

Appendix A

CONTRACTOR MANAGER IN-DEPTH INTERVIEW DISCUSSION GUIDE

A. General & Intro

ADD GENERAL INTRO ABOUT WHY TALKING TO THEM... AND WHAT HOPE TO LEARN

1. Roughly how many [insert IOU name for role] contractors are actively working for you?
2. What is your turnover? Do a lot of these folks stay with you a long time? Or are you regularly re-training staff to do this work?

B. Assessment/Education Specialist Selection and Hiring

3. When you are hiring new staff, how do you select and/or screen potential employees for Assessment/Education?
 - a. What are you looking for in an employee? Bilingual? What other criteria? (e.g., personality characteristics, technical skills, etc.?)
 - b. What is the process for screening these employees?
4. How do you monitor the [insert IOU name for role] performance and compliance?
 - a. What oversight, inspections, reports, ride-alongs or field visits are used for this?
 - b. How often do you identify problems or issues? What are the types of problems? What steps do you take when you identify and resolve a problem with an employee?
 - c. Do you have a way for identifying and sharing best practices?
 - d. Do you ever receive commendations/complaints from customers about how the [insert IOU name for role] communicated or deliver the educational component of the program?
 - e. Please describe the types of feedback received from customer? How do you respond?
5. How would you define or describe a very effective [insert IOU name for role]?
 - a. Have you noticed a wide range in [insert IOU name for role] performance when it comes to delivering the Energy Education component of the Assessment/Enrolments?
 - b. What is ideal – the very best? What is minimally acceptable?

C. AE Feedback

6. Do the [insert IOU name for role] who provide energy education ever offer feedback – in general on this aspect of what they do or are expected to do?
7. Do they offer feedback on what customers are responding to and/or if they are having issues with what and how the energy education is being delivered?

D. Assessment/Education Specialist Training

8. What -training and/or certification do the [insert IOU name for role] receive specifically with regard to doing the energy education?
 - a. How is the training conducted? How often?
 - b. What are your requirements concerning training? Who is required?
 - i. Are your requirements the same as the utility? How do they differ?
 - c. What records are kept of training completion?
 - d. How often are [insert IOU name for role] re-trained?
 - e. Who gets re-trained? Why is retraining done? Are there circumstances in which you might do more or less re-training?

Appendix A

- f. When doing the training – specifically on the energy education – how much flexibility do the [insert IOU name for role] have in terms of how it is delivered?
- g. How much flexibility do they have in terms of WHAT is delivered?
- 9. (SDG&E ONLY) What materials, handouts, PowerPoints, and course outlines are used for training?
 - a. Who produces them?
 - b. How often are these updated? What prompts you to update?

E. In-Home Visit Requirements, Documentation, Compensation

- 10. What materials are used by [insert IOU name for role] in-home?
 - a. Do the [insert IOU name for role] ever use any other materials beyond the Utility-provided education handout booklet?
- 11. What are the requirements of En Ed for each in-home visit (e.g., what is the [insert IOU name for role] required to do and/or provide during the visit)?
 - a. What aspects are more systematized or universally discussed with a similar format?
 - b. Are there aspects that you are aware of that the [insert IOU name for role] tend to customized more? What?
 - c. Are there aspects of the energy education that [insert IOU name for role] resist doing or tend to do less often? What and why?
 - d. What do you consider among the most valued or helpful information that customers receive in the energy education? Why?
 - e. What information that is included in the energy education do you believe assists customers in achieving the most energy or bill savings?
- 12. How is the En Ed aspect of the visit documented (and verified, monitored, etc.)?
- 13. How are the [insert IOU name for role] compensated? Overall? For En Ed?
 - a. Can they earn bonuses? Can they be penalized?

F. New Ideas and Improvements

- 14. Do you think the Energy Education is effective as it is currently done?
 - a. Why or why not?
- 15. What recommendations do you have for improving the En Ed component of ESAP?
 - a. Training? Materials and Requirements in En Ed? Brochures and leave-behinds? Ways of educating the customer? Etc.

Appendix A

CONTRACTOR ASSESSOR IN-DEPTH INTERVIEW DISCUSSION GUIDE

A. Selection and Hiring

1. What is your current job title? How did you get started in this job? Why?
 - a. How long have you worked in this capacity?
 - b. Are you a part time or full time employee?
 - c. What do you like best about your job?
 - d. What do you like least?
2. With regard to the energy education component of your job, what oversight, inspections, reports, ride-alongs and/or field visits are conducted by your supervisor ?
 - a. What challenges have been identified?
 - b. How were these challenges resolved?

B. Training

3. What training did you receive specific to the delivery of Energy Education during in-home visits?
4. How was the training conducted?
 - a. What aspects of the training did you find especially helpful or well done? What could be improved?
 - b. Have you had refresher training? Would this be valuable for you?
 - c. Do you feel the training prepared you to conduct effective energy education?
 - d. Did your training prepare you to answer customers' questions?
 - e. Have you done any research or training on your own about ways to save energy or about other utility programs?

C. Delivering the Education in the Home

5. Can you describe how and when you usually do the energy education?
 - a. When do you start educating during the visit? Before, during, or after the walk-through?
 - b. [IF DURING WALKTHROUGH) When you do the walkthrough, do you have a standard path that you follow, e.g., always begin in the kitchen and then move to the garage, or does it depend on the home?
 - c. Is energy education conducted prior to verifying income eligibility or feasible measures?
 - d. Who do you typically educate? Any others in the household?
6. What materials do you use when you are delivering the education component to the customer? Anything other than the Utility-provided education handout booklet?
 - a. What is good about it? What could be improved?
7. What are you required to cover regarding education during the visit?
 - a. How much flexibility do you have in terms of how it is delivered?
 - b. How much flexibility do you have in terms of WHAT is delivered?
 - c. What aspects do you discuss or cover in similar ways with ALL customers?
 - d. Are there aspects that customize more to a household? What?
 - e. Are there aspects of the energy education that you tend to cover less often? What and why?
8. What do you consider among the most valued or helpful information that customers receive in the energy education? Why?
 - a. What information that is included in the energy education do you believe assists customers in getting the most energy or bill savings?

Appendix A

9. How do you document energy education in the enrolment process?
 - a. How is this verified or monitored?
10. Describe the level of energy education that is provided during the installation process?
 - a. How is this verified or monitored?
11. Describe a really good experience that you have had – in terms of delivering energy education – where you think the household really got a lot out of the education.
[PROBES]
 - What did you do?
 - What topics and materials worked well?
 - Why were they receptive?
 - What else do you think contributed to making this a good experience?
 - In general, what aspects of the education do customers respond really well to? Why?
12. Now describe an experience delivering energy education where you think the household did not get much benefit from it.
 - a. What made this a “less than perfect” experience? What are all the factors that contribute to a negative experience?
 - b. In general, what aspects of energy education do customers seem not to care about or pay attention to? Why?
13. Do you ever receive feedback from customers about the energy education? What type of feedback?

D. New Ideas and Improvements

14. Do you think the Energy Education is effective as it is currently done?
 - a. Why or why not?
15. Do you share or receive ideas or techniques with other [insert iou name for the job] in your company?
 - a. Do you ever share or get ideas from other contracting agencies?
16. What recommendations do you have for improving the En Ed component of ESAP?
 - a. Training?
 - b. Requirements or oversight from your supervisors or the utility company?
 - c. Brochures and leave-behinds?
 - d. Ways of educating the customer?
 - e. Etc.

Appendix B

CONTRACTOR INTERNET SURVEY

Objectives of this survey:

- Identify how En Ed is delivered in homes
- Identify what En Ed content is delivered in homes
- Determine what works well and what has room for improvement (from the Assessor/Specialists perspective)
- Determine if there are differences in terms of training or personal background that can affect “how” and “what”

To meet these objectives, the survey includes questions related to training, delivery, content, and “characteristics” of the field personnel/specialists.

SURVEY

Thank you for taking the time to complete this survey. The survey is about the Energy Education component of the Energy Savings Assistance Program (ESAP), which is done during the initial assessment visit.

This survey is administered by HINER & Partners and KEMA, who are working with Pacific Gas & Electric Company (PG&E), Southern California Edison (SCE), Southern California Gas Company (SCG), and San Diego Gas & Electric Company (SDG&E) to improve both how and what the Utilities do with regard to energy education for low income customers.

There are no right or wrong answers, and your individual responses will remain confidential.

S1. To confirm, are you currently employed to conduct the initial in-home visits for the Energy Savings Assistance Program (ESAP) where you determine if a household is qualified and you conduct a walk-through assessment?

Yes.....	1	CONT
No	2	TERM

S2. Which utility company(s) do you do the in-home assessments for? *(Select all that apply.)*

Pacific Gas & Electric Company (PG&E)	1	Southern
California Edison (SCE).....	2	
Southern California Gas Company (SCG)	3	
San Diego Gas & Electric (SDG&E).....	4	

A1. How long have you been working in this position? If you left the position but came back later, please add up your total time. If less than a year, please enter in a zero in the years and then fill in the number of months.

Years _____

Months _____

Appendix B

[ANALYSIS NOTE ONLY. ANALYZE MORE THAN 3 MONTHS SEPARATELY FROM 3 MONTHS OR LESS]

A2. In a typical week, about how many hours do you work (counting drive time, in-home visits, office time, etc.)?

Hours _____

A3. And in a typical week, about how many homes do you visit for an assessment where you've met with the customer and done the qualification screening (that is, do not count cancellations or homes where no one was home, but count those who did not qualify)?

Homes Visited _____

A4. Do you schedule your own appointments, or does someone else schedule them for you?

Schedule them all myself.....	1
Someone else schedules them for me	2
Some of both	3

A5. About what percent of your scheduled appointments end up cancelled? Don't count appointments that you reschedule, just one's that cancel.

_____%

A6. Is canvassing to find people who might qualify that you could enroll part of your job as well?

Yes.....	1
No	2
Don't know.....	3

A7. What languages, in addition to English, are you fluent in? (*Select all that apply.*)

No other languages	1
Spanish.....	2
Chinese	3
Another language (SPECIFY:_____).....	4

[IF A7=1]

A8. Over the past 2 months, what percent of the homes you visited were you...

Able to speak with the customer fluently	_____%
Able to speak with the customer but not fluently because they spoke a language other than English	_____%
Not able to speak with because of a language barrier	_____%

(Total must add to 100%.)

Appendix B

[MUST ADD TO 100%]

[IF A7=2, 3, 4]

A9 Over the past 2 months, what percent of the homes you visited did you converse in ...

- English only %
- Spanish only %
- Other language (e.g., Chinese, etc.) %
- Both English and another language (bi-lingual discussion) %
- Could not talk with them because of a language barrier %

(Total must add to 100%.)

[MUST ADD TO 100%]

A10. Based on your experience in doing assessments and enrollments, what do you observe are the reasons that customers are reluctant or refuse to participate in the ESA program, other than not being income qualified? (GRID FORMAT: Frequent, Occasional, Rarely, Never)

- a. Did not want to provide income documentation
 - b. Did not trust it was free
 - c. Did not trust contractor / did not want to have strangers in their home
 - d. Would not get the measure or appliance they wanted
 - e. Too busy / don't have time
 - f. Doubted the quality of the work / doubted the quality of measures or appliances
 - g. Takes too long / too many visits
 - h. Other reason _____
 - i. Other reason _____
 - j. Other reason _____
-

T1. Which of the following was part of your training to initially prepare you for the energy education part of the assessment visits? Select all that apply.

- Received materials (e.g., manuals, books, instructions, etc)..... 1
 - Classroom training (e.g. presentations) 2
 - Role-playing (practicing giving the education with other trainees) .. 3
 - Ride-along training where you were the observer 4
 - Ride-along training where you were observed and critiqued 5
 - Something else (SPECIFY: _____) 6
-

T2. Did you take any "tests" associated with the training you received, to assess what you learned or recalled from the training?

- Yes..... 1
 - No 2
 - Don't recall 3
-

T3a. Have you received any additional training concerning energy education since then?

Appendix B

Yes..... 1
No 2

T3b. [IF T3a=Yes] Please describe the additional training you received.

T4. Overall, how would you rate the quality of the training you have received?
[10-point scale: Excellent to Poor]

T5. What aspect of the training did you feel was most helpful for you in your role to provide effective education to customers?

T6. How do you think the training could be improved to make you even more effective in providing energy education? What would you want to add or enhance?

T7. What would you recommend removing or de-emphasizing in the training?

T8. Have you done any research or learning on your own, for example, by going to the utility company's website?

Yes..... 1
No 2

The next questions are about the in-home energy education that you provide. Please keep in mind that there are no right or wrong answers. If you are not sure of an answer, please make an educated estimate.

IH1. We understand that some of the education may be provided when sitting down with a customer and some may be provided while doing the walk-through of the home.

When do you typically conduct the energy education? Thinking over the past two months, please estimate the amount of time you spent "educating" customers during each of the following.

0%-100%

Immediately after income qualifying the household
but before the walkthrough..... %

During the walkthrough assessment..... %

After the walkthrough assessment %

Appendix B

IH2a. During these different times in which you may be talking to customers about energy education, which of these times do you think is most effective for you, given your role and the requirements of your job?

- | | |
|--|---|
| Immediately after income qualifying the household
but before the walkthrough..... | 1 |
| During the walkthrough assessment..... | 2 |
| After the walkthrough assessment | 3 |
| A combination of the above..... | 4 |

IH2b. [IF IH2a=4] Select the times below for the most effective combination for you.

- | | |
|--|---|
| Immediately after income qualifying the household
but before the walkthrough..... | 1 |
| During the walkthrough assessment..... | 2 |
| After the walkthrough assessment | 3 |

IH3a. During these different times in which you may be talking to customers about energy education, which of these times do you think customers are most attentive and receptive to the energy education you provide?

- | | |
|---|---|
| Immediately after qualifying the household
but before the walkthrough..... | 1 |
| During the walkthrough assessment..... | 2 |
| After the walkthrough assessment | 3 |
| About the same for each | 4 |
| Not sure..... | 5 |

IH3b. Why do you think that customers are most attentive and receptive to energy education [ANSWER FROM IH3a]?

IH4. When do you typically provide the education and resource guide (booklet) that you leave behind with customers?

- | | |
|---|---|
| Immediately after qualifying the household
but before the walkthrough..... | 1 |
| During the walkthrough assessment..... | 2 |
| After the walkthrough assessment | 3 |

IH5. Over the past 2 months when you provided customers with the education and resource guide (booklet), what percent of the time were you able to do each of the following.

- | | |
|--|-----|
| Reviewed all of the pages in the materials with the customer | ___ |
| Reviewed some of the pages in the materials..... | ___ |
| Not reviewed any specific pages in the materials but explained the | |

Appendix B

purpose of the materials _____
Not reviewed the materials in detail or discussed or explained
the materials but left the materials with the customer to review. _____

(Total must add to 100%.)

(MUST TOTAL 100%)

IH6. What specific pages, charts, or information in the guide do you ALWAYS try to cover with customers?

IH7. What other specific pages, charts, or information in the guide do you try to cover with customers if time permits?

IH8. When you determine that a household does not qualify, how often do you leave the customer with the education and resource materials?

Always (e.g., 10 out of 10 times) 1
Most of the time (e.g., 7-9 times out of ten)..... 2
Sometimes (4-6 times out of ten)..... 3
Rarely (2-3 times out of ten) 4
Never 5

IH9. Over the past two months of the homes where you provided the energy education, what percent of the visits did you:

0%-100%
Talk with the customer (homeowner and/or person who manages utility bills, etc.) (0-100%)
Talk with another adult in the home (e.g., not the homeowner/person who manages utility bills) (0-100%)
Had children present (0-100%)
There appeared to be children living in home but were not there at the time of the visit..... (0-100%)

Thinking again about the past two months in which you assessed a home and provided energy education ...

IH10a. On average, how many minutes did you typically spend conducting the energy education part of the visit? This would include the time you are sitting down with a customer and/or walking around the home with the customer.

Minutes _____

IH10b. What was the most amount of time you spent in a single residence conducting energy education with the customer as part of the visit?

Minutes _____

Appendix B

IH10c. What was the least amount of time you spent conducting the energy education part of the visit?

Minutes _____

IH10d. Based on your experience and how customers respond to the energy education you offer, what do you consider an ideal amount of time to spend conducting the energy education part of the visit

Minutes _____

IH11. Which of the following topics do you verbally discuss during your in-home assessment and education visits? If there's something that's not on the list that you sometimes or always tell customers about, please write that in. There are no right or wrong answers – we are interested in understanding which specific topics *you talk* about vs. what is in the materials that you provide.

