

Minutes for Website Committee Conference Call

Wednesday, July 12, 2017, 2:00 PM PDT

Attendees:

Mona Dzvova – CPUC
Brian Smith – PG&E
Tim Caulfield – Caulfield Consulting (Website Administrator)
Loan Nguyen – SoCalGas

Absent:

Shahana Samiullah – SCE
Jesse Emge – SDG&E
Cynthia Rogers – CEC

Executive Summary

The CALMAC Website Committee held a regularly scheduled conference call to discuss possible improvements to the Searchable Database page. Costs associated with possible modifications were discussed, but action was tabled until input from the remaining members of the committee could be obtained. Tim Caulfield will obtain information on specific formatting questions and bring it to the next conference call on September 13, 2017 at 2:00 PM PDT.

Minutes of Conference Call – The purpose of this conference call was to discuss possible changes to the CALMAC Searchable Database page. Costs for various change proposals (see attached memo) were discussed with conclusions as follows:

1. *Implement “Program Administrator” area (like Implementer) in all areas of the site as needed (Search, Results, Report Submit, Report Editing, Mailing List). Cost: ~\$10,000.* This alternative was considered not cost effective, since it is believed that most of the same effect could be achieved by simply reordering the Implementer category, as discussed in 2 below.
2. *As an alternate to 1 above, prioritize the Implementers selection window so the major utilities appear at the top of the list. Virtually no cost.* Most of the discussion centered on how best to implement this approach. Initially the decision was to prioritize the list so that the four major California utilities appear at the top, then the rest of the implementer names would appear below those names in alphabetical order. Then it was proposed that the Regional Energy Networks (RENs) should also be prioritized at the top of the list along with the utility names. That resulted in discussion of the fact that, given that the implementer list only shows 5 implementers at a time, the logic of how the implementers are listed would not be apparent. This led to a discussion about whether the page layout could be changed to show more implementers. Tim Caulfield said he would check with Third Strand to see how difficult this would be. At this point Brian Smith

pointed out that once you have highlighted one name in the implementer list, all you had to do was hit the first letter of the implementer of interest name (such as a P for PG&E) to be taken to the first listing for that letter in the list. That makes searching easier. Tim Caulfield pointed out that in some ways, the presentation of a totally alphabetical list makes it obvious how to find any implementer. Mona indicated that she would like to hear input from the absent committee members, before calling for a decision.

3. *Rationalize the Categories: Change New Construction to a Publication Type. Reclassify existing New Construction Sector publications as New Construction Publication Type. Add codes such as, Education and Emerging Technologies as additional Publication Types. Confirm changes are working in all areas of the site. Cost: ~\$2,000.* The attached Screenshot of the Search page was emailed to the group 20 minutes before the meeting. It illustrates one view of this fundamental change in structure. This approach would reverse a 2001 decision made by the Website Committee that classified New Construction as a sector. It would call it a Program Type. This would, at the same time, change the term Publication Type to Program Type. Then several other program types that cross several sectors could be added, for example: Cross Cutting, Education and Training, Emerging Technologies. A quick hand modified screen shot of these changes is attached.

Overall, the conclusion was that (1) input from the absent committee members would be valued before deciding on changes, and (2) there is no hurry to make changes, so changes should be made after due consideration. Thus the Committee decided to ponder the changes until the next meeting and then, hopefully with everyone present, decide how to change the Database Search page.

Action Items:

- Tim Caulfield will discuss with Third Strand the viability and cost for changing the search page layout to use more of the available space, possibly allowing more of the Implementer list to be seen.
- Tim Caulfield will try to mock up screen layouts of the alternates discussed above to clarify how they would be presented.
- Brian Smith will email Jesse Emge to see if SDG&E might like to delegate someone else to attend CALMAC calls.

The conference call was ended approximately 2:40 PM PDT. The next call is scheduled for September 13, 2017 at 2 PM PDT.

