</strong></td>
<td><strong>n=12</strong></td>
<td><strong>n=19</strong></td>
<td><strong>n=58</strong></td>
</tr>
</tbody>
</table>
3. Process Evaluation Findings

Table 3-3. Overall Program Satisfaction Rating

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>n</td>
<td>n</td>
<td>n</td>
<td>n</td>
<td>n</td>
<td>Percent</td>
</tr>
<tr>
<td>Very dissatisfied</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Somewhat dissatisfied</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>Neither dissatisfied nor satisfied</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Somewhat satisfied</td>
<td>6</td>
<td>0</td>
<td>1</td>
<td>7</td>
<td>10%</td>
</tr>
<tr>
<td>Very satisfied</td>
<td>50</td>
<td>7</td>
<td>3</td>
<td>60</td>
<td>86%</td>
</tr>
<tr>
<td>Total</td>
<td>57</td>
<td>8</td>
<td>5</td>
<td>70</td>
<td>100%</td>
</tr>
</tbody>
</table>

When looking at overall satisfaction with the Energy Initiative program by the type of project, custom versus prescriptive, customers were equally satisfied with their experiences—for both tracks, 86 percent of their customers are very satisfied (reported by 14 custom respondents and 57 prescriptive respondents).

Respondents listed many reasons for their satisfaction rating with the Energy Initiative program. Most frequently, respondents mentioned that the program processes went smoothly (38 percent), they realized energy savings from the project (15 percent), or the program met all of their expectations (14 percent).

Table 3-4. Reason for Overall Program Satisfaction Rating

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>n</td>
<td>n</td>
<td>n</td>
<td>n</td>
<td>n</td>
<td>Percent</td>
</tr>
<tr>
<td>Process went smoothly</td>
<td>23</td>
<td>3</td>
<td>1</td>
<td>27</td>
<td>38%</td>
</tr>
<tr>
<td>Other</td>
<td>9</td>
<td>1</td>
<td>3</td>
<td>13</td>
<td>18%</td>
</tr>
<tr>
<td>Energy savings</td>
<td>10</td>
<td>1</td>
<td>0</td>
<td>11</td>
<td>15%</td>
</tr>
<tr>
<td>Program met all expectations</td>
<td>9</td>
<td>1</td>
<td>0</td>
<td>10</td>
<td>14%</td>
</tr>
<tr>
<td>Relationship with program staff</td>
<td>8</td>
<td>2</td>
<td>0</td>
<td>10</td>
<td>14%</td>
</tr>
<tr>
<td>Satisfied with measure received</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>7</td>
<td>10%</td>
</tr>
<tr>
<td>Rebate was received quickly</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>5</td>
<td>7%</td>
</tr>
<tr>
<td>Received rebate</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>6%</td>
</tr>
<tr>
<td>Problems encountered with process</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>Program provided guidance</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Program was not too time intensive</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Rebate freed up capital for other projects</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Program could be improved</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Rebate amount more than expected</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Total</td>
<td>58</td>
<td>8</td>
<td>5</td>
<td>71</td>
<td></td>
</tr>
</tbody>
</table>
When respondents were asked whether they were more or less satisfied with National Grid as a result of their experience with the Energy Initiative programs, most said they were either more or just as satisfied as a result of the program (60 and 38 percent, respectively). Only two respondents (1 large electric and 1 mid-sized gas) indicated they were less satisfied with National Grid as a result of their participation in the Energy Initiative program. The large electric respondent indicated they “wouldn’t do it again. Bad experience.” while the mid-sized gas customer indicated “I don’t see any savings.”

Some specific reasons for being more satisfied with National Grid include:

Large electric:

“I think they really partnered with us to help us reduce energy consumption.”

“Because he’s happy to see a utility transporter is out there doing this sort of program no matter where the money is coming from.”

“We went many years with no interaction between us and National Grid, and these projects have increased our interaction with the company.”

Mid-sized electric:

“Well, it proves that they care and they’re forward thinking about energy.”

“I think that it kind of shows that utilities are cognizant of lowering their demand and managing the load from a global perspective.”

“I think they really partnered with us to help us reduce energy consumption.”

“They helped reduce our power bill while increasing our capability to justify installation.”

“It was nice that they provided financial incentives and reduced energy costs.”

“It seems like the program is a good one. The state of New York is slow, and dealing with local people was great, and National Grid’s customer service for this project was great.”

“They made it very easy to complete this project and NYSERDA is not easy to work with.”

“Everything has come out to be where they need to be. Cost effective, lighting was better.”

“For them to come out and work with us it shows a lot of dedication.”

Mid-sized gas:

“It’s nice to see National Grid is really trying to make facilities more efficient, giving incentives to owners to take the time to look at their buildings and upgrade equipment and systems where they can to make it more energy efficient.”

“I mean it’s nice, I realize we pay the service charge, but it’s nice that they’re offering these incentives. Some other municipalities I’m in with other providers aren’t offering anything to help with these improvements. It’s well done.”

“Good overall experience, positive that National Grid was involved.”

In addition to satisfaction with the program overall and with the company as a result of the program, respondents were also asked to rate their satisfaction with a number of program components on a scale of zero to 10, with zero meaning very dissatisfied and 10 meaning very satisfied. Generally, participants were satisfied with all aspects of the Energy Initiative program (all program components had a mean score above 8). The three highest rated components were the installation inspection by a utility representative (average score of 9.3), how National Grid handled any questions (9.2), and the time it took to get a rebate check (9.2). However, while only based on five responses, mid-sized gas customer indicated lower satisfaction scores with the time it took to receive the rebate check. This is driven by one dissatisfied customer who indicated after waiting three months they had to resubmit their paperwork.

Table 3-5. Satisfaction with Different Aspects of the Programs

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installation inspection by a utility representative</td>
<td>9.4 47</td>
<td>8.4 8</td>
<td>9.0 2</td>
<td>9.3 57</td>
</tr>
<tr>
<td>Time it took to get a rebate check</td>
<td>9.4 59</td>
<td>9.6 8</td>
<td>6.8 5</td>
<td>9.2 72</td>
</tr>
<tr>
<td>How National Grid handled questions</td>
<td>9.3 63</td>
<td>8.8 9</td>
<td>8.4 5</td>
<td>9.2 77</td>
</tr>
<tr>
<td>Equipment installed</td>
<td>9.3 63</td>
<td>8.8 9</td>
<td>9.0 5</td>
<td>9.2 77</td>
</tr>
<tr>
<td>Rebate application process</td>
<td>9.3 60</td>
<td>9.0 9</td>
<td>8.0 5</td>
<td>9.1 74</td>
</tr>
<tr>
<td>Promptness of the audit /inspection of old equipment</td>
<td>9.1 21</td>
<td>8.3 3</td>
<td></td>
<td>9.0 24</td>
</tr>
<tr>
<td>Quality of equipment installation</td>
<td>9.1 56</td>
<td>8.5 8</td>
<td>8.6 5</td>
<td>9.0 69</td>
</tr>
<tr>
<td>Quality of audit</td>
<td>9.0 20</td>
<td>9.0 3</td>
<td></td>
<td>9.0 23</td>
</tr>
<tr>
<td>Usefulness of information provided about program</td>
<td>8.9 62</td>
<td>8.4 9</td>
<td>8.2 5</td>
<td>8.8 76</td>
</tr>
<tr>
<td>Promptness of the engineering study</td>
<td>8.0 2</td>
<td>10.0 1</td>
<td></td>
<td>8.7 3</td>
</tr>
<tr>
<td>Quality of engineering study</td>
<td>8.0 2</td>
<td>10.0 1</td>
<td></td>
<td>8.7 3</td>
</tr>
<tr>
<td>Type/variety of equipment eligible for program</td>
<td>8.7 63</td>
<td>8.4 9</td>
<td>7.4 5</td>
<td>8.6 77</td>
</tr>
<tr>
<td>Incentive available from National Grid</td>
<td>8.4 62</td>
<td>9.0 9</td>
<td>6.8 5</td>
<td>8.4 76</td>
</tr>
</tbody>
</table>

Some verbatim comments (followed by the rating given) as to the reason for lower satisfaction ratings for the incentive available from National Grid include:

Mid-sized gas customer: “Spent $5000 on boiler and only got $200, should be more incentives for switching from oil to gas.” (rating of 1)

Mid-sized electric customer: “They should pay for all of it.” (rating of 0)
When looking at satisfaction with different program components between customers with custom projects and customers with prescriptive projects, average ratings were very similar between the two. While only rated by three customers, the audit experience for customers with custom projects was slightly lower than customers with prescriptive projects. The average satisfaction rating for the incentive available from National Grid was slightly higher for custom projects, which is supported by contractor feedback. Two contractors mentioned how they prefer custom projects to optimize the incentive the customer receives.

Table 3-6. Satisfaction with Different Aspects of the Programs by Type of Project

<table>
<thead>
<tr>
<th></th>
<th>Custom</th>
<th></th>
<th>Prescriptive</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mean</td>
<td>N</td>
<td>Mean</td>
<td>N</td>
</tr>
<tr>
<td>Promptness of the audit /inspection of old equipment</td>
<td>8.0</td>
<td>3</td>
<td>9.2</td>
<td>21</td>
</tr>
<tr>
<td>Quality of the audit</td>
<td>8.7</td>
<td>3</td>
<td>9.0</td>
<td>20</td>
</tr>
<tr>
<td>Promptness of the engineering study</td>
<td>0</td>
<td>8.7</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Quality of the engineering study</td>
<td>0</td>
<td>8.7</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Type/variety of equipment eligible for program</td>
<td>8.3</td>
<td>16</td>
<td>8.6</td>
<td>62</td>
</tr>
<tr>
<td>How National Grid handled questions</td>
<td>9.3</td>
<td>16</td>
<td>9.2</td>
<td>62</td>
</tr>
<tr>
<td>Incentive available from National Grid</td>
<td>8.7</td>
<td>16</td>
<td>8.3</td>
<td>61</td>
</tr>
<tr>
<td>Usefulness of information provided about program</td>
<td>8.9</td>
<td>16</td>
<td>8.8</td>
<td>61</td>
</tr>
<tr>
<td>Quality of equipment installation</td>
<td>8.6</td>
<td>15</td>
<td>9.0</td>
<td>55</td>
</tr>
<tr>
<td>Equipment installed</td>
<td>8.9</td>
<td>16</td>
<td>9.2</td>
<td>62</td>
</tr>
<tr>
<td>Rebate application process</td>
<td>9.3</td>
<td>16</td>
<td>9.1</td>
<td>59</td>
</tr>
<tr>
<td>Time it took to get a rebate check</td>
<td>9.1</td>
<td>14</td>
<td>9.2</td>
<td>59</td>
</tr>
<tr>
<td>Installation inspection by a utility representative</td>
<td>8.8</td>
<td>13</td>
<td>9.4</td>
<td>44</td>
</tr>
</tbody>
</table>

When asked for suggestions on how to improve the program, almost two-thirds (63 percent) said they would not change anything about the program. Nine percent (or seven respondents) suggested increasing the rebate amount, while seven percent (5 respondents) suggested adding more types of eligible equipment to the program. Five percent (4 respondents) suggested improving the quality of equipment rebated through the program, and five percent (four respondents) requested financing options.

The seven respondents who indicated the rebate amount should be increased installed a variety of equipment. Five of six mid-sized electric customers installed lighting equipment including occupancy sensors and one installed VSDs. One large gas customer installed a thermostat.

When all respondents were asked what additional types of energy-saving equipment should have been offered, most said none (70 percent). Eight percent (6 respondents) suggested adding lighting equipment, and three percent (2 respondents) suggested adding more HVAC equipment (no specifics were given on the type of equipment).
3. Process Evaluation Findings...

Staff and contractor respondents also had a few recommended changes to the program. Both felt the program should consider adding more prescriptive offerings. There are currently only two prescriptive measures, lighting and compressed air, which means more projects are being run as custom projects. Interviewees mentioned how they would like additional prescriptive offerings added to the Energy Initiative program such as HVAC, motors, boilers, chillers, and heat pumps. While more prescriptive offerings may be needed, the custom program remains necessary as well. Some contractors find the prescriptive offerings limiting and restrictive and therefore use custom projects to optimize incentives and savings by integrating technologies. These differences may not be picked up by participant satisfaction scores, which are very similar between custom and prescriptive programs, because it may be more of a burden on the contractors, not the customers, to understand the program offerings.

According to interviewees, custom projects are also more time-consuming and take more resources to verify savings, complete paperwork, and determine the amount of the incentive that can be offered. Additionally, trade allies need to come to National Grid to help figure out what these incentives are going to be, which adds to the process. Engineering studies are also needed in these situations, which are conducted at the customer’s expense although the program pays up to 50 percent of the study. Interviewees mentioned how some customers do not like how they have to pay for a study when the results may come back indicating no changes are needed. In some cases, a customer may have already spent money on a study from a different entity and doesn’t feel like it is necessary to go through another.

3.3.1 Financing

One of the most frequently mentioned reasons given by program staff and contractors for customers not moving forward with energy efficiency projects is the capital needed. To alleviate this barrier, staff interviewees indicated National Grid could again consider offering financing options to customers\(^6\). Along with the available incentives, having a financing option available may be enough to allow some customers to move a project forward because they do not have to come up with the capital needed for the project. Financing options can range from something that National Grid offers through on-bill financing, or through low-interest loans, or through working with a third party to offer low-interest loans.

Staff interviewees note that the economy and lower natural gas prices are also playing a role in whether customers go through with projects or not. For example, as one internal staff member indicated, a gas measure with a payback of 1 year prior to the decrease in natural gas prices has changed to 5 years; this impacts whether a customer will move forward. This internal staff member went on to say that customers are looking at projects with the quickest payback, and National Grid may have to revisit the incentives and payback periods given what is happening with the economy and gas prices.

We asked both participants and nonparticipants about their interest in financing options. While we understand participants went through the project without the opportunity to use low-interest financing, we asked participants this question to understand if they would have utilized or considered using the financing, and to help determine if nonparticipants were more interested than participants to see how large a barrier lack of financing is.

\(^6\) National Grid did initially propose financing, but this was not approved by the Commission.
3. Process Evaluation Findings...

During participant interviews, respondents were asked if they would be interested in below-market interest rate financing through National Grid for energy-efficiency projects. A little over one-quarter of respondents (21 out of 77 respondents) said they would be interested. Over half (53 percent, 41 respondents) said they would not be interested, and 20 percent (15 respondents) said it would depend on a variety of factors, including decisions from management (7 respondents), the size of the project (4 respondents), and the interest rate of the loan (2 respondents).

<table>
<thead>
<tr>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>18</td>
<td>1</td>
<td>2</td>
<td>21</td>
</tr>
<tr>
<td>No</td>
<td>33</td>
<td>7</td>
<td>1</td>
<td>41</td>
</tr>
<tr>
<td>Depends</td>
<td>12</td>
<td>1</td>
<td>2</td>
<td>15</td>
</tr>
<tr>
<td>Total</td>
<td>63</td>
<td>9</td>
<td>5</td>
<td>77</td>
</tr>
</tbody>
</table>

Participants also gave a variety of reasons for why they would not be interested in using financing through National Grid, such as not using or not needing financing (9 and 8 respondents, respectively). Other reasons given for not being interested in financing through National Grid include a preference for private or internal financing (5 respondents), complications that are associated with it (3 respondents), government regulations (2 respondents), and the decision not being in the respondent's control (2 respondents). Responses in "Other" included: respondent has access to similar financing available through other means, tax incentives, and a lack of trust in a utility financing system. One respondent specifically mentioned preferring the Small Business Services program because of the 15 percent discount given if a participant pays up front.

Participants were also asked their interest in below-market interest rate financing for their energy efficiency projects through a third party (other than National Grid). Again, respondents most frequently reported that they would not be interested (43 percent or 33 respondents); 28 percent (or 21 respondents) said they would be interested while another 29 percent (or 22 respondents) said it would depend on a variety of reasons, most frequently the type of project (8 respondents). Respondents also provided similar reasons for not wanting to use a third-party for financing stating they do not use financing (10 respondents), no need for financing (7 respondents), or they prefer private or internal financing (7 respondents).
3. Process Evaluation Findings

Table 3-8. Participant Interest in Financing through Third-Party (other than National Grid)

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>18</td>
<td>1</td>
<td>2</td>
<td>21</td>
<td>28%</td>
</tr>
<tr>
<td>No</td>
<td>26</td>
<td>6</td>
<td>1</td>
<td>33</td>
<td>43%</td>
</tr>
<tr>
<td>Depends</td>
<td>18</td>
<td>2</td>
<td>2</td>
<td>22</td>
<td>29%</td>
</tr>
<tr>
<td>Total</td>
<td>62</td>
<td>9</td>
<td>5</td>
<td>76</td>
<td></td>
</tr>
</tbody>
</table>

Nonparticipating respondents were more likely to be interested in financing (Table 3-8). Just over one-third of nonparticipating respondents (20 respondents) indicated interest in financing their project with National Grid compared to 27 percent of participating customers. Twenty-five percent of nonparticipants indicated no interest in on-bill financing compared to 53 percent of participants.

Table 3-9. Nonparticipant Interest in Financing Options

<table>
<thead>
<tr>
<th>Interest in financing through bill to cover project cost</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>10</td>
<td>1</td>
<td>3</td>
<td>6</td>
<td>20</td>
</tr>
<tr>
<td>No</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>15</td>
</tr>
<tr>
<td>Depends</td>
<td>8</td>
<td>2</td>
<td>5</td>
<td>9</td>
<td>24</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Interest in financing project cost through a third party</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>6</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>15</td>
</tr>
<tr>
<td>No</td>
<td>7</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>Depends</td>
<td>8</td>
<td>1</td>
<td>5</td>
<td>10</td>
<td>24</td>
</tr>
</tbody>
</table>

Total n=21 n=6 n=12 n=20 n=59

Reasons nonparticipants gave for not wanting to use financing through National Grid include wanting to pay up front and wanting to depreciate the cost (each mentioned by 2 respondents). Respondents unsure as to whether or not they would use National Grid financing indicated it would depend on items such as: other available financing (4 respondents), decision of others (10 respondents), and the cost (4 respondents). Similar feedback was provided for using third-party financing.

3.4 EASE OF PARTICIPATION

Customers are participating in the Energy Initiative program as a means of reducing operating and energy costs. When asked for their main reason for participating in the program, respondents most often stated that they wanted to reduce operating or energy costs (58 percent, 28 respondents). Others mentioned the rebate or incentive (8 percent, 4 respondents) and an additional eight percent (or 4 respondents) said that they had already planned the work. Responses in "Other" included the age of the existing equipment, a desire to update equipment, or a reduction in maintenance.

When asked about other reasons for their participation in the program, they echoed the primary reasons for participating. Respondents most often reported a desire to reduce operating or energy costs (13 respondents). Respondents also reported that the work needed to be done regardless (9 respondents), the program incentive (7 respondents), or to improve their lighting (3 respondents) as other reasons they wanted to participate in the program.
Nonparticipating respondents were asked about barriers their company faces when deciding whether or not to implement energy efficiency projects. Capital funds are at the top of the list for the majority of nonparticipating customers (70 percent), followed by the payback (14 out of 59 respondents). Large nonparticipating customers were slightly more likely to indicate payback was a barrier to installing energy efficient equipment (Table 3-10).

**Table 3-10. Nonparticipants’ Reported Barriers to Deciding on Implementing Energy Efficiency Projects**

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital funds</td>
<td>13</td>
<td>3</td>
<td>10</td>
<td>15</td>
<td>41 (70%)</td>
</tr>
<tr>
<td>Payback</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>6</td>
<td>14 (24%)</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>8 (14%)</td>
</tr>
<tr>
<td>None</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>4 (7%)</td>
</tr>
<tr>
<td>Time</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>3 (5%)</td>
</tr>
<tr>
<td>Budget cycle</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>3 (5%)</td>
</tr>
<tr>
<td>Staff resources</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1 (2%)</td>
</tr>
<tr>
<td>Building limitations</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1 (2%)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>n=21</strong></td>
<td><strong>n=6</strong></td>
<td><strong>n=12</strong></td>
<td><strong>n=20</strong></td>
<td><strong>n=59</strong></td>
</tr>
</tbody>
</table>

Nonparticipants were asked for the reason why they have not installed any energy-efficient equipment through the program at this time. Three respondents thought the payback was too long, two did not trust they would see the estimated energy savings from the recommended equipment. Other verbatim comments include:

Large electric customer comment:

“In process.”

Mid-sized electric customer comments:

“Still gathering funding.”

“We are in the process of doing capital improvements project which will incorporate energy efficient equipment and upgrades.”

“Upfront capital costs.”

“Still working through internal design process.”

“No time to go over the program and discuss the savings for low cost power saving lights. Haven’t sat down to see how long to recoup savings based on cost and lights.”

“I actually have. It’s being installed now. Lighting and occupancy sensors.”

“Waiting for capital funds from the controller.”

Large gas customer comments:

“Did not receive any info on it.”
3. Process Evaluation Findings... 

“We have not qualified for the qualifications for the program.”

“Cost and do not know other initiatives that could do.”

“Didn't know of it.”

Mid-sized gas customer comments:

“I don't own the building.”

“Cheaper for us to do it ourselves. More cost effective.”

“Funding related. We did just go through a renovation.”

“Lack of knowledge of available programs.”

Nonparticipating customers were also asked what would increase their likelihood of participating in the Energy Initiative program. Responses focused on more awareness of the program and more follow-up contacts (mentioned by 29 respondents out of 59). Only seven of the 59 indicated there was nothing more that could be done. Some specific comments on what National Grid could do include:

Large electric verbatim comments:

“Decrease the payback period.”

“Keep offering it.”

“More help. More follow up. We've had people come in this plant from National Grid and they say they'll make recommendations but they don't come back or follow up.”

“Nothing at this time, keep me informed.”

Mid-sized electric verbatim comments:

“Better promotion. Give me more thorough understanding; you need to do a fair amount of research to find details.”

“Offer more rebates to decrease payback time. If we have a one year payback, we'll do it.”

“Increase the percentage of rebates offered.”

“I don't have any details on the program so I have no comment on it. I would need to see the details.”

“It comes down to the payback period. If you could get that to 3 years or less.”

“Just awareness. I'm not aware of the program and what's available.”

“I think the ability to have more direct contact to better understand the scope of the program and methodologies to implement the process.”

“Just have to get in here and show what kind of investment I have to have and have to make.”

“Contact us on regular basis.”

Large gas verbatim comments:

“Knowledge. Increase knowledge, that’s it.”

“I think they should continue regional seminars to spread the word.”

“I would say a visitation from a representative and then fill out the paper work.”

“We would need more information on the program to make a decision.”

“I guess they need to 1) make us aware of options, and 2) they should calculate the payback period, and 3) any help with the financing is always appreciated, a grant, or loan.”

“I guess share real life examples.”

“Develop new classifications for equipment.”

“Provide more frequent communications and updates on what’s available via email and the customer service representative, a phone call or email.”

Mid-sized gas verbatim comments:

“Rebates and paying for cost of machines and equipment.”