Please use the following scale:

- Always
- Some of the Time (Depends on Household)
- Rarely
- Never

[SCALE: Always, Some of the Time (Depends on Household), Rarely or Never]

- a. Electricity safety (e.g., electric heaters, water and electricity, plugs and outlets, etc.)
 - b. Gas safety (e.g., water heaters, gas appliances, etc.)
 - c. Earthquake safety (e.g., what to check for regarding electricity and/or natural gas)
 - d. Water conservation (e.g., using less hot water saves energy)
 - e. CFL disposal or recycling
 - f. How much it costs to run specific appliances
 - g. How to read an electric and/or natural gas bill
 - h. About other utility programs. Which ones? If you are not sure of the name, please provide a short description of it:
-

IH12. Which of the following energy saving tips do you provide verbally during your in-home assessment and education visits? If there's something that's not on the list that you sometimes or always tell customers about, please write that in. This list may include some items you are not familiar with or have not been asked to discuss with customers. In addition, the list might not include some topics that you do discuss. Please add those item in the "other" options. We are interested in what you try to discuss with customers verbally as part of your assessment and education.

Please use the following scale:

- Always
- Some of the Time (Depends on Household)
- Rarely
- Never

[SCALE: Always, Some of the Time (Depends on Household), Rarely or Never]

Kitchen

- a. Keep the refrigerator full, such as by filling empty soda bottles with water
-

Appendix B

- b. Set the refrigerator to 37-40 degrees, and the freezer to 0.
- c. Cover liquids and foods in the refrigerator
- d. Use pots and pans that fit the burners
- e. Use a microwave oven for reheating or heating instead of the range or oven
- f. Vacuum the coils under the refrigerator
- g. Other advice for the kitchen _____
- h. Other advice for the kitchen _____

Lighting

- i. Replace incandescent light bulbs with compact fluorescent bulbs (CFLs)
- j. Install motion detectors (e.g., for outside lights)
- k. Turn off lights in unoccupied rooms
- l. Other advice for lighting _____
- m. Other advice for lighting _____

Other Appliances & Electronics

- n. Wash only full loads of dishes in the dishwasher
- o. Wash and dry only full loads of laundry
- p. Wash laundry in cold water as much as possible
- q. Lower the water heater thermostat
- r. Unplug things like cell phone chargers or appliances when not in use
- s. Other advice for appliances & electronics _____
- t. Other advice for appliances & electronics _____

Heating & Cooling

- u. Set the thermostat at 78 (or higher in the summer and 68 (or lower) in the winter)
- v. Replace furnace and/or AC filters regularly
- w. Maintain your furnace and AC
- x. Don't cool an empty house
- y. Don't set your thermostat lower than normal to cool faster
- z. Close blinds and shades during the day in the summer to keep heat out
- aa. Open blinds and shades during the day in the winter to let warmth in
- bb. Other advice for heating & cooling _____
- cc. Other advice for heating & cooling _____

SU1. What aspects of the energy education do you think customers respond to best? Please try to be specific.

SU2. What aspects do you think they do not pay attention to? Please try to be specific.

SU3. Which if the following would you recommend including as part of the energy education component of the assessment visit? Please rate each on the 5-point scale where 1 means "bad idea" and 5 means "great idea."

[PROGRAMMER: GRID FORMAT: 5 POINT SCALE]

- a. A video or DVD to look at with customer
- b. A video or DVD to leave behind with customer

Appendix B

- c. Other handouts or materials you could leave behind (IF YES: What would you want these to include? _____)
 - d. Information for kids
 - e. Information for bigger households (5 or more people in the household, multiple generations, etc.)
 - f. Ability for you to show a customer how to go online to read daily and hourly energy use
 - g. Ability for you to provide a comparison of the customer's recent energy usage against other people in similar sized homes
 - h. Ability for you to show and enroll customers in new utility services such as email or text alerts to customers when they are exceeding a preset energy bill budget amount
 - i. Ability for you to sign customers up for other programs by checking a box on the application
 - j. Refrigerator magnets that would remind about things you taught them
 - k. [THIS LIST SHOULD BE REVISED BY REVIEWERS]
-

SU4. What ideas or suggestions do you have for updating or improving the education and resource guide and other handouts that you provide to customers?

SU5. Thinking beyond just the energy education that we have focused on so far, what are the main reasons you have observed that customers want to participate in the ESA program? This could be particular measures, services, or more general reasons?

SU6. Given your experience, are there particular measures or services that you have recognized (or heard from customers) that you think would benefit customers that the program either currently does not offer or there are program restrictions to offering?

The last few questions are about you.

D1. What is the highest level of education you have completed?

Not a High School graduate and not a GED	1
GED	2
High School graduate.....	3
Some college, trade or vocational school.....	4
College graduate	5

D2. What is your employment status?

Salary employee (paid a fixed amount every month)	1
Hourly employee (paid for each hour worked).....	2
Contract employee (paid a certain amount for each completed assessment)	3

Appendix B

D3. Have you ever discussed the information you typically provide to customers with friends or family with respect to ways to save electricity and/or natural gas at home, safety, how to read utility bills, etc?

- | | |
|---|---|
| Yes, I've told them nearly everything I know about it | 1 |
| Yes, I've shared a few things | 2 |
| No, I've not done this yet..... | 3 |
-

D4. Which best describes your own household energy bills now compared to when you first started this job?

- | | |
|--|---|
| Smaller now..... | 1 |
| The same now as before..... | 2 |
| Larger now..... | 3 |
| Not sure, haven't paid close enough attention..... | 4 |
| Don't know, not the bill payer..... | 5 |
-

Your answers have been submitted.

Those are all of the questions we have. Thank you for your time and help completing the survey!

You may now close your browser.

Appendix C

QS2 - Which utility company(s) do you do the in-home assessments for?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Pacific Gas & Electric Company (PG&E)	41%	100% BCE	6%	6%	--	14%
Southern California Edison (SCE)	39%	3%	100% AE	--	100% AE	29% C
Southern California Gas Company (SCG)	48%	4% B	--	100% AE	100% AE	14%
San Diego Gas & Electric (SDG&E)	4%	1%	6%	--	--	100% AB

QA1 - How long have you been working in this position?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Less than a year	22%	27% DE	39% DE	24% DE	9% E	--
One year to less than three years	29%	37% BC	17%	21%	28%	57% BC
Three years to less than five years	27%	19%	33%	35% A	33% A	14%
Five years or more	22%	17%	11%	21%	30% B	29%
Mean	3.8	3.6	2.5	3.4	4.6	5.0
Median	2.8	2.4	2.3	3.0	3.4	2.3

QA2 - In a typical week, about how many hours do you work?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Less than 30 hours per week	21%	21%	22%	21%	20%	14%
30 to 39 hours per week	22%	17% E	22% E	26% E	28% E	--
40 to 49 hours per week	29%	36%	22%	26%	24%	43%
50 hours per week or more	27%	26%	28%	26%	28%	43%
Unsure	1%	--	6%	--	--	--
Mean	37.1	37.3	38.6	35.9	36.8	42.1
Median	40.0	40.0	40.0	40.0	40.0	45.0

QA3 - And in a typical week, about how many homes do you visit for an assessment?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7

Appendix C

Less than 10 houses per week	18%	16%	6%	15%	28%	14%
10 to 19 houses per week	42%	54%	33%	38%	B 30%	57%
20 to 29 houses per week	19%	21%	39%	15%	11%	29%
30 or more houses per week	20%	9%	22%	32%	30%	--
Mean	21.5	17.1	24.2	26.3	AE 24.3	14.6
Median	15.0	15.0	20.0	15.0	AE 17.0	15.0

QA7 - What languages, in addition to English, are you fluent in?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
No other languages	30%	46%	50%	6%	20%	14%
Spanish	63%	CDE 43%	CDE 44%	91%	C 76%	86%
Chinese	5%	7%	6%	--	AB 7%	AB --
Another language	8%	CE 10%	6%	6%	CE 11%	-- E

QA8 - Over the past 2 months, what percent of homes you visited were you...	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	51	32	9	2	9	1
Able to speak with the customer fluently	88%	92%	85%	55%	82%	85%
Able to speak with the customer but not fluently because they spoke a language other than English	10%	7%	10%	24%	17%	10%
Not able to speak with because of a language barrier	3%	1%	5%	21%	1%	5%

QA9 - Over the past 2 months, what percent of the homes you visited did you converse in...	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	120	38	9	32	37	6
English only	38%	50%	32%	25%	36%	47%
Spanish only	47%	CD 34%	46%	60%	C 50%	C 39%
Other language	2%	4%	2%	1%	AE 1%	2%
Both English and another language (bi-lingual discussion)	12%	C 10%	19%	13%	AE 12%	13%

Appendix C

Could not talk with them because of a language barrier	1%	2%	1%	1%	<1%	-
--	----	----	----	----	-----	---

QT1 - Which of the following was part of your training to initially prepare you for the energy education part of the assessment visits?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Received materials		84%	80%	94%	76%	89%	86%
Classroom training		83%	83%	83%	76%	87%	71%
Role-playing		63%	69%	78%	32%	63%	71%
Ride-along training where you were the observer		60%	67%	72%	53%	46%	100%
Ride-along training where you were observed and critiqued		59%	80%	44%	59%	33%	86%
Something else		9%	10%	6%	9%	9%	14%

QT3a - Have you received any additional training concerning energy education since then?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Yes		60%	54%	61%	59%	67%	57%
No		40%	46%	39%	41%	33%	43%

QT3b - Please describe the additional training you received.		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	103	38	11	20	31	4
In-office training for new materials		34%	34%	18%	45%	35%	25%
Refresher class		20%	13%	36%	20%	26%	--
Field training / Ride-alongs		13%	26%	9%	--	6%	--
Utility provided training		9%	11%	9%	--	13%	--
New forms		5%	--	--	15%	6%	--
Customer service training		4%	--	--	10%	--	50%
MIDI program		3%	--	--	5%	6%	--
Other		13%	16%	27%	5%	6%	25%

Appendix C

QT4 - Overall, how would you rate the quality of the training you have received?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
10 Excellent	27%	23%	22%	35%	30%	14%
NET: 8-9	47%	50%	50%	44%	46%	57%
NET: 4-7	24%	26%	28%	18%	24%	29%
NET: 1-3	1%	1%	--	3%	--	--

QT5 - What aspect of the training did you feel was most helpful for you in your role to provide effective education to customers?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
<u>NET: Energy Savings Information</u>	<u>29%</u>	<u>29%</u>	<u>11%</u>	<u>35%</u>	<u>33%</u>	<u>29%</u>
Customer education of energysavings	21%	B	11%	B	B	14%
Personal energysaving tips	8%	7%	--	9%	11%	14%
<u>NET: Real Customer Interaction</u>	<u>15%</u>	<u>23%</u>	<u>11%</u>	<u>15%</u>	<u>7%</u>	<u>14%</u>
Field training / Observation	12%	D	6%	12%	7%	14%
Real customer interaction	2%	BD	6%	3%	--	--
Instructions / Classroom training	9%	14%	6%	--	7%	29%
Role playing	8%	6%	33%	--	9%	--
Training booklet	7%	1%	11%	12%	11%	--
<u>NET: Updates/New Docs</u>	<u>6%</u>	<u>4%</u>	<u>11%</u>	<u>6%</u>	<u>7%</u>	<u>14%</u>
Learning about new documents	4%	3%	--	3%	7%	--
Updates	3%	1%	11%	3%	BE	14%
Everything	6%	4%	6%	12%	4%	--
Appliance instructions	2%	4%	--	--	--	14%
<u>NET: Other</u>	<u>14%</u>	<u>13%</u>	<u>11%</u>	<u>15%</u>	<u>20%</u>	<u>--</u>
Good training in general	1%	E	--	--	E	--
Other	13%	--	11%	15%	17%	--
Don't Know	1%	--	--	3%	2%	--
None	2%	1%	--	3%	2%	--

Appendix C

QT6 - How do you think the training could be improved to make you even more effective in providing energy education?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Ride-alongs/Field training		11%	14%	11%	9%	9%	14%
More energy education		9%	6%	6%	12%	11%	14%
More role playing		8%	10%	--	15%	4%	--
Constant updates /Refresher courses		7%	6%	11%	6%	9%	--
Customer service training		5%	10%	--	--	2%	14%
Paperwork training		4%	7%	6%	--	2%	--
More classroom training		4%	3%	6%	--	4%	14%
Other		18%	19%	11%	24%	15%	14%
Don't know		1%	--	--	--	2%	--
Nothing		27%	20%	44%	32%	33%	14%
				AE			

QT8 - Have you done any research or learning on your own, for example, by going to the utility company's website?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Yes		75%	84%	67%	71%	74%	57%
No		25%	16%	33%	29%	26%	43%

QIH1 - When do you typically conduct the energy education?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Immediately after income qualifying the household but before the walkthrough		24%	25%	20%	26%	25%	12%
During the walkthrough assessment		43%	49%	30%	44%	35%	66%
After the walkthrough assessment		34%	27%	51%	26%	45%	16%
			E	ACE		ACE	

QIH2a/2b - Which of these times do you think is most effective for you, given your role and the requirements of your job?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)

Appendix C

	n=	171	70	18	34	46	7
Immediately after income qualifying the household but before the walkthrough		19%	24%	17%	15%	17%	--
			E	E	E	E	
During the walkthrough assessment		49%	56%	28%	59%	39%	86%
			BD		BD		ABCD
After the walkthrough assessment		32%	20%	56%	26%	43%	14%
				ACE		AE	

QIH3a - Which of these times do you think customers are most attentive and receptive to the energy education?

	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Immediately after qualifying the household but before the walkthrough	12%	10%	17%	18%	11%	--
		E	E	E	E	
During the walkthrough assessment	44%	51%	28%	47%	37%	86%
		B				ABCD
After the walkthrough assessment	29%	19%	50%	24%	39%	14%
			ACE		AE	
About the same for each	13%	19%	6%	9%	11%	--
		BE		E	E	
Not sure	2%	1%	--	3%	2%	--

QIH4 - When do you typically provide the education and resource guide (booklet) that you leave behind with customers?

	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Immediately after income qualifying the household but before the walkthrough	16%	13%	17%	21%	17%	--
		E	E	E	E	
During the walkthrough assessment	7%	6%	6%	9%	7%	14%
After the walkthrough assessment	77%	81%	78%	71%	76%	86%

QIH5 - Over the past 2 months, what percent of the time were you able to do each of the following?

	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Reviewed all of the pages in the materials with the customer	59%	67%	78%	54%	45%	54%
		D	CD			
Reviewed some of the pages in the materials	30%	24%	14%	29%	44%	34%
				B	ABC	
Not reviewed any specific pages in the materials but explained the purpose of the materials	8%	7%	7%	15%	6%	8%
				AD		

Appendix C

Not reviewed the materials in detail or discussed or explained the materials but left the materials with the customer to review	3%	2%	1%	3%	5%	4%
---	----	----	----	----	----	----

QIH8 - When you determine that a household does not qualify, how often do you leave the resource materials?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
NET: Always/Most of the time/Sometimes	41%	54%	39%	38%	26%	29%
Always (e.g., 10 out of 10 times)	10%	D 16%	11%	9%	2%	--
Most of the time (e.g., 7-9 times out of ten)	14%	DE 19%	11%	15%	9%	--
Sometimes (4-6 times out of ten)	17%	E 20%	17%	E 15%	E 15%	29%
NET: Rarely/Never	59%	46%	61%	62%	74%	71%
Rarely (2-3 times out of ten)	26%	A 26%	6%	29%	A 33%	43%
Never	33%	B 20%	56%	B 32%	B 41%	B 29%
			A		A	

QIH9 - Over the past two months, what percent of the visits did you:	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Talk with the customer	75%	82%	73%	67%	73%	71%
Talk with another adult in the home	19%	14%	25%	18%	23%	26%
Had children present	19%	18%	23%	18%	19%	7%
There appeared to be children living in home but were not there at the time of the visit	14%	13%	22%	11%	12%	19%

QIH10a - On average, how many minutes did you typically spend conducting the energy education part of the visit?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Mean (minutes)	31.9	34.4	20.0	31.0	32.7	32.1
Median (minutes)	25.0	B 35.0	20.0	B 30.0	B 20.0	20.0

Appendix C

QIH10b - What was the most amount of time you spent in a single residence conducting energy education?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Mean (minutes)		51.1	63.9	27.5	53.1	41.5	55.0
Median (minutes)		45.0	60.0	27.5	45.0	35.0	45.0

QIH10c - What was the least amount of time you spent conducting the energy education part of the visit?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Mean (minutes)		20.8	25.1	14.6	21.9	16.6	17.1
Median (minutes)		20.0	25.0	15.0	20.0	15.0	15.0

QIH10d - What do you consider an ideal amount of time to spend conducting the energy education part of the visit?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Mean (minutes)		25.5	31.4	17.8	25.0	19.4	29.3
Median (minutes)		20.0	30.0	20.0	20.0	18.0	20.0

QIH11 - Which of the following topics do you verbally discuss during your in-home assessment and education visits?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
NET: Always/Some of the Time	n=	171	70	18	34	46	7
Gas safety		94%	94%	83%	97%	96%	100%
How much it costs to run specific appliances		92%	99%	94%	82%	89%	86%
Water conservation		90%	86%	89%	88%	96%	100%
CFL disposal or recycling		81%	91%	89%	65%	72%	100%
Electricity safety		78%	74%	94%	59%	87%	71%
How to read an electric and/or natural gas bill		76%	93%	56%	74%	59%	100%
About other utility programs.		73%	80%	89%	76%	54%	71%
Earthquake safety		54%	36%	72%	68%	67%	29%

Appendix C

QIH12a - Which of the following topics do you verbally discuss during your in-home assessment and education visits?