July 10, 2017

Fr: Tim Caulfield, Caulfield Consulting
To: CALMAC Website Committee
Re: Cost and assessment to date on possible changes to Search interface

Summary: This documents provides estimated costs for two possible modifications to the CALMAC Searchable Database interface and provides preliminary data on how the interface is currently being used.

Costs for Changing Interface: The Website Committee requested cost estimates on two potential modifications to the CALMAC Searchable Database interface. Those two changes are summarized as follows:

1. Implement "Program Administrator" area (like Implementer) in all areas of the site as needed (Search, Results, Report Submit, Report Editing, Mailing List). Cost: ~\$10,000.
2. As an alternate to 1 above, prioritize the Implementers selection window so the major utilities appear at the top of the list. Virtually no cost.
3. Rationalize the Categories: Change New Construction to a Publication Type. Reclassify existing New Construction Sector publications as New Construction Publication Type. Add codes such as, Education and Emerging Technologies as additional Publication Types. Confirm changes are working in all areas of the site. Cost: ~\$2,000. **This subject needs more discussion by the Website Committee.**

The cost estimate for Approach #1 above is high because the code for the database search was written by the original contractor that built the database and Third Strand hasn't delved into search code before now. They want to make sure they don't break it in any way.

Analysis of Data on How Search Interface is Being Used: Below is a series of pages that present downloads of data from Google Analytics, which is the software CALMAC.org uses to track website statistics. On March 23rd, Third Strand modified the parameters of Google Analytics to have it collect more specific data on the use of the CALMAC Searchable Database interface. The data presented spans from March 23rd to July 7th, 2017. The following bullets illustrate findings base on the Google Analytic pages for the 76 day period covered:

- Page 1 shows that the site had 3,111 visits and that 896 visits resulted in searches (29%).
- Page 2 shows that the 896 visits with searches resulted in 1,514 unique searches.
- Pages 3 and 4 list, in descending frequency, the search terms used when an entry was typed into the Search Text box. These search terms may have been used with or without selecting additional filters using the other pre-categorize search criteria. Additionally, they may have been conducted during one session where the user performer multiple iterations or during multiple sessions.
- Pages 5 and 6 show that of the 1,514 searches performed, 1,122 searches (74%) were performed using only a Search Text box entry (not set). Of the remaining 26% of searches, the table breaks out the types of searches by "numbers" indicating the criteria

chosen. However, without extensive point-by-point data evaluation, it is impossible to isolate what each Site Search Category number signifies. The main reason for this is that when Conceo, the original contractor who built the database, constructed the data system, they didn't have data assessment systems like Google Analytics in mind, since they didn't exist. As a result, they didn't create unique number ranges for each type of search category. The result is that there are multiple values (i.e., meanings) for many numbered search criteria, each from a different category, each indication different search criteria. This doesn't mean that the data is inaccurate, it simply limits our ability to parse it into meaningful bins. Third Strand believes that there are some potential workarounds for this issue if the Website Committee wants it to pursue them.

Bottom line, about three quarters of all searches are performed without using selections from the other six pre-coded search categories. Further modifications will be necessary to obtain more detailed tracking of search practices.