“Maybe provide more documentation of projects that have achieved savings that have used the program.”

“Offer a good rate. Have the equipment be efficient and last at least two decades.”

“Probably just having a point person that we could speak to come and see the site.”

“If I had information in print form to give to my board of trustees, that would be helpful.”

“I’ve heard several people offering 0 percent financing. That definitely intrigues the building’s owner.”

“I guess something in writing, clear vision of what would happen, cost is main thing.”
3. Process Evaluation Findings...

3.4.1 Audit experience

Respondents who reported receiving technical assistance through the program (32 respondents) most frequently indicated that this assistance included a walk-through energy audit (59 percent or 19 respondents). Nineteen percent mentioned an engineering study; 16 percent said they received a custom review while an additional 13 percent said they received a custom audit. Fifteen of the 32 respondents said that the audit or review encompassed the entire facility; fourteen said that it only included certain pieces of equipment.

Most frequently, respondents reported that their main reason for wanting to receive technical assistance through the program was to look for ways to reduce operating or energy costs (47 percent). Seven percent said they needed the work done anyway or had already planned it, and an additional seven percent said that they were interested in learning what they could do to save energy. Responses in the “Other” category included needing help with technical specifications, not having internal staff to conduct audits, and verification of what was needed.

Part of the technical assistance participants received was a report estimating the energy savings and incentives for the recommended equipment. Three-quarters (75 percent, 24 respondents) of those who received technical assistance remembered seeing this report, 19 percent (6 respondents) did not remember seeing it, and six percent (two respondents) were not sure. Of those who recalled seeing the report, most remembered specifically seeing the estimates of energy savings (96 percent, 23 respondents) and the incentives (92 percent, 22 respondents) for their projects. Of those who remembered seeing the energy savings portion of the report (23 respondents), nearly all reported that the estimated energy savings were higher or about what they had expected (8 and 14 respondents, respectively). When looking at just the three large electric customers who recalled the report, one indicated the estimated savings amount was lower than they expected and two indicated the savings amount was about what they had expected.

Similarly, of the 22 respondents who remembered seeing the incentives portion of the report, five said that the incentives estimate was higher than they expected (all were mid-sized customers) and 13 said it was about what they expected (4 respondents were not sure). Again, when looking at just the large electric customers, of the 3 respondents who recalled seeing the report, one did not recall seeing a summary of the incentive estimate, one thought the incentive amount was about what they expected, and one did not know if it was more or less than they expected.

When asked to rate the influence of the technical assistance on their decision to participate in the program on a scale of zero to 10 (where zero is not at all influential and 10 is very influential), 88 percent (28 respondents) rated the technical assistance 7 or above. The average rating was 8.2.

While only rated by four respondents, the large electric participants rated the influence of the technical assistance slightly higher than the mid-sized customers. Two large electric customers rated the influence of the technical assistance a 10 and the other two rated the influence an eight or a nine.

Of the 28 respondents who indicated they received technical assistance and installed equipment with National Grid, only three customers indicated they did not move forward with some of the recommendations provided during the review. One respondent indicated “this
3. Process Evaluation Findings... 

"Project was a pilot program to see how well it would go," while two respondents indicated financial reasons; "cost" or "no funding" was available. 

For nonparticipants who are considering energy efficiency improvements, about half indicate they research different organizations for technical assistance while the other 47 percent indicate they typically work with a firm they are comfortable with. Ten percent indicate it depends on the project and/or the size. 

Twelve of the 59 nonparticipating respondents indicated they received technical assistance from National Grid (6 mid-sized electric, 3 large electric and 3 large gas). The type of assistance received varied; nine had a walk-through audit, three each had a custom audit (either an audit or a review), one had a full engineering study, and one respondent was unsure as to the type of technical assistance they received. About two-thirds of the technical assistance studies looked at specific equipment rather than the entire building. Reasons nonparticipants indicated they were interested in the technical assistance was because it was available at a discounted rate (mentioned by 4 out of 11 respondents) and that they were looking for ways to reduce operating/energy costs (2 respondents). 

Nine of the 12 nonparticipating respondents who received technical assistance recalled receiving the energy savings report with incentives. Eight of the nine respondents recalled seeing the energy savings portion of the report and half thought the energy savings estimate was higher than they expected (2 mid-sized electric and 2 large gas respondents). One respondent thought the estimate was lower than expected and the remaining three indicated it was about what they expected. Only six nonparticipating respondents recalled seeing the eligible incentive information of which four indicated it was about what they expected, one indicated it was higher, and one indicated it was lower than they expected. 

The 12 nonparticipating respondents who received technical assistance that have not installed equipment through the National Grid Energy Initiative program were asked what National Grid could have done to increase the likelihood that they would install the recommended equipment. Increased incentives and decreased payback periods were frequently mentioned items. 

Large electric customer comment: 

"No, I think it had all to do with the limitations of the program itself more than the help and information we got."

"Increase the incentive or lower payback period."

"Nothing differently."

Mid-sized electric customer comment:

"If we could come up with the money."

"Not a lot - I think they did what they needed to do - it is just getting our Board of Education to approve the upgrades. A lot of it has to do with the return on investment even with the incentives."
“A greater incentive. We were initially looking at a two year payback, but when the report came they said 6 years. We'd rather have a shorter payback period.”

“Give us more money.”

“Pretty much nothing. I don't see what else could be done.”

“The only thing I can think of is to increase the incentive.”

Large gas customer comments:

“Probably still will but it will be a two year process to get NA approval.”

“Higher return, quicker payback.”

“I don't think there would have been anything else.”

### 3.5 CUSTOMER AWARENESS AND MARKETING

Independent contractors are the most frequently reported source from which participants hear of the Energy Initiative program followed closely by their National Grid account manager. Thirty-three percent of participants indicated they heard about the program through an independent contractor and 32 percent mentioned a National Grid account manager. Nine percent said they heard of the program from other National Grid staff, and an additional nine percent said they first heard of the program from an equipment distributor. As expected, participants in the large electric program were more likely to hear about the program through their account manager (6 out of 9 respondents). On the other hand, mid-sized customers were more likely to hear about the program through an independent contractor.
3. Process Evaluation Findings...

Table 3-11. How Participating Respondents First Heard of the Program

<table>
<thead>
<tr>
<th>Source</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent contractor</td>
<td>22</td>
<td>0</td>
<td>3</td>
<td>25</td>
<td>33%</td>
</tr>
<tr>
<td>National Grid account manager</td>
<td>18</td>
<td>6</td>
<td>0</td>
<td>24</td>
<td>32%</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>8</td>
<td>11%</td>
</tr>
<tr>
<td>National Grid staff</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>9%</td>
</tr>
<tr>
<td>Distributor</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>9%</td>
</tr>
<tr>
<td>National Grid email newsletter</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>4</td>
<td>5%</td>
</tr>
<tr>
<td>Vendor</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>4</td>
<td>5%</td>
</tr>
<tr>
<td>National Grid website</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>Conference/trade show/expo</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>National Grid utility bill insert</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>National Grid call center</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Participation in another program</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Television</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Radio</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Contractor hired by National Grid</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Total Respondents</strong></td>
<td><strong>63</strong></td>
<td><strong>9</strong></td>
<td><strong>4</strong></td>
<td><strong>76</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

About two-thirds of nonparticipating customers were aware of National Grid’s Energy Initiative program. Because of the low response rate of the nonparticipant effort, it could be that only those that were aware of the program were likely to speak with us, so care should be taken when interpreting these results.

Table 3-12. Nonparticipant Awareness in Energy Initiative Programs

<table>
<thead>
<tr>
<th>Source</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>15</td>
<td>5</td>
<td>6</td>
<td>13</td>
<td>39</td>
</tr>
<tr>
<td>No</td>
<td>6</td>
<td>1</td>
<td>6</td>
<td>7</td>
<td>20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>n=21</strong></td>
<td><strong>n=6</strong></td>
<td><strong>n=12</strong></td>
<td><strong>n=20</strong></td>
<td><strong>n=59</strong></td>
</tr>
</tbody>
</table>

Source: Nonparticipant Survey, Question C5a

The account manager was the most frequently cited source of how nonparticipating customers heard about the Energy Initiative program, particularly with large customers. Overall, if a customer was aware of the Energy Initiative program, it was primarily from some National Grid source. An emailed newsletter, direct mailing, staff other than an account manager, bill inserts and the website were all mentioned as ways nonparticipating customers heard about the program.
3. Process Evaluation Findings

### Table 3-13. How Nonparticipating Respondents Heard about the Energy Initiative Programs

<table>
<thead>
<tr>
<th>Source</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Grid account manager</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>6</td>
<td>14</td>
</tr>
<tr>
<td>National Grid email newsletter</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>National Grid direct mailing</td>
<td>2</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>National Grid staff</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Conference/trade show/expo</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Friend/business person</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Haven't heard of it before this survey</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>National Grid call center (BSC)</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>National Grid utility bill insert</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>National Grid website</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Independent contractor</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>n=15</strong></td>
<td><strong>n=5</strong></td>
<td><strong>n=6</strong></td>
<td><strong>n=13</strong></td>
<td><strong>n=39</strong></td>
</tr>
</tbody>
</table>

Source: Nonparticipant Survey, Question A1

Nonparticipating customers were also asked about where they go when looking for information on energy efficiency programs and services. The internet was the most common resource that customers report using, with most mentioning the National Grid website (mentioned by 16 of 59 respondents) followed by the NYSERDA website (11 out of 59 respondents). A general Google search was also mentioned by five respondents as well as other general websites (13 respondents). Others mentioned looking for communications from National Grid in the form of letters, emails, onsite visits, and phone calls (mentioned by 11 respondents).

### Table 3-14. Nonparticipant Resources for Energy Efficiency Programs and Services

<table>
<thead>
<tr>
<th>Source</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Grid website</td>
<td>7</td>
<td>1</td>
<td>5</td>
<td>3</td>
<td>16</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1</td>
<td>5</td>
<td>6</td>
<td>13</td>
</tr>
<tr>
<td>NYSERDA website</td>
<td>9</td>
<td>1</td>
<td>1</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Communication from National Grid</td>
<td>4</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>11</td>
</tr>
<tr>
<td>General / nonspecific websites</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>National Grid account manager</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>Google search</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Other website</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Contractor recommendations</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>5%</td>
</tr>
<tr>
<td>Vendor recommendations</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>n=21</strong></td>
<td><strong>n=6</strong></td>
<td><strong>n=12</strong></td>
<td><strong>n=20</strong></td>
<td><strong>n=59</strong></td>
</tr>
</tbody>
</table>

3.5.1 Participating Customer and Contractor Awareness of National Grid Programs

Most participating customers are aware of other commercial and industrial programs offered by National Grid in the state of New York (81 percent). When prompted for specifics, those
who were aware of other programs most frequently mentioned programs that offer incentives for lighting (34 percent), motors and drives (12 percent), compressed air (10 percent), or other HVAC equipment (8 percent). Twenty-one percent indicated that they were aware of other programs in general, but could not give specifics on the name or equipment.

Mid-sized participating customers were more likely to hear about programs that offer lighting rebates while large electric customers were aware of National Grid’s small business and large business programs and rebates for “gas and manufacturing things.”

Table 3-15. Types of National Grid Programs Participants are Aware of in New York

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>n</td>
<td>n</td>
<td>n</td>
</tr>
<tr>
<td>Lighting</td>
<td>19</td>
<td>0</td>
<td>2</td>
<td>21</td>
</tr>
<tr>
<td>Aware, but can’t recall specific name</td>
<td>12</td>
<td>1</td>
<td>0</td>
<td>13</td>
</tr>
<tr>
<td>Other</td>
<td>8</td>
<td>3</td>
<td>0</td>
<td>11</td>
</tr>
<tr>
<td>Variable drives/Motors</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>Compressed air</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>HVAC</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Kitchen/Cooking equipment</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Lighting controls</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Small Business Services</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>All of them</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Boilers</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Insulation</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Oil to gas conversion</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Furnace</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Commercial HeHe</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total Respondents</strong></td>
<td><strong>52</strong></td>
<td><strong>6</strong></td>
<td><strong>4</strong></td>
<td><strong>62</strong></td>
</tr>
</tbody>
</table>

About one-quarter (24 percent; 14 respondents) of participating customers have participated in other National Grid energy efficiency programs (1 large electric respondent, 11 mid-sized electric respondents and 2 mid-sized gas respondents). Six of the fourteen indicated that they have participated in a program that offers incentives for lighting equipment (5 mid-sized electric and 1 mid-sized gas) and four mid-sized electric participants indicated that they had participated in a program for motors and drives. The one large electric respondent was not able to give specifics about the program they participated in.

An additional four specifically mentioned participating in the Small Business Services program (all mid-sized electric participants). One mid-sized gas customer mentioned they had participated in the Commercial High-Efficiency Heating and Water Heating program.

When asked to compare their Energy Initiative program experience with the other National Grid program they had participated in, opinions were divided as far as to which program worked best for them. Three respondents said that the programs worked equally well, while
an additional three indicated that they had a better experience with the other program (lighting, motors and drives, etc.) due to better incentives and being more cost-effective. Two said that the Energy Initiative program worked well compared to the other program in which they had participated.

Large electric respondent:

“It is all the same; same across the country, applications identical. It all boils down to how good your rep is.”

Mid-sized gas respondent:

“Very different programs. Thermo-furnace paperwork was simple and straight-forward. Lighting had a bigger financial impact and was a more complicated process.”

Those participating customers who were aware of other National Grid programs were asked if they had considered participating in another program for the project they implemented through the Energy Initiative program. A vast majority (95 percent) said they had not considered that. Three mid-sized electric participants indicated they looked into other programs, one being the Small Business program where the costs went right on the bill but at the time, they did not qualify. The other two did not recall the specific program but indicated they did not participate because of the cost.

3.5.2 Participating Customer and Contractor Awareness of Other Program Administrator’s Programs

Participants who were familiar with National Grid’s energy efficiency programs in New York were often also familiar with other New York program administrators’ programs (as shown in Table 3-16). Almost one-third of respondents (64 percent) indicated that they were aware of other energy efficiency programs in New York outside of those offered by National Grid. Of these 49 respondents, 40 of them were also familiar with other National Grid’s C&I programs in New York (other than the Energy Initiative programs). Those familiar with both offerings accounted for six of the nine large electric respondents, 30 of the 63 mid-sized electric customers and four of the five mid-sized gas respondents.

Table 3-16. Participant Awareness of Both National Grid and Other Program Administrator Programs in New York (n=76)

<table>
<thead>
<tr>
<th>Awareness of other National Grid C&amp;I energy efficiency programs in New York</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware of other energy efficiency programs in New York (outside of National Grid)</td>
<td>Yes</td>
<td>40</td>
</tr>
<tr>
<td>No</td>
<td>21</td>
<td>6</td>
</tr>
</tbody>
</table>

The other entity offering energy efficiency programs in New York that participating customers were most familiar with was NYSERDA (78 percent). This was mentioned by seven of the eight large electric respondents, 27 of the 36 mid-sized electric respondents and four of the five mid-sized gas respondents. Ten percent also mentioned NYPA and ESCO-managed programs, of which all were mid-sized electric customers with the exception of one mid-sized gas customer.
Those who were aware of the programs offered through other entities most often said that they were also eligible to participate in these other programs (84 percent out of 49 respondents). Of those, half (50 percent) had spoken with a representative at these other entities about their program offerings; again, the most frequently mentioned entity was NYSERDA (55 percent).

Of those who had spoken with other entities about their program offerings (20 respondents), 11 respondents indicated they have participated in one or more of these other programs. When asked why they decided to participate in the other program instead of a National Grid program, respondents most frequently reported that National Grid did not have an applicable program at that time or they were not aware of a National Grid program (4 respondents each). One respondent said that the other program had better incentives, while one noted that the other program was a better fit for their project.

Those who were eligible to participate in another entity’s program were asked why they ultimately chose National Grid's Energy Initiative program (34 respondents). Most often, respondents indicated that they chose the Energy Initiative program because if offered better incentives (47 percent or 16 respondents). Respondents also said that the Energy Initiative program was a better fit (4 respondents), or they have a better relationship with National Grid (3 respondents).

Those who were eligible to participate in another entity’s program were also asked to compare National Grid to the other entity’s offerings (34 respondents). Most frequently, respondents said that National Grid's program offerings are comparable to other programs (35 percent or 12 respondents). Six respondents said that National Grid is more helpful or easier to work with, and five respondents said that they were more satisfied overall with National Grid. Four respondents indicated that National Grid offers better incentives than the other program administrator offerings.

Contractors also indicated familiarity with other program administrator programs (specifically NYSERDA) and said they review each program offering available to customers (and which they are eligible for) and compare them against the National Grid program. Contractors do the comparison in order to offer their customers the best options (e.g., rebates or equipment offered). One contractor who works fairly regularly with NYSERDA mentioned they received more support from the National Grid program and also indicated the National Grid program was more user-friendly. Three contractors mentioned how there was confusion in the marketplace between the different program administrator programs. Therefore, contractors have to be familiar with the different offerings to understand which would be best for their customer.

When participants were asked whether they were confused with the services different program administrators (e.g., NYSERDA, NYPA) provide and whether the organizations were affiliated with National Grid or which entity’s service were the best fit, in general, respondents felt the differences were fairly clear. Almost 20 percent (9 out of 48 respondents, one large electric, seven mid-sized electric and one mid-sized gas) indicated confusion between National Grid and other program administrators’ programs.

Table 3-17. Participant Confusion between National Grid and Other Program Administrator Programs

<table>
<thead>
<tr>
<th>Past confusion with services</th>
<th>Mid-sized Electric (n=35)</th>
<th>Large Electric (n=8)</th>
<th>Mid-sized Gas (n=5)</th>
<th>Total (n=48)</th>
</tr>
</thead>
<tbody>
<tr>
<td>different entities provided</td>
<td>n</td>
<td>n</td>
<td>n</td>
<td>n</td>
</tr>
<tr>
<td>Past confusion on whether entities were affiliated with National Grid</td>
<td>4</td>
<td>0</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Past confusion on which entity could provide services that best fit needs</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>3</td>
</tr>
</tbody>
</table>

Those who indicated confusion to any of the above three questions were asked how they resolved their confusion (9 respondents); two spoke with National Grid, and an additional two compared their needs to the program offerings. Three respondents indicated they spoke with a contractor or vendor for understanding. The confusion of these nine respondents did not influence the program selected (indicated by 7 of the 9 respondents). It may be important to clarify any program or marketing materials to alleviate this confusion.

With other programs available to customers in New York, National Grid staff indicated they need to be aware of and understand these offerings to be able to better position their programs, and to offer the best product to their customers even if it is with a different entity. One National Grid staff member indicated how they are aware of the other programs and have even told their customer about a better offer that is available by another organization for the work they were looking to do. This interviewee mentioned how they look at each individual project and determine what is best for the customer even if it is through a different organization.

3.5.3 Nonparticipating Customer Awareness of National Grid Programs

Approximately one-third of nonparticipating customers are aware of other National Grid energy efficiency programs offered to commercial and industrial customers in the state of New York. Only two respondents were able to name a specific program, the Small Business program (both of these were gas customers, one large and one mid-sized). Other respondents mentioned different types of equipment that was eligible for rebates such as lighting (mentioned by 6 respondents), motors (2 respondents), and compressed air (1 respondent).

Table 3-18. Nonparticipant Awareness of National Grid C&I Programs in New York

| Source: Nonparticipant Survey, Question A2 |
|---------------------------------|-----------------|-----------------|-----------------|-----------------|
| Yes                             | 9               | 2               | 1               | 7               | 19               | 32%             |
| No                              | 12              | 4               | 11              | 13              | 40               | 68%             |
| Total                           | n=21            | n=6             | n=12            | n=20            | n=59             |

Of the 19 respondents who were aware of other National Grid C&I programs, 13 went on to contact National Grid about participating in the program. The outcome of the contact appears

to be promising with a number of respondents indicating the project is still in the works. Some specific comments include:

Large electric customer comments:

“We have several projects in place.”

Mid-sized electric customer comments:

“They were going to come in and do an evaluation, and there were cost-saving measures. This was inclusive of what was already done by a third party. National Grid was better than the other party we were going to for rebates.”

“Still ongoing.”

“They helped me identify the one we ultimately used.”

Large gas customer comments:

“We understood what some of the rebates programs offered.”

“Just the one I’m working on now. I just have to get all the information on the form from the computer and send it in.”

“Very positive but we were already involved with a NYSERDA project.”

“They are still in the process.”

Mid-sized gas customer comments:

“We’re still in the system awaiting decisions.”

For customers that did not contact National Grid, reasons include:

Large gas customer comments:

“Lack of knowledge.”

“I guess ignorance.”

Mid-sized electric customer comments:

“Prefer to tackle one project at a time.”

“Well, part of the reason, we have another group we’ve been working with. NYSERDA. I think National Grid’s programs are similar. They kind of overlap. I haven’t done a side-by-side comparison. Bigger rebate probably go with it. They seem similar. Go with what you know.”

3.5.4 Nonparticipating Customer Awareness of Other Program Administrators’ Programs

Nonparticipating respondents who were familiar with National Grid’s Energy Initiative programs were often also familiar with other New York program administrators. Twenty-two respondents (out of 57) who were aware of the Energy Initiative program also indicated that they were aware of other energy efficiency programs in New York outside of those offered by National Grid. Those familiar with both offerings accounted for three of the five large electric respondents, 11 of the 21 mid-sized electric customers, and eight of the 20 large gas respondents.

Table 3-19. Nonparticipant Awareness of Both National Grid and Other Program Administrator Programs in New York (n=57)

<table>
<thead>
<tr>
<th>Heard of National Grid Energy Initiative Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>Aware of other energy efficiency programs in New York (outside of National Grid)</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

Of the 27 nonparticipating respondents who were familiar with other program administrators’ programs, 13 mentioned NYSERDA (3 of 4 large electric, 5 of 12 mid-sized electric, 5 of 10 large gas, and no mid-sized gas respondents).

Almost all (24 of the 27) nonparticipating customers who were aware of programs offered by other entities indicated they were eligible to participate in their programs. When asked if they have participated in these programs, 16 out of 22 indicated they had, nine of which mentioned NYSERDA as the program they participated in. For the nine respondents who went with NYSERDA, they did so for a variety of reasons including National Grid not having a program available or the customer was not aware of the program at the time. Verbatim comments include:

“I believe at the time NYSERDA was more favorable, or National Grid didn’t cover what we were trying to do. One project was variable speed drives to increase energy efficiency in a number of motors; National Grid didn’t have that at the time and NYSERDA was very good.”

“At the time they were pushing it harder. They offered some incentives for gas fired purchases.”

“I guess I just happened to be more aware of the NYSERDA programs. More aware of them. Basically not being aware of what’s available from National Grid.”

“They were more tailored to the work we were doing.”

“National Grid did not offer it as an option.”

“That was even before National Grid came out with that type of program.”

“National Grid didn’t get into this one. Only buying into a few things. Only this year that they started getting into the program.”