Kitchen:	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
NET: Always/Some of the Time	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Set the refrigerator to 37-40 degrees, and the freezer to 0.	75%	79%	83%	53%	85%	71%
Use a microwave oven for reheating or heating instead of the range or oven	72%	C 90%	C 39%	56%	C 70%	86%
Keep the refrigerator full, such as by filling empty soda bottles with water	70%	BCD 90%	50%	47%	B 63%	BC 100%
Vacuum the coils under the refrigerator	68%	BCD 80%	56%	53%	65%	ABCD 100%
Cover liquids and foods in the refrigerator	56%	BCD 59%	56%	50%	57%	ABCD 71%
Use pots and pans that fit the burners	50%	50%	56%	50%	50%	57%
Other advice for the kitchen	63%	73% C	58%	52%	62%	83% C

QIH12b - Which of the following topics do you verbally discuss during your in-home assessment and education visits?

Lighting:	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
NET: Always/Some of the Time	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Replace incandescent light bulbs with compact fluorescent bulbs (CFLs)	96%	99%	100%	88%	98%	100%
Turn off lights in unoccupied rooms	94%	C 97%	C 100%	79%	98%	C 100%
Install motion detectors	57%	C 64%	C 44%	50%	C 54%	C 57%
Other advice for lighting	27%	21%	39%	24%	33%	43%

QIH12c - Which of the following topics do you verbally discuss during your in-home assessment and education visits?

Other Appliances & Electronics:	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
NET: Always/Some of the Time	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Wash and dry only full loads of laundry	91%	93%	89%	82%	96%	100%
Lower the water heater thermostat	90%	C 97%	72%	85%	C 89%	AC 100%
Unplug things like cell phone chargers or appliances when not in use	89%	BC 93%	100%	79%	87%	BCD 100%
		C	ACD			ACD

Appendix C

Wash laundry in cold water as much as possible	86%	96%	67%	79%	83%	100%
Wash only full loads of dishes in the dishwasher	85%	91%	78%	74%	87%	100%
Other advice for appliances & electronics	29%	33%	33%	26%	28%	43%

QIH12d - Which of the following topics do you verbally discuss during your in-home assessment and education visits?							
Heating & Cooling:		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
NET: Always/Some of the Time		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Set the thermostat at 78		96%	97%	94%	94%	96%	100%
Replace furnace and/or AC filters regularly		93%	87%	100%	97%	96%	100%
Maintain your furnace and AC		93%	91%	100%	94%	91%	100%
Don't cool an empty house		82%	76%	78%	91%	87%	100%
Don't set your thermostat lower than normal to cool faster		88%	83%	83%	88%	96%	100%
Close blinds and shades during the day in the summer to keep heat out		91%	93%	94%	88%	91%	86%
Open blinds and shades during the day in the winter to let warmth in		88%	93%	78%	82%	91%	86%
Other advice for heating & cooling		24%	26%	17%	29%	20%	29%

QSU3 - Which if the following would you recommend including as part of the energy education component of the assessment visit?							
		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
Top 2 Box		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Ability for you to sign customers up for other programs by checking a box on the application		74%	67%	83%	79%	78%	57%
Refrigerator magnets that would remind about things you taught them		72%	70%	72%	56%	80%	86%
Information for bigger households		63%	59%	67%	62%	65%	57%
Ability for you to provide a comparison of the customer's recent energy usage against other people in similar sized homes		63%	57%	61%	65%	70%	57%
Information for kids		59%	57%	67%	68%	57%	14%

Appendix C

Ability for you to show and enroll customers in new utility services such as email or text alerts	57%	E 49%	E 72%	E 62%	E 63%	43%
Ability for you to show a customer how to go online to read daily and hourly energy use	49%	41%	A 50%	53%	57%	43%
Other handouts or materials you could leave behind. What would you want these to include?	49%	50%	44%	56%	41%	71%
A video or DVD to leave behind with customer	45%	31%	50%	47%	57%	57%
A video or DVD to look at with customer	19%	17% E	28% E	12% E	A 26% CE	--

QD1 - What is the highest level of education you have completed?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Not a High School graduate or GED	2%	1%	6%	6%	--	--
GED	2%	1%	--	6%	--	--
High School graduate	14%	7%	--	26%	17%	29%
Some college, trade or vocational school	48%	B 53%	56%	AB 38%	B 43%	B 29%
College graduate	34%	37%	39%	24%	39%	43%

QD2 - What is your employment status?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Salary employee	4%	6% DE	6%	3%	--	--
Hourly employee	13%	16% CD	28% CD	3%	4%	57% ACD
Contract employee	83%	79% E	67%	94% ABE	96% ABE	43%

QD3 - Have you ever discussed the information you provide to customers with friends or family?	Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
	(T)	(A)	(B)	(C)	(D)	(E)
n=	171	70	18	34	46	7
Yes, I've told them nearly everything I know about it	70%	74%	61%	76%	59%	71%
Yes, I've shared a few things	27%	D 26%	33%	D 21%	35%	29%

Appendix C

No, I've not done this yet	3%	--	6%	3%	7% AE	--
----------------------------	----	----	----	----	----------	----

QD4 - Which best describes your own household energy bills now compared to when you first started this job?		Total	PG&E	SCE Only	SoCalGas Only	SCE & SoCalGas	SDG&E
		(T)	(A)	(B)	(C)	(D)	(E)
	n=	171	70	18	34	46	7
Smaller now		82%	84%	72%	85%	85%	71%
The same now as before		9%	6%	17%	6%	11%	29%
Larger now		1%	--	--	3%	--	--
Not sure, haven't paid close attention		5%	6%	11%	3%	2%	--
Don't know, not the bill payer		3%	4% E BE	--	3%	2%	--

Appendix D

CUSTOMER IN-HOME INTERVIEW DISCUSSION GUIDE June 13, 2013 Version-Updated

An interviewer will conduct in-home discussions with three Energy Savings Assistance (ESA) participants in each of ten areas selected for a diversity of climate zones. Six interviews (two clusters of three) will be conducted in Spanish. The interviews will last up to one hour and the interviewer will compensate participants for their time.

First, the interviewer will capture the participant's overall opinions about the educational components of the Energy Saving Assistance Program. Then he/she will complete a module of diagnostic questions that seek to identify the attitudes and motivations shaping those overall opinions.

Next, the interviewer will retrace the initial walk-through that the assessor conducted. This will (ideally) aid the memories of participants about what the assessor actually said and guide the interviewer toward education topics that he probably covered. Last, the interviewer will review the booklet with the participant. He will note the participant's impressions about the material it covers and the resulting behavioral changes by the participant and his/her household members.

Insert Record Information

Participant Name _____ Interviewer Name: _____
Gender: M F Date/Time _____
Address _____
City: _____ Telephone: (____) _____

Introduction (5 minutes)

INTERVIEWER:

Introduce yourself at the ESA household, stating:

- Name/general purpose of visit
- Need to speak to [name of person agreeing to the visit]...Repeat introduction, if necessary.
- Resident may call to confirm visit legitimacy:
 - Carol Edwards at SCE, at (626) 633-7105
 - Brenda Gettig at SDG&E and SCG (Sempra), at 858-654-8755
 - Mary O'Drain at PG&E, at (415) 973-2317
- Interview will take up to one hour; seeking only honest answers; will provide incentive at end of discussion
- Can answer any customer questions now or as they arise

Main Questionnaire

Overall Ratings (10 minutes)

- 1. Your household was recently served by the Energy Savings Assistance Program sponsored by your utility. During the first visit, an authorized contractor evaluated appliances, windows and other aspects of your home that affect energy use. He/She explained how your home uses energy and mentioned ways to reduce energy consumption. He/She may have left print material with information about saving energy and energy safety. During one or more follow-on visits, your home may have received the improvements or equipment identified during the initial visit.

Overall, based on your experience with this program, how likely are you to recommend the program to others? Use a 0-to-10 scale, where "0" means "extremely unlikely" and "10" means "extremely likely" to recommend it. _____ [CODE '99' IF UNABLE TO RATE]

1_1: Why do you give that rating? _____

- 2. Overall, how effective was the Energy Savings Assistance Program in saving you energy? Use the same 0-to-10 scale, where "0" means "not at all effective" and "10" means "extremely effective." _____ [CODE '99' IF UNABLE TO RATE]

2_1: Why do you give that rating? _____

2_2: How much/what percent do you estimate are you saving? ___%

2_3 How? _____

- 3. What types of information about saving energy and energy safety did the contractor discuss with you? [DO NOT READ. UNAIDED.]

- General Assistance Programs from the utility, such as CARE, FERA, Medical baseline
 Gas-related safety information
 Electric-related safety information
 Earthquake-related safety information
 How to read your energy bill
 Water conservation or saving energy by using less hot water
 CFLs, lighting, etc.
 The amount of energy / costs of using different appliances
 Information about other utility rebates and programs offered
 Other Energy Saving Information (Probe for details), specify: _____

Other, specify: _____

- 4. Did what you learned affect your behavior regarding how you use energy? For example, did it affect your general habits, or how you use particular equipment or appliances that use gas or electricity?

No Yes/How? What else? _____

Appendix D

5. Did the attitudes or behavior of anyone else in your home change as a result of your participation in this program? How?

No Yes/Who?/How? _____

6. Do you feel safer since receiving assistance from the Program?

No Yes/Why? _____

6_1: Why is THAT important? _____

7. Using the 0-to-10 scale, where “0” means “not at all useful” and “10” means “extremely useful,” how useful was the information that the contractor provided about...?

- a. Saving energy? _____
b. Energy-related safety? _____

7_1a: Why do you give “**saving energy**” THAT rating? _____

7_2a: Why do you say that?/Why is that important? _____

[Additional probes for personal relevance] _____

[Additional probes for personal relevance] _____

7_1b: Why do you give “**safety tips**” that rating? _____

7_2b: Why do you say that?/Why is that important? _____

[Additional probes for personal relevance] _____

[Additional probes for personal relevance] _____

8. What is the most useful (or helpful) type of information that your utility could provide to help you save energy?

8_1: Why?/What's its benefit? _____

Motivation Diagnostics (5 minutes)

9. As you know, the Energy Savings Assistance Program helps people save energy by (1) **Improving energy efficiency** in the home (e.g., by adding insulation; sealing windows, providing energy efficient appliances, etc.), and (2) **Providing information** on various programs your utility offers, safety and tips to help people use less energy. Your utility company also offers (3) the CARE program that gives you a **financial discount** on your energy bill.

a) How can [1] **improving energy efficiency** be important to your household?

b) Why is THAT important? _____

c) How can [2] **providing information** be important to your household?

d) Why is THAT important?

e) How can [3] **a financial discount** provided by CARE be important to your household?

f) Why is THAT important? _____

10. Which is most important: [1] or [2] or [3]? Which is second?

MOST IMPORTANT: [1] [2] [3] CIRCLE

2ND MOST IMPORTANT: [1] [2] [3] CIRCLE

11.

11_1: Why is [2] **information**, [More/Less] important than [1] improving energy efficiency?

11_2: Why is [2] **information**, [More/Less] important than [3] a financial discount?

Review of Home's Major Energy Uses/ Walk-Through (20 minutes)

12. The assessor who visited your home may have talked to you at different points during his visit about various ways to save energy and be safe with energy before, during or after the walk-through. About how many minutes did the assessor spend providing you with this educational information...

- a. Before the assessment walk-through? _____
- b. During the assessment walk-through? _____
- c. After the assessment walk-through? _____

13. Did you accompany the assessor during the walk-through?

Yes No Why not? _____

[IF YES CONTINUE. IF NO, USE THIS SECTION TO RECORD SPECIFIC ENERGY EDUCATION INFORMATION PROVIDED AFTER WALK-THROUGH: "Which of the rooms in your home did he discuss?" (Enter below.)]

14. Now, please take me to each room that the assessor visited. I'd like to see everything he saw and in the same order, if possible. Which room did he start with?

FIRST ROOM: _____

14_1a. Did the assessor/energy-use educator provide energy-saving or energy safety information about anything in this room? [CIRCLE EACH ITEM IN Q14_1a, BELOW] What did he/she tell you?

14_1b. Was this new information or something you already knew about?

14_1c. Are you now doing this now?

14_1d. Why? Or why not?

14_1a Item:	14_1a Energy Saving or Safety Advice:	14_1b New?	14_1c Doing It?
[1] _____	_____	[]	[]
[2] _____	_____	[]	[]
[3] _____	_____	[]	[]
[4] _____	_____	[]	[]
[5] _____	_____	[]	[]

14_1d: Why?

[] _____
 [] _____
 [] _____

14_1d: Why not?

[] _____
 [] _____
 [] _____

Room Items NOT MENTIONED: INTERVIEWER COMMENTS/OBSERVATIONS

[1] _____
 [2] _____
 [3] _____

SECOND ROOM: _____

14_2a. Did the assessor/energy-use educator provide energy-saving information about anything in this room? What did he/she tell you? **[DISTINGUISH ITEMS THAT ASSESSOR MENTIONED VS UNMENTIONED]**

14_2b. Was this new information or something you already knew about?

14_2c. Are you now doing this? 14_2d. Why? Or why not?

14_2a Item:	14_2a Energy Saving or Safety Advice:	14_2b New?	14_2c Doing It?
[1] _____	_____	[]	[]
[2] _____	_____	[]	[]

Appendix D

[3] _____	_____	[]	[]
[4] _____	_____	[]	[]
[5] _____	_____	[]	[]

14_2d: Why?	14_2d: Why not?
[] _____	[] _____
[] _____	[] _____
[] _____	[] _____

THIRD ROOM: _____

14_3a. Did the assessor/energy-use educator provide energy-saving information about anything in this room? What did he/she tell you? **[DISTINGUISH ITEMS THAT ASSESSOR MENTIONED VS UNMENTIONED]**

14_3b. Was this new information or something you already knew about?

14_3c. Are you now doing this? **14_3d. Why? Or why not?**

14_3a Item:	14_3a Energy Saving or Safety Advice:	14_3b New?	14_3c Doing It?
[1] _____	_____	[]	[]
[2] _____	_____	[]	[]
[3] _____	_____	[]	[]
[4] _____	_____	[]	[]
[5] _____	_____	[]	[]

14_3d: Why?	14_3d: Why not?
[] _____	[] _____
[] _____	[] _____
[] _____	[] _____

FOURTH ROOM: _____

14_4a. Did the assessor/energy-use educator provide energy-saving information about anything in this room? What did he/she tell you? **[DISTINGUISH ITEMS THAT ASSESSOR MENTIONED VS UNMENTIONED]**

14_4b. Was this new information or something you already knew about?

14_4c. Are you now doing this? **14_4d. Why? Or why not?**

14_4a Item:	14_4a Energy Saving or Safety Advice:	14_4b New?	14_4c Doing It?
[1] _____	_____	[]	[]
[2] _____	_____	[]	[]
[3] _____	_____	[]	[]
[4] _____	_____	[]	[]
[5] _____	_____	[]	[]

14_4d: Why?	Why not?
[] _____	[] _____
[] _____	[] _____
[] _____	[] _____

Appendix D

FIFTH ROOM: _____

14_5a. Did the assessor/energy-use educator provide energy-saving information about anything in this room? What did he/she tell you? **[DISTINGUISH ITEMS THAT ASSESSOR MENTIONED VS UNMENTIONED]**

14_5b. Was this new information or something you already knew about?

14_5c. Are you now doing this? **14_5d.** Why? Or why not?