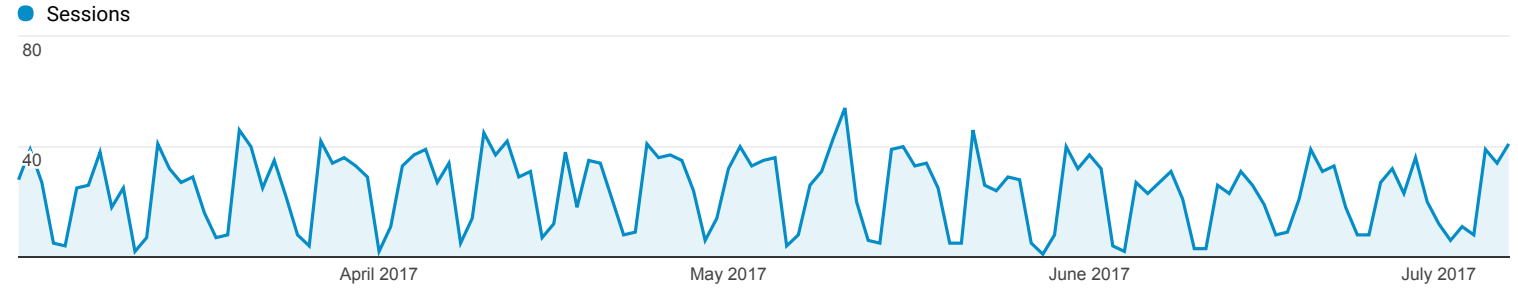
Mar 1, 2017 - Jul 7, 2017

Site Search Usage

All Users
100.00% Sessions

Explorer

Summary



| Site Search Status | Acquisition | | | Behavior | | | Conversions | | |
|-------------------------------|--|--|---|---|--|--|--|----------------------------------|--|
| | Sessions | % New Sessions | New Users | Bounce Rate | Pages / Session | Avg. Session Duration | Goal Conversion Rate | Goal Completions | Goal Value |
| | 3,111 % of Total: 100.00% (3,111) | 55.06% Avg for View: 55.03% (0.06%) | 1,713 % of Total: 100.06% (1,712) | 44.46% Avg for View: 44.46% (0.00%) | 3.73 Avg for View: 3.73 (0.00%) | 00:03:32 Avg for View: 00:03:32 (0.00%) | 0.00% Avg for View: 0.00% (0.00%) | 0 % of Total: 0.00% (0) | \$0.00 % of Total: 0.00% (\$0.00) |
| 1. Visits Without Site Search | 2,215 (71.20%) | 61.35% | 1,359 (79.33%) | 59.59% | 2.53 | 00:02:17 | 0.00% | 0 (0.00%) | \$0.00 (0.00%) |
| 2. Visits With Site Search | 896 (28.80%) | 39.51% | 354 (20.67%) | 7.03% | 6.70 | 00:06:36 | 0.00% | 0 (0.00%) | \$0.00 (0.00%) |

Rows 1 - 2 of 2

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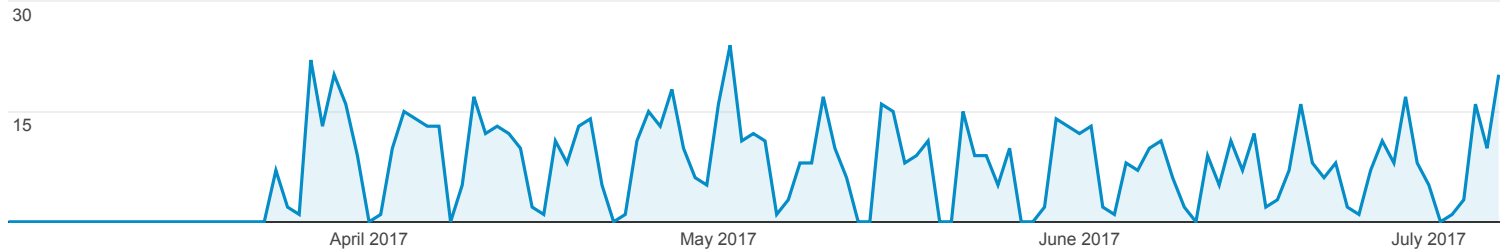
Mar 1, 2017 - Jul 7, 2017