When asked whether they were confused with the services offered by different program administrators (e.g., NYSERDA, NYPA) and whether the organizations were affiliated with National Grid or which entity’s service was the best fit, in general, respondents indicate some confusion. Twelve out of 27 respondents (one large electric, six mid-sized electric and five large gas) indicated confusion between National Grid and other program administrators’ programs. This confusion was typically resolved by reviewing the paperwork for each program, talking with different people and asking questions.

Table 3-20. Nonparticipant Confusion between National Grid and Other Program Administrators

<table>
<thead>
<tr>
<th>Past confusion with services different entities provided</th>
<th>Mid-sized Electric (n=12)</th>
<th>Large Electric (n=4)</th>
<th>Mid-sized Gas (n=1)</th>
<th>Large Gas (n=10)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past confusion on whether entities were affiliated with National Grid</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Past confusion on which entity could provide services that best fit needs</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>4</td>
<td>8</td>
</tr>
</tbody>
</table>

3.6 CUSTOMER CHARACTERISTICS AND DECISION-MAKING PROCESSES

Customers heard about the Energy Initiative program early in their decision making process. Almost one-third of respondents indicated they were already thinking about purchasing some type of equipment when they found out about the rebate (mentioned for 22 of the 78 pieces of equipment installed). An additional 21 said they were just beginning to collect information about the equipment, and 17 had already decided to buy the equipment. Responses were varied by program (as seen in Table 3-21) and by type of equipment received (Table 3-22), although responses for certain programs and equipment have small n’s and therefore should only be considered qualitative.

Table 3-21. Point in Decision to Purchase Equipment When Heard of Program by Program (n=78*)

<table>
<thead>
<tr>
<th>Already been thinking about purchasing some type of equipment</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Large Gas</th>
<th>Total n</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Began collecting information about equipment</td>
<td>19</td>
<td>2</td>
<td>1</td>
<td>22</td>
<td>29%</td>
</tr>
<tr>
<td>Decided to buy equipment</td>
<td>16</td>
<td>3</td>
<td>2</td>
<td>21</td>
<td>27%</td>
</tr>
<tr>
<td>Had not been thinking about it</td>
<td>13</td>
<td>2</td>
<td>2</td>
<td>17</td>
<td>22%</td>
</tr>
<tr>
<td>Total</td>
<td>63</td>
<td>9</td>
<td>5</td>
<td>78**</td>
<td></td>
</tr>
</tbody>
</table>

* Respondents were asked about their decision making process with each piece of equipment that was installed. One respondent installed two pieces of equipment, which is reflected in the responses in this section.

** One respondent did not get asked this question
3. Process Evaluation Findings

Table 3-22. Point in Decision to Purchase Equipment When Heard of Program by Type of Equipment (n=78*)

<table>
<thead>
<tr>
<th>Compressed Air</th>
<th>Cooking</th>
<th>HVAC</th>
<th>Lighting</th>
<th>Refrigeration</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>n</td>
<td>n</td>
<td>N</td>
<td>n</td>
<td>n</td>
<td>n</td>
</tr>
<tr>
<td>Already been thinking about purchasing some type of equipment</td>
<td>8</td>
<td>0</td>
<td>1</td>
<td>12</td>
<td>1</td>
</tr>
<tr>
<td>Began collecting information about equipment</td>
<td>6</td>
<td>0</td>
<td>2</td>
<td>13</td>
<td>0</td>
</tr>
<tr>
<td>Decided to buy equipment</td>
<td>4</td>
<td>1</td>
<td>3</td>
<td>8</td>
<td>1</td>
</tr>
<tr>
<td>Had not been thinking about it</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>13</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>22</strong></td>
<td><strong>1</strong></td>
<td><strong>6</strong></td>
<td><strong>46</strong></td>
<td><strong>2</strong></td>
</tr>
</tbody>
</table>

* Respondents were asked about their decision making process with each piece of equipment that was installed.
One respondent installed two pieces of equipment, which is reflected in the responses in this section.
** One respondent did not get asked this question

Most program equipment replaced already existing equipment (97 percent). Of that pre-existing equipment, 40 percent of it was working properly, one-half (50 percent) was working but in need of repair, three percent was not working but repairable, and seven percent was not working and not repairable. These data suggest that the program is effectively motivating early retirement in getting customers to replace working equipment.

Table 3-23. Condition of Old Equipment

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Large Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working properly</td>
<td>20</td>
<td>6</td>
<td>3</td>
<td>29</td>
<td>40%</td>
</tr>
<tr>
<td>Working but in need of repair (e.g. inefficient)</td>
<td>32</td>
<td>3</td>
<td>1</td>
<td>36</td>
<td>50%</td>
</tr>
<tr>
<td>Not working but repairable</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Not working, not repairable</td>
<td>4</td>
<td>0</td>
<td>1</td>
<td>5</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>58</strong></td>
<td><strong>9</strong></td>
<td><strong>5</strong></td>
<td><strong>72</strong></td>
<td></td>
</tr>
</tbody>
</table>

Respondents were asked to rate their likelihood of installing their specific type of equipment within a year if they had not received the rebate from National Grid through the Energy Initiative program. Using a zero to 10 scale with zero being not at all likely and 10 being very likely, the average rating was a 4.3, with slightly more than half of the pieces of equipment installed (53 percent) receiving a likelihood rating of less than five. For 28 percent of the pieces of equipment installed through the program, the respondent gave a rating of zero (not at all likely to install the equipment within one year). For 17 percent of the pieces of equipment installed through the program, the respondent gave a rating of ten (very likely to install the equipment outside of the program within a year).

Respondents were asked to give reasons why they wanted to install the specific equipment, besides the rebate offered by the program. For over half of the equipment (56 percent), the respondent said they wanted to reduce their operating costs or energy bills. For 23 percent of the equipment, the respondent said it was part of upgrading or expanding their facility.
3. Process Evaluation Findings

Those participants who indicated they would have been very likely to purchase the same efficiency equipment without the National Grid rebate tended to have equipment that was working but in need of repair or inefficient equipment (9 of 72 respondents). Another two respondents indicating their existing equipment was not working and not fixable.

Table 3-24. Likelihood of Purchasing Same Equipment without National Grid Rebate by the Condition of Old Equipment

<table>
<thead>
<tr>
<th>Likelihood of purchasing equipment within a year without National Grid rebate</th>
<th>Working properly</th>
<th>Working but in need of repair (e.g., inefficient)</th>
<th>Not working but repairable</th>
<th>Not working, not repairable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all likely (0-3)</td>
<td>15</td>
<td>17</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Neutral (4-7)</td>
<td>7</td>
<td>9</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Very likely (8-10)</td>
<td>8</td>
<td>9</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

For nine percent of the equipment installed through the program, the respondent received an additional incentive (besides the rebate from National Grid). Of the seven pieces of equipment that were also rebated outside of the Energy Initiative program, two mentioned a state or federal tax credit as the source of funding. One mentioned their local government, and one mentioned NYSERDA. Responses in “other” included interest-free loans from banks, or third party-financing.

Respondents were asked their likelihood of purchasing without the additional incentive they received (outside of the Energy Initiative program). For two pieces of equipment, the respondent said "zero," and for an additional two pieces of equipment the respondent gave a rating of five. One pieces of equipment was given a rating of seven, and one was given a rating of ten.

3.6.1 Quality control

About three-quarters of respondents (77 percent, 59 respondents) indicated that someone conducted quality control checks or followed-up on the installation of their equipment. Most indicated that a National Grid staff member conducted the follow-up (85 percent, 50 respondents); others said that an independent contractor (9 percent, 5 respondents) followed up. Large electric respondents were more likely to indicate that a National Grid staff member followed up on the installation of the equipment with all eight respondents indicating so.

All respondents indicated that they were satisfied with the follow-up visit to their facility. When asked for reasons for their satisfaction, they gave a wide variety of responses, including: the follow-up ensured proper installation of equipment (21 percent, 11 respondents), the inspection was thorough (17 percent, 9 respondents), and the quality control staff was knowledgeable (12 percent, 6 respondents).

Table 3-25. Reasons for Satisfaction with Follow-up Visit

<table>
<thead>
<tr>
<th>Reason</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>n</td>
<td>n</td>
<td>n</td>
<td>n</td>
<td>n</td>
<td></td>
</tr>
<tr>
<td>Ensured proper installation of measures</td>
<td>10</td>
<td>0</td>
<td>2</td>
<td>12</td>
<td>21%</td>
</tr>
<tr>
<td>Inspection was thorough</td>
<td>9</td>
<td>0</td>
<td>0</td>
<td>9</td>
<td>17%</td>
</tr>
<tr>
<td>Appreciated attention given to project after completion</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>14%</td>
</tr>
<tr>
<td>Person was helpful</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>7</td>
<td>14%</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>14%</td>
</tr>
<tr>
<td>Job was performed exceptionally</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>6</td>
<td>12%</td>
</tr>
<tr>
<td>Person was knowledgeable</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>6</td>
<td>12%</td>
</tr>
<tr>
<td>Received rebate</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>4</td>
<td>8%</td>
</tr>
<tr>
<td>No strong reason</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>3</td>
<td>6%</td>
</tr>
<tr>
<td>Process was simple to go through</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>8%</td>
</tr>
<tr>
<td>Person was professional</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>6%</td>
</tr>
<tr>
<td>Fulfilled contract requirements</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>45</strong></td>
<td><strong>4</strong></td>
<td><strong>3</strong></td>
<td><strong>52</strong></td>
<td></td>
</tr>
</tbody>
</table>

Some specific verbatim comments include:

Responses from large electric respondents:

“*My facility manager thought they handled everything very well, they didn’t occupy a whole day of his. If he’s happy, I’m happy.*”

“It was very efficient and straight forward.”

“They were great; very knowledgeable and helpful”

Responses from mid-sized electric respondents:

“The guy who came from National Grid was very helpful and knowledgeable.”

“The fact that they held us accountable to do a lot of the installation itself, NYSERDA took 4 months for a response, but National Grid came within a week.”

“The initial one uncovered some questions and the contractor followed up on that ...thought it was well done ... it wasn’t just a paper drill.”

“They came back and checked everything out and they found a couple small problems and they fixed those problems. And it went how I thought it should go.”

“Part of the reason was that we had a pretty good record and it didn’t take too long, didn’t have to look at all the fixtures.”

Responses from mid-sized gas respondents:

“Checked out equipment to make sure properly installed.”

“Very informed. The rep was very helpful and educated.”

“Made sure it was installed properly.”

3.6.2 Participating customer characteristics

The most frequent business type reported by participating electric customers was industrial, either light (17 percent) or heavy (13 percent), while the five gas participants accounted for a variety of different business types. Unspecified manufacturing was also a highly mentioned business type for mid-sized participants (11 out of 63 respondents).

Thirty percent of respondents indicated that their business was a not-for-profit. Most frequently, when asked to describe their business's ownership category, respondents reported that their business was a single establishment (42 percent) or a branch office (16 percent). Twelve percent indicated they were part of a government facility (local, state or federal), nine percent indicated their business was part of a chain, and an additional nine percent said their business was an educational facility.

Most respondents indicated that their business owned their facility (83 percent), while 14 percent leased. Eighty percent plan to stay at their location indefinitely. Of those who did not plan to stay at their location indefinitely most respondents said they planned to stay at their locations for another ten years (5 respondents).

Forty-three percent of respondents indicated that their revenue has not changed in the past two years. Thirty-nine percent said that their revenue had increased, while twelve percent said it had decreased).

When asked to rate the level of effort their business has put towards energy efficiency, respondents most often said that they had made at least some energy efficiency improvements (66 percent), while 33 percent said that they had done everything or almost everything that they could do to be energy efficient. Only one percent said they had not done much to save energy at their facility, and zero respondents said that they had not done anything to save energy at their facility.
### Table 3-26. Participating Customer Characteristics

<table>
<thead>
<tr>
<th>Business Type</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n=63</td>
<td>n=9</td>
<td>n=5</td>
<td>n=77</td>
<td></td>
</tr>
<tr>
<td>Light industrial</td>
<td>10</td>
<td>3</td>
<td>0</td>
<td>13</td>
<td>17%</td>
</tr>
<tr>
<td>Manufacturing-unspecified</td>
<td>11</td>
<td>1</td>
<td>0</td>
<td>12</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>10</td>
<td>1</td>
<td>1</td>
<td>12</td>
<td>16%</td>
</tr>
<tr>
<td>Heavy industrial</td>
<td>7</td>
<td>3</td>
<td>0</td>
<td>10</td>
<td>13%</td>
</tr>
<tr>
<td>Large office</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>9%</td>
</tr>
<tr>
<td>Hospital</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>Large retail</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>Small office</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>Big box retail</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Community college</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Warehouse</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Elementary school</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Full service restaurant</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>University</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Auto</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
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<tr>
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<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Multifamily low-rise</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Religious</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>*Nursing home</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Business is a non-profit organization</strong></td>
<td><strong>n=62</strong></td>
<td><strong>n=9</strong></td>
<td><strong>n=5</strong></td>
<td><strong>n=76</strong></td>
<td><strong>Total</strong></td>
</tr>
<tr>
<td>Yes</td>
<td>17</td>
<td>2</td>
<td>4</td>
<td>23</td>
<td>30%</td>
</tr>
<tr>
<td>No</td>
<td>45</td>
<td>7</td>
<td>1</td>
<td>53</td>
<td>70%</td>
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</table>
### 3. Process Evaluation Findings... 

#### Business ownership category

<table>
<thead>
<tr>
<th>Business Ownership Category</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>n=62</td>
<td>n=9</td>
<td>n=5</td>
<td>n=76</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single establishment business/organization</td>
<td>30</td>
<td>0</td>
<td>2</td>
<td>32</td>
<td>42%</td>
</tr>
<tr>
<td>Branch office</td>
<td>8</td>
<td>3</td>
<td>1</td>
<td>12</td>
<td>16%</td>
</tr>
<tr>
<td>Educational facility</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>7</td>
<td>9%</td>
</tr>
<tr>
<td>One of a chain of establishments</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>7</td>
<td>9%</td>
</tr>
<tr>
<td>Local government facility</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>5</td>
<td>7%</td>
</tr>
<tr>
<td>Headquarters of business/organization</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>3</td>
<td>0</td>
<td>4</td>
<td>5%</td>
</tr>
<tr>
<td>State government facility</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>Franchise</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Federal government facility</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
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</table>

#### Number of years business plans to stay at location

<table>
<thead>
<tr>
<th>Number of Years Business Plans to Stay at Location</th>
<th>n=59</th>
<th>n=9</th>
<th>n=5</th>
<th>n=73</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indefinite</td>
<td>47</td>
<td>8</td>
<td>3</td>
<td>58</td>
<td>80%</td>
</tr>
<tr>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>10</td>
<td>4</td>
<td>0</td>
<td>1</td>
<td>5</td>
<td>7%</td>
</tr>
<tr>
<td>15</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>3%</td>
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<tr>
<td>18</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>25</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>50</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>75</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>100</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1%</td>
</tr>
</tbody>
</table>

#### Total number of employees

<table>
<thead>
<tr>
<th>Total Number of Employees</th>
<th>n=56</th>
<th>n=7</th>
<th>n=5</th>
<th>n=68</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 50</td>
<td>21</td>
<td>0</td>
<td>3</td>
<td>24</td>
<td>35%</td>
</tr>
<tr>
<td>51 to 100</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td>15%</td>
</tr>
<tr>
<td>101 to 500</td>
<td>19</td>
<td>6</td>
<td>1</td>
<td>26</td>
<td>38%</td>
</tr>
<tr>
<td>More than 500</td>
<td>6</td>
<td>1</td>
<td>1</td>
<td>8</td>
<td>12%</td>
</tr>
</tbody>
</table>
3. Process Evaluation Findings...

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business own/leases facility</strong></td>
<td>n=63</td>
<td>n=9</td>
<td>n=5</td>
<td>n=77</td>
</tr>
<tr>
<td>Own all</td>
<td>50</td>
<td>9</td>
<td>5</td>
<td>64</td>
</tr>
<tr>
<td>Lease all</td>
<td>11</td>
<td>0</td>
<td>0</td>
<td>11</td>
</tr>
<tr>
<td>Own some and lease some</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td><strong>Business’ EE efforts at specific address</strong></td>
<td>n=63</td>
<td>n=9</td>
<td>n=5</td>
<td>n=77</td>
</tr>
<tr>
<td>We have not done much to save energy</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>We have made some energy efficiency improvements</td>
<td>40</td>
<td>8</td>
<td>3</td>
<td>51</td>
</tr>
<tr>
<td>We have done everything or almost everything that we can</td>
<td>22</td>
<td>1</td>
<td>2</td>
<td>25</td>
</tr>
<tr>
<td><strong>Revenue changes in last two years</strong></td>
<td>n=63</td>
<td>n=9</td>
<td>n=5</td>
<td>n=77</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Increased</td>
<td>27</td>
<td>3</td>
<td>0</td>
<td>30</td>
</tr>
<tr>
<td>Decreased</td>
<td>7</td>
<td>0</td>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>Stayed the same</td>
<td>26</td>
<td>4</td>
<td>3</td>
<td>33</td>
</tr>
<tr>
<td><strong>Title at business</strong></td>
<td>n=63</td>
<td>n=9</td>
<td>n=5</td>
<td>n=77</td>
</tr>
<tr>
<td>Maintenance manager</td>
<td>12</td>
<td>1</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Facility manager</td>
<td>9</td>
<td>1</td>
<td>1</td>
<td>11</td>
</tr>
<tr>
<td>CEO/President</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Facilities engineer</td>
<td>9</td>
<td>1</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
<td>3</td>
<td>1</td>
<td>10</td>
</tr>
<tr>
<td>Operations manager</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Energy management staff</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Project manager</td>
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<td>2</td>
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<td>3</td>
</tr>
<tr>
<td>Director</td>
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<td>0</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>General manager</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
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<td>Office manager</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Vice President</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Business owner</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Pastor</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

3.6.3 Nonparticipating customer characteristics

Similar to the participant respondents, the most frequent business type reported by nonparticipating customers was industrial, either heavy (14 percent) or light (8 percent) although many different business types were included. Large office buildings and manufacturing were also highly mentioned (10 percent of respondents, 6 respondents each).
3. Process Evaluation Findings...

Also similar to participating customers, about one-third of nonparticipating respondents indicated that their business was a not-for-profit. Most frequently, when asked to describe their business’s ownership category, respondents reported that their business was a single establishment (39 percent) or one in a chain of establishments (15 percent).

Most respondents indicated that their business owned their facility (77 percent), while 19 percent (or 11 respondents) leased.

Table 3-27. Nonparticipating Customer Characteristics

<table>
<thead>
<tr>
<th>Business Type</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n=21</td>
<td>n=6</td>
<td>n=12</td>
<td>n=20</td>
<td>n=59</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>0</td>
<td>5</td>
<td>6</td>
<td>15</td>
<td>25%</td>
</tr>
<tr>
<td>Heavy industrial</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>3</td>
<td>8</td>
<td>14%</td>
</tr>
<tr>
<td>Large office</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>6</td>
<td>10%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>6</td>
<td>10%</td>
</tr>
<tr>
<td>Light industrial</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>8%</td>
</tr>
<tr>
<td>Education</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>5%</td>
</tr>
<tr>
<td>University</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Warehouse</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Motel</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Library</td>
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<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Production</td>
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<td>0</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Assembly</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Hospital</td>
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<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Small office</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Elementary school</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Full service restaurant</td>
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<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Religious</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
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<td>n=19</td>
<td>n=11</td>
<td>n=57</td>
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<tr>
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<td>7</td>
<td>1</td>
<td>4</td>
<td>6</td>
<td>18</td>
<td>32%</td>
</tr>
<tr>
<td>No</td>
<td>14</td>
<td>5</td>
<td>7</td>
<td>13</td>
<td>39</td>
<td>68%</td>
</tr>
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<td>n=12</td>
<td>n=20</td>
<td>n=59</td>
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<td>Single establishment business/organization</td>
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<td>1</td>
<td>7</td>
<td>6</td>
<td>23</td>
<td>39%</td>
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<tr>
<td>One of a chain of establishments</td>
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<td>2</td>
<td>1</td>
<td>4</td>
<td>9</td>
<td>15%</td>
</tr>
<tr>
<td>Educational facility</td>
<td>4</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>8</td>
<td>14%</td>
</tr>
<tr>
<td>Branch office</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>5</td>
<td>8%</td>
</tr>
<tr>
<td>Local government facility</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>4</td>
<td>7%</td>
</tr>
<tr>
<td>Headquarters of business/organization</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>5%</td>
</tr>
<tr>
<td>Franchise</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Federal government facility</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of years business plans to stay at location</th>
<th>n=4</th>
<th>n=0</th>
<th>n=4</th>
<th>n=5</th>
<th>n=13</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
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<tr>
<td>10</td>
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<td>1</td>
<td>1</td>
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<td>20</td>
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<td>30</td>
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<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>50</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>100</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total number of employees</th>
<th>n=20</th>
<th>n=5</th>
<th>n=11</th>
<th>n=16</th>
<th>n=52</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 50</td>
<td>9</td>
<td>0</td>
<td>11</td>
<td>2</td>
<td>22</td>
</tr>
<tr>
<td>51 to 100</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>5</td>
<td>13</td>
</tr>
<tr>
<td>101 to 500</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>More than 500</td>
<td>1</td>
<td>3</td>
<td>0</td>
<td>3</td>
<td>7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Business own/leases facility</th>
<th>n=21</th>
<th>n=6</th>
<th>n=12</th>
<th>n=18</th>
<th>n=57</th>
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<tbody>
<tr>
<td>Own all</td>
<td>19</td>
<td>5</td>
<td>6</td>
<td>14</td>
<td>44</td>
</tr>
<tr>
<td>Lease all</td>
<td>2</td>
<td>1</td>
<td>5</td>
<td>3</td>
<td>11</td>
</tr>
<tr>
<td>Manage property</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

3.7 TRADE ALLY PARTICIPATION

With a number of different energy efficiency programs available to customers in New York, contractors can also be selective on which programs are used or suggested to customers. One of the main factors contractors consider in a program is the ease of participating. Contactors look at the amount of paperwork needed, incentives and equipment available, and the different types of programs offered (prescriptive versus custom).

Awareness of National Grid’s programs and understanding its offerings is key to getting trade allies involved in the Energy Initiative programs. National Grid is fairly new to the energy efficiency market in New York so significant effort needs to be put into marketing the programs to both customers and trade allies. Two contractors mentioned that the current materials are good and they are able to give them to their customers. Although one specifically mentioned how they would prefer one brochure that contained all their commercial programs. The more comprehensive the brochure and the better it is put together, the better it will work. Another two contractors indicated they get calls from National Grid staff (e.g., account managers or CECs) which is very helpful, although one indicated they would expect more global emails. One contractor mentioned how great the breakfast meetings are. This contractor mentioned this type of outreach should continue but also consider conducting these in different ways (none specifically mentioned) as this was a great way to build relationships and provide opportunities to meet the people that could do the work and allow individuals to set-up appointments. One additional contractor mentioned how they like the fact that National Grid does not have a “preferred contractor list” such as one NYSERDA has. The program is open to anyone who is eligible for the program.