14_5a Item:	14_5a Energy Saving or Safety Advice:	14_5b New?	14_5c Doing It?
[1] _____	_____	[]	[]
[2] _____	_____	[]	[]
[3] _____	_____	[]	[]
[4] _____	_____	[]	[]
[5] _____	_____	[]	[]

14_5d: Why?	14_5d: Why not?
[] _____	[] _____
[] _____	[] _____
[] _____	[] _____

SIXTH ROOM: _____

14_6a. Did the assessor/energy-use educator provide energy-saving information about anything in this room? What did he/she tell you? **[DISTINGUISH ITEMS THAT ASSESSOR MENTIONED VS UNMENTIONED]**

14_6b. Was this new information or something you already knew about?

14_6c. Are you now doing this? **14_6d.** Why? Or why not?

14_6a Item:	14_6a Energy Saving or Safety Advice:	14_6b New?	14_6c Doing It?
[1] _____	_____	[]	[]
[2] _____	_____	[]	[]
[3] _____	_____	[]	[]
[4] _____	_____	[]	[]
[5] _____	_____	[]	[]

14_6d: Why?	14_6d: Why not?
[] _____	[] _____
[] _____	[] _____
[] _____	[] _____

SEVENTH ROOM: _____

14_7a. Did the assessor/energy-use educator provide energy-saving information about anything in this room? What did he/she tell you? **[DISTINGUISH ITEMS THAT ASSESSOR MENTIONED VS UNMENTIONED]**

14_7b. Was this new information or something you already knew about?

14_7c. Are you now doing this? **14_7d.** Why? Or why not?

14_7a Item:	14_7a Energy Saving or Safety Advice:	14_7b New?	14_7c Doing It?
[1] _____	_____	[]	[]
[2] _____	_____	[]	[]
[3] _____	_____	[]	[]
[4] _____	_____	[]	[]
[5] _____	_____	[]	[]

14_7d: Why?	14_7d: Why not?
[] _____	[] _____
[] _____	[] _____
[] _____	[] _____

Appendix D

EIGHTH ROOM: _____

14_8a. Did the assessor/energy-use educator provide energy-saving information about anything in this room? What did he/she tell you? **[DISTINGUISH ITEMS THAT ASSESSOR MENTIONED VS UNMENTIONED]**

14_8b. Was this new information or something you already knew about?

14_8c. Are you now doing this?

14_8d. Why? Or why not?

14_8a Item:	14_8a Energy Saving or Safety Advice:	<u>14_8b</u> New?	<u>14_8c</u> Doing It?
[1] _____	_____	[]	[]
[2] _____	_____	[]	[]
[3] _____	_____	[]	[]
[4] _____	_____	[]	[]
[5] _____	_____	[]	[]

14_8d: Why?

[] _____
[] _____
[] _____

14_8d: Why not?

[] _____
[] _____
[] _____

Where did the assessor finish up their discussions with you? Can we finish our interview there?

This has been really helpful for me. Now I have a few additional questions about various appliance and equipment in your home that you have not already discussed.

Review of Home's Major Energy Uses/ follow up (5 minutes?)

15. [IF NOT MENTIONED PREVIOUSLY] Which of the following do you have in your home? **[READ AND CIRCLE ITEMS NOT PREVIOUSLY MENTIONED]**

15_1: **[FOR EACH ITEM MENTIONED]** Did the assessor/energy-use educator offer any energy-saving tips or safety information about that? What did he say?

15_2. Was this new information or something you already knew about?

15_3. Are you now doing this?

15_4. Why? Or why not?

Q15 LIST:

Q15_1: Energy Saving Information Provided by Assessor:

- [1] Central heating and cooling _____
- [2] Wall unit A/C _____
- [3] Water Heater _____
- [4] Portable fans _____
- [5] Portable heaters _____
- [6] Electric blanket _____
- [7] TVs (Number?: _____)
- [8] Game consoles (Number?: _____)
- [9] Computers (Number?: _____)
- [10] Plug in chargers (e.g., cell phones) _____
- [11] Washer _____
- [12] Dryer _____
- [13] Refrigerator _____
- [14] Oven / Microwave _____
- [15] Stove _____

Q 15 2

Q 15 3

ITEM #	New?	Doing It?	Q15_4: Why? Or Why not?
[]	[]	[]	_____
[]	[]	[]	_____
[]	[]	[]	_____
[]	[]	[]	_____
[]	[]	[]	_____
[]	[]	[]	_____
[]	[]	[]	_____

16. Did the assessor have any additional comments about any other ways you could save energy during the walkthrough? If yes, please describe what he/she said?

17. Did your home receive any appliance replacement or repair? Yes No
IF YES: What information did the appliance person provide about the appliance?

Assessment of Materials Provided (10 minutes)

18. In terms of the specific materials that the assessor provided to you, did the assessor...? **[CHECK ALL THAT APPLY]**

- Review a booklet with you about energy use?
- Leave a booklet for you to review on your own?
- Not leave a booklet?

[IF “Review” or “Leave” a booklet,” ASK:] At what point in his visit did he [review/leave] it with you?

- Beginning
- Walk-through
- Discussion after walk-through

19. Do you have the booklet the assessor left behind? Yes No
 Could you get it for me? **[USE DEMO COPY IF PARTICIPANT’S COPY IS UNAVAILABLE]**
RECORD: Assessor wrote in book Yes No N/A

- Which of these sections...?
- 19_1: ...did the assessor review with you?
 - 19_2: ...did you read later, on your own?
 - 19_3: ...was helpful in saving you energy?
 - 19_4: Why not helpful?

19_1: Reviewed With Participant:	19_2: Read on Own?:	19_3: Helpful?:	19_4: Why not?
a. <input type="checkbox"/> <u>General</u> Assistance Programs (e.g., CARE, FERA, Medical baseline)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____
b. <input type="checkbox"/> Energy Saving <u>Information</u>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____
c. <input type="checkbox"/> Energy Savings <u>Assistance Programs</u> (e.g., appliance repair/replacement)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____
d. <input type="checkbox"/> Safety, gas-related	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____
e. <input type="checkbox"/> Safety, electric-related	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____
f. <input type="checkbox"/> Safety, earthquake-related	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____
g. <input type="checkbox"/> Other (specify:)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____
h. <input type="checkbox"/> Other (specify:)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____
i. <input type="checkbox"/> Other (specify:)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____
j. <input type="checkbox"/> Other (specify:)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	_____

20. Did you ever review the booklet after the assessor left?
 Yes No/Why not? _____

20_1: **[IF “Reviewed the book again,” ASK:]** How many times? _____ **Why?** _____

21. Did you pass on any energy-saving and/or safety information to anyone else in your household?
 Yes
 No
 NA, there are no other household members

Appendix D

21_1 [IF NO] Why not pass on information to other household members?

22. [IF Q21 = YES] To which household member(s) did you pass on the information?

- Spouse
- Child (or children)
- Other relative in household
- Other household member, not related to participant

23. [IF Q21 = YES] What information did you pass on?

24. 24_1: Do you think this changed either their attitudes OR their behaviors in terms of how they use gas or electricity in the home?

24_2: [IF BEHAVIOR DIDN'T CHANGE, ASK:] Why not?

Q23: Information Passed On:	Q24_1 Changed:		Q24_2 If Not, Why Not?
	<u>Att</u>	<u>Beh</u>	
1) _____	<input type="checkbox"/> Y	<input type="checkbox"/> Y	_____
2) _____	<input type="checkbox"/> Y	<input type="checkbox"/> Y	_____
3) _____	<input type="checkbox"/> Y	<input type="checkbox"/> Y	_____

25. Which of the following best describes where the assessor delivered his most valuable information about saving energy?

- Before his walk-through IF BEFORE: Where were you? _____
 - During his walk-through
 - After his walkthrough IF AFTER: Where were you? _____
- Why do you say that? _____
-

26. On a "0-to-10 scale," where "0" means "poor" and "10" means "excellent," how do you rate your assessor on...?

- a. Knowledge of the material and subject matter _____
- b. Interest in your questions _____
- c. Relevance of the information for your needs and situation _____
- d. Ability to clearly communicate with you _____
- e. Courtesy and Politeness _____

27. What could the utility contractor have done differently to make his education visit more helpful and/or useful to you (and others in your household)?

28. Can you think of anything, in terms of information on safety, saving energy or any other relevant information your utility might be able to provide you that you wish you had received and did not?

29. Thinking back over the entire visit and the information provided, what's the most important information you learned about saving energy and/or energy safety?

Demographics NOT Already in Screener. Thank and Pay (5 minutes)

D1. Just a couple more questions for classification. What is the highest level of education that you have completed?

- 1. 8th Grade
- 2. Some high school
- 3. GED (General Education Development Test)
- 4. High school diploma
- 5. Technical or trade school certificate
- 6. Some college
- 7. Associate's degree
- 8. Bachelor's degree
- 9. Some graduate school
- 10. Graduate/advanced degree

D2. Who lives in the home with you? [SELECT ALL THAT APPLY]

- 1. Spouse
- 2. Roommate (How many? _____)
- 3. Parent
- 4. Child 1 (Age? _____)
- 5. Child 2 (Age? _____)
- 6. Child 3 (Age? _____)
- Child 4 (Age? _____)
- Child 5 (Age? _____)
- Other person _____
- Other person _____

D3. Approximately what year was your home built? _____

Appendix D

[INTERVIEWER: OBTAIN SIGNATURE OF PARTICIPANT BEFORE DELIVERING COMPENSATION.]

NOTES ABOUT THE HOME (Age, condition, quantity or lack of energy using appliances/electronics, observed behaviors such as things left on, anything that stands out, etc.)

Approximate Year Built _____ **[MOVED TO PRIOR PAGE]**

Home's condition: Very good Average Below Average _____

Energy-using appliances/electronics: Above average Average Below average

NOTES:

Notable behaviors of resident(s):

Other Noteworthy Item(s):

CUSTOMER FOCUS GROUP DISCUSSION GUIDE
Recent ESA Participants
Focus Group Discussion Guide
(Approximately 1:55 hours total time)

I. INTRODUCTION (10 minutes)

OBJECTIVE: Create an atmosphere for open discussion

- Moderator Introduction:
 - Introduce self
 - Leading the discussion today
 - Independent consultant and do not work directly for the company who hired us so you will not hurt our feelings or insult us if you disagree with, or do not like something is presented here today.
 - Only rules are (1) everyone needs to participate although not all at once, so please take turns talking, and (2) if you have something to share please speak to the entire group, not just your neighbor (3) it is VERY important that you are honest. Do not just agree with others or say what you think WE or others in the group want to hear. Personal and HONEST opinions are important.
 - Room description, backroom observers, audio and video recording

- Objective/Topic of Discussion:
We want to learn more about...
 - your attitudes and behavior related to the use of energy in your home (as well as those of your family)
 - your experiences with your utility company's Energy Savings Assistance program
 - your thoughts about ways we could improve the program

- Introductions: Tell us about yourself:
 - Name
 - Where you live
 - What type of home is it (single family, townhouse, condo, apartment)
 - How long you've lived there
 - How many in your household
 - And share with us one current source of frustration that perhaps keeps you from doing more of the things that you would like to do?

Appendix E

II. OVERALL ENERGY HABITS AND USE (5 minutes)

OBJECTIVE: Understand energy efficient and inefficient habits and behaviors. Determine barriers to adopting more energy efficient behaviors.

- A. I'd like to begin by asking you to tell me a little bit about your home – and in particular, how you and other members of your household use energy.
1. What do YOU think are the biggest contributors/causes to the energy that is used in your home?
 - Probe for:
 - Behaviors
 - Family Members (attitudes, behaviors)
 - Appliances and electronics (number, age, etc.)
 - Attitudes (interest in saving energy)
 2. IF NOT MENTIONED: You were all recent participants in the Energy Savings Assistance program. Did this help?
 - What aspects were most beneficial? Why do you say these were beneficial?
 - What aspects were not very effective? Why do you say these were not very effective?

III. CONSERVING ENERGY (15 minutes)

OBJECTIVE: Understand awareness, knowledge, and beliefs about their own capabilities to reduce energy use.

- A. Now I want you to think “before and after.” Before you had your in-home assessment and education visit from the utility representative for the Energy Savings Assistance (ESA) program, to what extent did you and others in your household try to actively conserve or save energy ... Did you and your household try hard to save energy, or not so hard?
1. IF TRY HARD: Why do you say that you tried hard?
 - What are some examples of what you did?
 2. IF DON'T TRY HARD: Why do you say that you didn't try hard?
 - What didn't you do that you think you should have done?
 3. To the extent that you or your household tried to save energy, what was the main reason that you did this? What prompted you to actively conserve energy?
 - IF NOT MENTIONED: PROBE ABOUT:
 - MONEY
 - HEALTH
 - ENVIRONMENT
 - COMFORT
 - PRESSURE FROM OTHERS (WHO?)
 - ANYTHING YOU'VE SEEN OR READ
 - [ONLY IF TIME PERMITS] Why is that important? How do you benefit?
 - E.G., Have money for other things, financial security, set a good example, be a good parent,
 4. How about other members of your household? Did other members of your household share your same interests in saving energy?
 - Were they interested?
 - IF YES: What motivated them? How did you get them to be involved?
 - IF NO: What do you think was the barrier that kept them from being motivated? Had you tried getting them involved? What was the result?
- B. Before you had the visit, tell me the things that you felt you **COULD NOT** control or tried but were unable to control or change with regard to your energy use?

Appendix E

1. PROBES:

- Condition of home or appliances
- The number of appliances and electronics
- Habits: turning off lights and TVs, turning off the heat or AC when you leave your home, etc.
- Knowledge: not knowing how much energy is actually used for different appliances, etc.
- Need for energy for: comfort (heating and cooling), work (computers), entertainment (TV), saving time (dishwasher), etc.
- (IF NOT ALREADY COVERED) Habits or behavior of others

IV. UTILITY PROGRAMS OVERVIEW (10 minutes)

OBJECTIVE: Gain insights into perspectives about education in context of other forms of assistance.

A. Your utility company(s), and others, offer different types of assistance to help people deal with their energy costs.

1. There are three main types of help:

- Financial help like a discount or help with a payment
- Physical help like replacing old appliances or insulating your home
- Advice or educational assistance, informing you what you can do to use less energy

2. What do you think about these types of assistance?

- What are the benefits to you of this type of assistance?
 - i. PROBES FOR EACH OF THE THREE TYPES
- What are the Negatives of this type of help? (e.g., too time consuming to help, hurts self-respect, doesn't really help, etc.)

3. Which of the three do you think is most important?

- Why is this most important?
 - i. [IF NOT ADVICE OR EDUCATION] Why is ___ more important than advice or educational assistance?
- Which is second? Why?
 - i. [IF NOT ADVICE OR EDUCATION] Why is ___ more important than advice or educational assistance?

V. FEEDBACK ABOUT ESA ENERGY EDUCATION (25 minutes)

OBJECTIVE: Gain insights into customer awareness and perceptions of the program, as well as barriers to participation.

A. You were invited here because you recently participated in the Energy Savings Assistance (ESA) program.

1. What enticed you to participate? [PROBE FOR REASONS]

- What was the most important reason that you participated?

2. What were the strengths of the program? What was best about it?

3. What were the weaknesses of it?

B. Now I would like to get your reaction to the part of the program where you received information and education about how to use less energy.

1. At what point during the visit did the representative provide information about how to save energy? Any other times?

- IF RECEIVED INFO AT BEGINNING OF VISIT:
 - i. What were the positives about receiving information during this part of the visit?
 - ii. What were the negatives?

Appendix E

- IF RECEIVED INFORMATION DURING WALKTHROUGH:
 - i. What were the positives about receiving information during this part of the visit?
 - ii. What were the negatives?
- IF RECEIVED INFORMATION DURING “SIT DOWN” OR AFTER WALK THROUGH:
 - i. What were the positives about receiving information during this part of the visit?
 - ii. What were the negatives?
- 2. How well did the representative communicate this information?
 - Were you able to understand what they were talking about? Could they answer your questions?
 - What did he/she do particularly well?
 - What could use improvement?
- 3. [IF OTHER PEOPLE IN HOUSEHOLD] Did the representative include any others in your household while providing the educational information?
 - [IF YES] How so? Do you think this was useful?
 - [IF NO] Would this have been useful? Why or why not?
 - What are your ideas for how the representative could get others in your home involved in the education?
- 4. What was the most valuable or useful information that you received?
 - Why was this valuable or useful to you?
 - i. What made it valuable?
 - ii. Did you put this into practice? Are you still doing it?
- 5. What information was not very valuable or useful?
 - Why wasn't this very useful or valuable to you?
 - i. PROBES:
 - 1. Things you already know
 - 2. Too generic or not specific about your home
 - 3. Things that would be hard to do
 - 4. Things that require you to spend money
 - ii. Did you try doing this?
- 6. Did you change anything AFTER the visit about how you use energy in your home?
 - What did you change?
- 7. After the visit, is there anything you felt was missing or lacking? Any reason for disappointment?
- 8. How many of you were present during the second visit when another representative came to your home to install additional improvements, like weather stripping, insulation, and lights?
 - Did you get additional knowledge or information during this second visit?
 - i. What information did you receive?
 - ii. Did you receive any appliance related information?
 - 1. What?
 - IF YES: Was this information helpful or valuable to you?
 - i. Why?
 - ii. Why not?
 - IF NO: Is this second visit a time that you would have liked to get more knowledge or information?
 - i. Why?
 - ii. Why not?
- 9. After the visits, your utility company could follow up with you. Would this be of interest to you?
 - Why or why not?
 - Follow up could be done in different ways. Which of the following would you be interested in?
 - i. Text or email messages each week telling you how your energy usage compares to a predetermined goal level.
 - ii. Text or email reminders about some of the things you can do to save energy.
 - iii. Follow-up from the person who came to your home and conducted the training.
 - iv. Phone call from the person who did the assessment with you.