Site Search Overview

All Users
100.00% Pageviews

Overview

Sessions with Search



28.80% of your visits used site search

Sessions with Search

896

Total Unique Searches

1,514

Results Pageviews / Search

1.16

% Search Exits

27.74%

% Search Refinements

36.39%

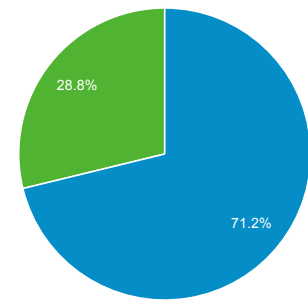
Time after Search

00:02:58

Avg. Search Depth

1.58

Visits Without Site Search Visits With Site Search



| Search Term | Total Unique Searches | % Total Unique Searches |
|------------------------|-----------------------|-------------------------|
| 1. multifamily | 17 | 1.12% |
| 2. PG | 17 | 1.12% |
| 3. codes and standards | 14 | 0.92% |
| 4. lighting | 14 | 0.92% |
| 5. direct install | 10 | 0.66% |
| 6. quality maintenance | 10 | 0.66% |
| 7. home energy reports | 8 | 0.53% |
| 8. ialc | 8 | 0.53% |
| 9. SDG | 8 | 0.53% |
| 10. upstream | 8 | 0.53% |

Mar 1, 2017 - Jul 7, 2017

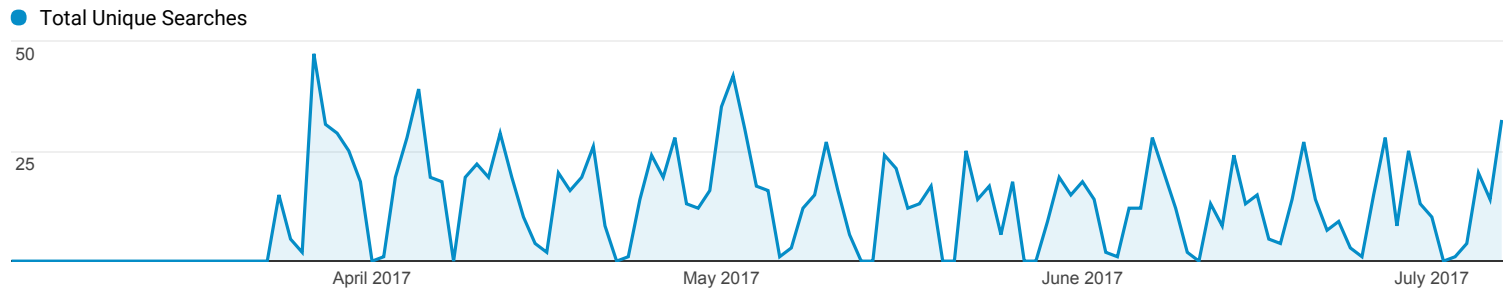
Search Terms

The table rows have been filtered to include only data for "Search Term". The graph and table headers include totals for all data.