Related to marketing, two contractors mentioned being not happy with the Small Business Services program. One contractor believes the Small Business Services program has a poor reputation with customers and that it may be impacting the Energy Initiative program. This contractor felt customers are unable to separate the programs and when they hear about problems with one of National Grid programs they may be unlikely to use National Grid for
any programs. A second trade ally indicated they were displeased with National Grid because they view the Small Business Services program as not involving local contractors. Therefore, in contrast to the contractor who mentioned combining program material into one brochure, it may be more important to separate them to more clearly delineate the programs. One additional contractor mentioned how they would like to be able to “co-brand” marketing material as they do with ENERGY STAR but understand there may be limitations or criteria that may come along with it.

Contractors mentioned how they tend to go with the programs that are the best option for their customers. Sometimes this is who is offering the best incentives while other contractors look for the program that offers the most support and most straight-forward paperwork. Feedback from contractors indicates no problems with the application, approval of the application, or the rebate processes. One contractor mentioned how National Grid was faster than NYSERDA in this area.

Contractors we spoke with had a number of different suggestions for improving the program. One suggestion, mentioned by three of the six contractors we spoke with mentioned the need for additional prescriptive programs and a fourth contractor mentioned concern over the time-consuming nature of custom projects. Suggestions for additional prescriptive programs, which contractors mentioned are easier on everyone, include motors and VFDs, boilers (one specifically mentioned steam boilers), boiler controls, and burner retrofit.

Two contractors talked about the engineering study as an area to review. The concern revolved around customers having to spend money to understand if any changes are needed. One contractor felt incentives should be offered to help provide assistance and another questioned whether it was needed in certain situations. For example, if a neighbor had an audit and the buildings were similar, the contractor question whether both customers would need to have an audit.

Additional program improvement suggestions include: financing (mentioned by three contractors), a review of payback criteria for LED lighting (NYSERDA’s is longer), increasing incentives for the custom program, and consideration of newer technologies (e.g., EMS, computer controls). One contractor voiced a specific concern over the technologies offered. This contractor indicated the National Grid program uses a lot of timers and devices that are hooked up to equipment, which he felt could be bypassed after the contractor leaves, which results in less energy savings. He went on to say more can be done or focused on such as changing out lighting to lower wattages, upgrading refrigeration cases, or upgrading compressors.

Overall, contractors believe National Grid staff are dedicated to the program. Two contractors specifically mentioned how they like the fact that they represent National Grid in the work that they do. One contractor mentioned while the program is fairly new, National Grid staff still gets back to them and provide feedback (e.g., why things do not work or staff will let the contractor know they are researching the issue).

3.8 PROGRAM IMPACTS

Participation in the Energy Initiative program was much lower than anticipated in 2010. As discussed earlier, program staff believe this was due to a number of different reasons including a delay getting the program started, including marketing efforts, competition between program administrators, and perceived overlap between National Grid’s programs.

That being said, the program was influential in getting participating customers thinking about energy efficiency with over one-quarter of participating customers having installed additional equipment since their participation in the Energy Initiative program. Twenty-seven percent of respondents (20 respondents out of 75) indicated that they have purchased some other type of energy-efficiency equipment since participating in the program. Of those who had purchased additional equipment (20 respondents), nine indicated purchasing lighting equipment, while five said they purchased motors and drives equipment. Three noted that they had purchased appliances, and two mentioned a water heater.

Table 3-28. High-Efficiency Equipment Purchased since Participating in Program

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lighting</td>
<td>8</td>
<td>1</td>
<td>0</td>
<td>9</td>
</tr>
<tr>
<td>Other electric equip</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>Motors / variable</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Appliances</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Water heater</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Boilers</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Other gas equipment</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Lighting controls</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Furnaces</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>n=17</strong></td>
<td><strong>n=2</strong></td>
<td><strong>n=1</strong></td>
<td><strong>n=20</strong></td>
</tr>
</tbody>
</table>

Depending on the type of equipment, some respondents did utilize National Grid’s programs for rebates (water heater and some lighting) for this additional equipment, while others went to other organizations for the equipment (e.g., motors and drives). There were a few respondents who indicated they did not receive any rebate for the equipment, so there may be opportunities to further educate customers on the programs and make them aware of program offerings.
3. Process Evaluation Findings... 

Table 3-29. Rebate Received for Purchasing High-Efficiency Equipment since Participating in Program

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Responses</td>
<td>Responses</td>
</tr>
<tr>
<td>Lighting</td>
<td>3 National Grid</td>
<td>2 No rebate</td>
<td>1 NYSERDA</td>
</tr>
<tr>
<td></td>
<td>2 No rebate</td>
<td>1 Another organization</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1 Don't know</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other electric</td>
<td>3 No rebate</td>
<td>1 No rebate</td>
<td></td>
</tr>
<tr>
<td>equipment</td>
<td>2 National Grid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motors / variable</td>
<td>3 No rebate</td>
<td>1 NYSERDA</td>
<td></td>
</tr>
<tr>
<td>speed drives</td>
<td>2 No rebate</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1 NYSERDA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appliances</td>
<td>1 National Grid</td>
<td>1 No rebate</td>
<td>1 No rebate</td>
</tr>
<tr>
<td></td>
<td>1 No rebate</td>
<td>1 NYSERDA</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1 NSTAR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water heater</td>
<td>2 National Grid</td>
<td>1 Another fuel provider</td>
<td></td>
</tr>
<tr>
<td>Boilers</td>
<td></td>
<td></td>
<td>1 Another organization</td>
</tr>
<tr>
<td>Other gas equipment</td>
<td>1 No rebate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lighting controls</td>
<td>1 No rebate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Furnaces</td>
<td>1 Don't know</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>n=17</td>
<td>n=2</td>
<td>n=1</td>
</tr>
</tbody>
</table>

On a scale of zero to ten, where zero is not at all influential and ten is very influential, 11 of the 20 respondents who installed equipment outside of the program rated the Energy Initiative program as very influential (8 or higher) in their decision to install the additional equipment. Four respondents gave an influential rating of zero to the program. The average program influence was a 6.5 across all programs.

Figure 3-1. Program Influence on Purchasing Equipment

Respondents who installed equipment outside of the program were also asked to rate several factors that influence their equipment installation and purchasing habits on the same zero to ten scale. The two most highly rated factors were the energy savings from the equipment (mean of 9.0) and operating cost (mean of 8.9). Factors with the lowest ratings were the
recommendation of a contractor or supplier (mean of 6.4) and the compatibility with business
design and recommendations of others that had experience with the equipment (both with a
mean of 7.2). Although only rated by two respondents, large electric customers appear to
consider their existing equipment more in their purchasing decisions.

Table 3-30. Factors that Influence Participants’ Purchasing Decisions

<table>
<thead>
<tr>
<th>Factor</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy savings of equipment</td>
<td>9.1 (16)</td>
<td>8.0 (2)</td>
<td>10.0 (1)</td>
<td>9.0 (19)</td>
</tr>
<tr>
<td>Operating cost</td>
<td>8.8 (17)</td>
<td>8.5 (2)</td>
<td>10.0 (1)</td>
<td>8.9 (20)</td>
</tr>
<tr>
<td>Efficiency level of equipment</td>
<td>8.7 (17)</td>
<td>9.0 (2)</td>
<td>10.0 (1)</td>
<td>8.8 (20)</td>
</tr>
<tr>
<td>Initial purchase cost</td>
<td>8.6 (17)</td>
<td>7.5 (2)</td>
<td>10.0 (1)</td>
<td>8.6 (20)</td>
</tr>
<tr>
<td>Length of payback period</td>
<td>8.5 (17)</td>
<td>8.0 (2)</td>
<td>10.0 (1)</td>
<td>8.6 (20)</td>
</tr>
<tr>
<td>Rebate from utility or other source</td>
<td>8.9 (16)</td>
<td>7.0 (2)</td>
<td>5.0 (1)</td>
<td>8.5 (19)</td>
</tr>
<tr>
<td>Compatibility with existing equipment</td>
<td>7.5 (17)</td>
<td>9.5 (2)</td>
<td>5.0 (1)</td>
<td>7.6 (20)</td>
</tr>
<tr>
<td>Compatibility with business design</td>
<td>7.3 (16)</td>
<td>7.5 (2)</td>
<td>5.0 (1)</td>
<td>7.2 (19)</td>
</tr>
<tr>
<td>Recommendations of others that had experience with equipment</td>
<td>7.1 (15)</td>
<td>8.0 (2)</td>
<td>8.0 (1)</td>
<td>7.2 (18)</td>
</tr>
<tr>
<td>Recommendation of contractor or supplier</td>
<td>6.2 (16)</td>
<td>6.5 (2)</td>
<td>10.0 (1)</td>
<td>6.4 (19)</td>
</tr>
</tbody>
</table>

Nonparticipating respondents were asked the same question about the importance of
different factors that influence purchasing decisions. Just like the participants, the energy
savings of the equipment had the highest mean score. The compatibility with existing
equipment scored slightly higher for nonparticipants than for participants. The efficiency level
of the equipment score was similar across the participant and nonparticipant groups (8.8 and
8.6 respectively). Nonparticipants were less likely to give a high rating to recommendations
from contractors or suppliers as influencing their purchasing decisions. The availability of
financing was the lowest rated item for nonparticipants (mean of 6.0). Although this was the
lowest rated item among all participating customer classes in their decision making process,
both participating and nonparticipating customers may still utilize the financing if it were
offered, as indicated earlier. Large gas customers may be slightly more likely to consider the
length of the payback period when considering purchasing equipment giving it a mean rating
of 9.2, although this is based on 20 responses.

Table 3-31. Factors that Influence Nonparticipants Purchasing Decisions

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mean</td>
<td>N</td>
<td>Mean</td>
<td>N</td>
<td>Mean</td>
</tr>
<tr>
<td>Energy savings of equipment</td>
<td>8.9</td>
<td>20</td>
<td>7.5</td>
<td>6</td>
<td>8.4</td>
</tr>
<tr>
<td>Compatibility with existing equipment</td>
<td>8.7</td>
<td>20</td>
<td>9.8</td>
<td>6</td>
<td>8.4</td>
</tr>
<tr>
<td>Efficiency level of equipment</td>
<td>8.8</td>
<td>20</td>
<td>7.8</td>
<td>6</td>
<td>8.4</td>
</tr>
<tr>
<td>Operating cost</td>
<td>8.2</td>
<td>20</td>
<td>9.0</td>
<td>6</td>
<td>8.5</td>
</tr>
<tr>
<td>Length of payback period</td>
<td>8.4</td>
<td>20</td>
<td>8.8</td>
<td>6</td>
<td>7.0</td>
</tr>
<tr>
<td>Compatibility with business design</td>
<td>8.3</td>
<td>18</td>
<td>8.2</td>
<td>5</td>
<td>8.8</td>
</tr>
<tr>
<td>Initial purchase cost</td>
<td>7.9</td>
<td>20</td>
<td>7.8</td>
<td>6</td>
<td>9.3</td>
</tr>
<tr>
<td>Rebate from utility or other source</td>
<td>8.0</td>
<td>20</td>
<td>6.7</td>
<td>6</td>
<td>6.7</td>
</tr>
<tr>
<td>Recommendations of others that had experience with equipment</td>
<td>7.9</td>
<td>20</td>
<td>6.0</td>
<td>6</td>
<td>7.8</td>
</tr>
<tr>
<td>Recommendation of contractor or supplier</td>
<td>6.5</td>
<td>20</td>
<td>5.0</td>
<td>6</td>
<td>6.9</td>
</tr>
<tr>
<td>Availability of financing</td>
<td>6.4</td>
<td>19</td>
<td>2.6</td>
<td>5</td>
<td>6.4</td>
</tr>
</tbody>
</table>

Nonparticipants were also asked about recent equipment purchases of energy efficient equipment (purchases in the last two years). Over two-thirds (38 respondents out of 56) indicated they have made recent purchases with the majority of purchases being lighting and other electric equipment such as appliances or HVAC equipment.

Table 3-32. Recent Equipment Purchases from Nonparticipants

<table>
<thead>
<tr>
<th></th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lighting</td>
<td>6</td>
<td>1</td>
<td>4</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>Other electric equip</td>
<td>6</td>
<td>1</td>
<td>4</td>
<td>5</td>
<td>16</td>
</tr>
<tr>
<td>Motors / variable</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>13</td>
</tr>
<tr>
<td>Other gas equipment</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Boilers</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Water heater</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Lighting controls</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Electric process</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>n=15</td>
<td>n=2</td>
<td>n=6</td>
<td>n=15</td>
<td>n=38</td>
</tr>
</tbody>
</table>

As far as receiving rebates for installing the equipment, almost one-half of nonparticipants who installed lighting equipment did not receive a rebate for the equipment (9 out of 19). Five received a rebate from NYSERDA. The majority of the other electric equipment purchased in the last two years from nonparticipants did not receive a rebate for installing the equipment.
### Table 3-33. Rebates Received from Purchase of High-Efficiency Equipment in Last Two Years

<table>
<thead>
<tr>
<th>Category</th>
<th>Mid-sized Electric</th>
<th>Large Electric</th>
<th>Mid-sized Gas</th>
<th>Large Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lighting equipment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No rebate</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>9</td>
</tr>
<tr>
<td>National Grid</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>NYSERDA</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Another organization</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>3</td>
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4. SUMMARY AND RECOMMENDATIONS

Overall, the Energy Initiative programs worked as well as can be expected for the introductory year. Participating customers are satisfied with their experiences with the program and staffs are optimistic about the program gaining momentum for future years. National Grid will need to continue to address internal (marketing) and external barriers to the program including both market barriers and competition in the energy efficiency marketplace. In order to best do this, the evaluation team offers the following recommendations to consider that address some of the opportunities identified.

**Review other program administrators’ offerings to better position National Grid’s Energy Initiative programs.** To be able to ‘sell’ the Energy Initiative program, many staff feel they and trade allies need to understand the difference in programs and how to differentiate the National Grid Energy Initiative program. In addition, many staff reported that other program administrators offer more comprehensive offerings, more prescriptive offerings, and higher incentives. Many staff expressed the need for a review of all New York energy efficiency offerings to provide valuable information for improving National Grid’s offerings. Both participating and nonparticipating customers report confusion in offerings between the different entities. National Grid has recognized this need and has funded an additional research task as part of the overall process evaluation to review other program administrators’ commercial and industrial offerings in New York. The challenge will be to use this information to make program improvements and enhancements and keep program staff and partners abreast of the changes to the offerings and how best to position the Energy Initiative program.

**Explore the possibility of offering financing options (e.g., low interest loans).** The primary barrier to customers moving forward with energy efficient projects is the lack of capital. The incentive is essential to overcome this barrier, but a significant portion of interviewees (internal and external staff and participating and nonparticipating customers) also thought the Energy Initiative program would benefit from offering some type of financing to customers.

**Consider expanding the prescriptive offerings.** National Grid currently only offers lighting and compressed air measures as part of their prescriptive offerings; all others are run as custom projects. Given the ease of using prescriptive versus custom measures, both internal staff and contractors offered suggestions for expanding the prescriptive programs. Motors, VFDs, boilers and heat pumps were some suggestions for prescriptive measures. As program participation increases, the need for additional prescriptive offerings may be greater.

One recommendation is to roll the Commercial High-Efficiency Heating and Water heating to the Energy Initiative program as a prescriptive offering. By incorporating the program into a prescriptive offering within Energy Initiative, it may be a good introduction to gas projects that get customers thinking about energy efficiency and additional projects that could result in higher savings. If the Energy Initiative program included the Commercial High-Efficiency Heating and Water Heating program, we recommend the offering retain a straight-forward prescriptive track for the current Commercial High-Efficiency Heating and Water Heating program offerings in addition to a separate custom track that could allow more comprehensive measures to be installed.
4. Summary and Recommendations

*Continue to keep program processes as streamlined as possible and assess the need for internal process improvements.* The program’s streamlined application and rebate processing was mentioned as an important advantage of the program over other organizations’ programs. At the same time, there is some concern that the requirement of pre- and post-inspections for all projects, including prescriptive, is overly burdensome. In addition, external staff reported that depending on the type of project a customer has (custom vs. prescriptive), they are passed around among National Grid contacts.

*Continue internal program trainings and communications.* While internal staff’s experience and communication was reported as a program success, some internal staff did indicate a desire for more internal trainings such as field trips to observe measures and projects. In addition to training on sales techniques, internal staff felt providing tools and resources to Account Managers and CECs would be helpful. It was also reported by some that a clearer prioritization of program needs and actions is needed and should be communicated in weekly meetings. Since customers mention National Grid staff as a resource, it will be important to make sure they have the necessary information and tools to help customers make decisions. This will both increase customer satisfaction and move more customers through the program.

*Expand outreach to trade allies.* Staff reported that being available to trade allies allows projects to move forward in a timely manner. Keeping this one-on-one interaction allows for account managers and other National Grid staff to keep building trade ally relationships. ‘Relationship building’ was reported as a necessity with trade allies as they place the highest value on their customer relationship. Other reported barriers to trade ally participation is a lack of understanding of the program requirements and incentives. In general, trade allies said they like to receive program information via email, internet websites, and Energy Expos or conferences. On-site visits were also reported as helpful. Participating customers also report hearing about the programs from the contractors so it will be vital to keep growing the contractor base.

Also, as mentioned earlier, with different program administrator offering options for energy efficiency programs, there has been confusion among customers about the programs available, who is offering them, and which is the best fit for their business. Customers report that the confusion was typically resolved by reviewing paperwork for the different programs and talking with different people and asking questions. It will be important for trade allies to be kept aware of the different options and any changes made to the programs to be able to answer customer questions.

*Continue improvements to the InDemand system to capture valuable program information and streamline data entry.* A designated internal staff person collects feedback on InDemand from those working with it in the field and prioritizes improvements needed to support the program. For example, at the time of interviews, a feature was being added to track customer leads (as opposed to just participants) through InDemand. Another identified improvement mentioned in interviews was the need to have the system look the same for both gas and electric offerings. Staff thought this improvement would allow for more timely and accurate input of application data. The InDemand system is seen as a good tool to have all information recorded centrally and accessible throughout National Grid. Additionally, some interviewees would like the InDemand system to tie in with the customer information system to automatically populate certain information such as address.
4. Summary and Recommendations.

**Increase and tailor the marketing of the programs.** The Energy Initiative programs did not meet their participation targets in 2010. Staff interviews indicate the need for an expanded and targeted marketing approach. Most staff would also like more marketing collateral and tools to use with customers to demonstrate how they would benefit (e.g., by doing X, you will be able to reduce your bottom line by Y). Staff are also in favor of specific case studies showing real life examples of the work that was done, the available incentives, and what the savings were. While labor intensive, many interviewees said cold calling and on-site visits are the most effective way to reach customers. As discussed above, the other most effective mean reported was working through trade allies. Customers who have not participated in the program also indicate they research National Grid’s website for information, so making sure this information is readily available may increase the likelihood of customers’ awareness and use of the program. One big barrier the program faced in 2010 was lack of awareness of the programs so the more that can be done to get the word out about the programs, the more likely customers will be to utilize the program.

Compared to the initial marketing material used to promote the program, in 2011, National Grid launched an aggressive marketing campaign to promote the Energy Initiative programs. The campaign included direct mail, website banner ads, and articles in newsletters. Additional strategies included email blasts to customers and trade allies and telemarketing. Some specific activities performed in 2011 included:

- Paid search campaign including placing ads on various websites that business owners visit (March 2011 – June 2011)
- Hosting the Upstate New York Energy Efficiency Conference and Expo (April 7, 2011 in Verona, New York), an event geared towards commercial customers from Buffalo to Albany interested in implementing energy efficiency measures in their business operations
- Marketing effort geared towards engaging trade allies in promoting National Grid’s energy efficiency programs, including trainings on the programs, new technologies (the Energy Solutions Partner program)
- Breakfast seminars for large industrial customers, in Syracuse and Albany, where combustion controls, thermal blanket insulation and steam systems were discussed.

The additional marketing efforts may have been effective in increasing participation. Program savings targets for 2011 were exceeded for the Large Industrial Electric program (188 percent), the Mid-sized Electric program (180 percent) and the Large Industrial Gas program (344 percent). Savings targets for the Mid-sized Gas program achieved 73 percent of target.

**Review the adequacy of engineering study incentives.** External staff mentioned that the 50 percent program funding of the engineering study may not be enough. “Customers have a hard time spending money on a study when they are unsure what the outcome is going to be.” Supporting the need for setting an appropriate incentive for engineering studies, nonparticipating customers who received technical assistance indicated they were interested in the review because it was available at a discounted rate (mentioned by 4 out of 11 respondents).
4. Summary and Recommendations...

*Review incentive levels and payback periods.* Respondents who received technical assistance but did not install equipment indicated that increasing incentive levels and decreasing payback periods will increase their likelihood of installing the recommended equipment. Incentive levels also had the lowest satisfaction rating among participating customers.
APPENDIX A: NONRESPONDENT APPROVAL LETTER

STATE OF NEW YORK DEPARTMENT OF PUBLIC SERVICE
THREE EMPIRE STATE PLAZA, ALBANY, NY 12223-1350
www.dps.state.ny.us

PUBLIC SERVICE COMMISSION
GARRY A. BROWN
Chairman
PATRICIA L. ACAMPORA
MAUREEN F. HARRIS
ROBERT E. CURRY JR.
JAMES L. LAROCCA
Commissioners

PETER McGOWAN
General Counsel
JACLYN A. BRILLING
Secretary

May 1, 2011

Via E-Mail
Evaluation Advisory Group

Dear Sir/Madam:

On June 12, 2009, I wrote to you to provide guidance for the proper collection and handling of customer energy consumption data for EEPS/SBC program evaluation purposes. The Customer Data Guidelines (guidelines) were developed to clarify the process for maintaining the confidentiality of customer data and specifically addressed customer energy consumption data that would be analyzed to estimate the energy savings resulting from EEPS/SBC programs.

In response to concerns expressed by EEPS/SBC program administrators and the Evaluation Advisory Group, Staff revised these guidelines to allow utilities administering EEPS programs to provide program non-participant contact information to their evaluation contractors under specific circumstances and restrictions. Data from non-participants can help us to more fully understand a program’s strengths and weaknesses including insights into why some customers chose not participate. This type of information can play an important role in achieving the Commission objective of reliable and rigorous evaluation, and providing results that can lead to better and more cost effective programs.

The revised guidelines are attached. If you have any comments or questions, please contact Bill Saxonis at william_saxonis@dps.state.ny.us or 518-486-1610.

Sincerely,
Floyd E. Barwig
Director
Office of Energy Efficiency and the Environment

Customer Data Guidelines

Analyzing utility customer energy consumption data is often a cost effective approach for documenting energy savings from System Benefits Charge (SBC), Energy Efficiency Portfolio Standard (EEPS), and other Commission-approved energy efficiency programs. Customer energy consumption data is collected before and after energy actions are implemented and statistically analyzed (e.g., adjusted for variables such as weather) to produce estimates of energy savings. This approach can provide valuable data at a lower cost than site visits or end use metering. While customer data may facilitate rigorous and cost effective evaluation, priority must be given to protecting the consumer’s privacy and data.