Appendix E

- v. OTHER IDEAS
 - o How often would you want follow up?

VI. FEEDBACK ABOUT ESA MATERIALS (40 minutes)

OBJECTIVE: Understand customer perceptions about the Energy Resource Guide.

1. Now we're going to review the booklet that is part of the education. The utility representative reviewed some of the information that is in the booklet and left it behind as a resource.
 - a. PASS OUT THE RESOURCE GUIDE BOOKLET OF THE INCUMBANT UTILITY.
 - i. How did the representative present the booklet?
 1. Did he/she talk about any information in the booklet?
 2. What information did the representative cover with you?
 3. Did the representative write anything on the booklet for you?
 - ii. What information in this resource booklet got your attention?
 1. Why?
 - iii. What information did you like best?
 1. What did you like about this?
 - iv. Is there anything in this booklet that you'd skip over or ignore?
 1. Why?
 - v. Was this left behind with you?
 1. What did you do with it? Where did you put it?
 2. Did you look at it again?
 - a. [IF YES] Why?
 - b. [IF NO] Why not?
 3. Did you share this with others in your household?
 - a. [IF YES] What did you share?
 - b. [IF NO] Why not? What would have made this booklet better for sharing?
 - vi. Are there any changes you can think of that would make this booklet more useful for you?
 1. How about ...
 - a. Information on how to read your online energy use data at your utility's website?
 - b. Information about how to read and understand your energy bill?
 - c. A list of the Top 5 things YOUR household should do?
 - d. Suggestions for making a "game" out of saving energy if you have children
 - e. Information specifically for children
 - f. Information for bigger households about how to get everyone involved in saving
 - g. Comparisons to energy used by homes that are the same size as yours
 - h. Something you could pull out and stick to your refrigerator as a reminder
 - i. OTHER IDEAS
2. Now I'd like to review two other examples of the Energy Resource Guide that are used by other utility companies in California. Here is the first one.
 - a. PASS OUT RESOURCE GUIDE BOOKLET OF OTHER UTILITY "A" ... Take a few minutes to browse through this guide book.
 - i. What information in this resource booklet got your attention?
 1. Why?
 - ii. What information did you like best?
 1. What did you like about this?

Appendix E

- iii. Is there anything in this booklet that you'd skip over or ignore?
 1. Why?
3. Now let's review the other example.
 - a. PASS OUT RESOURCE GUIDE BOOKLET OF OTHER UTILITY "B" ... Take a few minutes to browse through this guide book.
 - i. What information in this resource booklet got your attention?
 1. Why?
 - ii. What information did you like best?
 1. What did you like about this?
 - iii. Is there anything in this booklet that you'd skip over or ignore?
 1. Why?
4. Between these three examples ...
 - a. Is there one that you prefer regarding the look and feel?
 - i. What about the booklet's look and feel do you like?
 - b. Are there any examples of the way that information is shown or described that you like better in one of the booklets?
 - i. What makes this a more effective way to communicate?
 - c. Are there any examples of specific information or energy saving advice that you like better in one of the booklets?
 - i. What makes this information stand out for you?
5. Instead of a package of information to read, would some other method of teaching work better?
 - a. How about ...
 - i. A DVD?
 - ii. An online video like on YouTube?
 - iii. An online training class where you would learn some things, answer some questions, and receive a certificate of completion (like online traffic school)?
 - iv. A class you could attend in person?
 - v. OTHER IDEAS

V. CONCLUSION (10 minutes)

OBJECTIVES: Summary and final comments.

1. [IF NOT YET DISCUSSED DURING THE GROUP] So are you saving money on your energy bill(s) as a result of the program?
 - a. IF YES: What do you think are the main reasons you are saving?
 - i. Was it the insulation, lights, weather stripping, faucet aerators or shower heads, appliance(s), etc that you received?
 - ii. Was it because of the information or education you received?
 - iii. What are the one or two things that you think could help you save even more energy in your home?
 - b. IF NO: Why don't you think you are saving even after the visits?
 - i. PROBES: Is your home still too inefficient? Was it too difficult to change how you and your household uses energy?
 - ii. What are the one or two things that you think could turn things around in your home so you do save energy?
2. I am going to go into the back room now to see if they have any final questions for me to ask you. (LEAVE AND RETURN. ASK FINAL QUESTIONS)
3. Do you any final comments?

THANK YOU VERY MUCH!

CUSTOMER FOCUS GROUP DISCUSSION GUIDE
CARE Non-ESA Participants
Focus Group Discussion Guide
(Approximately 1:45 hours total time)

I. INTRODUCTION (10 minutes)

OBJECTIVE: Create an atmosphere for open discussion

- Moderator Introduction:
 - Introduce self
 - Leading the discussion today
 - Independent consultant and do not work directly for the company who hired us so you will not hurt our feelings or insult us if you disagree with, or do not like something is presented here today.
 - Only rules are (1) everyone needs to participate although not all at once, so please take turns talking, and (2) if you have something to share please speak to the entire group, not just your neighbor (3) it is VERY important that you are honest. Do not just agree with others or say what you think WE or others in the group want to hear. Personal and HONEST opinions are important.
 - Room description, backroom observers, audio and video recording

- Objective/Topic of Discussion:
We want to learn more about...
 - your attitudes and behavior related to the use of energy in your home (as well as those of your family)
 - your family's home and circumstances as they relate to energy use
 - your opinions of some ideas of service your energy utility(s) could provide to help you use less energy

- Introductions: Tell us about yourself:
 - Name
 - Where you live
 - What type of home is it (single family, townhouse, condo, apartment)
 - How long you've lived there
 - How many in your household
 - And share with us one current source of frustration about energy use in your home?

Appendix E

II. OVERALL ENERGY HABITS AND USE (5 minutes)

OBJECTIVE: Understand energy efficient and inefficient habits and behaviors. Determine barriers to adopting more energy efficient behaviors.

A. I'd like to begin by asking you to tell me a little bit about your home – and in particular, how you and other members of your household use energy.

1. What do YOU think are the biggest contributors/causes to the energy that is used in your home?
 - o Probe for:
 - Behaviors
 - Family Members (attitudes, behaviors)
 - Appliances and electronics (number, age, etc.)
 - Attitudes (interest in saving energy)

III. CONSERVING ENERGY (15 minutes)

OBJECTIVE: Understand awareness, knowledge, and beliefs about their own capabilities to reduce energy use.

A. To what extent do you and others in your household try to actively conserve or save energy ... Do you and your household try hard to save energy, or not so hard?

1. IF TRY HARD: Why do you say that you try hard?
 - a. What are some examples of what you do?
2. IF DON'T TRY HARD: Why do you say that you don't try hard?
 - a. What don't you do that you think you should?
3. To the extent that you or your household tries to save energy, what is the main reason that you do this? What motivates you to actively conserve energy?
 - a. IF NOT MENTIONED: PROBE ABOUT:
 - i. MONEY
 - ii. HEALTH
 - iii. ENVIRONMENT
 - iv. COMFORT
 - v. PRESSURE FROM OTHERS (WHO?),
 - vi. ANYTHING YOU'VE SEEN OR READ
 - b. Why is that important? How do you benefit?
 - i. E.G., Have money for other things, financial security, set a good example, be a good parent,
 - c. PROBES TO UNDERSTAND THE DYNAMICS OF WHY SAVING MATTERS
4. Have you been successful in saving energy?
 - o IF YES: How does that make you feel?
 - MORE PROBES TO UNDERSTAND DYNAMICS OF WHY SAVING MATTERS. FLESH OUT THE DRIVERS.
 - o IF NO: What are the biggest barriers that hold you back or keep you from using less energy than you currently do?
5. How about other members of your household? Do other members of your household share your same interests in saving energy?
 - o Are they interested?
 - IF YES: What motivates them? How did you get them to be involved?
 - IF NO: What do you think is the barrier that keeps them from being motivated? Have you tried getting them involved? What was the result?

B. Tell me the things that you feel you CANNOT control or change with regard to your energy use?

Appendix E

1. PROBES:

- Condition of home or appliances
- The number of appliances and electronics
- Habits: turning off lights and TVs, turning off the heat or AC when you leave your home, etc.
- Knowledge: not knowing how much energy is actually used for different appliances, etc.
- Need for energy for: comfort (heating and cooling), work (computers), entertainment (TV), saving time (dishwasher), etc.
- (IF NOT ALREADY COVERED) Habits or behavior of others

C. Now that we've had this discussion, what do you think are the top 2 or 3 things that would help your household use less energy?

1. Why do you think these will help?

IV. UTILITY PROGRAMS OVERVIEW (10 minutes)

OBJECTIVE: Gain insights into perspectives about education in context of other forms of assistance.

A. Your utility company(s), and others, offer different types of assistance to help people deal with their energy costs.

1. What types of help do you know about?
 - a. PROBES FOR DETAILS: NAME OF PROGRAM, WHAT IT OFFERS, HOW IT HELPS PEOPLE, ETC.
2. It sounds like you've heard about three types of help:
 - a. Financial help like a discount or help with a payment
 - b. Physical help like replacing old appliances or insulating your home
 - c. Advice or educational assistance, informing you what you can do to use less energy
3. What do you think about these types of assistance?
 - a. What are the benefits to you of this type of assistance?
 - i. PROBES FOR EACH OF THE THREE TYPES
 - b. What are the Negatives of this type of help? (e.g., too time consuming to help, hurts self-respect, doesn't really help, etc.)
4. Which of the three do you think is most important?
 - a. Why is this most important?
 - i. [IF NOT ADVICE OR EDUCATION] Why is ___ more important than advice or educational assistance?
 - b. Which is second? Why?
 - i. [IF NOT ADVICE OR EDUCATION] Why is ___ more important than advice or educational assistance?

V. FEEDBACK ABOUT ESA ENERGY EDUCATION (25 minutes)

OBJECTIVE: Gain insights into customer awareness and perceptions of the program, as well as barriers to participation.

A. Who has heard of the Energy Savings Assistance or ESA program?

1. Show of hands
2. MODERATOR READ:

[UTILITY COMPANY(S)] offers a program that provides energy efficiency products and services to some customers at no cost. A qualifying household can receive a mix of different services, depending on its needs. Some of the things provided by the program include: informational materials and tips on saving energy and how to be safe around energy, compact florescent bulbs, attic insulation, energy efficient refrigerators, evaporative coolers, caulking, and in some areas air conditioning units. The

Appendix E

program also offers maintenance services for some appliances to insure that they are working properly and not “wasting” energy.

- B. How many of you have heard of this program?
- C. Beyond what I just described... what else do you know about this program?
1. What does it include?
 2. How can someone participate?
 3. How do you qualify?
- D. Have any of you participated in this program, or one like it?
4. For those of you who have participated in this or a program like it, what enticed you to participate? [PROBE FOR REASONS]
 - o What was the most important reason that you participated?
 5. What would you tell friends who might qualify for the program were the strengths of the program? What was best about it?
 6. What were the weaknesses of it?
- E. Now, for the rest of the group, does this program sound like something that would be helpful to you or your household?
1. [SHOW OFF HANDS YES] Why?
 2. [SHOW OF HANDS NO] Why not?
 3. What is it about the program that you find appealing?
 4. What are the negatives of the program, or reasons you might hesitate signing up for it?
 5. Assuming that you are eligible, based on what you have heard so far, how many of you would consider participating in a program like this?
 6. What is the main reason that you WOULD participate? PROBE FOR SPECIFIC ASPECTS OF THE PROGRAM THAT SOUND APPEALING – INFORMATION, GETTING A NEW FRIDGE, ETC?
 7. What, if anything, might keep you from participating in the program?
- F. Now that you know a little bit about the program, I would like to get your reaction to the part of the program where customers receive information and education about how to use less energy.
1. Do you think this sort of education would be useful?
 - a. IF YES: Why?
 - b. IF NO: Why not?
 2. What can you think of that could be possible negatives of this in home education? What concerns might you have about it?
 - a. PROBES:
 - i. Things you already know;
 - ii. Too generic or not specific about your home;
 - iii. Things that would be hard to do;
 - iv. Things that require you to spend money; etc.
 3. [IF OTHERS IN HOME] One challenge is getting everyone in the home involved in saving energy. Would it be helpful for the utility representative to include others in the discussions?
 - a. What ideas do you have for how this could be done?
- G. After the visit, your utility company could follow up with you. Would this be of interest to you?
1. Why or why not?
 2. Follow up could be done in different ways. Which of the following would you be interested in?
 - o Text or email messages each week telling you how your energy usage compares to a predetermined goal level.
 - o Text or email reminders about some of the things you can do to save energy.
 - o Follow-up from the person who came to your home and conducted the training.
 - o Phone call from the person who did the assessment with you.

Appendix E

- OTHER IDEAS

3. How often would you want follow up?

VI. FEEDBACK ABOUT ESA MATERIALS (40 minutes)

OBJECTIVE: Understand customer perceptions about the Energy Resource Guide.

1. Now we're going to review a booklet that is part of the education. The utility representative reviews the information that is in the booklet and leaves it behind as a resource.
 - a. PASS OUT THE RESOURCE GUIDE BOOKLET OF THE INCUMBANT UTILITY.
 - i. What information in this resource booklet gets your attention?
 1. Why?
 - ii. What information do you like best?
 1. What do you like about this?
 - iii. Is there anything in this booklet that looks like you'd skip over it?
 1. Why?
 - iv. If this were left behind with you in your home, what would you do with it?
 1. Would you keep it? Where?
 2. Would you ever look at it again? Why?
 - v. Are there any changes you can think of that would make this booklet more useful for you?
 1. How about ...
 - a. Information on how to read your online energy use data at your utility's website?
 - b. Information about how to read and understand your energy bill?
 - c. A list of the Top 5 things YOUR household should do?
 - d. Suggestions for making a "game" out of saving energy if you have children
 - e. Information specifically for children
 - f. Information for bigger households about how to get everyone involved in saving
 - g. Comparisons to energy used by homes that are the same size as yours
 - h. Something you could pull out and stick to your refrigerator as a reminder
 - i. OTHER IDEAS
2. Now I'd like to review two other examples of the Energy Resource Guide that are used by other utility companies in California. Here is the first one.
 - b. PASS OUT RESOURCE GUIDE BOOKLET OF OTHER UTILITY "A" ... Take a few minutes to browse through this guide book.
 - i. What information in this resource booklet got your attention?
 1. Why?
 - ii. What information did you like best?
 1. What did you like about this?
 - iii. Is there anything in this booklet that you'd skip over or ignore?
 1. Why?
3. Now let's review the other example.
 - a. PASS OUT RESOURCE GUIDE BOOKLET OF OTHER UTILITY "B" ... Take a few minutes to browse through this guide book.
 - i. What information in this resource booklet got your attention?
 1. Why?
 - ii. What information did you like best?
 1. What did you like about this?

Appendix E

- iii. Is there anything in this booklet that you'd skip over or ignore?
 1. Why?
4. Between these three examples ...
 - a. Is there one that you prefer regarding the look and feel?
 - i. What about the booklet's look and feel do you like?
 - b. Are there any examples of the way that information is shown or described that you like better in one of the booklets?
 - i. What makes this a more effective way to communicate?
 - c. Are there any examples of specific information or energy saving advice that you like better in one of the booklets?
 - i. What makes this information stand out for you?
5. Instead of a package of information to read, would some other method of teaching work better?
 - a. How about ...
 - i. A DVD?
 - ii. An online video like on YouTube?
 - iii. An online training class where you would learn some things, answer some questions, and receive a certificate of completion (like online traffic school)?
 - iv. A class you could attend in person?
 - v. OTHER IDEAS

V. CONCLUSION (5 minutes)

OBJECTIVES: Summary and final comments.

1. I am going to go into the back room now to see if they have any final questions for me to ask you. (LEAVE AND RETURN. ASK FINAL QUESTIONS)
2. Do *you* any final comments?