All Users
100.00% Total Unique Searches

Explorer

Site Usage



| Search Term | Total Unique Searches | Results Pageviews / Search | % Search Exits | % Search Refinements | Time after Search | Avg. Search Depth |
|-------------------------|--|--|--|--|--|--|
| | 1,514 % of Total: 100.00% (1,514) | 1.16 Avg for View: 1.16 (0.00%) | 27.74% Avg for View: 27.74% (0.00%) | 36.39% Avg for View: 36.39% (0.00%) | 00:02:58 Avg for View: 00:02:58 (0.00%) | 1.58 Avg for View: 1.58 (0.00%) |
| 1. multifamily | 17 (1.12%) | 1.59 | 47.06% | 29.63% | 00:03:54 | 5.18 |
| 2. PG | 17 (1.12%) | 1.12 | 58.82% | 15.79% | 00:01:40 | 0.71 |
| 3. codes and standards | 14 (0.92%) | 1.50 | 28.57% | 14.29% | 00:07:55 | 2.36 |
| 4. lighting | 14 (0.92%) | 1.36 | 7.14% | 21.05% | 00:05:33 | 2.07 |
| 5. direct install | 10 (0.66%) | 1.10 | 20.00% | 9.09% | 00:00:58 | 1.50 |
| 6. quality maintenance | 10 (0.66%) | 1.00 | 90.00% | 0.00% | 00:00:19 | 0.20 |
| 7. home energy reports | 8 (0.53%) | 1.12 | 37.50% | 0.00% | 00:03:18 | 3.38 |
| 8. ialc | 8 (0.53%) | 1.38 | 12.50% | 18.18% | 00:09:33 | 3.88 |
| 9. SDG | 8 (0.53%) | 1.50 | 62.50% | 0.00% | 00:04:30 | 2.25 |
| 10. upstream | 8 (0.53%) | 1.12 | 62.50% | 11.11% | 00:02:45 | 0.75 |
| 11. CPU0104.01 | 7 (0.46%) | 1.14 | 14.29% | 87.50% | 00:02:49 | 1.43 |
| 12. ESA | 7 (0.46%) | 1.00 | 42.86% | 14.29% | 00:03:23 | 2.00 |
| 13. SCE0396 | 7 (0.46%) | 1.14 | 28.57% | 12.50% | 00:00:37 | 1.14 |
| 14. custom program | 6 (0.40%) | 1.00 | 83.33% | 16.67% | 00:00:08 | 0.17 |
| 15. finance | 6 (0.40%) | 1.00 | 33.33% | 16.67% | 00:00:26 | 0.67 |
| 16. hvac | 6 (0.40%) | 1.83 | 33.33% | 27.27% | 00:07:19 | 3.00 |
| 17. HVAC | 6 (0.40%) | 1.50 | 33.33% | 22.22% | 00:06:01 | 1.33 |
| 18. hvac behavior study | 6 (0.40%) | 1.00 | 0.00% | 0.00% | 00:00:18 | 1.50 |

| | | | | | | |
|---|--------------|------|---------|---------|----------|------|
| 19. HVAC1 | 6 (0.40%) | 1.17 | 33.33% | 42.86% | 00:00:44 | 0.83 |
| 20. PGE0301.01 | 6 (0.40%) | 1.00 | 33.33% | 33.33% | 00:01:39 | 0.67 |
| 21. pool pump | 6 (0.40%) | 1.17 | 50.00% | 0.00% | 00:02:24 | 1.33 |
| 22. we | 6 (0.40%) | 1.17 | 66.67% | 0.00% | 00:01:22 | 0.67 |
| 23. boiler | 5 (0.33%) | 1.40 | 20.00% | 14.29% | 00:01:23 | 3.20 |
| 24. cannabis | 5 (0.33%) | 1.40 | 60.00% | 0.00% | 00:01:48 | 0.40 |
| 25. etp | 5 (0.33%) | 1.00 | 40.00% | 40.00% | 00:03:25 | 1.20 |
| 26. ETP | 5 (0.33%) | 1.00 | 0.00% | 40.00% | 00:01:28 | 1.80 |
| 27. home upgrade | 5 (0.33%) | 1.00 | 20.00% | 60.00% | 00:04:34 | 1.00 |
| 28. itron | 5 (0.33%) | 1.40 | 0.00% | 28.57% | 00:01:41 | 1.80 |
| 29. SCE0361.02 | 5 (0.33%) | 1.00 | 0.00% | 100.00% | 00:02:36 | 1.40 |
| 30. SCE0361.04 | 5 (0.33%) | 1.20 | 0.00% | 83.33% | 00:07:02 | 1.20 |
| 31. upstream HVAC | 5 (0.33%) | 1.20 | 60.00% | 33.33% | 00:00:30 | 0.60 |
| 32. customer survey | 4 (0.26%) | 1.00 | 100.00% | 0.00% | 00:00:00 | 0.00 |
| 33. evergreen | 4 (0.26%) | 1.25 | 0.00% | 20.00% | 00:10:42 | 2.25 |
| 34. financing | 4 (0.26%) | 1.00 | 25.00% | 25.00% | 00:01:03 | 1.25 |
| 35. home energy report | 4 (0.26%) | 1.00 | 25.00% | 0.00% | 00:02:11 | 1.25 |
| 36. hvac3 | 4 (0.26%) | 1.00 | 75.00% | 0.00% | 00:14:33 | 1.50 |
| 37. HVAC3 | 4 (0.26%) | 1.00 | 0.00% | 50.00% | 00:00:34 | 1.25 |
| 38. HVAC4 | 4 (0.26%) | 1.00 | 0.00% | 25.00% | 00:01:17 | 1.50 |
| 39. low income | 4 (0.26%) | 1.00 | 25.00% | 0.00% | 00:01:35 | 1.25 |
| 40. midstream | 4 (0.26%) | 1.00 | 25.00% | 75.00% | 00:02:43 | 0.75 |
| 41. multi family | 4 (0.26%) | 1.00 | 0.00% | 50.00% | 00:10:05 | 2.25 |
| 42. net to gross | 4 (0.26%) | 1.25 | 0.00% | 60.00% | 00:09:51 | 2.00 |
| 43. satisfaction | 4 (0.26%) | 1.00 | 100.00% | 0.00% | 00:00:00 | 0.00 |
| 44. smart thermostat | 4 (0.26%) | 1.50 | 50.00% | 33.33% | 00:01:01 | 1.00 |
| 45. workforce education and training | 4 (0.26%) | 1.00 | 50.00% | 25.00% | 00:07:55 | 3.00 |
| 46. California Commercial Saturation Survey | 3 (0.20%) | 1.00 | 33.33% | 33.33% | 00:04:30 | 1.33 |
| 47. CLASS | 3 (0.20%) | 1.33 | 0.00% | 75.00% | 00:03:37 | 1.00 |
| 48. Codes and Standards | 3 (0.20%) | 1.00 | 33.33% | 33.33% | 00:06:36 | 1.33 |
| 49. codes standards impact evaluation | 3 (0.20%) | 1.00 | 33.33% | 33.33% | 00:00:26 | 0.67 |
| 50. contractor training | 3 (0.20%) | 1.00 | 0.00% | 66.67% | 00:02:59 | 2.00 |