Staff has developed guidelines for securing customer consent and maintaining confidentiality of customer data. These guidelines should be followed by program administrators and their evaluation contractors seeking access to customer energy consumption data.

Customer Consent Form

To ensure that the customer knowingly agrees to disclose his/her confidential data, the program administrator should furnish to program participants a form authorizing the release of certain specifically enumerated customer data to the program administrator and, if applicable, the evaluation contractor. The availability of customer data must be limited to the minimum data necessary to conduct the evaluation, consistent with evaluation guidelines approved by DPS evaluation Staff. This data could include consumption data, but may not include payment histories. A customer signature or the equivalent (i.e., an electronic signature) is required. The consent form should explain that the data will be used only for program evaluation purposes, confidentiality will be strictly protected, and results will only be reported in the aggregate. The customer consent language should be displayed prominently, directly above the customer’s acceptance signature, if possible. The consent form should be included as part of the program application material.

To further facilitate the evaluation process, the consent form should also include language requiring program participants to agree to cooperate with activities designed to evaluate program effectiveness, such as responding to questionnaires and allowing on-site inspection and measurement of installed program supported measures.

Utility-Evaluator Confidentiality Agreement

Program evaluators contracted by an EEPS or SBC program administrator must sign an agreement with the utility providing the data that states that they will keep customer information, including energy consumption data, confidential at all times. The agreement must specify how the data will be used and reported and explain the process for disposing of the data at the conclusion of the evaluation project. Program evaluator agreements should be submitted as part of the evaluation plans approved by Staff. Key components of the agreement must include:
1) The contractor will maintain the confidentiality of all customer data;

2) All customer information provided to the contractor will be used solely to evaluate energy efficiency programs consistent with the agreement;

3) Customer information will be safeguarded from unauthorized disclosure with all reasonable care;

4) At the conclusion of the evaluation project, or if the program administrator and evaluator end their business relationship, the evaluator will return to the utility all customer information (including any data or analyses generated from the data) and/or provide proof to the utility that the data was destroyed;

5) If the program evaluator and/or the program administrator is affiliated with or doing work for any retail energy business interest, then the program evaluator must provide specific details on the program evaluator’s internal security arrangements that will keep the customer data secure from employees involved in unregulated retail energy business related activities in the service territory from which the data was extracted; and

6) Each program evaluator that receives customer information must agree to indemnify the providing utility from any and all harm that may result from the inappropriate release of customer information by the program evaluator or its representatives.

Non-Participant Customer Information

Analysis of program non-participant energy consumption data can play a key role as a control against which to measure the participant group results, including helping to identify naturally occurring energy efficiency. In other cases, non-participants may be surveyed to more fully understand a program’s strengths and weaknesses. The evaluator would need to clearly articulate and justify the need for and uses of the data to the customer’s utility and Staff.

The Department recognizes that obtaining consent forms from non-participants could be a burden on program administrators. To facilitate quality evaluations and ensure that evaluations are implemented in a cost effective manner, the exchange of personally identifiable information, defined as information that is capable of directly identifying an individual, for non-participants between a utility and its evaluation contractor will be permissible under the circumstances and restrictions described here. When an approved evaluation plan calls for analysis of non-participant energy consumption, the information shall be redacted by the customer’s utility to remove all personally identifiable information and only provide consumption information identified by generalized category such as service class, customer type (e.g., single family) or location (e.g., Manhattan). In instances when, after the redacting process, a customer might still be identifiable (e.g., the customer is the single large industrial customer in a small service territory), the utility should seek customer consent for inclusion of the information in the evaluation process through a signed customer consent form or exclude the information from the evaluation process.

For evaluation surveys requiring personally identifiable customer information, the utility may provide such information to its contractors without a consent form provided the following requirements are met. The evaluation contractor must demonstrate to the
A: Nonrespondent Approval Letter . . .

providing utility that the information is needed to complete the specific evaluation survey for which it is requested. The evaluation contractor must also demonstrate that the information sought is the least amount necessary, both in terms of number of customers and level of detail for each customer, to complete the relevant evaluation survey. Finally, the data shall be made available pursuant to a written confidentiality agreement, including all the provisions described above.

Information to be provided by a utility without prior customer consent should never include payment history or detailed usage history. Usage history, if provided at all, shall be limited to general categories of usage (e.g. commercial customers using over 100 kW) and shall only be provided when necessary to ensure evaluation surveys are sufficiently targeted. Details of the customer information that will be provided to program evaluators, including the exact type of information, the type of evaluation survey for which it will be used, sample sizes and sampling techniques shall be contained in the evaluation plans approved by Staff.

If a customer, whose personally identifiable information has been provided to an evaluation contractor without prior written consent, indicates that he/she is unwilling to participate in evaluation activities, or otherwise wishes not to be contacted in relation to program evaluation, the evaluation contractor must report such to the utility within a reasonable time. The utility will compile and maintain a “do not contact” list and refrain from including any customers on that list in future evaluation activities.
APPENDIX B: PROGRAM STAFF INTERVIEW GUIDE

B.1 NEW YORK UPSTATE ENERGY INITIATIVE PROGRAM STAFF INTERVIEW GUIDE – NATIONAL GRID STAFF SURVEY

Note: This semi-structured interview guide is for interviews with National Grid staff other than program managers—technical staff, Energy Efficiency Consultants (EEC), account executives and Business Development staff. There are varying degrees to which the positions work with the program. Interviewees will be asked questions as applicable to their interaction with the program.

Roles and Responsibilities

1. Could you please describe your position within National Grid?

Role in Program and Background Information

2. What types of services do you provide?

3. What is your role in relation to commercial and industrial (C&I) energy efficiency programs (CEEP/Industrial) and the Energy Initiative (EI) Program specifically? What percentage of your time is devoted to working with these programs compared to your regular/normal account management responsibilities?

4. Do you have experience providing services to C&I customers in the past or in other states?

5. Which programs are you working with National Grid on delivering? Probe if involved in SBS?

6. When did you become involved with the [programs named by respondent]?

7. Could you tell me if you are familiar with the goals of this/these programs and how you help to meet these goals?

8. Who do you regularly work with regarding the National Grid EI programs? Probe about interaction with other National Grid staff, third-party technical vendors and trade allies.

9. How would you describe your working relationship with these staff? What are their roles? Probe for:
   i. number of people
   ii. their position
   iii. their responsibilities
   iv. communications and coordination
   v. information/training

10. What training/information have you received to prepare you for this job? What additional training/information do you think would be useful or help you improve?
Customer Outreach and Interactions

11. Do you feel you have a clear idea of the program's target market and how to reach this market? What activities have you been doing to promote the program?

12. What type of customers do you think are the best target for the program (business type, size, profit/non-profit)? Why?
   a. How do you identify and market to target customers?
   b. How effective do you feel your marketing efforts have been in reaching different types of target C&I customers? (If “not effective”) What barriers have inhibited you from effectively reaching those customers?
   c. What do you think would be the "ideal" way to market this program to customers? Why?

13. In what capacity do you interact with customers (i.e. field complaints, requests, questions, outreach, technical assistance, etc.)?

14. What parties do you work with that are involved in administering and/or serving customers through the program? (Probe for account reps, trade allies, third-party contractors, etc.) Interviewer note: specific questions for trade ally interactions are below for staff who work with trade allies

15. What are frequent questions or concerns you receive about the program from your customers? How do you address these? What do you see as the primary barriers to customer participation? What messages do you feel are most successful in encouraging customers to move forward with program participation? What other funding sources impact participation (NYSERDA, ARRA, stimulus, etc)

16. How do you communicate with customers? Do you use emails, collateral/marketing materials or anything else when dealing with customers? Do you direct them to any websites? Which method do you think is most effective?

17. Do customers understand the purpose of the program and who is sponsoring it? Is there any confusion with other energy efficiency programs and sponsors in New York? If so, how do you address this confusion?

18. Are there any internal confusion or coordination issues with other National Grid programs (e.g., CEEP/Industrial, EI, Multifamily, SBS, and Com HeHe)? What internal synergies are there with other National Grid programs?

19. What percent of customers are not interested in participating in the program? What are the main reasons they choose not to participate? Probe: are there external factors (e.g., the economy) holding customers back?

20. What feedback have you received from customers about the program?

21. How does the program incentive affect customer decisions regarding choosing efficient equipment and/or participating in the program? Do you have to switch from prescriptive to custom work to win a project?

22. In your opinion, are customers aware of the energy savings and bill reductions that will stem from the program? Payback time frame? How about available incentives and rebates? What are their sources for this type of information? Are there differences in
how the paybacks are set?

23. In your opinion, are the bill reductions, payback periods, and incentives viewed as sufficient by a significant fraction of customers?

24. [If Upstate] What is the level of customer interest in energy bill financing, if any? Why do you say that? Should it be offered? (This question is included because of EI mid-size overlap with SBS)

25. Do you feel you have a clear idea of the program’s target markets and how to reach these markets? What activities have you been doing to promote the program?

[Downstate] Probe for New York City vs. Long Island and commercial vs. industrial customers.

[Upstate] Probe for the dual fuel / single fuel territory differences.

Trade Ally Outreach and Interactions

26. In what capacity do you interact with trade allies (i.e. field complaints, requests, questions, outreach, technical assistance, etc.)? How does this differ by gas EI and electric EI?

27. What are frequent questions or concerns you receive about the program from trade allies? What do you see as the primary barriers to trade ally participation?

28. How do you communicate with trade allies? Which method do you think is most effective?

29. What kind of training and information do you provide trade allies? Are there information/training gaps that you see?

30. Are there any trade ally confusion or coordination issues with other National Grid programs? Other energy efficiency programs in New York? Are there synergies with other National Grid programs or other New York energy efficiency programs?

31. What percent of trade allies are not interested in participating in the program? What are the main reasons they choose not to participate?

32. What feedback have you received from trade allies about the program?

Satisfaction with Program

33. Overall, how satisfied do you feel customers and trade allies are with the program? Why do you think that is the case?

34. What do you feel are the major strengths and weaknesses of the program?

35. How could the program be more effective? What other program improvements would you suggest?

36. How is the program doing toward goal in 2010? How well do you think the program will do in 2011?

[Downstate] Probe for New York City vs. Long Island and commercial vs. industrial customers.
37. What are the biggest challenges that the program faces? What can be done to overcome these challenges?

38. If you could change one thing about the program, what would it be? Probe for items that need to be changed for the 2012-2015 filing (what don’t they want to stick with, what tools need to be included, etc.)
APPENDIX C: PARTICIPANT CUSTOMER SURVEY

National Grid
New York Energy Initiative and Downstate C&I
Commercial High-Efficiency Heating and Water Heating
Process Evaluation for Large and Mid-sized Commercial Customers
Participant and Nonparticipant Survey

Key Research Questions:

- **Customer Awareness and Marketing**
  - How is the program promotion working? What improvements can be made?
  - What are the differences by sector and by size of customer? What tools are most effective?
  - How does the program's promotion coordinate with the other National Grid programs and other organization's programs in New York? Does the overlap with other internal and external programs help or hinder the success of these programs?
  - What marketing and outreach efforts are most successful in generating customer leads?

- **Ease of Participation/Administrative Processes**
  - What are the characteristics of the participating customer population and how does that compare to the eligible population? Are there any groups not reached by the program?
  - Who was the customer’s initial point of contact for program information? Were they knowledgeable about the program?
  - Are program requirements clearly understood? Are the procedures for application and rebates easy to follow?
  - Was the application and rebate processed in a timely manner? If received an audit or technical study, was the turnaround time acceptable?
  - What barriers exist for customers' participation in the program?
  - Is there confusion between National Grid's programs and NYSERDA's programs?

- **Program Satisfaction**
  - How is the program working? What enhancements are needed in the design and delivery of the program?
  - Are customers satisfied with the program? What specific program components have the most and least customer satisfaction?
  - What do customers and trade allies believe could be offered to improve program services?
  - Does participation affect participants' perception of the utility and, if so, how?

- **Customer Characteristics and Decision Making Processes**
  - Which measures have been installed and what type of equipment did it replace? How are they accepted and valued by the customer?
  - Do measures remain installed and, if not, why not?
  - Why do customers decide not to install measures after receiving technical assistance?
Did the technical assistance provide information which prompted important energy savings projects? How important was the technical assistance in their decision to participate? Who provided the technical assistance and were they knowledgeable?

Was the program incentive adequate? Were other program incentives available from National Grid or from other entities for the same measures or equipment?

**Program Performance Indicators**

Is the program delivering the intended benefits to participants and are they achieving planned energy impacts?

Is the appropriate information being collected to support future evaluation activities (i.e., impact evaluation)?

Are there differences in participation by technology? If so, what is driving those differences?

If the sample is available, this questionnaire will be used to interview five different groups of customers:

1. **Unaware Nonparticipants.** Those who were contacted by National Grid staff but may not recall hearing about the program.
2. **Aware Nonparticipants.** Those who heard of program but have not utilized the program (did not receive technical assistance, did not install equipment).
3. **TA Participants.** Those who received some form of technical assistance but installed no equipment.
4. **Full Other Participants.** Those who completed a project through another program.
5. **Full NGRID Participants.** Those who installed measures with National Grid, with or without technical assistance.
C1 Hello, my name is [interviewer name], and I'm calling on behalf of National Grid. May I speak with [named respondent]?

1 Yes
2 No [If named respondent is not available: ask for another person who is familiar with the business’ energy use.]

Prompts if needed:
[I'm not selling anything, I'd just like to ask you some questions about your experience with the [PROGRAM] offered by National Grid. I'd like to assure you that your responses will be kept confidential and your name will not be revealed to anyone. For quality and training purposes this call will be recorded.]

[Why are you conducting this study: Studies like this help National Grid better understand customer satisfaction with, and need for, energy efficiency programs.]

[Timing: This survey should take approximately 20 minutes of your time. Is this a good time for us to speak with you? IF NOT, SET UP CALL BACK APPOINTMENT OR OFFER TO LET THEM CALL US BACK AT 1-800-454-5070]

[Sales concern: I am not selling anything. This information will help National Grid best design and deliver energy efficiency programs to assist commercial and industrial customers. Your responses will be kept confidential by our firm. If you would like to talk with someone about this study, feel free to call Melissa Piper of National Grid at (315) 428-5002]

C2 I'm with Tetra Tech, an independent research firm. We are speaking with businesses about the [PROGRAM] program offered to commercial/industrial customers by National Grid.

Through the [Program], business customers are offered prescriptive and custom incentives to help purchase and install energy efficient equipment and systems for their facilities.

According to our records, your business/facility [BUSINESS NAME] at [ADDRESS] in [CITY] …

Installed equipment through the program.

Is this information correct?

1 Yes [SKIP TO INTRO2]
2 No
8 Don’t know
C3  Is it possible that someone else in your business would be familiar with the [program name] program, the technical assistance, audit, engineering study or the equipment that was installed?

1  Yes
2  No  [THANK AND TERMINATE]
8  Don’t know  [THANK AND TERMINATE]

C4  May I please speak with that person?

1  Yes  [BEGIN THE SURVEY AGAIN [C2] WITH NEW R]
2  No  [THANK AND TERMINATE]
8  Don’t know  [THANK AND TERMINATE]

INTRO2:
[if needed: I’m with Tetra Tech, an independent research firm.]

First, I’d like to assure you that I’m not selling anything. You may remember receiving a letter explaining the purpose of this call. We are talking to National Grid customers to understand their views on energy efficiency and participation in National Grid’s energy efficiency programs. The results of the survey will be used to make improvements to the programs that National Grid offers in the state of New York. Your responses will be kept confidential. For quality and training purposes this call will be recorded.

[IF PARTICIPANT OR RECEIVED TECHNICAL ASSISTANCE] I’d just like to ask you some questions about your experience with the [program name] program offered by National Grid. The information you provide will help National Grid to improve its programs.
C5  Please tell me which of the following best describes your status in regards to the [PROGRAM] program?

1  Never been contacted or have ever heard of program
2  Heard of program but have only talked with an account manager or other National Grid staff
3  No equipment installed, received technical assistance
4  Installed equipment AND received technical assistance
5  Installed equipment, have NOT received technical assistance
6  No project with National Grid, completed through another program outside of National Grid

Unaware Nonparticipant: C5 = 1
Aware Nonparticipant: C5 = 2
TA Participant: C5 = 3
Full Other Participants: C5 = 6
Full National Grid Participants: C5 = 4, 5
Commercial HeHe (C5=5)

C6  [if C5 > 2] Were you involved in the decision of whether or not to participate in making [this/these] energy saving improvements to this facility?

[if C5 = 1 or 2] Are you involved in the decision of whether or not to participate in making energy saving improvements at your facility?

1  Yes
2  No
8  Don’t know

C7  [if C5 > 2] Who else within your company or outside your company was involved in the decision-making process of whether or not to participate?

(PROBE: IF MORE THAN ONE DECISION MAKER, ASK R WHO WAS RESPONSIBLE FOR MAKING THE ULTIMATE DECISION)

[if C5 = 1 or 2] Who else within your company or outside your company is involved in the decision-making process of whether or not to participate in energy-saving programs?

1  No one else
2  (SPECIFY):

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone number</th>
<th>Probe for role</th>
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### A1 [if C5 > 1] How did you hear about the [program name] Program?

*DO NOT READ; SELECT ALL THAT APPLY* (Probe: Anywhere else?)

1. National Grid Account manager
2. National Grid call center – Business Solutions Center (BSC)
3. National Grid staff (other than account manager or BSC)
4. National Grid utility bill insert
5. National Grid email newsletter
6. National Grid website
7. Direct mailing from National Grid
8. From participation in another National Grid program *[SPECIFY PROGRAM]*
9. Contractor, independent (e.g., lighting contractor) *(SPECIFY)*
10. Contractor hired by National Grid (e.g. RISE, ERS etc) *(SPECIFY)*
11. Conference/trade show/expo
12. Chamber of Commerce meeting or newsletter
13. Newspaper
14. Radio
15. Television
16. Friend/business person *(Probe: Did this friend/business person also participate in the program?)*
17. Haven't heard of it before this survey
18. Other *[SPECIFY]*

### A2 [if aware: C5>1] Are you aware of other National Grid energy efficiency programs offered to commercial and industrial customers in the state of New York?

*[if not aware: C5 = 1]* Are you aware of any National Grid energy efficiency programs offered to commercial and industrial customers in the state of New York?

1. Yes (Which ones?)
2. No  [SKIP TO PP0]

### A3 Have you participated in any other energy-efficiency programs offered by National Grid?

1. Yes [Which programs? Small Business, Comm HeHe, Other (specify)]
2. No     [SKIP TO A5]
3. Don’t know  [SKIP TO A5]

### A4 [if aware: C5 > 1] In your opinion, how does the [program name] program compare to other National Grid programs in which you’ve participated?

*RECORD VERBATIM RESPONSE*
C: Participant Customer Survey...

A5  [EI only] [if aware: C5>1] Did you consider participating in a different National Grid program for this project?

1   Yes
2   No   [SKIP TO PP0]

A5a [EI only] Which other National Grid programs did you consider participating in?

[RECORD VERBATIM RESPONSE]

A6  [EI only] [NG participants C5 = 4, 5] What was the main reason for choosing the [program name] program over [fill with A5a]?

[RECORD VERBATIM RESPONSE]

Program Participation (TA participants and full National Grid participants and unaware nonparticipants)

If (C5 <> 2,3,4) SKIP TO IF2
If (C5=5) SKIP TO PP15

PP0  [if C5 =3,4] What level of technical assistance from National Grid did your business receive through the [program name] program? (READ LIST; Select all that apply)

1   [DO NOT READ] Did not receive any form of technical assistance [SKIP TO PP4]
2   Walk-through energy audit (a walk-through and report)
3   Engineering study (a full study of a facility to identify energy-savings measures and project savings)
4   Custom audit (engineering analysis to determine therm savings)
5   Custom review (when a previously completed study by a different engineering firm is reviewed)
8   Don’t know [SKIP TO PP4]

PP1  [if C5 =3,4] Did they look at the entire building or only certain equipment? (Select one)

1   The entire facility
2   Only certain equipment (specify-What equipment? Lighting equipment, lighting controls, electric motors, electric process measures, other)
8   Don’t know

PP2  [if C5 = 3,4] What is the main reason your company was interested in receiving technical assistance through the [program name] program? [DO NOT READ; SELECT ONLY ONE]

1  Wasn’t interested--someone approached us about it
2  Looking for ways to reduce operating/energy costs
3  Wanted to know what we could do to save energy
4  It was available at a discounted rate through the program
5  I like to take advantage of National Grid program offers
6  Needed the work done anyway/already planned it (technical assistance required for incentive)
7  Other [SPECIFY]
8  Don’t know

PP3  [if C5 = 3,4] What are other reasons your company was interested in receiving technical assistance through the [program name] program? [DO NOT READ; SELECT ALL THAT APPLY]

1  Wasn’t interested--someone approached us about it
2  Looking for ways to reduce operating/energy costs
3  Wanted to know what we could do to save energy
4  It was available at a discounted rate through the program
5  I like to take advantage of National Grid program offers
6  Needed the work done anyway/already planned it (technical assistance required for incentive)
7  Other [SPECIFY]
8  No other reasons

PP4  (If C5 = 3,4) What is the main reason your company [IF INSTALLED EQUIPMENT:] was interested in [IF TECHNICAL ASSISTANCE ONLY:] was considering obtaining energy-saving equipment through the [program name] program? [DO NOT READ; SELECT ONE]

1  Wasn’t interested--someone approached us about it
2  Wanted to reduce operating/energy costs
3  The equipment and installation was incentivized
4  I like to take advantage of National Grid offers
5  Needed the work done anyway/already planned it
6  Other [SPECIFY]

PP5  (If C5 = 3,4) What were other reasons your company [IF INSTALLED EQUIPMENT:] was interested in [IF TECHNICAL ASSISTANCE ONLY:] was considering obtaining energy-saving equipment through the [program name] program? [DO NOT READ; SELECT ALL THAT APPLY]

1 Wasn't interested--someone approached us about it
2 Wanted to reduce operating/energy costs
3 The equipment and installation was incentivized
4 I like to take advantage of National Grid offers
5 Needed the work done anyway/already planned it
6 Other [SPECIFY]
7 No other reasons

PP6 [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3 or 4] The program representative who visited your site presented your company with a report about the energy savings and incentives you could expect to receive from National Grid by installing the recommended measures. Do you recall seeing this report?

1 Yes
2 No [SKIP TO PP11]
8 Don’t know [SKIP TO PP11]

PP7 [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3 or 4] Part of the report included information on how much energy savings there would be based on the new equipment. Do you recall seeing the energy savings estimate?

1 Yes
2 No [SKIP TO PP9]
8 Don’t know [SKIP TO PP9]

PP8 [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3 or 4] Was the estimate of energy savings higher than you expected, about what you expected, or lower than what you expected?