THANK YOU VERY MUCH!

Appendix F

CUSTOMER TELEPHONE SURVEY

ESA Energy Education Research July 2013

n=500 Recent ESA Participants

INTRODUCTION

Hello, I'm _____ calling from HINER & PARTNERS, on behalf of [Pacific Gas & Electric Company/Southern California Edison/San Diego Gas & Electric/Southern California Gas Company] to conduct a survey about energy usage in your area. We are only interested in your opinions, and all your answers are completely confidential. For quality purposes, this call may be monitored.

S1a. Your household recently participated in the Energy Savings Assistance or ESA program, where you had at least two visits from utility representatives – first to assess your home and discuss energy savings with you and second to provide some energy efficiency improvements. .

Could I speak to the person in your household who met with the utility contractor during the first visit? (IF LANGUAGE BARRIER, ASK TO SPEAK TO SOMEONE WHO SPEAKS ENGLISH)

Yes, speaking	GO TO S3
Someone else	ASK FOR THEM
Not available	SCHED CALLBACK
Language Barrier: No English speaker.....	CONTINUE

S1b. DO NOT ASK: WHAT LANGUAGE?

Spanish.....	SPANISH PROC
Asian (SPECIFY IF POSSIBLE: _____)	2
European (SPECIFY IF POSSIBLE: _____)	3
Other (SPECIFY: _____).....	4
Don't know / can't determine.....	9

(ONCE THE CORRECT PERSON IS ON THE LINE, READ INTRO AGAIN IF NEEDED)

Hello, I'm _____ calling from HINER & PARTNERS, on behalf of [Pacific Gas & Electric Company/Southern California Edison/San Diego Gas & Electric/Southern California Gas Company] to conduct a survey about energy usage in your area. We are only interested in your opinions, and all your answers are completely confidential. For quality purposes, this call may be monitored.

S2a. To confirm, your household recently participated in a utility program that enabled you to receive some free energy efficiency services and improvements. Were you the person in your household who met with the utility contractor during the first visit?

Yes, speaking	GO TO S3
Someone else	ASK FOR THEM
Not available	SCHED CALLBACK
Language Barrier: No English speaker.....	CONTINUE

S2b. And are you also the person who pays your [PG&E/SCE/SCG/SDG&E] bill or does someone else take care of that?

Yes, I pay the bill	CONTINUE
No, someone else	CONTINUE
Don't know/not sure	CONTINUE

Appendix F

IF NEEDED OR WHEN ASKED: The survey can take as long as 20 minutes. I can begin now and at any time we can break and continue later.

SCREENING – 2 Minutes including intro

First, I have some questions about your **household and your home**.

S3. Counting yourself and any others, how many people live in your home for at least 6 months out of the year?

(RECORD NUMBER) _____
Refused..... 99

S4. (IF S4=2 OR MORE) And not counting yourself, how many are under 18?

(RECORD NUMBER) _____
Refused..... 99

S5. (IF S3 MINUS S4=2 OR MORE) And not counting yourself, how many are 65 or older?

(RECORD NUMBER) _____
Refused..... 99

[SKIP S6 IF SOUTHERN CALIFORNIA GAS COMPANY. AUTOPUNCH "ELECTRICITY AND GAS"]

S6. Is your home all electric or do you have both electricity and gas?

All Electric..... 1
Electricity and Gas 2
Don't know/Refused..... 9

[SOUTHERN CALIFORNIA GAS COMPANY ONLY]

S7. Which company provides your electricity?

Southern California Edison (SCE)..... 1
Los Angeles Department of Water & Power (LADWP)..... 2
Riverside Public Utilities 3
Other (Specify: _____) 4
Don't know/Refused..... 9

[ASK S8 AND S9 OF SOUTHERN CALIFORNIA GAS COMPANY/SOUTHERN CALIFORNIA EDISON CUSTOMERS ONLY]

S8. Approximately how much has your monthly electric bill been this summer?

S9. Approximately how much was your monthly electric bill last winter?

[ASK S10 AND S11 OF SOUTHERN CALIFORNIA GAS COMPANY/SOUTHERN CALIFORNIA EDISON CUSTOMERS IF S6=2]

S10. Approximately how much has your monthly SoCal gas bill been this summer?

Appendix F

S11. Approximately how much was your monthly SoCal gas bill last winter?

[ASK S12 and S13 OF PG&E AND SDG&E CUSTOMERS]

S12. Approximately how much has your monthly [PG&E/SDG&E] bill been this summer?

S13. Approximately how much was your monthly [PG&E/SDG&E] bill last winter?

MAIN QUESTIONNAIRE

OBSTACLES & MOTIVATIONS - 6 Minutes

AT1. DELETED

AT2. DELETED

AT3. For the next few items, tell me if these are obstacles to reducing energy use in your home. Please answer yes, somewhat or no.

- Yes..... 1
- Somewhat 2
- No 3
- Don't know / Refused (DO NOT READ)..... 9

Is the following preventing you from saving more energy?

- Cooperation of others in your home 1
- Cost of new appliances or repairs 2
- The need to maintain heating or cooling during hot and cold periods 3
- Age or condition of your home..... 4
- Being too busy or having other priorities 5
- Not knowing what else you can do to reduce energy use further 6
- Medical needs of someone in the home..... 7
- You rent so there are things you can't do..... 8
- Having too many things that use electricity, such as TV's, cell phones, etc. 9
- Age of some of your major appliances 10

AT4. What other obstacles do you face that I've not mentioned?

AT5. DELETED

AT6. DELETED

AT7. DELETED

AT8. MOVED

AT9. DELETED

AT10. To what extent do each of the following describe you and your household? Use a 5-point scale where a 5 means "strongly agree" and a 1 means "strongly disagree", and you can use any number between 1 and 5. [RANDOMIZE]

- Strongly Agree..... 5
- Somewhat agree 4
- Neither agree nor disagree 3
- Somewhat disagree..... 2
- Strongly Disagree..... 1
- Don't know / Refused (DO NOT READ)..... 9

Appendix F

1. Having the benefits ~~I get from~~ of using energy is more important than saving energy
2. I don't often think about how much energy I use in my home
3. New technologies provide me with tools and information to help me use energy more efficiently
4. DELETED
5. I could probably use less energy than I use now without sacrificing too much
6. DELETED
7. I am knowledgeable about things I can do around my home to save energy
8. I monitor my electricity bills closely
9. I've already done all I can to save energy in my home.
10. My actions have little effect on global warming.
11. DELETED.

EDUCATION METHODS – 4 minutes

There may have been several visits to your home by an ESA representative. The first was the assessment visit where the representative determined if you were qualified for the program, did a walk-through to identify energy efficiency improvements for your home, and gave you information about how to use less energy. Other representatives may have visited a second or third time to install appliances or make the improvements. I want to focus just on the first visit.

EDM1. The assessor may have talked to you at different points during the first visit about various ways to save energy and be safe with energy before, during or after the walk-through. About how many minutes in total did the assessor spend providing you with this **energy-related** information...

a. _____(0-90 MINUTES, DK=99)

EDM2. Did you accompany the assessor during the walk-through?

Yes	1
No	2
Don't know	9

EDM3. DELETED

EDM4. [IF S3=2 OR MORE] Did anyone else from your household join you and the assessor during any of the educational information-sharing part of the visit either before, during, or after the walk though?

Yes	1
No	2
Don't know	9

EDM5a. In terms of the materials provided to you, did the assessor give you a booklet or resource guide about how to save energy and be safe in your home?

Yes, gave you a booklet or left a booklet for you	1
No, did not give or leave a booklet	2
Don't know	9

EDM5b. [IF EDM5a=YES] Did the assessor review parts of the booklet with you, or leave the booklet for you to review on your own?

Review the booklet with you about energy use	1
--	---

Appendix F

Left the booklet for you to review on your own.....	2
Don't know	9

EDM6. DELETED

EDM7. [IF EDM5a=1] Did you save the booklet?

Yes	1
No.....	2
Don't know	9

EDM8. [IF EDM7=1] Have you [IF S3=2+ or someone else in your household] opened and reviewed the booklet on your own after the assessment visit?

Yes	1
No.....	2
Don't know	9

EDM9. DELETED

EDM10. DELETED

EDM11. What do you recall that the assessor told you either about keeping your home safe or how to keep your energy bills down? PROBE: Anything else? (RECORD TOP 2-3 THINGS MENTIONED. DO NOT PROBE UNTIL "EXHAUSTED")

EN ED CONTENT: SAFETY AND OTHER TOPICS – 1 minute

SED1. Which of the following did the assessor discuss with you during the visit? If you don't recall, just let me know. Do you recall the assessor discussing ...

FOR EACH:

Yes	1
No.....	2
Don't know	9

- Electric, gas, and/or earthquake safety
- CFL disposal and recycling
- How much it costs to run specific appliances
- How to read an electric and/or natural gas bill
- Other utility programs or assistance programs
- Going to your utility's website for more information about utility programs or to review your energy usage

Appendix F

EN ED CONTENT: SAVING ENERGY – 6 minutes

For each of the following, tell me if the assessor discussed how to save energy with the item. If you don't have an item that I mention, just let me know. There are no right or wrong answers – we are interested in learning what is discussed verbally. The first item I want to ask about is ... [ROTATE BLOCKS OF ITEMS, AND ITEMS WITHIN BLOCKS]

ADDITIONAL ITEMS: Did the assessor discuss how to save energy with ...

KITCHEN ITEMS

EDC1a. Your refrigerator?

Yes	1	GO TO 1b
No	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC1b. [IF EDC1a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Clean/vacuum the coils.....	1
Keep it full/keep empty water bottles in it.....	2
Temperature setting.....	3
Cover liquids and food	4
Other (Specify: _____)	5
Don't know / Don't recall	9

EDC1c. [IF EDC1b answered other than DK] Was this new to you, or did you know this already?

New to me	1
Knew of it already	2
Some new, some I already knew.....	3
Don't know	9

EDC2a. Your oven, range or cooktop?

Yes	1	GO TO 2b
No	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC2b. [IF EDC2a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Cover pots when cooking/boiling.....	1
Other (Specify: _____)	4
Don't know / Don't recall	9

EDC2c. [IF EDC2b answered other than DK] Was this new to you, or did you know this already?

New to me	1
Knew of it already	2
Don't know	9

Appendix F

EDC3a. Your microwave oven?

Yes	1	GO TO 3b
No	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC3b. [IF EDC3a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Use for heating/reheating instead of range or regular oven	1
Other (Specify: _____)	4
Don't know / Don't recall	9

EDC3c. [IF EDC3b answered other than DK] Was this new to you, or did you know this already?

New to me	1
Knew of it already	2
Don't know	9

EDC4a. Your dishwasher?

Yes	1	GO TO 4b
No	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC4b. [IF EDC4a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Wash only full loads	1
Other (Specify: _____)	4
Don't know / Don't recall	9

EDC4c. [IF EDC4b answered other than DK] Was this new to you, or did you know this already?

New to me	1
Knew of it already	2
Don't know	9

OTHER MAJOR APPLIANCES

EDC5a. Your washing machine and/or dryer?

Yes	1	GO TO 5b
No	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC5b. [IF EDC5a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Wash/dry only full loads	1
Use cold(er) water	2
Hang/Line dry clothes	3
Other (Specify: _____)	4

Appendix F

Don't know / Don't recall 9

EDC5c. [IF EDC5b answered other than DK] Was this new to you, or did you know this already?

New to me 1
Knew of it already 2
Don't know 9

EDC6a. Keeping cool, including air conditioning or other aspects of keeping cool?

Yes 1 GO TO 6b
No 2 NEXT ITEM
Not applicable – don't have item 8 NEXT ITEM
Don't know 9 NEXT ITEM

EDC6b. [IF EDC6a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Set AC thermostat at 78 1
Close drapes to keep out heat 2
Use fans instead of air conditioning 3
Change filters 4
Don't cool an empty house/turn off when you leave 5
Don't set thermostat lower to try to cool faster 6
Do regular maintenance 7
Use an evaporative or "swamp" cooler 8
Other (Specify: _____) 9
Don't know / Don't recall 10

EDC6c. [IF EDC6b answered other than DK] Was this new to you, or did you know this already?

New to me 1
Knew of it already 2
Don't know 9

EDC7a. Keeping warm, including heating or other aspects of keeping warm?

Yes 1 GO TO 7b
No 2 NEXT ITEM
Not applicable – don't have item 8 NEXT ITEM
Don't know 9 NEXT ITEM

EDC7b. [IF EDC7a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Set thermostat at 68 1
Close drapes to keep out cold/keep in warmth 2
Use sweaters or more blankets 3
Change filters 4
Don't use/high cost of portable heaters 5
Use electric blankets 6
Other (Specify: _____) 7
Don't know / Don't recall 9

EDC7c. [IF EDC7b answered other than DK] Was this new to you, or did you know this already?

Appendix F

New to me	1
Knew of it already	2
Don't know	9

EDC8a. Your hot water heater?

Yes	1	GO TO 8b
No	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC8b. [IF EDC8a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Lower temperature/thermostat	1
Other (Specify: _____)	2
Don't know / Don't recall	9

EDC8c. [IF EDC8b answered other than DK] Was this new to you, or did you know this already?

New to me	1
Knew of it already	2
Don't know	9

LIGHTING

EDC9a. Lights and light bulbs?

Yes	1	GO TO 9b
No	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC9b. [IF EDC9a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Replace bulbs with CFL or LED bulbs.....	1
Turn off when not using	2
Use timers or motion sensors.....	3
Other (Specify: _____)	4
Don't know	9

EDC9c. [IF EDC9b answered other than DK] Was this new to you, or did you know this already?

New to me	1
Knew of it already	2
Don't know	9

ELECTRONICS

EDC10a. Your TV's, DVR's, cable boxes, and video game consoles?

Yes	1	GO TO 10b
-----------	---	-----------

Appendix F

No.....	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC10b. [IF EDC10a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Use a power strip or smart power strip.....	1
Unplug when not using	2
Turn off when not using	3
Use timers	4
Other (Specify:_____)	5
Don't know / Don't recall	9

EDC10c. [IF EDC10b answered other than DK] Was this new to you, or did you know this already?

New to me	1
Knew of it already	2
Don't know	9

EDC11a. Your desktop computers, laptop computers, printers, and monitors?

Yes	1	GO TO 11b
No.....	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC11b. [IF EDC11a=YES] What did the assessor talk about? [UNAIDED. CHECK ALL THAT APPLY]

Use a power strip or smart power strip.....	1
Unplug when not using	2
Turn off when not using	3
Use timers	4
Other (Specify:_____)	5
Don't know / Don't recall	9

EDC11c. [IF EDC11b answered other than DK] Was this new to you, or did you know this already?

New to me	1
Knew of it already	2
Don't know	9

EDC12a. Cell phone chargers and other small devices such as iPods, iPads, Kindles, and such?

Yes	1	GO TO 12b
No.....	2	NEXT ITEM
Not applicable – don't have item	8	NEXT ITEM
Don't know	9	NEXT ITEM

EDC12b. [IF EDC12a=YES] What did the assessor talk about regarding charging small devices? [UNAIDED. CHECK ALL THAT APPLY]

Appendix F

- Unplug when not using 1
- Other (Specify: _____) 2
- Don't know / Don't recall 9

EDC12c. [IF EDC12b answered other than DK] Was this new to you, or did you know this already?

- New to me 1
- Knew of it already 2
- Don't know 9

WATER-RELATED

EDC13a. Using less water through faucets and showering?

- Yes 1 GO TO 13b
- No 2 NEXT ITEM
- Not applicable – don't have item 8 NEXT ITEM
- Don't know 9 NEXT ITEM

EDC13b. [IF EDC13a= YES] What did the assessor talk about regarding using less water? **[UNAIDED. CHECK ALL THAT APPLY]**

- Short showers 1
- Don't leave water running 2
- Fix leaks 3
- Use timers 4
- Other (Specify: _____) 5
- Don't know / Don't recall 9

EDC13c. [IF EDC13b answered other than DK] Was this new to you, or did you know this already?

- New to me 1
- Knew of it already 2
- Don't know 9

MOST USEFUL INFORMATION – 1 minute

SECTION MOVED

MUI1. Of all the information that you received from the assessor during their visit, what was of the most value to you?

MUI2. Why was this information the most valuable to you?

Summary Impact of Program – 1 minute

SIP1. Overall, did you learn anything through the program that resulted in you or others in your home...
[READ][YES, NO, DON'T KNOW FOR EACH]?

- Yes 1
- No 2
- Don't know 9

- A. Becoming more aware of things you can do to save energy
- B. Paying more attention to how you are using energy
- C. Making specific changes in how you do things in order to save energy
- D. Considering the purchase of more efficient appliances or electronics
- E. Actually purchasing more efficient appliances or electronics

SIP2. [IF SIPC = YES] What changes did you make in terms of what you do in your home to save energy?