Mar 1, 2017 - Jul 7, 2017

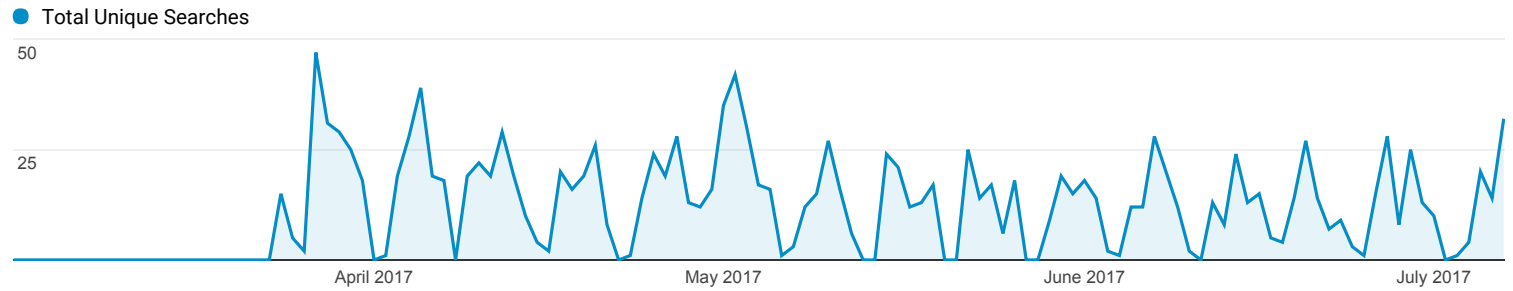
Search Terms

The table rows have been filtered to include only data for "Search Term". The graph and table headers include totals for all data.
The table rows have been filtered to include only data for "Site Search Category". The graph and table headers include totals for all data.