1 Higher than expected
2 About what I expected
3 Lower than expected
8 Don’t know

PP9 [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3 or 4] Another part of the report detailed the eligible incentives for the new equipment. Do you recall seeing the incentives estimate?

1 Yes
2 No [SKIP TO PP11]
8 Don’t know [SKIP TO PP11]
**PP10**  [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3 or 4] Were the eligible incentives from National Grid higher than you expected, about what you expected, or lower than what you expected?

1. Higher than expected  
2. About what I expected  
3. Lower than expected  
8. Don’t know

**PP11**  [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3 or 4] On a 0 to 10 scale, with 0 being not at all important and 10 being very important, how important was the technical assistance in your decision to participate in the National Grid program?

_____ 0 to 10  
55. Technical assistance was required  
88. Don’t know  
99. Refused

**PP12**  [IF C5 = 2,3] What is the main reason you have not installed any energy-efficient equipment through the program at this time?  

[DO NOT READ; SELECT ONLY ONE]

1. Your experience with the representative responsible for the technical assistance [SPECIFY]  
2. The type of equipment recommended  
3. The estimated energy savings from the recommended equipment was too small  
4. Don’t trust that we will see the estimated energy savings from the recommended equipment  
5. Potential disruption to our business  
6. The internal approval process for the funding of the contribution  
7. Don’t feel savings justify cost  
8. Have had problems with energy-efficient equipment in the past  
9. Found the [technical assistance] report hard to understand  
10. The rebate available from the utility was too small  
11. Payback period too long  
12. Installed through a different program  
13. State of the economy  
14. Other reason [SPECIFY]
C: Participant Customer Survey...

PP13 [IF C5 = 2,3] Are there any other reasons you have not installed any energy-efficient equipment through the program at this time? [DO NOT READ; SELECT ALL THAT APPLY]

0 No other reasons
1 Your experience with the representative responsible for the technical assistance [SPECIFY]
2 The type of equipment recommended
3 The estimated energy savings from the recommended equipment was too small
4 Don’t trust that we will see the estimated energy savings from the recommended equipment
5 Potential disruption to our business
6 The internal approval process for the funding of the contribution
7 Don’t feel savings justify cost
8 Have had problems with energy-efficient equipment in the past
9 Found the [technical assistance] report hard to understand
10 The rebate available from the utility was too small
11 Payback period too long
12 Installed through a different program
13 State of the economy
14 Other reason [SPECIFY]

PP14 [IF C5 = 2,3] What could National Grid or the program have done to increase the likelihood that you would install the recommended equipment?

[RECORD VERBATIM RESPONSE]

PP15 [ONLY IF INSTALLED EQUIPMENT C5 = 4, 5] Has anyone conducted any follow-up visits or quality control checks on the equipment installed in your business?

1 Yes
2 No [SKIP TO IF2]
8 Don’t know [SKIP TO IF2]

PP15A Who conducted these follow-up visits or quality control checks?

Was it a...[READ]

1 National Grid staff member
2 Contractor hired by National Grid (e.g., RISE, ERS, etc.)
3 Independent contractor
4 Other [SPECIFY]
PP16  [*ONLY IF INSTALLED EQUIPMENT C5 = 4, 5*] Were you satisfied with the follow-up visit or quality control process?

1  Yes  [PROBE: Why?]
2  No   [PROBE: Why not?]
8  Don’t know

---

**Program Incentives and Financing (all)**

**IF2** These next few questions ask about the customers’ portion of the cost and available financing.

**IF2a**  [FOR CUSTOM PROJECTS] Do you think that National Grid’s [program name] program requirement that your company pay at least 50 percent of the project cost is appropriate?

1  Yes [PROBE: Why do you say that?] [ SKIP TO IF4]
2  No  [PROBE: Why do you say that?]
8  Don’t know  [ SKIP TO IF4]

**IF3**  [FOR CUSTOM PROJECTS; if IF2a = 2] Assuming a customer contribution is required, what percent of the project cost do you think would be appropriate to ask customers to contribute?

_____ Percent of cost
888  Don’t know
999  Refused

**IF4** If the utility was able to provide financing at below market interest rate that could be repaid through your [EI: electric or gas; CI: gas; ComHeHe: gas] bill to cover your part of project costs, would your business use this financing?

1  Yes  [SKIP TO IF5]
2  No
3  Depends  [SKIP TO IF4b]

**IF4a** Why not?

[RECORD VERBATIM RESPONSE] SKIP TO IF5

**IF4b** What does it depend on?

[RECORD VERBATIM RESPONSE]
IF5  If the utility was able to arrange for financing at below market interest rate through a third party, would your business use this financing to pay your part of the project cost?

1  Yes  [SKIP TO SAT1]
2  No
3  Depends  [SKIP TO IF5b]

IF5a  Why not?

[RECORD VERBATIM RESPONSE] SKIP TO SAT1

IF5b  What does it depend on?

[RECORD VERBATIM RESPONSE]

Satisfaction with Program (TA participants and Full National Grid participants)

IF (C5 <> 3,4,5) SKIP TO O1

SAT1  [if C5 = 3, 4, 5] Overall, how satisfied are you with your experiences with the [program name] Program to date? Are you.? [READ LIST]

1  Very dissatisfied
2  Somewhat dissatisfied
3  Neither dissatisfied nor satisfied
4  Somewhat satisfied
5  Very satisfied
8  Don’t know  [SKIP TO SAT2]

SAT1a  Why do you say that?

[RECORD VERBATIM RESPONSE]
SAT2 For the following questions, I'd like you to tell me how satisfied you are with each aspect of the services you received through the [program name] Program so far. On a scale of 0 to 10, with 0 being "Not at All Satisfied" and 10 being "Very Satisfied," how satisfied were you with the?

[programming note: need an NA option for those statements that may not apply]

[RECORD RESPONSE. IF ANSWER < 5, PROBE WITH: Why do you say that?]

a. [IF RECEIVED TA, PP0=2, 3, 4, 5] Promptness of the audit or inspection of your old equipment
b. [IF RECEIVED TA, PP0=2, 3, 4, 5] Quality of the audit
c. [IF RECEIVED TA, PP0=3] Promptness of the engineering study
d. [IF RECEIVED TA, PP0=3] Quality of the engineering study
e. [C5=3, 4, 5] Type/variety of equipment eligible for the program
f. [C5=3, 4, 5] The way National Grid or [trade ally] handled your questions
g. [C5=3, 4, 5] The amount of incentive available from National Grid
h. [C5=3, 4, 5] Usefulness of information provided about the program

[ONLY IF INSTALLED EQUIPMENT]

i. [IF INSTALLED EQUIPMENT, C5=4, 5] Quality of work of the person who installed your equipment
j. [IF INSTALLED EQUIPMENT, C5=4, 5] The equipment installed
k. [IF INSTALLED EQUIPMENT, C5=4, 5] Rebate application process
l. [IF INSTALLED EQUIPMENT, C5=4, 5] Length of time it took to get a rebate check
m. [IF INSTALLED EQUIPMENT, C5=4, 5] [IF PP15 = 2 OR DK, SKIP] Inspection of the installation by a utility representative

SAT3 Which features of the program, if any, would you change? [DO NOT READ; SELECT ALL THAT APPLY] [PROBE: Is there anything else you would change?]

1. Wouldn't change anything/keep program as is
2. More oversight/quality control of installation
3. Improve quality of equipment
4. Conduct technical assistance quicker
5. Provide more direct utility involvement
6. Include measures at no cost
7. Include more measures or equipment through the program
8. Provide a more comprehensive audit
9. Provide technical assistance at no cost
10. More helpful/responsive program staff
11. Increase amount of rebate
12. Offer financing options
13. More advertising of program
14. Other [please describe]
SAT4  What other energy efficiency equipment measures do you feel should have been recommended and installed through the program?

[RECORD VERBATIM RESPONSE]

SAT5  As a result of your involvement with the [program name] Program, would you say you are more satisfied, just as satisfied, or less satisfied with National Grid as your energy provider?

1  More satisfied
2  Just as satisfied
3  Less satisfied
8  Don't know   [SKIP TO SAT7]

SAT6  Why do you say that?

[RECORD VERBATIM RESPONSE]

SAT7  Have you recommended the program to others?

1  Yes
2  No
8  Don't know

Decision-Making Processes (Full National Grid participant)

[IF R ONLY RECEIVED TECHNICAL ASSISTANCE, SKIP TO NEXT SECTION.]

[ASK FOLLOWING QUESTIONS P1- P17 FOR EACH MEASURE TYPE INSTALLED]

IF (C5 <> 4,5) SKIP TO O1

P1  [IF C5 = 4,5.] Now I would like to ask about your decision-making process for each type of equipment you installed.

Our records indicate the [MEASURE TYPE] you installed through this program included: [SHOW SPECIFIC MEASURES]
Is that correct?

1  Yes
2  No       [Skip to next measure or P19 if last measure]
8  Don't know
P2  Our records also show that you received a rebate for [MEASURE TYPE]. Is this correct?

1  Yes
2  No
8  Don’t know

P3  At what point in your decision to purchase [MEASURE TYPE] were you when you found out about the rebate offered through the program? [READ LIST AND INDICATE RESPONSE]

1  Already been thinking about purchasing some type of [MEASURE TYPE]
2  Began collecting information about [MEASURE TYPE]
3  Decided to buy [MEASURE TYPE]
4  Had not been thinking about it
5  Other [SPECIFY]

P4  Did this equipment replace existing equipment?

1  Yes
2  No
8  Don’t know

P5  (If P4=1) What was the condition of the old equipment? [READ LIST AND INDICATE RESPONSE]

1  Working properly
2  Working but in need of repair (e.g., inefficient)
3  Not working but repairable
4  Not working, not repairable
8  Don’t know

P8  What percent of the [measure] you received through the program is currently in use? [ENTER RESPONSE IN WHOLE NUMBER]

______  0 to 100 %  [IF 100% SKIP TO P13]
888  Don’t know
999  Refused
C: Participant Customer Survey...

P9  Why isn’t your business using all the [measure]? [DO NOT READ; SELECT ALL THAT APPLY]

1. Was never installed
2. Was removed
3. Doesn’t fit properly
4. Don’t know how to operate
5. Dissatisfied with performance
6. Other (specify)

P9a  [IF P9 = 2] Why was the new equipment removed?

[RECORD VERBATIM RESPONSE]

P13  On a 0 to 10 scale, with 0 being not at all likely and 10 being very likely, how likely is that you would have bought the same [MEASURE] within a year of when you purchased it if you had not received the rebate [(if PP0 = 2 or 3) and technical assistance] from National Grid?

0 to 10
88  Don’t know
99  Refused

P13a  Other than the rebate, what is the main reason you chose to install [measure]? [DO NOT READ; SELECT ONE]

1. Recommended by contractor/vendor
2. Wanted to reduce operating costs / reduce electric bill
3. Updating / expanding facility
4. Current equipment did not work
5. Other (specify)

P14  Did you receive additional financial assistance, rebate or tax incentive from a source other than the [program name] Program to purchase the [MEASURE]?

1. Yes
2. No  [Skip to next measure or P19 if last measure]
8. Don’t know  [Skip to next measure or P19 if last measure]
C. Participant Customer Survey

**P15** Who did you receive it from? [READ LIST; SELECT ALL THAT APPLY]

1. Dealer
2. Manufacturer
3. Local government
4. State tax credit
5. Federal tax credit
6. NYSERDA
7. Other utility [SPECIFY]
8. Other [SPECIFY]
9. Don’t know

**P16** About how much was the additional financial assistance? [RECORD TO THE NEAREST DOLLAR; IF MORE THAN ONE WAS MENTIONED, RECORD TOTAL AMOUNT OF ALL ASSISTANCE]

_____ Dollars
8888 Don’t know
9999 Refused

**P17** On a 0 to 10 scale, with 0 being not at all likely and 10 being very likely, how likely is that you would have bought the same [MEASURE] if you had not received this other financial incentive?

_____ 0 to 10
88 Don’t know
99 Refused

**P19** [IF C5 = 4] Were there recommendations that you did not move forward with?

1. Yes
2. No [SKIP TO O1]

**P20** Why did you choose not to move forward with those recommendations? [DO NOT READ; SELECT ALL THAT APPLY]

1. Rebate amount was too low
2. Equipment too expensive
3. Had to prioritize projects
4. Current equipment working fine
5. Other (specify)
### Other organization Program Awareness (all)

**O1** When it comes to energy and energy efficiency, businesses in New York are often approached by multiple companies.

**O1A** Are you aware of any energy efficiency programs for businesses offered by entities other than National Grid in New York State?

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<td>2</td>
<td>No</td>
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<tr>
<td>8</td>
<td>Don’t know</td>
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**O2** What other entities are you aware of that offer energy efficiency programs? (DO NOT READ; SELECT ALL MENTIONED)

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<tbody>
<tr>
<td>1</td>
<td>LIPA (Long Island Power Authority)</td>
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<tr>
<td>2</td>
<td>ConEd (Consolidated Edison)</td>
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<td>3</td>
<td>NYSERDA (New York State Energy Research and Development Authority)</td>
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<td>4</td>
<td>NYSEG (New York State Electric &amp; Gas)</td>
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<td>5</td>
<td>NYPAA (New York Power Authority)</td>
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<td>6</td>
<td>Central Hudson</td>
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<td>7</td>
<td>ARRA funded programs</td>
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<td>8</td>
<td>ESCOs (energy service companies)</td>
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<td>9</td>
<td>Other federal programs [SPECIFY]</td>
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<td>10</td>
<td>Other [SPECIFY]</td>
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<td>11</td>
<td>Don’t know</td>
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**O3** Are you eligible to participate in programs offered by these other entities?

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<td>2</td>
<td>No</td>
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<td>8</td>
<td>Don’t know</td>
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### Decision-Making Processes – Other entities (all)

**OP1** [participants: C5 = 4, 5] Did you talk with any of these other organizations about their energy efficiency programs before making the decision whether to participate in National Grid’s [program name] program?

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<td>1</td>
<td>Yes (Specify which one(s)?)</td>
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<tr>
<td>2</td>
<td>No [SKIP TO OP4]</td>
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</table>
OP2 Have you participated in any programs for businesses from entities other than National Grid?

1  Yes          [SKIP TO OP4]
2  No           [SKIP TO OP4]
8  Don’t know  [SKIP TO OP4]

OP2a In which programs from other entities have you participated?

[RECORD VERBATIM RESPONSE]

OP3 What was the main reason for choosing another program over a National Grid program(s)?

[RECORD VERBATIM RESPONSE]

OP4 [participants: C5 = 4, 5] For this project, what was the main reason for choosing National Grid over other program(s)?

[RECORD VERBATIM RESPONSE]

OP5 [participants: C5 = 4, 5] In your own words, how would you compare offerings from the other entities with the National Grid’s programs?

[RECORD VERBATIM RESPONSE]

OP6 At any time, was there any confusion within your company in regards to …

a. What services different entities provided?
b. Whether these entities were affiliated with National Grid?
c. Which entity could provide services that best fit your needs?

1  Yes
2  No
8  Don’t know

OP6r [if Yes to any in OP6] How was this confusion resolved?

[RECORD VERBATIM RESPONSE]
C.: Participant Customer Survey...

OP6i  [if Yes to any in OP6] Did the confusion influence which program was chosen?

1  Yes
2  No
8  Don’t know

OP7  [all] Some energy efficiency programs offered by utilities offer a turn-key approach. By this we mean the program does everything for you. Program staff come in and identify all opportunities, install the equipment and remove the old equipment. All the customer does is agree to the installation and pay a portion of the cost.

Others like the [program name] program allows the customer to select the contractor who does the work and apply for a rebate.

Assuming the cost to you would be the same, which of these would you prefer; a more turn-key approach or an approach like the [program name] program?

1  Turn-key approach
2  Existing approach
3  No preference  [IF C5=4 OR 5 SKP SP1, ELSE SKP NP1]
8  Don’t know  [IF C5=4 OR 5 SKP SP1, ELSE SKP NP1]

OP8  Why do you prefer this approach?

[RECORD VERBATIM RESPONSE]

Other Equipment Purchases (Full National Grid participants)

IF (C5 <> 4, 5) SKIP TO NP1

SP1  [participants: C5 = 4, 5] Since participating in National Grid’s [program name] Program, have you purchased any other type of energy efficient or ENERGY STAR rated equipment?

1  Yes
2  No  [SKIP TO F1]
8  Don’t know  [SKIP TO F1]
SP2 What high efficiency equipment have you purchased?
[SELECT ALL THAT APPLY; READ LIST IF NEEDED]

1 Lighting
2 Lighting controls
3 Electric process measures
4 Motors / variable speed drives
5 Boilers
6 Furnaces
7 Water heater
8 Other electric equipment [SPECIFY]
9 Other gas equipment [SPECIFY]

SP3 [ASK FOR EACH MEASURE IN SP2] Did you receive a rebate from National Grid or any other organization for [this/any of these] equipment? (Select all that apply)

1 No rebate
2 Yes, National Grid
3 Yes, NYSERDA
4 Yes, another organization [SPECIFY]
5 Yes, another fuel provider [SPECIFY]
8 Don’t know

SP4 On a scale of 0 to 10, with 0 being no influence and 10 being total influence, how much influence did your participation in the [program name] Program have on your decision to purchase this high-efficiency equipment?

_____ 0 to 10
88 Don’t know
99 Refused
Businesses consider many different factors when deciding which equipment to purchase. On a scale of 0 to 10, with 0 being "not at all important," and 10 being "very important," how important are each of the following in your firm's decision of which equipment to purchase? [SPECIFY FOR EACH ITEM]

- Compatibility with existing equipment
- Initial purchase cost
- Operating cost
- Length of payback period
- Recommendation of contractor or supplier
- Efficiency level of equipment
- Rebate from utility or other source
- Recommendations of others that had experience with equipment
- Compatibility with business design
- Energy savings of equipment

**Recent Equipment Purchases (all except Full National Grid participants)**

IF (C5 <> 1,2,3,6,7) SKIP TO F1

**NP1** [C5 = 1, 2, 3, 6] Have you purchased any type of energy efficient or ENERGY STAR rated equipment in the last 2 years?

1. Yes
2. No [SKIP TO F1]
3. Don’t know [SKIP TO F1]

**NP2** What high efficiency equipment have you purchased?
[SELECT ALL THAT APPLY; READ LIST IF NEEDED]

1. Lighting
2. Lighting controls
3. Electric process measures
4. Motors / variable speed drives
5. Boilers
6. Furnaces
7. Water heater
8. Other electric equipment [SPECIFY]
9. Other gas equipment [SPECIFY]
NP3  [ASK FOR EACH MEASURE IN NP2] Did you receive a rebate from National Grid or any other organization for [this/any of these] equipment? (Select all that apply)

1  No rebate
2  Yes, National Grid
3  Yes, NYSERDA
4  Yes, another organization [SPECIFY]
8  Don’t know

NP4  Businesses consider many different factors when deciding which equipment to purchase. On a scale of 0 to 10, with 0 being "not at all important," and 10 being "very important," how important are each of the following in your firm’s decision of which equipment to purchase? [SPECIFY FOR EACH ITEM]

a. Compatibility with existing equipment
b. Initial purchase cost
c. Operating cost
d. Length of payback period
e. Recommendation of contractor or supplier
f. Efficiency level of equipment
g. Rebate from utility or other source
h. Recommendations of others that had experience with equipment
i. Compatibility with business design
j. Energy savings of equipment

NP5  What could National Grid or the program do to increase the likelihood that you would participate in the [program name] program?

[RECORD VERBATIM RESPONSE]
We’re almost done, I just have a few questions about your business’s general characteristics.

**F1g** [gas only] What is the majority of the space at this location used for?

[DO NOT READ LIST]

1. Assembly
2. Auto repair
3. Big box retail
4. Community college
5. Fast food
6. Dormitory
7. Elementary school
8. Full service restaurant
9. Grocery
10. Heavy industrial
11. Hotel
12. Hospital
13. Industrial refrigeration
14. Large office
15. Light industrial
16. Motel
17. Multi story retail
18. Multifamily high-rise
19. Multifamily low-rise
20. Religious
21. Secondary school
22. Small office
23. Small retail
24. University
25. Warehouse
26. Other [SPECIFY]
C.: Participant Customer Survey

F1e [electric only] What is the majority of the space at this location used for?
[DO NOT READ LIST]

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Assembly</td>
</tr>
<tr>
<td>2</td>
<td>Auto</td>
</tr>
<tr>
<td>3</td>
<td>Big box</td>
</tr>
<tr>
<td>4</td>
<td>College dormitory</td>
</tr>
<tr>
<td>5</td>
<td>Community college</td>
</tr>
<tr>
<td>6</td>
<td>Elementary school</td>
</tr>
<tr>
<td>7</td>
<td>Fast food</td>
</tr>
<tr>
<td>8</td>
<td>Full service restaurant</td>
</tr>
<tr>
<td>9</td>
<td>Grocery</td>
</tr>
<tr>
<td>10</td>
<td>High school</td>
</tr>
<tr>
<td>11</td>
<td>Heavy industrial</td>
</tr>
<tr>
<td>12</td>
<td>Hospital</td>
</tr>
<tr>
<td>13</td>
<td>Hotel</td>
</tr>
<tr>
<td>14</td>
<td>Large office</td>
</tr>
<tr>
<td>15</td>
<td>Large retail</td>
</tr>
<tr>
<td>16</td>
<td>Light industrial</td>
</tr>
<tr>
<td>17</td>
<td>Motel</td>
</tr>
<tr>
<td>18</td>
<td>Multifamily high-rise</td>
</tr>
<tr>
<td>19</td>
<td>Multifamily low-rise</td>
</tr>
<tr>
<td>20</td>
<td>Refrigerated Warehouse</td>
</tr>
<tr>
<td>21</td>
<td>Religious</td>
</tr>
<tr>
<td>22</td>
<td>Single family residence</td>
</tr>
<tr>
<td>23</td>
<td>Small office</td>
</tr>
<tr>
<td>24</td>
<td>Small retail</td>
</tr>
<tr>
<td>25</td>
<td>University</td>
</tr>
<tr>
<td>26</td>
<td>Warehouse</td>
</tr>
<tr>
<td>27</td>
<td>Other [SPECIFY]</td>
</tr>
</tbody>
</table>

F2 Is this business a non-profit organization?

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>2</td>
<td>No</td>
</tr>
<tr>
<td>8</td>
<td>Don’t know</td>
</tr>
</tbody>
</table>
F3 Which of the following options best describes your business/organization's ownership category? Is it? [READ LIST]

1 One of a chain of establishments
2 Franchise
3 Single establishment business/organization
4 Branch office
5 Headquarters of business/organization
6 Federal government facility
7 State government facility
8 Local government facility
9 Educational facility
10 Other [SPECIFY]

F4 How many more years does your business plan to be at this location?

____ Years
777 Indefinite
888 Don't know
999 Refused

F5 Approximately how many full-time, part-time, and seasonal employees, including yourself, work at this location?