SIP3. DELETED
SIP4. DELETED

AT8. Do you think you have saved money on your electric [IF S6=2: and natural gas] bill since you've participated in the ESA program?

- Yes..... 1
- No 2
- Don't know / Refused..... 9

SHARING INFORMATION WITH OTHERS – 1 minute

SIO1. [IF S3=2 or more] Did you discuss or share any of the energy-saving and/or safety information with anyone else in your household?

- Yes. 1
- No 2
- Don't know 9

SIO2. DELETED
SIO3. DELETED

SIO4. [IF SIO1=1] What information did you pass on?

SIO5. DELETED

SIO6. [IF SIO1=1 AND S3=2 or more] Do you think this changed their behaviors so they are now doing more to save energy than before the assessment visit?

- Yes. 1
- No 2
- Don't know 9

ASSESSOR RATINGS – 2 minutes

REP1 How would you evaluate the representative who came to your home for the assessment visit on the following aspects, using a 0 to 10 scale where 0 means “poor – the representative was not effective,” a 5 means ‘average – the representative did what they needed to do no more and no less” and 10 means “perfect.”

- a. Knowledge of the material and subject matter
- b. Interest and ability to answer all of your questions.
- c. Ability to clearly communicate with you
- d. Courtesy and politeness.
- e. Sensitivity or awareness of specific needs of your household

REP2. [INTERVIEWER IF SCORES ARE ALL VERY HIGH: Even if you think they were close to perfect,] what could the representative have done to improve the way they provided the information?

REP3. What stood out in your mind about the representative that made them effective?

NEW IDEAS – 2 minutes

SPLIT SAMPLE – ASK HALF OF ITEMS OF EACH RESPONDENT – ROTATING OR RANDOM

NEW1. [UTILITY COMPANY] is thinking about adding new aspects to the program. Please rate each of the following new ideas using a 0 to 10 scale where 0 means you would have no interest in this and 10 means you would definitely want this, and you can use any number between 1 and 10.

- a. A guide explaining how to read your daily and hourly energy usage online
- b. A customized list of the Top 5 things you can do that would save energy in your home
- c. A list of how much it costs to run each of your appliances for one hour
- d. [IF S4=1 or MORE CHILDREN] Suggestions for making a “game” out of saving energy that could be used for getting others in your household to save energy
- e. A DVD about ways to save energy and be safe around your home
- f. [IF S4=1 or MORE CHILDREN] Information specifically for children, such as age appropriate booklets
- g. [IF S3=5 or MORE] Information specifically for bigger households with 5 or more people residing there
- h. Comparison of your recent energy usage against other similar homes
- i. Assistance in enrolling in a text or email program that would alert you when you are exceeding a preset energy bill budget amount
- j. Refrigerator magnet with reminders about ways to save energy
- k. Periodic follow-up text or email or postcard reminders about ways to save energy
- l. DELETED
- m. An online video about ways to save energy and be safe around your home
- n. Personal email or mail follow-up about the program, materials, or services you received
- o. An online training class about how to save energy that you would be required to complete in order to receive the home improvements from the program
- p. Magnets or stickers for every appliance to remind you of energy saving tips
- q. A checklist or survey you could complete and send in right after the visit regarding the program, materials, and services you received
- r. Information about new LED lights

NEW2.If [UTILITY COMPANY] were to provide you with follow-up information about the program, which of the following would you most prefer? **[READ ALL THAN ACCEPT 1 ANSWER]**

- Email..... 1
- Letter or postcard through the mail..... 2
- Text message to your cell phone..... 3
- Recorded voice message to your phone..... 4
- Phone call from a live person, for example your assessor .. 5
- [DO NOT READ] Don't know..... 9

NEW3.DELETED

NEW4.How often would you want follow up – once a month, once every three months, twice a year, once a year, or not at all?

- Once a month..... 1
- Once every 3 months (quarterly) 2
- Twice a year..... 3
- Once a year..... 4
- Not at all 5
- [DO NOT READ] Don't know..... 9

Appendix F

APPLIANCES REPLACED OR RECEIVED - 1 minutes

ARR1. Did the program replace any of your appliances or provide any new appliances? [IF NEEDED: Not all customers qualify for this so don't be concerned if this did not happen.]

Yes.....	1
No	2
Don't Know / Refused	9

ARR2. [IF ARR1=YES] Which appliance did you receive? [DO NOT READ]

Refrigerator.....	1
Air Conditioner.....	2
Furnace	3
Evaporative or swamp cooler	4
Microwave oven.....	5
Washing machine / dryer	6
Other (SPECIFY).....	7
Don't Know / Refused	9

ARR3. [IF ARR1=YES] When the appliance was delivered, did the installer give you with any information about how to keep your energy costs lower with the new appliance?

Yes.....	1
No	2
Don't Know / Refused	9

ARR4. [IF ARR3=YES] Was it written material about the appliance or something they told you? [MULTIPLE OKAY]

Written material	1
Something they told you.....	2
Don't Know / Refused	9

ARR5. [IF ARR4=2 – SOMETHING THEY TOLD YOU] What did they tell you?

HOME CHARACTERISTICS - 2 minutes

HC1. What type of home do you live in? Is it a ... (READ UNTIL RESPONDENT SELECTS ANSWER)

Single Family Detached home.....	1
Duplex.....	2
Townhouse or Row House with shared walls.....	3
Condominium with shared walls and another unit above or below	4
Apartment.....	5
Mobile Home	6
Or some other type (SPECIFY) (DO NOT READ)	7
Don't Know / Refused (DO NOT READ)	9

Appendix F

HC2. Approximately how many square feet is your home? Your best guess is okay.

(RECORD NUMBER) _____ (0-9998)
Don't Know / Refused (DO NOT READ) 9999

HC3. Do you own or rent your home?

Own 1
Rent / lease 2
Don't Know / Refused (DO NOT READ) 99

HC4. DELETED

HC5. What type of air conditioning does your home have? (READ)(MULTIPLE OKAY)

Central AC 1
Heat Pump 2
Evaporative or swamp cooler 3
Window or wall mounted air conditioner(s)..... 4
Portable air conditioner 5
Fans 6
None 7
Don't Know / Refused (DO NOT READ) 9

HOME INVENTORY AND EFFICIENCY – 1 minute

My next questions are about things you have in your home that use energy.

HIN1. How many of each of the following does your household have? Only count those that are used or are plugged in at least on occasion.

_____(RECORD NUMBER BETWEEN 1-20)
Don't know/Refused 99

ELECTRONICS (ASK 1-5 AS FIRST GROUP– RANDOMIZE WITHIN THE GROUP)

1. TV's
2. Desktop computers
3. Laptop computers
4. Cable, satellite, DVR or TIVO boxes
5. Video game consoles like Xbox, PlayStation or Wii

APPLIANCES (ASK 6-14 AS SECOND GROUP – RANDOMIZE WITHIN THE GROUP)

6. Refrigerators
7. Stand alone freezers
8. Dishwasher
9. Clothes washer
10. Clothes dryer
11. Pool or spa
12. Window AC units (ask ONLY if HC5 = 4)
13. Plug in electric heaters

Appendix F

DEMOGRAPHICS – 2 minutes

These last questions are for classification purposes. Your answers will be kept confidential.

D1. In what year were you born?

19 __ (ENTER LAST TWO DIGITS)
 Don't Know / Refused (DO NOT READ) 99

D2. Which of the following best describes your education? (READ LIST)

High school or less 1
 Some college or post-high school training..... 2
 College graduate 3
 Completed graduate school..... 4
 Don't Know / Refused (DO NOT READ) 9

D3. Do you consider yourself (READ LIST)

White 1
 African-American..... 2
 Hispanic or Latino 3
 Asian..... 4
 American-Indian 5
 Or a member of another race 6
 Don't Know / Refused (DO NOT READ) 9

D4. And what language do you speak most often in your home? (DO NOT READ)(IF RESPONDENT SAYS CHINESE, CLARIFY MANDARIN OR CANTONESE)(IF MORE THAN ONE SPOKEN MOST OFTEN EQUALLY, MARK BOTH)

English..... 1
 Spanish 2
 Mandarin (Chinese) 3
 Cantonese (Chinese)..... 4
 Vietnamese 5
 Tagalog (Filipino)..... 6
 Korean..... 7
 Japanese..... 8
 Russian 9
 Other (SPECIFY: _____) 10
 Don't Know / Refused (DO NOT READ) 99

D5. Which of the following categories best describes your annual household income? (READ LIST)

Less than \$15,000..... 1
 \$15,000 to just less than \$28,000 2
 \$28,000 to just less than \$33,000 3
 \$33,000 to just less than \$40,000 4
 \$40,000 to just less than \$46,000 5
 \$46,000 to just less than \$53,000 6
 \$53,000 to just less than \$60,000 7
 \$60,000 to just less than \$75,000 8
 \$75,000 to just less than 100,000 9

Appendix F

\$100,000 to just less than 200,000.....	10
\$200,000 or more.....	11
Don't know / Refused (DO NOT READ).....	99

D6. Do you or does anyone in your household have a permanent disability, related to mobility, hearing, vision, cognitive, psychological, or chronic disease?

Yes.....	1
No.....	2
Refused.....	9

D7. [IF D6=YES] In which category would you classify the disability? (READ ONLY IF NEEDED TO PROMPT)

Mobility.....	1
Hearing.....	2
Vision.....	3
Cognitive (learning or mental).....	4
Psychological.....	5
Chronic disease.....	6
(DO NOT READ) Other (Specify:____).....	7
(DO NOT READ) Don't know / Refused.....	9

D8. OBSERVE AND RECORD GENDER

Male.....	1
Female.....	2
Don't know.....	9

CONFIRM NAME AND TELEPHONE.

On behalf of [SCE/PG&E], thank you very much.

IF RESPONDENT HAS QUESTIONS ABOUT SURVEY LEGITIMACY: The name of your utilities contact person for this survey is:

SCE: Carol Edwards. She can be reached at (626) 633-7105.

SDG&E/SCG: Brenda Gettig. She can be reached at (858) 654-8755

PG&E: Mary O'Drain. She can be reached at (415) 973-2317

IF RESPONDENT WANTS INFORMATION OR ASSISTANCE FROM THEIR UTILITY COMPANY, PROVIDE THE APPROPRIATE PHONE NUMBER:

SCE	800-655-4555
SDG&E	800-411-7343
SCG	877-238-0092
PG&E	800-743-5000

Appendix G

AT3. Are these obstacles to reducing energy use in your home... SUMMARY OF "YES"/"SOMEWHAT" RESPONSES	Total	Utility			
		PG&E	SCE	SCG	SDG&E
n=	505	197	63	205	39
The need to maintain heating or cooling during hot and cold periods	62%	64%	54%	63%	63%
Age or condition of your home	52%	53%	52%	49%	56%
Having too many things that use electricity, such as TVs, cell phones, etc.	50%	46%	47%	54%	50%
Cost of new appliances or repairs	49%	45%	53%	51%	48%
Age of some of your major appliances	48%	47%	54%	45%	55%
Not knowing what else you can do to reduce energy use further	46%	44%	43%	51%	36%
You rent so there are things you can't do	45%	52%	25%	43%	48%
Cooperation of others in your home	38%	38%	40%	36%	39%
Being too busy or having other priorities efficient practices	30%	30%	29%	32%	23%
Medical needs of someone in the home	27%	30%	29%	23%	26%

AT10. Describes my household... SUMMARY OF "STRONGLY AGREE"/"SOMEWHAT AGREE" RESPONSES	Total	Utility			
		PG&E	SCE	SCG	SDG&E
n=	505	197	63	205	39
I am knowledgeable about things I can do around my home to save energy	78%	78%	84%	76%	81%
I monitor my energy bills closely	73%	70%	75%	75%	75%
New technologies provide me with tools and information to help me use energy more efficiently	67%	66%	70%	67%	71%
I've already done all I can to save energy in my home	65%	62%	70%	66%	72%
I could probably use less energy than I use now without sacrificing too much	52%	53%	60%	48%	50%
My actions have little effect on global warming	42%	40%	42%	46%	31%

Appendix G

Having the benefits of using energy is more important than saving energy	39%	40%	45%	37%	39%
I don't often think about how much energy I use in my home	38%	37%	57% BDE	34%	33%

EDM1a. About how many minutes in total did the assessor spend providing you with this energy-related information...	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
n=	441	180	55	169	37
NET: 0-19 minutes	33%	28%	38%	37%	35%
0 to 9 minutes	7%	7%	15% BD	5%	8%
10 to 19 minutes	26%	22%	23%	32% B	27%
NET: 20 minutes or more	60%	66% D	56%	54%	63%
20 to 29 minutes	16%	19%	13%	15%	13%
30 minutes or more	44%	47%	43%	39%	50%
Unsure	7%	5%	6%	9% E	2%
Mean	26.5	28.4 C	23.6	24.9	28.4 C

EDM2. Did you accompany the assessor during the walk-through?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
n=	505	197	63	205	39
Yes	89%	89%	93%	87%	94% bd
No	10%	10% E	7%	12% E	5%
Don't know/Refused	1%	2%	1%	1%	1%

EDM4. Did anyone else from your household join you and the assessor during any of the educational information part of the visit?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
n=	414	156	53	174	30
BASE: Households with 2 or more people					
Yes	40%	43%	40%	37%	38%
No	59%	56%	60%	62%	61%
Don't know/Refused	1%	1%	--	1%	1%

Appendix G

EDM5a. Did the assessor give you a booklet or resource guide about how to save energy and be safe in your home?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
n=	(A) 505	(B) 197	(C) 63	(D) 205	(E) 39
Yes, gave you a booklet or left a booklet for you	86%	86%	79%	89%	84%
No, did not give or leave a booklet	9%	9%	17%	6%	7%
Don't know/Refused	6%	5%	5%	6%	9%

EDM5b. Did the assessor review parts of the booklet with you, or leave the booklet for you to review on your own?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
BASE: Those that received a booklet n=	(A) 434	(B) 169	(C) 50	(D) 182	(E) 33
Review the booklet with you about energy use	55%	60%	46%	52%	57%
Left the booklet for you to review on your own	39%	36%	42%	41%	40%
Don't know/Refused	6%	4%	12%	6%	3%

EDM8. Have you opened and reviewed the booklet on your own after the assessment visit?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
BASE: Those that saved the booklet n=	(A) 409	(B) 156	(C) 46	(D) 174	(E) 32
Yes	78%	74%	73%	83%	80%
No	21%	24%	26%	17%	20%
Don't know/Refused	1%	2%	1%	--	--

EDM11. What do you recall that the assessor told you either about keeping your home safe or how to keep your energy bills down?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
n=	(A) 505	(B) 197	(C) 63	(D) 205	(E) 39
Upgrading light bulbs	13%	12%	21%	10%	24%
Unplug electronics	10%	5%	6%	14%	21%
Weather stripping	10%	9%	14%	11%	5%

Appendix G

Adjust the thermostat	9%	13%	E 6%	E 7%	6%
Turn lights off	8%	10%	8%	7%	8%
Use appliances during off peak hours	6%	5%	6%	8%	7%
New appliances	4%	4%	7%	3%	7%
How to lower your bill (general)	4%	5%	1%	3%	2%
Insulation	3%	3%	4%	4%	1%
Shower heads	2%	2%	2%	1%	3%
Upgraded AC/Swamp cooler	1%	--	5%	2%	1%
Other	13%	13%	15%	11%	15%
Don't know	20%	20%	17%	22%	16%
Nothing	9%	9%	7%	11%	7%

SED1. Do you recall the assessor discussing... SUMMARY OF "YES" RESPONSES	Total	Utility			
		PG&E	SCE	SCG	SDG&E
n=	(A) 100% 505	(B) 100% 197	(C) 100% 63	(D) 100% 205	(E) 100% 39
Other utility programs or assistance programs for income qualified households	54%	59% C	47%	50%	57%
Going to your utility's website for more information about utility programs or to review your energy usage	50%	53% C	42%	49%	55% C
How to read an electric and/or natural gas bill	38%	48% CDE	33%	29%	36%
Electric, gas, and/or earthquake safety	37%	38%	37%	34%	42%
CFL disposal and recycling	37%	42% D	37%	29%	45% D
How much it costs to run specific appliances	30%	42% CD	23%	20%	34% CD

EDC_a. Did the assessor discuss how to save energy regarding: SUMMARY OF "YES" RESPONSES	Total	Utility			
		PG&E	SCE	SCG	SDG&E
n=	(A) 505	(B) 197	(C) 63	(D) 205	(E) 39