All Users
100.00% Total Unique Searches

Explorer

Site Usage



| Site Search Category | Total Unique Searches | Results Pageviews / Search | % Search Exits | % Search Refinements | Time after Search | Avg. Search Depth |
|----------------------|--|--|--|--|--|--|
| | 1,514 % of Total: 100.00% (1,514) | 1.16 Avg for View: 1.16 (0.00%) | 27.74% Avg for View: 27.74% (0.00%) | 36.39% Avg for View: 36.39% (0.00%) | 00:02:58 Avg for View: 00:02:58 (0.00%) | 1.58 Avg for View: 1.58 (0.00%) |
| 1. (not set) | 1,122 (74.11%) | 1.09 | 27.45% | 37.36% | 00:02:41 | 1.46 |
| 2. 1 | 81 (5.35%) | 1.43 | 34.57% | 37.93% | 00:02:47 | 1.85 |
| 3. 2 | 57 (3.76%) | 1.18 | 15.79% | 43.28% | 00:06:02 | 2.26 |
| 4. 5 | 35 (2.31%) | 1.23 | 25.71% | 32.56% | 00:04:35 | 1.77 |
| 5. 103 | 31 (2.05%) | 1.58 | 51.61% | 14.29% | 00:04:19 | 1.68 |
| 6. 252 | 25 (1.65%) | 1.28 | 32.00% | 34.38% | 00:03:22 | 1.72 |
| 7. 104 | 14 (0.92%) | 1.43 | 35.71% | 35.00% | 00:02:10 | 1.21 |
| 8. 6 | 14 (0.92%) | 1.14 | 21.43% | 62.50% | 00:08:27 | 2.50 |
| 9. 102 | 13 (0.86%) | 1.23 | 30.77% | 37.50% | 00:00:35 | 1.31 |
| 10. 3 | 12 (0.79%) | 1.33 | 0.00% | 50.00% | 00:01:38 | 1.50 |
| 11. 92 | 11 (0.73%) | 1.18 | 36.36% | 30.77% | 00:03:09 | 1.73 |
| 12. 117 | 10 (0.66%) | 1.90 | 30.00% | 36.84% | 00:06:17 | 3.10 |
| 13. 194 | 10 (0.66%) | 1.30 | 40.00% | 15.38% | 00:01:10 | 2.10 |
| 14. 107 | 9 (0.59%) | 1.44 | 33.33% | 38.46% | 00:02:08 | 2.00 |
| 15. 215 | 9 (0.59%) | 1.00 | 22.22% | 55.56% | 00:05:20 | 2.22 |
| 16. 4 | 6 (0.40%) | 2.33 | 16.67% | 35.71% | 00:08:30 | 3.33 |
| 17. 101 | 5 (0.33%) | 1.20 | 20.00% | 16.67% | 00:01:08 | 2.60 |
| 18. 105 | 4 | 1.75 | 25.00% | 42.86% | 00:03:35 | 3.50 |