_____ Full time employee [30+ hours per week]
_____ Part-time
_____ Seasonal employees
8888 Don't know
9999 Refused

F6 Does your business own or lease the space you occupy/manage at this location?

1 Own all
2 Lease all
3 Own some and lease some
4 Manage property
5 Other
8 Don't know
9 Refused
C: Participant Customer Survey

F7 Overall, which of the following statements best describes your business's energy efficiency efforts at this location? [READ LIST]

1 [nonparticipants only, C5=1,2,3,7] We have not done anything to save energy at this location
2 We have not done much to save energy
3 We have made some energy efficiency improvements
4 We have done everything or almost everything that we can

F8 Finally, in terms of revenues, over the last two years, has your business increased, decreased, or remained about the same?

1 Increased
2 Decreased
3 Stayed the same
8 Don’t know

F9 What is your title?

1 CEO/President
2 Business owner
3 General manager
4 Facilities engineer
5 Maintenance manager
6 Office manager
7 Administrator
8 Energy management staff
9 Purchasing agent/buyer
10 Landlord/property manager
11 Operations manager
12 Other [SPECIFY]

F10 Lastly, I’d like to get your name and contact information if we have additional questions. Your contact information will not be associated with your responses provided in this survey.

1 Collect contact information:
   Name: ________________________
   Phone: ________________________

2 Refused to provide contact information
In this section, we present the final response rate summary for the Energy Initiative programs participant survey.

Table C-1. Final Participant Response Rate for Energy Initiative Programs

<table>
<thead>
<tr>
<th></th>
<th>Large Electric</th>
<th>Mid-sized Electric</th>
<th>Mid-sized Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting sample</td>
<td>10</td>
<td>134</td>
<td>11</td>
<td>155</td>
</tr>
<tr>
<td>Ineligible - Doesn’t recall participation</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Ineligible - Contact no longer at company</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Ineligible - Named company not at address</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Ineligible - Contractor/3rd party to project</td>
<td>0</td>
<td>4</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Bad numbers</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Adjusted sample</td>
<td>10</td>
<td>125</td>
<td>10</td>
<td>145</td>
</tr>
<tr>
<td>Refusals</td>
<td>2</td>
<td>0</td>
<td>30</td>
<td>32</td>
</tr>
<tr>
<td>Unavailable for duration</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Active sample</td>
<td>2</td>
<td>31</td>
<td>4</td>
<td>37</td>
</tr>
<tr>
<td>Completes</td>
<td>8</td>
<td>63</td>
<td>5</td>
<td>76</td>
</tr>
<tr>
<td>Cooperation Rate</td>
<td>80%</td>
<td>50%</td>
<td>50%</td>
<td>52%</td>
</tr>
<tr>
<td>Response Rate</td>
<td>80%</td>
<td>47%</td>
<td>45%</td>
<td>49%</td>
</tr>
</tbody>
</table>

1 Phone number look-ups were done on all bad numbers
2 Attempts were made to convert all soft refusals
3 Number of completed surveys divided by Adjusted Sample Size
4 Number of completed surveys divided by Starting Sample Size

Advance letters: mailed 3/25/2011
Date calling began: 3/24/2011

Call Statistics:
Average Call Length 18.71
Average Number of Attempts on Active Sample 5.61
APPENDIX E: NONPARTICIPANT CUSTOMER SURVEY RESPONSE RATE

In this section, we present the final response rate summary for the Energy Initiative programs nonparticipant survey effort.

Table C-1. Final Nonparticipant Response Rate for Energy Initiative Programs

<table>
<thead>
<tr>
<th></th>
<th>Large Electric</th>
<th>Mid-sized Electric</th>
<th>Large Gas</th>
<th>Mid-sized Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting sample</td>
<td>41</td>
<td>148</td>
<td>148</td>
<td>148</td>
<td>485</td>
</tr>
<tr>
<td>Ineligible- Not eligible for National Grid programs</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Ineligible- Full participant (installed equipment + TA)</td>
<td>3</td>
<td>6</td>
<td>2</td>
<td>2</td>
<td>13</td>
</tr>
<tr>
<td>Ineligible- Full participant (installed equipment)</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>Bad numbers</td>
<td>2</td>
<td>4</td>
<td>10</td>
<td>13</td>
<td>29</td>
</tr>
<tr>
<td>Multiple location for same contact</td>
<td>0</td>
<td>42</td>
<td>21</td>
<td>9</td>
<td>72</td>
</tr>
<tr>
<td>Unable to attempt- Contact name and phone number, no company</td>
<td>15</td>
<td>9</td>
<td>0</td>
<td>13</td>
<td>37</td>
</tr>
<tr>
<td>Unable to attempt- No phone number, contact, or company</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Unable to attempt- No company or contact, with phone number</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Adjusted sample</td>
<td>18</td>
<td>80</td>
<td>112</td>
<td>107</td>
<td>317</td>
</tr>
<tr>
<td>Refusals</td>
<td>3</td>
<td>18</td>
<td>20</td>
<td>32</td>
<td>73</td>
</tr>
<tr>
<td>Hard ref</td>
<td>0</td>
<td>5</td>
<td>7</td>
<td>1</td>
<td>13</td>
</tr>
<tr>
<td>Soft ref</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Partial ref</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>2</td>
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<tr>
<td>Corporate decision</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
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<tr>
<td>Landlord decision</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Do not do surveys (company policy)</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Will not release contact info of R</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Thought it was a sales call</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Take me off your list</td>
<td>1</td>
<td>0</td>
<td>4</td>
<td>6</td>
<td>11</td>
</tr>
<tr>
<td>Thought they already participated</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>No time to do surveys</td>
<td>0</td>
<td>7</td>
<td>4</td>
<td>6</td>
<td>17</td>
</tr>
<tr>
<td>Never reached a contact (all hang ups)</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Unavailable for duration</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Called out- reached 8 attempts and made no contact</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>Active sample</td>
<td>9</td>
<td>40</td>
<td>71</td>
<td>53</td>
<td>173</td>
</tr>
<tr>
<td>Completes</td>
<td>6</td>
<td>21</td>
<td>20</td>
<td>12</td>
<td>59</td>
</tr>
<tr>
<td>Full Nonparticipant¹</td>
<td>1</td>
<td>9</td>
<td>11</td>
<td>12</td>
<td>33</td>
</tr>
<tr>
<td>Touched participant²</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>6</td>
</tr>
</tbody>
</table>
### Nonparticipant Customer Survey Response Rate

<table>
<thead>
<tr>
<th>Other PA participant</th>
<th>Large Electric</th>
<th>Mid-sized Electric</th>
<th>Large Gas</th>
<th>Mid-sized Gas</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>3</td>
<td>9</td>
<td>8</td>
<td>0</td>
<td>20</td>
</tr>
<tr>
<td>Cooperation Rate</td>
<td>33%</td>
<td>26%</td>
<td>18%</td>
<td>11%</td>
<td>19%</td>
</tr>
<tr>
<td>Response Rate</td>
<td>15%</td>
<td>14%</td>
<td>14%</td>
<td>8%</td>
<td>12%</td>
</tr>
</tbody>
</table>

1. Defined as respondents who have not participated in National Grid's or any other program administrator's program
2. Defined as respondents who have received technical assistance from National Grid
3. Defined as respondents who have participated in another program administrator's program
4. Number of completed surveys divided by Adjusted Sample Size
5. Number of completed surveys divided by Starting Sample Size

**Advance letters: mailed 9/13/2011**
**Date calling began: 9/7/2011**

**Call Statistics:**
- Average Call Length: 19.34
- Average Number of Attempts on Active Sample: 6.36
APPENDIX F: NONPARTICIPANT CUSTOMER SURVEY

National Grid
New York Energy Initiative and Downstate C&I
Process Evaluation for Large and Mid-sized Commercial Customers
Participant and Nonparticipant Survey

Key Research Questions:

- **Customer Awareness and Marketing**
  - How is the program promotion working? What improvements can be made? What are the differences by sector and by size of customer? What tools are most effective?
  - How does the program’s promotion coordinate with the other National Grid programs and other organization’s programs in New York? Does the overlap with other internal and external programs help or hinder the success of these programs?
  - What marketing and outreach efforts are most successful in generating customer leads?

- **Ease of Participation/Administrative Processes**
  - What are the characteristics of the participating customer population and how does that compare to the eligible population? Are there any groups not reached by the program?
  - Who was the customer’s initial point of contact for program information? Were they knowledgeable about the program?
  - Are program requirements clearly understood? Are the procedures for application and rebates easy to follow?
  - Was the application and rebate processed in a timely manner? If received an audit or technical study, was the turnaround time acceptable?
  - What barriers exist for customers’ participation in the program?
  - Is there confusion between National Grid’s programs and NYSERDA’s programs?

- **Program Satisfaction**
  - How is the program working? What enhancements are needed in the design and delivery of the program?
  - Are customers satisfied with the program? What specific program components have the most and least customer satisfaction?
  - What do customers and trade allies believe could be offered to improve program services?
  - Does participation affect participants’ perception of the utility and, if so, how?

- **Customer Characteristics and Decision Making Processes**
  - Which measures have been installed and what type of equipment did it replace? How are they accepted and valued by the customer?
  - Do measures remain installed and, if not, why not?
  - Why do customers decide not to install measures after receiving technical assistance?
  - Did the technical assistance provide information which prompted important energy savings projects? How important was the technical assistance in their
decision to participate? Who provided the technical assistance and were they knowledgeable?
• Was the program incentive adequate? Were other program incentives available from National Grid or from other entities for the same measures or equipment?

- **Program Performance Indicators**
  • Is the program delivering the intended benefits to participants and are they achieving planned energy impacts?
  • Is the appropriate information being collected to support future evaluation activities (i.e., impact evaluation)?
  • Are there differences in participation by technology? If so, what is driving those differences?

If the sample is available, this questionnaire will be used to interview five different groups of customers:
• 1 – **Unaware Nonparticipants.** Those who were contacted by National Grid staff but may not recall hearing about the program.
• 2 – **Aware Nonparticipants.** Those who heard of program but have not utilized the program (did not receive technical assistance, did not install equipment).
• 3 – **TA Participants.** Those who received some form of technical assistance but installed no equipment.
• 4 – **Full Other Participants.** Those who completed a project through another program.
• 5 – **Full NGRID Participants.** Those who installed measures with National Grid, with or without technical assistance.
Hello, my name is [interviewer name], and I'm calling on behalf of National Grid. May I speak with [named respondent] or the facilities/building manager, operations manager, maintenance manager, owner, or general manager?

1  Yes
2  No [If named respondent is not available: ask for another person who is familiar with the business’ energy use.]

INTRO 1

[PRESS 1 TO CONTINUE]

[READ IF NEEDED]

I'm not selling anything, I'd just like to ask you some questions about your awareness of or experiences with the program offered by National Grid. I'd like to assure you that your responses will be kept confidential and your name will not be revealed to anyone. For quality and training purposes this call will be recorded.

[Why are you conducting this study:] Studies like this help National Grid better understand customer satisfaction with, and need for, energy efficiency programs.

[Timing:] This survey should take approximately 15 minutes of your time. Is this a good time for us to speak with you? IF NOT, SET UP CALL BACK APPOINTMENT OR OFFER TO LET THEM CALL US BACK AT 1-800-454-5070

[Sales concern:] This information will help National Grid best design and deliver energy efficiency programs to assist commercial and industrial customers. Your responses will be kept confidential by our firm. If you would like to talk with someone about this study, feel free to call Melissa Piper of National Grid at (315) 428-5002.

INTRO 2

I'm with Tetra Tech, an independent research firm. I'm not selling anything. We have been hired by National Grid to talk with customers to understand your views on energy efficiency and National Grid's energy efficiency programs.

Their records show you have not yet participated and National Grid would like to learn more about ways to better serve you.

Before we start, I would like to inform you that your responses will be kept confidential and for quality and training purposes this call will be recorded.
F: Nonparticipant Customer Survey . . .

[If needed: You may recall receiving a letter explaining the purpose of this call. We can send or fax you another copy of the letter to verify the purpose of the study.

The results of the survey will be used to make improvements to the programs that National Grid offers in the state of New York.]

1 Continue (skip to C2)
2 Need to send/fax letter (dispo = 2224 and set callback)
3 Dispo screen

C2 We are speaking with businesses about the [PROGRAM] program offered to commercial/industrial customers by National Grid.

Through the [Program], business customers are offered prescriptive and custom incentives to help purchase and install energy efficient equipment and systems for their facilities.

is eligible to participate in the program but has not in the past 2 years.

Is this information correct?

1 Yes (aware, eligible, haven’t participated in past 2 years) [SKIP TO c5A]
2 No, we have participated [SKIP TO c5A]
3 No, we are not eligible for National Grid programs (e.g., not in service territory) [Terminate AAPOR=4704]
4 Unaware of eligibility for National Grid program [SKIP TO c5A]
5 Ineligible- resident [AAPOR=4703]
8 Don’t know (incorrect contact) [BACK TO C1]

C3 Is it possible that someone else in your business would be familiar with the [program name] program, the technical assistance, audit, engineering study or the equipment that was installed?

1 Yes [THANK AND TERMINATE]
2 No [THANK AND TERMINATE]
8 Don’t know [THANK AND TERMINATE]

C4 May I please speak with that person?

1 Yes [BEGIN THE SURVEY AGAIN [C2] WITH NEW R]
2 No [THANK AND TERMINATE]
8 Don’t know [THANK AND TERMINATE]
**F: Nonparticipant Customer Survey . . .**

**C5a** Have you ever heard of the National Grid [proname] program?

1. Yes
2. No [SKIP TO C6]

**C5b** Have you received any technical assistance, such as an energy audit or engineering study, from National Grid?

1. Yes
2. No

**C5c** Have you installed energy efficient equipment and received a rebate from National Grid’s [proname] program or from another organization?

1. National Grid
2. Other organization
3. None [never installed equipment through ANY program]

<table>
<thead>
<tr>
<th>C5</th>
<th>C5a</th>
<th>C5b</th>
<th>C5c</th>
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<td>1103</td>
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</table>

**C5** Please tell me which of the following best describes your status in regards to the [PROGRAM] program?

[Participant: READ ALL OPTIONS]
[Nonparticipant: options are coded based on responses to C5a to C5c per the table above]

1. Never been contacted or have never heard of program
2. Heard of program but have only talked with an account manager or other National Grid staff
3. No equipment installed, received technical assistance or audit from National Grid
4. Installed equipment AND received technical assistance from National Grid
5. Installed equipment, have NOT received technical assistance from National Grid
6. No project with National Grid, completed through another program outside of National Grid [SPECIFY]
7. [nonparticipant option only] I have received technical assistance from National Grid but have installed equipment through another program [SPECIFY]
Unaware Nonparticipant: C5 = 1  
AAPOR=1101

Aware Nonparticipant: C5 = 2  
AAPOR=1101
(1101 is a full nonparticipant)

TA Participant (touched): C5 = 3  
AAPOR=1102
(1102 is a touched nonparticipant)

Full Other Participants: C5 = 6  
AAPOR=1103

Full National Grid Participants: C5 = 4,5  
Terminate if C5 = 4 or 5 for nonparticipant effort

NG TA and other participant: C5=7  
AAPOR=1103
(1103 is an other PA participant)

Commercial HeHe (C5=5)

C6 [if C5 > 2]Were you involved in the decision of whether or not to make [this/these] energy saving improvements to this facility?

[if C5 = 1 or 2] Are you involved in the decision of whether or not to make energy saving improvements at your facility?

1 Yes
2 No
8 Don’t know
C7 [if C5 > 2] Who else within your company or outside your company was involved in the decision-making process of whether or not to participate?

(PROBE: IF MORE THAN ONE DECISION MAKER, ASK R WHO WAS RESPONSIBLE FOR MAKING THE ULTIMATE DECISION)

[if C5 = 1 or 2] Who else within your company or outside your company is involved in the decision-making process of whether or not to participate in energy-saving programs?

(DO NOT READ)
(SELECT ALL THAT APPLY)

1. No one else
2. President/CEO
3. Board of Directors
4. Facilities Manager
5. Other senior leaders
6. Owner
7. Other (specify)

C8 What barriers do you face, either internal or external to your company, when deciding whether or not to implement energy efficiency projects?

(Probe for initial barriers as well as any barriers that occur while moving through the participation process)

(SELECT ALL THAT APPLY)

1. Initial capital (funds) needed for the work
2. Management cooperation
3. Staff resources to manage the project
4. The economy
5. Our budgeting cycle
6. Finding a qualified contractor
7. Other (specify)
F: Nonparticipant Customer Survey

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**National Grid Program Awareness (all)**

### A1

[if C5 > 1] How did you hear about the [program name] Program?  
*[DO NOT READ; SELECT ALL THAT APPLY] (Probe: Anywhere else?)*

1. National Grid Account manager
2. National Grid call center – Business Solutions Center (BSC)
3. National Grid staff (other than account manager or BSC)
4. National Grid utility bill insert
5. National Grid email newsletter
6. National Grid website
7. Direct mailing from National Grid
8. From participation in another National Grid program *[SPECIFY PROGRAM]*
9. Contractor, independent (e.g., lighting contractor) *[SPECIFY]*
10. Contractor hired by National Grid (e.g. RISE, ERS etc) *[SPECIFY]*
11. Conference/trade show/expo
12. Chamber of Commerce meeting or newsletter
13. Newspaper
14. Radio
15. Television
16. Friend/business person [Probe: Did this friend/business person also participate in the program?]
17. Haven’t heard of it before this survey
18. Other *[SPECIFY]*

### A2

[if aware: C5>1] Are you aware of other National Grid energy efficiency programs offered to commercial and industrial customers in the state of New York?  

[if not aware: C5 – 1] Are you aware of any National Grid energy efficiency programs offered to commercial and industrial customers in the state of New York?

1. Yes (Which ones?)
2. No  [SKIP TO A7]

### A2a

Have you contacted National Grid about participating in any of these other energy efficiency programs?

1. Yes
2. No  [Why not?]  [SKIP TO A7]
3. Don’t know  [SKIP TO A5]

### A2b

[IF A2a=1] What was the outcome of that contact?

*RECORD VERBATIM RESPONSE*
A2c  [IF A2a=1] Did you experience any challenges or difficulties in understanding what National Grid could offer?

1    Yes [explain]
2    No
8    Don’t know

A3   Have you participated in any other energy-efficiency programs offered by National Grid?

1    Yes [Which programs? Small Business, Comm HeHe, Other (specify)]
2    No [SKIP TO A5]
8    Don’t know [SKIP TO A5]

A4  [if aware: C5 > 1 and A3=1] In your opinion, how does the [program name] program compare to other National Grid programs in which you’ve participated?

[RECORD VERBATIM RESPONSE]

A5  [EI only] [if aware: C5>1] Did you consider participating in a different National Grid program for this project?

1    Yes
2    No [SKIP TO A7]

A5a [EI only] Which other National Grid programs did you consider participating in?

[RECORD VERBATIM RESPONSE]

A6  [EI only] [NG participants C5 = 4, 5] What was the main reason for choosing the [program name] program over [fill with A5a]?

[RECORD VERBATIM RESPONSE]

A7  [if C5 < 4] When looking for information on energy efficiency programs and services, which sources do you prefer? (DO NOT READ; Select all that apply)

1    Contractor recommendations
2    Vendor recommendations
3    National Grid website
4    NYSERDA website
5    Department of Energy (DOE) website
6    ENERGY STAR website
7    Other website (specify)
8    Other (specify)
If (C5 <> 2,3,4,7) SKIP TO IF2
If (C5=5) SKIP TO PP15

PP0  [if C5 =3,4,7] What level of technical assistance from National Grid did your business receive through the [program name] program? (READ LIST; Select all that apply)

1  [DO NOT READ] Did not receive any form of technical assistance [SKIP TO PP4]
2  Walk-through energy audit (a walk-through and report)
3  Engineering study (a full study of a facility to identify energy-savings measures and project savings)
4  Custom audit (engineering analysis to determine therm savings)
5  Custom review (when a previously completed study by a different engineering firm is reviewed)
8  Don't know [SKIP TO PP4]

PP1  [if C5 =3,4,7] Did they look at the entire building or only certain equipment? (Select one)

1  The entire facility
2  Only certain equipment (specify--What equipment? Lighting equipment, lighting controls, electric motors, electric process measures, other)
8  Don't know

PP2  [if C5 =3,4,7] What is the main reason your company was interested in receiving technical assistance through the [program name] program? [DO NOT READ; SELECT ONLY ONE]

1  Wasn't interested--someone approached us about it
2  Looking for ways to reduce operating/energy costs
3  Wanted to know what we could do to save energy
4  It was available at a discounted rate through the program
5  I like to take advantage of National Grid program offers
6  Needed the work done anyway/already planned it (technical assistance required for incentive)
7  Other [SPECIFY]
8  Don't know
What are other reasons your company was interested in receiving technical assistance through the [program name] program?

[DO NOT READ; SELECT ALL THAT APPLY]

1. Wasn't interested--someone approached us about it
2. Looking for ways to reduce operating/energy costs
3. Wanted to know what we could do to save energy
4. It was available at a discounted rate through the program
5. I like to take advantage of National Grid program offers
6. Needed the work done anyway/already planned it (technical assistance required for incentive)
7. Other [SPECIFY]
8. No other reasons

What is the main reason your company [IF INSTALLED EQUIPMENT:] was interested in [IF TECHNICAL ASSISTANCE ONLY:] was considering obtaining energy-saving equipment through the [program name] program?

[DO NOT READ; SELECT ONE]

1. Wasn't interested--someone approached us about it
2. Wanted to reduce operating/energy costs
3. The equipment and installation was incentivized
4. I like to take advantage of National Grid offers
5. Needed the work done anyway/already planned it
6. Other [SPECIFY]

What were other reasons your company [IF INSTALLED EQUIPMENT:] was interested in [IF TECHNICAL ASSISTANCE ONLY:] was considering obtaining energy-saving equipment through the [program name] program?

[DO NOT READ; SELECT ALL THAT APPLY]

1. Wasn't interested--someone approached us about it
2. Wanted to reduce operating/energy costs
3. The equipment and installation was incentivized
4. I like to take advantage of National Grid offers
5. Needed the work done anyway/already planned it
6. Other [SPECIFY]
7. No other reasons
PP6 [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3,4,7] The program representative who visited your site presented your company with a report about the energy savings and incentives you could expect to receive from National Grid by installing the recommended measures. Do you recall seeing this report?

1  Yes
2  No    [SKIP TO PP11]
8  Don’t know [SKIP TO PP11]

PP7 [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3,4,7] Part of the report included information on how much energy savings there would be based on the new equipment. Do you recall seeing the energy savings estimate?

1  Yes
2  No    [SKIP TO PP9]
8  Don’t know [SKIP TO PP9]

PP8 [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3,4,7] Was the estimate of energy savings higher than you expected, about what you expected, or lower than what you expected?

1  Higher than expected
2  About what I expected
3  Lower than expected
8  Don’t know

PP9 [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3,4,7] Another part of the report detailed the eligible incentives for the new equipment. Do you recall seeing the incentives estimate?

1  Yes
2  No    [SKIP TO PP11]
8  Don’t know [SKIP TO PP11]

PP10 [IF RECEIVED TECHNICAL ASSISTANCE: C5 = 3,4,7] Were the eligible incentives from National Grid higher than you expected, about what you expected, or lower than what you expected?

1  Higher than expected
2  About what I expected
3  Lower than expected
8  Don’t know
**PP11**  
[IF RECEIVED TECHNICAL ASSISTANCE: C5 = 4] On a 0 to 10 scale, with 0 being not at all important and 10 being very important, how important was the technical assistance in your decision to participate in the National Grid program?

______ 0 to 10
55 Technical assistance was required
88 Don't know
99 Refused

**PP12**  
[IF C5 = 2,3,7]  
What is the main reason you have not installed any energy-efficient equipment through the program at this time?  
[DO NOT READ; SELECT ONLY ONE]

1 Your experience with the representative responsible for the technical assistance  
[SPECIFY]
2 The type of equipment recommended
3 The estimated energy savings from the recommended equipment was too small
4 Don't trust that we will see the estimated energy savings from the recommended equipment
5 Potential disruption to our business
6 The internal approval process for the funding of the contribution
7 Don't feel savings justify cost
8 Have had problems with energy-efficient equipment in the past
9 Found the [technical assistance] report hard to understand
10 The rebate available from the utility was too small
11 Payback period too long
12 Installed through a different program
13 State of the economy
14 Other reason [SPECIFY]
**PP13**  \(IF \ C5 = 2,3,7\)
Are there any other reasons you have not installed any energy-efficient equipment through the program at this time?

[DO NOT READ; SELECT ALL THAT APPLY]

0  No other reasons
1  Your experience with the representative responsible for the technical assistance [SPECIFY]
2  The type of equipment recommended
3  The estimated energy savings from the recommended equipment was too small
4  Don’t trust that we will see the estimated energy savings from the recommended equipment
5  Potential disruption to our business
6  The internal approval process for the funding of the contribution
7  Don’t feel savings justify cost
8  Have had problems with energy-efficient equipment in the past
9  Found the [technical assistance] report hard to understand
10  The rebate available from the utility was too small
11  Payback period too long
12  Installed through a different program
13  State of the economy
14  Other reason [SPECIFY]

**PP14**  \(IF \ C5 = 3,7\) What could National Grid or the program have done to increase the likelihood that you would install the recommended equipment?

[Probes: Was there anything related to information or education, personal assistance, financial assistance, or timing that could have been better? WHAT?]

[RECORD VERBATIM RESPONSE]

**PP15**  \(ONLY \ IF \ INSTALLED \ EQUIPMENT\ \ C5 = 4, 5\) Has anyone conducted any follow-up visits or quality control checks on the equipment installed in your business?

1  Yes
2  No  [SKIP TO IF2]
8  Don’t know  [SKIP TO IF2]

**PP15A** Who conducted these follow-up visits or quality control checks?

Was it a....[READ]

1  National Grid staff member
2  Contractor hired by National Grid (e.g., RISE, ERS, etc.)
3  Independent contractor
4  Other [SPECIFY]
F: Nonparticipant Customer Survey

PP16  [ONLY IF INSTALLED EQUIPMENT C5 = 4,5] Were you satisfied with the follow-up visit or quality control process?

1  Yes  [PROBE: Why?]
2  No  [PROBE: Why not?]
8  Don't know

Program Incentives and Financing (all)

IF2  These next few questions ask about the customers’ portion of the cost and available financing for purchasing energy efficient equipment.

IF2a  [FOR CUSTOM PROJECTS] Do you think that National Grid’s [program name] program requirement that your company pay at least 50 percent of the project cost is appropriate?

1  Yes  [PROBE: Why do you say that?]  [SKIP TO IF4]
2  No  [PROBE: Why do you say that?]  [SKIP TO IF4]
8  Don’t know

IF3  [FOR CUSTOM PROJECTS; if IF2a = 2] Assuming a customer contribution is required, what percent of the project cost do you think would be appropriate to ask customers to contribute?

______  Percent of cost
888  Don't know
999  Refused

IF4  If the utility was able to provide financing at below market interest rate that could be repaid through your [EI: electric or gas; CI: gas; ComHeHe: gas] bill to cover your part of project costs, would your business use this financing?

1  Yes  [SKIP TO IF5]
2  No
3  Depends  [SKIP TO IF4b]

IF4a  Why not?

[RECORD VERBATIM RESPONSE] SKIP TO IF5

IF4b  What does it depend on?

[RECORD VERBATIM RESPONSE]
IF5  If the utility was able to arrange for financing at below market interest rate through a third party, would your business use this financing to pay your part of the project cost?

1  Yes [SKIP TO SAT1]
2  No
3  Depends [SKIP TO IF5b]

IF5a  Why not?

[RECORD VERBATIM RESPONSE] SKIP TO SAT1

IF5b  What does it depend on?

[RECORD VERBATIM RESPONSE]

Satisfaction with Program (TA participants and Full National Grid participants)

IF (C5 <> 3,4,5,7) SKIP TO O1

SAT1  [if C5 = 3, 4, 5] Overall, how satisfied are you with your experiences with the [program name] Program to date? Are you.? [READ LIST]

1  Very dissatisfied
2  Somewhat dissatisfied
3  Neither dissatisfied nor satisfied
4  Somewhat satisfied
5  Very satisfied
8  Don’t know [SKIP TO SAT2]

SAT1a  Why do you say that?

[RECORD VERBATIM RESPONSE]
SAT2 For the following questions, I'd like you to tell me how satisfied you are with each aspect of the services you received through the [program name] Program so far. On a scale of 0 to 10, with 0 being "Not at All Satisfied" and 10 being "Very Satisfied," how satisfied were you with the?

[programming note: need an NA option for those statements that may not apply]

[RECORD RESPONSE. IF ANSWER < 5, PROBE WITH: Why do you say that?]

a. [IF RECEIVED TA, PP0=2, 3, 4, 5] Promptness of the audit or inspection of your old equipment
b. [IF RECEIVED TA, PP0=2, 3, 4, 5] Quality of the audit
c. [IF RECEIVED TA, PP0=3] Promptness of the engineering study
d. [IF RECEIVED TA, PP0=3] Quality of the engineering study
e. [C5=3, 4, 5, 7] Type/variety of equipment eligible for the program
f. [C5=3, 4, 5, 7] The way National Grid or [trade ally] handled your questions
g. [C5=3, 4, 5, 7] The amount of incentive available from National Grid
h. [C5=3, 4, 5, 7] Usefulness of information provided about the program

[ONLY IF INSTALLED EQUIPMENT]
i. [IF INSTALLED EQUIPMENT, C5=4, 5] Quality of work of the person who installed your equipment
j. [IF INSTALLED EQUIPMENT, C5=4, 5] The equipment installed
k. [IF INSTALLED EQUIPMENT, C5=4, 5] Rebate application process
l. [IF INSTALLED EQUIPMENT, C5=4, 5] Length of time it took to get a rebate check
m. [IF INSTALLED EQUIPMENT, C5=4, 5] [IF PP15 = 2 OR DK, SKIP] Inspection of the installation by a utility representative

SAT3 Which features of the program, if any, would you change? [DO NOT READ; SELECT ALL THAT APPLY] [PROBE: Is there anything else you would change?]

1. Wouldn't change anything/keep program as is
2. More oversight/quality control of installation
3. Improve quality of equipment
4. Conduct technical assistance quicker
5. Provide more direct utility involvement
6. Include measures at no cost
7. Include more measures or equipment through the program
8. Provide a more comprehensive audit
9. Provide technical assistance at no cost
10. More helpful/responsive program staff
11. Increase amount of rebate
12. Offer financing options
13. More advertising of program
14. Other [please describe]
SAT4  What other energy efficiency equipment measures do you feel should have been recommended and installed through the program?

[RECORD VERBATIM RESPONSE]

SAT5  As a result of your involvement with the [program name] Program, would you say you are more satisfied, just as satisfied, or less satisfied with National Grid as your energy provider?

1  More satisfied
2  Just as satisfied
3  Less satisfied
8  Don’t know  [SKIP TO SAT7]

SAT6  Why do you say that?

[RECORD VERBATIM RESPONSE]

SAT7  Have you recommended the program to others?

1  Yes
2  No
8  Don’t know

---

**Decision-Making Processes (Full National Grid participant)**

[IF R ONLY RECEIVED TECHNICAL ASSISTANCE, SKIP TO NEXT SECTION.]

[ASK FOLLOWING QUESTIONS P1- P17 FOR EACH MEASURE TYPE INSTALLED]

IF (C5 <> 4,5) SKIP TO O1

P1  [IF C5 = 4,5.] Now I would like to ask about your decision-making process for each type of equipment you installed.

Our records indicate the [MEASURE TYPE] you installed through this program included: [SHOW SPECIFIC MEASURES]

Is that correct?

1  Yes
2  No [Skip to next measure or P19 if last measure]
8  Don’t know
P2  Our records also show that you received a rebate for [MEASURE TYPE]. Is this correct?
1  Yes
2  No
8  Don’t know

P3  At what point in your decision to purchase [MEASURE TYPE] were you when you found out about the rebate offered through the program? [READ LIST AND INDICATE RESPONSE]
1  Already been thinking about purchasing some type of [MEASURE TYPE]
2  Began collecting information about [MEASURE TYPE]
3  Decided to buy [MEASURE TYPE]
4  Had not been thinking about it
5  Other [SPECIFY]

P4  Did this equipment replace existing equipment?
1  Yes
2  No
8  Don’t know

P5  (If P4=1) What was the condition of the old equipment? [READ LIST AND INDICATE RESPONSE]
1  Working properly
2  Working but in need of repair (e.g., inefficient)
3  Not working but repairable
4  Not working, not repairable
8  Don’t know

P8  What percent of the [measure] you received through the program is currently in use? [ENTER RESPONSE IN WHOLE NUMBER]
______  0 to 100 %  [IF 100% SKIP TO P13]
888  Don’t know
999  Refused
F: Nonparticipant Customer Survey. . .

**P9** Why isn’t your business using all the [measure]? [DO NOT READ; SELECT ALL THAT APPLY]

1. Was never installed
2. Was removed
3. Doesn’t fit properly
4. Don’t know how to operate
5. Dissatisfied with performance
6. Other (specify)

**P9a** [IF P9 = 2] Why was the new equipment removed?

[RECORD VERBATIM RESPONSE]

**P13** On a 0 to 10 scale, with 0 being not at all likely and 10 being very likely, how likely is that you would have bought the same [MEASURE] within a year of when you purchased it if you had not received the rebate [(if PP0 = 2 or 3) and technical assistance] from National Grid?

[Blank] 0 to 10
88 Don’t know
99 Refused

**P13a** Other than the rebate, what is the main reason you chose to install [measure]? [DO NOT READ; SELECT ONE]

1. Recommended by contractor/vendor
2. Wanted to reduce operating costs / reduce electric bill
3. Updating / expanding facility
4. Current equipment did not work
5. Other (specify)

**P14** Did you receive additional financial assistance, rebate or tax incentive from a source other than the [program name] Program to purchase the [MEASURE]?

1. Yes
2. No [Skip to next measure or P19 if last measure]
8. Don’t know [Skip to next measure or P19 if last measure]
P15  Who did you receive it from? [READ LIST; SELECT ALL THAT APPLY]

1  Dealer
2  Manufacturer
3  Local government
4  State tax credit
5  Federal tax credit
6  NYSERDA
7  Other utility [SPECIFY]
8  Other [SPECIFY]
9  Don't know

P16  About how much was the additional financial assistance?  
[RECORD TO THE NEAREST DOLLAR; IF MORE THAN ONE WAS MENTIONED, RECORD TOTAL AMOUNT OF ALL ASSISTANCE]

____ Dollars
8888 Don't know
9999 Refused

P17  On a 0 to 10 scale, with 0 being not at all likely and 10 being very likely, how likely is that you would have bought the same [MEASURE] if you had not received this other financial incentive?

____ 0 to 10
88 Don't know
99 Refused

P19  [IF C5 = 4] Were there recommendations that you did not move forward with?

1  Yes
2  No  [SKIP TO O1]

P20  Why did you choose not to move forward with those recommendations? [DO NOT READ; SELECT ALL THAT APPLY]

1  Rebate amount was too low
2  Equipment too expensive
3  Had to prioritize projects
4  Current equipment working fine
5  Other (specify)
F: Nonparticipant Customer Survey

Other organization Program Awareness (all)

O1 When it comes to energy and energy efficiency, businesses in New York are often approached by multiple companies.

O1A Are you aware of any energy efficiency programs for businesses offered by entities other than National Grid in New York State?

1 Yes 
2 No [SKIP TO OP7] 
8 Don’t know [SKIP TO OP7]

O2 What other entities are you aware of that offer energy efficiency programs? (DO NOT READ; SELECT ALL MENTIONED)

1 LIPA (Long Island Power Authority)
2 ConEd (Consolidated Edison)
3 NYSERDA (New York State Energy Research and Development Authority)
4 NYSEG (New York State Electric & Gas)
5 NYPA (New York Power Authority)
6 Central Hudson
7 ARRA funded programs
8 ESCOs (energy service companies)
9 Other federal programs [SPECIFY]
10 Other [SPECIFY]
11 Don’t know

O3 Are you eligible to participate in programs offered by these other entities?

1 Yes 
2 No [SKIP TO OP6] 
8 Don’t know [SKIP TO OP6]

Decision-Making Processes – Other entities (all)

OP1 [participants: C5 = 4, 5, 7] Did you talk with any of these other organizations about their energy efficiency programs before making the decision whether to participate in National Grid’s [program name] program?

1 Yes (Specify which one(s)?)
2 No [SKIP TO OP4]
OP2 Have you participated in any programs for businesses from entities other than National Grid?

1 Yes
2 No [SKIP TO OP4]
8 Don’t know [SKIP TO OP4]

OP2a In which programs from other entities have you participated?

[RECORD VERBATIM RESPONSE]

OP3 What was the main reason for choosing another program over a National Grid program(s)?

[RECORD VERBATIM RESPONSE]

OP4 [participants: C5 = 4, 5] For this project, what was the main reason for choosing National Grid over other program(s)?

[RECORD VERBATIM RESPONSE]

OP5 [participants: C5 = 4, 5,7] In your own words, how would you compare offerings from the other entities with the National Grid’s programs?

[RECORD VERBATIM RESPONSE]

OP6 At any time, was there any confusion within your company in regards to …

a. What services different entities provided?
b. Whether these entities were affiliated with National Grid?
c. Which entity could provide services that best fit your needs?

1 Yes
2 No
8 Don’t know

OP6r [if Yes to any in OP6] How was this confusion resolved?

[RECORD VERBATIM RESPONSE]
F: Nonparticipant Customer Survey... 

**OP6** [If Yes to any in OP6] Did the confusion influence which program was chosen?

1. Yes
2. No
8. Don’t know

**OP7** [all] Some energy efficiency programs offered by utilities offer a turn-key approach. By this we mean the program does everything for you. Program staff come in and identify all opportunities, install the equipment and remove the old equipment. All the customer does is agree to the installation and pay a portion of the cost.

Others like the [program name] program allows the customer to select the contractor who does the work and apply for a rebate.

Assuming the cost to you would be the same, which of these would you prefer; a more turn-key approach or an approach like the [program name] program?

1. Turn-key approach
2. Existing approach
3. No preference [IF C5=4 OR 5 SKP SP1, ELSE SKP NP1]
8. Don’t know [IF C5=4 OR 5 SKP SP1, ELSE SKP NP1]

**OP8** Why do you prefer this approach?

[RECORD VERBATIM RESPONSE]

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### Other Equipment Purchases (Full National Grid participants)

**IF (C5 <> 4, 5) SKIP TO NP1**

**SP1** [participants: C5 = 4, 5] Since participating in National Grid's [program name] Program, have you purchased any other type of energy efficient or ENERGY STAR rated equipment?

1. Yes
2. No [SKIP TO F1]
8. Don’t know [SKIP TO F1]
SP2 What high efficiency equipment have you purchased?
[SELECT ALL THAT APPLY; READ LIST IF NEEDED]

1 Lighting
2 Lighting controls
3 Electric process measures
4 Motors / variable speed drives
5 Boilers
6 Furnaces
7 Water heater
8 Other electric equipment [SPECIFY]
9 Other gas equipment [SPECIFY]

SP3 [ASK FOR EACH MEASURE IN SP2] Did you receive a rebate from National Grid or any other organization for [this/any of these] equipment? (Select all that apply)

1 No rebate
2 Yes, National Grid
3 Yes, NYSERDA
4 Yes, another organization [SPECIFY]
5 Yes, another fuel provider [SPECIFY]
6 Don’t know

SP4 On a scale of 0 to 10, with 0 being no influence and 10 being total influence, how much influence did your participation in the [program name] Program have on your decision to purchase this high-efficiency equipment?

_____ 0 to 10
88 Don’t know
99 Refused
SP5 Businesses consider many different factors when deciding which equipment to purchase. On a scale of 0 to 10, with 0 being "not at all important," and 10 being "very important," how important are each of the following in your firm's decision of which equipment to purchase? [SPECIFY FOR EACH ITEM]

a. Compatibility with existing equipment
b. Initial purchase cost
c. Operating cost
d. Length of payback period
e. Recommendation of contractor or supplier
f. Efficiency level of equipment
g. Rebate from utility or other source
h. Recommendations of others that had experience with equipment
i. Compatibility with business design
j. Energy savings of equipment

Recent Equipment Purchases (all except Full National Grid participants)

IF (C5 <> 1,2,3,6,7) SKIP TO F1

NP1 [C5 = 1, 2, 3, 6, 7] Have you purchased any type of energy efficient or ENERGY STAR rated equipment in the last 2 years?

1 Yes [SKIP TO NP4]
2 No [SKIP TO NP4]
8 Don't know [SKIP TO NP4]

NP2 What high efficiency equipment have you purchased? [SELECT ALL THAT APPLY; READ LIST IF NEEDED]

1 Lighting
2 Lighting controls
3 Electric process measures
4 Motors / variable speed drives
5 Boilers
6 Furnaces
7 Water heater
8 Other electric equipment [SPECIFY]
9 Other gas equipment [SPECIFY]
NP3  [ASK FOR EACH MEASURE IN NP2] Did you receive a rebate from National Grid or any other organization for [this/any of these] equipment? (Select all that apply)

1. No rebate
2. Yes, National Grid
3. Yes, NYSERDA
4. Yes, another organization [SPECIFY]
5. Yes, another fuel provider [SPECIFY]
6. Don’t know

NP4  Businesses consider many different factors when deciding which equipment to purchase. On a scale of 0 to 10, with 0 being "not at all important," and 10 being "very important," how important are each of the following in your firm’s decision of which equipment to purchase? [SPECIFY FOR EACH ITEM]

a. Compatibility with existing equipment
b. Initial purchase cost
c. Operating cost
d. Length of payback period
e. Recommendation of contractor or supplier
f. Efficiency level of equipment
g. Rebate from utility or other source
h. Recommendations of others that had experience with equipment
i. Compatibility with business design
j. Energy savings of equipment
k. Availability of financing

NP5  What could National Grid or the program do to increase the likelihood that you would participate in the [program name] program?

Probe if went with another organization: What could National Grid do differently to convince you to participate in their program? Any other items National Grid could learn from this other program?

[RECORD VERBATIM RESPONSE]

NP6  For each energy efficiency improvement you consider, do you research different technical assistance firms or do you typically select one organization you are comfortable with?

1. Research different firms
2. Select firm comfortable with
3. It depends (specify)
NP7 How do you select an installation contractor for energy efficiency improvements?

Probe: do they need to be affiliated with the program?

[RECORD VERBATIM RESPONSE]

Firmographics (all)

We’re almost done, I just have a few questions about your business’s general characteristics.

F1g [gas only] What is the majority of the space at this location used for?
[DO NOT READ LIST]

1 Assembly
2 Auto repair
3 Big box retail
4 Community college
5 Fast food
6 Dormitory
7 Elementary school
8 Full service restaurant
9 Grocery
10 Heavy industrial
11 Hotel
12 Hospital
13 Industrial refrigeration
14 Large office
15 Light industrial
16 Motel
17 Multi story retail
18 Multifamily high-rise
19 Multifamily low-rise
20 Religious
21 Secondary school
22 Small office
23 Small retail
24 University
25 Warehouse
26 Other [SPECIFY]
F1e [electric only] What is the majority of the space at this location used for? [DO NOT READ LIST]

1 Assembly  
2 Auto  
3 Big box  
4 College dormitory  
5 Community college  
6 Elementary school  
7 Fast food  
8 Full service restaurant  
9 Grocery  
10 High school  
11 Heavy industrial  
12 Hospital  
13 Hotel  
14 Large office  
15 Large retail  
16 Light industrial  
17 Motel  
18 Multifamily high-rise  
19 Multifamily low-rise  
20 Refrigerated Warehouse  
21 Religious  
22 Single family residence  
23 Small office  
24 Small retail  
25 University  
26 Warehouse  
27 Other [SPECIFY]

F2 Is this business a non-profit organization?

1 Yes  
2 No  
8 Don’t know
F3 Which of the following options best describes your business/organization’s ownership category? Is it? [READ LIST]

1. One of a chain of establishments
2. Franchise
3. Single establishment business/organization
4. Branch office
5. Headquarters of business/organization
6. Federal government facility
7. State government facility
8. Local government facility
9. Educational facility
10. Other [SPECIFY]

F4 How many more years does your business plan to be at this location?

____ Years

777 Indefinite
888 Don’t know
999 Refused

F5 Approximately how many full-time, part-time, and seasonal employees, including yourself, work at this location?

____ Full time employee [30+ hours per week]
____ Part-time
____ Seasonal employees
8888 Don’t know
9999 Refused

F6 Does your business own or lease the space you occupy/manage at this location?

1. Own all
2. Lease all
3. Own some and lease some
4. Manage property
5. Other
8. Don’t know
9. Refused
Overall, which of the following statements best describes your business’s energy efficiency efforts at this location? [READ LIST]

1. [nonparticipants only, C5=1,2,3,7] We have not done anything to save energy at this location
2. We have not done much to save energy
3. We have made some energy efficiency improvements
4. We have done everything or almost everything that we can

Finally, in terms of revenues, over the last two years, has your business increased, decreased, or remained about the same?

1. Increased
2. Decreased
3. Stayed the same
4. Don’t know

What is your title?

1. CEO/President
2. Business owner
3. General manager
4. Facilities engineer
5. Maintenance manager
6. Office manager
7. Administrator
8. Energy management staff
9. Purchasing agent/buyer
10. Landlord/property manager
11. Operations manager
12. Other [SPECIFY]

Lastly, I’d like to get your name and contact information if we have additional questions. Your contact information will not be associated with your responses provided in this survey.

1. Collect contact information:
   Name: ____________________________
   Phone: __________________________
2. Refused to provide contact information