| | | | | | | | |
|-----|-----|--------------|------|---------|---------|----------|------|
| 19. | 229 | 4 (0.26%) | 1.25 | 0.00% | 0.00% | 00:03:45 | 3.25 |
| 20. | 9 | 4 (0.26%) | 1.25 | 75.00% | 20.00% | 00:01:22 | 1.25 |
| 21. | 202 | 3 (0.20%) | 1.67 | 0.00% | 20.00% | 00:01:06 | 1.33 |
| 22. | 221 | 3 (0.20%) | 1.33 | 0.00% | 50.00% | 00:03:41 | 2.33 |
| 23. | 254 | 3 (0.20%) | 1.00 | 66.67% | 33.33% | 00:00:23 | 0.00 |
| 24. | 63 | 3 (0.20%) | 1.67 | 66.67% | 0.00% | 00:11:37 | 0.67 |
| 25. | 110 | 2 (0.13%) | 2.00 | 0.00% | 25.00% | 00:02:09 | 3.50 |
| 26. | 120 | 2 (0.13%) | 2.00 | 0.00% | 25.00% | 00:02:03 | 5.50 |
| 27. | 140 | 2 (0.13%) | 1.00 | 0.00% | 50.00% | 00:01:10 | 1.50 |
| 28. | 144 | 2 (0.13%) | 1.50 | 0.00% | 66.67% | 00:07:46 | 4.50 |
| 29. | 20 | 2 (0.13%) | 1.00 | 0.00% | 0.00% | 00:00:15 | 1.00 |
| 30. | 77 | 2 (0.13%) | 1.00 | 0.00% | 0.00% | 00:00:32 | 1.50 |
| 31. | 81 | 2 (0.13%) | 1.50 | 50.00% | 0.00% | 00:00:05 | 1.00 |
| 32. | 134 | 1 (0.07%) | 1.00 | 100.00% | 0.00% | 00:00:00 | 0.00 |
| 33. | 141 | 1 (0.07%) | 1.00 | 0.00% | 100.00% | 00:01:10 | 3.00 |
| 34. | 142 | 1 (0.07%) | 1.00 | 0.00% | 0.00% | 00:00:12 | 1.00 |
| 35. | 149 | 1 (0.07%) | 1.00 | 0.00% | 0.00% | 00:00:13 | 1.00 |
| 36. | 182 | 1 (0.07%) | 1.00 | 0.00% | 0.00% | 00:00:15 | 1.00 |
| 37. | 213 | 1 (0.07%) | 1.00 | 0.00% | 0.00% | 00:00:36 | 1.00 |
| 38. | 263 | 1 (0.07%) | 1.00 | 100.00% | 0.00% | 00:00:00 | 0.00 |
| 39. | 32 | 1 (0.07%) | 1.00 | 0.00% | 0.00% | 00:00:04 | 1.00 |
| 40. | 41 | 1 (0.07%) | 1.00 | 0.00% | 0.00% | 00:00:31 | 1.00 |
| 41. | 43 | 1 (0.07%) | 1.00 | 100.00% | 0.00% | 00:00:00 | 0.00 |
| 42. | 60 | 1 (0.07%) | 2.00 | 0.00% | 100.00% | 00:05:24 | 2.00 |
| 43. | 69 | 1 (0.07%) | 1.00 | 0.00% | 0.00% | 00:00:08 | 1.00 |

Rows 1 - 43 of 43

Searchable Database

Need Help?

Help file includes hints for first time visitors

**Download Entire
Publication List**

Search Text:

(optional)

Title, Authors (Evaluators), Abstract, Category, Sector, program number and Study IDs will be searched.
This Search Engine currently allows the use of only the following boolean operators:
and, +, or, not, -, " " and nested searches with the use of parentheses ()

Search Type: Partial Word Search Whole Word Search

Filter Search By:

PROGRAM
Publication Types:

Energy Efficiency Demand Response Low Income Self Generation

NEW CONSTRUCTION **CROSS CUTTING** **EDUCATION** **EMERGING TECHNOLOGY**

Categories:

| | |
|-----------------------|--|
| Evaluation Guidelines | AAG & Associates |
| Impact Evaluation | ACEEE |
| Market Effects | ADM |
| Market Study | Aloha Systems |
| Measure Retention | Alternative Energy Systems Consulting, Inc. (AESC) |

ALL CLEAR

ALL CLEAR

Sectors:

Agricultural
Commercial
Industrial
New Construction
Residential

Implementers:

ADM
AESC Inc.
Alliance to Save Energy
American Synergy Corporation
Association of Bay Area Governments

appear first

*PO#E
SCE
SCG
SPG#E*

ALL CLEAR

ALL CLEAR

Acronyms

Publication Dates:

From: To: **ALL CLEAR**
(earliest: 1/18/1990) (latest: 11/18/2017)

Program Years:

From: To: **ALL CLEAR**
(yy) (yy)

Sort Search By:

- Publication Dates
- Program Years

Search