Appendix G

Lights and lightbulbs?	79%	76%	76%	81%	83%
Using less water through faucets and showering?	66%	66%	57%	67%	77%
Your hot water heater?	54%	57%	56%	53%	42%
Your refrigerator?	53%	61%	61%	41%	67%
Keeping cool, including air conditioning or other aspects of keeping cool?	46%	44%	47%	49%	40%
Keeping warm, including heating or other aspects of keeping warm?	39%	41%	38%	38%	36%
Your washing machine and/or dryer?	31%	27%	33%	34%	29%
Your TV's, DVR's, cable boxes, and video game consoles?	30%	30%	33%	26%	44%
Your oven, range or cooktop?	25%	35%	18%	16%	32%
Cell phone chargers and other small devices such as iPods, iPads, Kindles, and such?	24%	24%	17%	23%	41%
Your microwave oven?	21%	28%	14%	12%	47%
Your desktop computers, laptop computers, printers, and monitors?	19%	20%	16%	19%	22%
Your dishwasher?	10%	14%	8%	7%	13%

EDC_c. Was this new to you, or did you know this already? SUMMARY OF "NEW TO ME" RESPONSES	Total	Utility			
		PG&E	SCE	SCG	SDG&E
n=	(A) 505	(B) 197	(C) 63	(D) 205	(E) 39
Lights and lightbulbs?	26%	35%	19%	21%	17%
Using less water through faucets and showering?	44%	46%	42%	44%	37%
Your hot water heater?	41%	36%	39%	48%	30%
Your refrigerator?	45%	57%	33%	38%	38%
Keeping cool, including air conditioning or other aspects of keeping cool?	31%	27%	24%	35%	34%
Keeping warm, including heating or other aspects of keeping warm?	28%	29%	19%	30%	23%
Your washing machine and/or dryer?	43%	38%	37%	52%	25%

Appendix G

Your TV's, DVR's, cable boxes, and video game consoles?	34%	26%	43%	44%	17%
Your oven, range or cooktop?	49%	44%	50%	64%	26%
Cell phone chargers and other small devices such as iPods, iPads, Kindles, and such?	33%	37%	47%	30%	23%
Your microwave oven?	57%	50%	20%	82%	44%
Your desktop computers, laptop computers, printers, and monitors?	31%	26%	33%	37%	23%
Your dishwasher?	37%	41%	17%	40%	27%

MUI1. Of all the information that you received from the assessor during their visit, what was of the most value to you?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
n=	505	197	63	205	39
All of it	11%	9%	8%	15%	11%
Lighting info	11%	11%	10%	9%	15%
AC/Temperature info	10%	11%	5%	11%	4%
Saving energy in general	9%	8%	9%	9%	12%
Appliance replacement	9%	9%	17%	6%	8%
Weather stripping	7%	6%	7%	8%	6%
Water savings	7%	10%	4%	4%	9%
Unplugging appliances	5%	5%	3%	7%	4%
Refrigerator info	3%	2%	10%	1%	4%
Insulation	2%	2%	2%	2%	3%
Other	15%	18%	14%	13%	14%
Don't know	9%	10%	10%	8%	8%
Nothing	7%	4%	5%	10%	5%

MUI2. Why was this information the most valuable to you?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
n=	505	197	63	205	39

Appendix G

Saves money	25%	24%	26%	25%	25%
Learned what uses energy	24%	24%	20%	25%	20%
Good to save energy	12%	12%	12%	13%	12%
Helped me	5%	4%	4%	6%	4%
I need new appliance	4%	4%	9%	3%	5%
Not valuable	4%	4%	6%	5%	3%
Safety concerns	4%	5%	2%	4%	6%
Already knew information	3%	2%	4%	5%	2%
Needed new bulbs	0%	1%	--	--	--
Other	11%	12%	9%	10%	16%
Don't Know	5%	6%	8%	4%	7%
Refused	3%	4%	--	2%	4%
		C			C

SIP1. Did you learn anything that resulted in you... SUMMARY OF "YES" RESPONSES	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
	100%	100%	100%	100%	100%
n=	505	197	63	205	39
SIP1A. Becoming more aware of things you can do to save energy	82%	83%	77%	83%	84%
SIP1B. Paying more attention to how you are using energy	81%	83%	77%	80%	83%
SIP1C. Making specific changes in how you do things in order to save energy	76%	78%	73%	75%	73%
SIP1D. Considering the purchase of more efficient appliances or electronics	65%	62%	70%	66%	64%
SIP1E. Actually purchasing more efficient appliances or electronics	54%	50%	67%	54%	55%
			BD		

SIP2. What changes did you make in terms of what you do in your home to save energy? (open-ended)	Total	Utility			
		PG&E	SCE	SCG	SDG&E
BASE: Those that made specific changes in how they did things in order to save energy	(A)	(B)	(C)	(D)	(E)
n=	333	139	40	126	27
Turned off the lights	31%	29%	34%	32%	32%
Unplugged things	29%	26%	21%	34%	35%

Appendix G

Less AC use	20%	21%	25%	C 18%	C 9%
Switched to CFLs	14%	E 15%	E 9%	14%	14%
Less water usage	11%	8%	3%	17%	11%
Doing the laundry during off peak hours	11%	C 10%	15%	C 11%	C 9%
New appliances	4%	2%	7%	5%	3%
Weather stripping	3%	1%	4%	6%	3%
Closed windows	2%	3%	1%	B 2%	1%
A lot	0%	1%	--	--	--
Other	9%	9%	18%	8%	5%
Don't Know	0%	--	DE 1%	--	--
Nothing	4%	5%	1%	5%	5%

AT8. Do you think you have saved money on your energy bill since you've participated in the ESA program?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
Yes	n= 505 74%	197 75%	63 69%	205 75%	39 78%
No	17%	18%	22%	15%	14%
Don't know/Refused	9%	7%	8%	10%	8%

SIO1. Did you discuss or share any of the energy-saving and/or safety information with anyone else in your household?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
BASE: Households with 2 or more people	n= 414	156	53	174	30
Yes	69%	67%	69%	69%	82%
No	31%	33%	31%	30%	17%
Don't know/Refused	1%	E --	E --	E 1%	BCD 1%

SIO4. What information did you pass on? (open ended)	Total	Utility			
		PG&E	SCE	SCG	SDG&E
BASE: Those that discussed/shared energy-saving information with others in their household	(A)	(B)	(C)	(D)	(E)

Appendix G

	n=	285	104	36	120	25
Turn the lights off		28%	31%	34%	24%	25%
Unplug appliances/chargers		18%	12%	11%	24%	19%
Saving energy		14%	11%	13%	18%	10%
Everything		14%	18%	5%	13%	12%
Save water		10%	10%	13%	8%	10%
CFL bulbs		7%	8%	5%	6%	4%
Turn the thermostat down		7%	10%	5%	3%	10%
New appliances		3%	3%	8%	2%	6%
Close windows/Doors		3%	3%	5%	2%	1%
Weather stripping		2%	--	2%	3%	1%
Recommended ESA program to others		2%	3%	2%	--	3%
Other		14%	8%	15%	19%	12%
Don't know		1%	2%	5%	--	1%
Nothing		2%	2%	--	2%	1%

SIO6. Do you think this changed their behaviors so they are now doing more to save energy than before the assessment visit?	Total	Utility				
		PG&E	SCE	SCG	SDG&E	
BASE: Households with 2 or more people and those that shared information with others in the household		(A)	(B)	(C)	(D)	(E)
n=	285	104	36	120	25	
Yes	81%	81%	82%	81%	79%	
No	17%	19%	15%	15%	19%	
Don't know/Refused	3%	--	3%	5%	1%	

REP1. How would you evaluate the representative who came to your home for the assessment visit? TOP 3 BOX SUMMARY TABLE	Total	Utility			
		PG&E	SCE	SCG	SDG&E
n=	505	197	63	205	39
Courtesy and politeness.	88%	91%	85%	85%	96%

Appendix G

Ability to clearly communicate with you everything they were telling you.	81%	86% C	73%	78%	88% CD
Interest and ability to answer all of your questions.	80%	85% CD	73%	76%	85% C
Knowledge of the material and subject matter efficiency, safety, and other types of assistance provided by your utility company.	78%	84% CD	75%	72%	83% D
Sensitivity or awareness of specific needs of your household.	78%	81% C	71%	76%	80%

REP2. What could the representative have done to improve the way they provided the information?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
n=	504	197	63	205	39
More thorough walkthrough	6%	4%	6%	8%	6%
Go through the booklet more	4%	4%	2%	6%	1%
More knowledge about the program	3%	3%	2%	4%	5%
Follow up	3%	1%	5%	5%	1%
More explanation about the entire process	3%	5%	5%	1%	--
Be more caring / less rude	2%	1%	1%	3%	1%
Appointment times	1%	2%	1%	--	--
Help with the paperwork	0%	1%	--	--	--
Qualify us for new appliances	0%	1%	1%	--	1%
Other	6%	5%	9%	5%	7%
Don't know	8%	10%	11%	3%	13%
Nothing	65%	64%	58%	68%	66%

REP3. What stood out in your mind about the representative that made them effective?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
n=	503	197	63	203	39
Courteous / Good customer service	40%	40%	39%	39%	49%
Knowledgeable / Answered questions	29%	35%	21%	27%	33%

Appendix G

Helpful	7%	C 6%	6%	9%	C 4%
Did a good job	6%	5%	6%	6%	8%
Efficient	5%	6%	2%	6%	7%
Clean	1%	C 1%	1%	--	C 1%
Other	5%	4%	11%	3%	7%
Don't know	9%	9%	BD 12%	10%	6%
Nothing	11%	6%	E 16%	BE 16%	4%

NEW1. How much do you like the following new idea for the program? - TOP 3 BOX SUMMARY	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
Information specifically for bigger households with 5 or more people residing there	73%	79%	63%	72%	77%
A customized list of the Top 5 things you can do that would save energy in your home	73%	74%	71%	74%	66%
Information specifically for children, such as age appropriate booklets	71%	68%	78%	70%	85%
Information about new LED lights	70%	66%	69%	73%	B 72%
A list of how much it costs to run each of your appliances for one hour	65%	66%	68%	62%	68%
Refrigerator magnet with reminders about ways to save energy	63%	62%	67%	65%	57%
Suggestions for making a 'game' out of saving energy that could be used for getting others in your household to save energy	62%	58%	68%	64%	71%
A checklist or survey you could complete and send in right after the visit regarding the program, materials, and services you received	62%	61%	69%	60%	66%
Comparison of your recent energy usage against other similar homes	59%	56%	61%	63%	52%

Appendix G

Assistance in enrolling in a text or email program that would alert you when you are exceeding a preset energy bill budget amount	54%	54%	56%	53%	55%
A guide explaining how to read your daily and hourly energy usage online	54%	59%	50%	52%	51%
A DVD about ways to save energy and be safe around your home	53%	47%	62% B	54%	58%
Periodic follow-up text or email or postcard reminders about ways to save energy	53%	48%	66% B	53%	61% B
Personal email or mail follow-up about the program, materials, or services you received	52%	43%	54%	59% B	56%
An online video about ways to save energy and be safe around your home	49%	46%	45%	51%	60%
Magnets or stickers for every appliance to remind you of energy saving tips	49%	36%	59% BE	58% BE	35%
An online training class about how to save energy that you would be required to complete in order to receive the home improvements from the program	42%	39%	49%	41%	48%

NEW2. If PG&E/SCE/SCG/SDG&E were to provide you with follow-up information about the program, which of the following would you most prefer?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
	n= 505	197	63	205	39
Letter or postcard through the mail	49%	50%	61% BD	44%	52%
Email	27%	25%	19%	31% C	27%
Phone call from a live person, for example your assessor	15%	16%	16%	13%	12%
Text message to your cell phone	7%	5%	4%	10% C	7%
Recorded voice message to your phone	1%	3% D	1%	--	1%
Don't know	1%	1%	--	1%	1%

NEW4. How often would you want follow up - once a month, once every three months, twice a year, once a year, or not at all?	Total	Utility			
		PG&E	SCE	SCG	SDG&E

Appendix G

	n=	(A)	(B)	(C)	(D)	(E)
Once a month	505	20%	20%	17%	23%	15%
Once every 3 months (quarterly)		34%	37%	34%	32%	29%
Twice a year		27%	22%	32%	28%	36%
Once a year		16%	17%	B	16%	B
Not at all		2%	4%	4%	--	4%
Don't know		1%	D	D	1%	D
			--	2%	1%	1%

ARR1. Did the program replace any of your appliances or provide any new appliances?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
	(A)	(B)	(C)	(D)	(E)
Yes	n= 505	197	63	205	39
	40%	39%	49%	37%	46%
No		61%	D	62%	53%
	59%	C	50%	C	
Don't know/Refused		1%	1%	1%	1%
	1%	1%	1%	1%	1%

ARR2. Which appliance did you receive?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
BASE: Those that had any appliances replaced					
	(A)	(B)	(C)	(D)	(E)
Refrigerator	n= 201	77	31	76	18
	39%	44%	65%	26%	22%
Washing machine/dryer		DE	BDE		
	16%	--	8%	36%	12%
Microwave oven			B	BCE	B
	14%	22%	--	5%	37%
Air Conditioner		CD			bCD
	7%	3%	6%	13%	2%
Evaporative or swamp cooler			BE	BE	
	7%	3%	12%	10%	--
Lightbulbs			BE	E	
	7%	15%	--	--	8%
Shower heads		CD			CD
	5%	10%	--	3%	4%
Lamp		CD			
	3%	--	2%	3%	14%
Furnace					BCD
	1%	--	--	--	6%
Other					BCD
	5%	8%	8%	3%	--
Don't Know/Refused		E	E		
	1%	--	--	3%	--

Appendix G

ARR3. When the appliance was delivered, did the installer give you with any information about how to keep your energy costs lower with the new appliance?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
BASE: Those that had any appliances replaced					
n=	(A)	(B)	(C)	(D)	(E)
Yes	201 50%	77 53%	31 50%	76 49%	18 49%
No	40%	36%	37%	44%	43%
Don't know/Refused	10%	11%	13%	8%	8%

ARR4. Was it written material about the appliance or something they told you?	Total	Utility			
		PG&E	SCE	SCG	SDG&E
BASE: Those that got information about how to keep energy costs low with their new appliance					
n=	(A)	(B)	(C)	(D)	(E)
Written material	101 74%	40 76%	15 73%	37 74%	9 67%
Something they told you	42%	47%	46%	37%	29%
Don't Know/Refused	5%	--	8%	5%	17%
					B

Appendix H

TIPS PROVIDED IN RESOURCE GUIDEBOOKS		
PGE	SCE/SCG	SDGE
Simple Tips for Saving Energy	Things You Can Do to Save Energy and Money	Things you can do to cut costs
Heating		
Control your thermostat.	Lower the furnace thermostat	Choose the correct temperature setting.
Weatherize your home or apartment.	Don't turn up the thermostat higher than normal to heat your home.	Insulate your home properly.
	Install a programmable thermostat	Don't let heat escape.
	Keep your system tuned-up	Don't block heating vents.
	Upgrade your insulation.	Keep filters clean.
	Caulk and weatherstrip windows and doors	
	Keep all heating vents and furnace registers clear.	
	Clean or replace furnace filters.	
	Open drapes during day.	
	Have air ducts tested for leaks.	
Cooling		
Close drapes or blinds when it's sunny and warm.	Set your AC thermostat.	Set thermostat and leave it.
	Don't cool an empty house. Don't set your thermostat lower to cool faster.	Maintain your AC.
	Keep your AC clean	Keep cool air in.
	Inspect and clean/replace filters regularly.	Keep the vents clear.
	During evening hours, open windows to let cool air in.	Install reflective films or solar shade screens.
	Keep fireplace damper, attic openings, and other openings to the outside closed.	
	Keep shades, blinds, drapes closed during the day.	
	Don't leave doors or windows open while cooling house.	
	Keep heat-producing appliances away from your thermostat.	
	When using an evaporative "swamp" cooler, keep a window open to prevent moisture buildup. Clean and replace filters frequently.	Shade your house.
	Don't operate an AC and an evaporative cooler at the same time.	
Water Heater		
Set your water heater between "vacation" and warm.	Set your water heater thermostat at or slightly below recommendations.	Set the thermostat properly.
Install a low-flow faucet aerator on all your household faucets.	Take shorter showers rather than baths.	Install low-flow devices.
Install a low-flow showerhead.	Fix leaky faucets.	
	Install a low-flow showerhead.	
	Wash full loads of clothes.	
	Wash full loads in the dishwasher.	
	If you have a gas water heater, turn it to "pilot" setting when on vacation. If electric, shut it off at the circuit breaker.	
Lighting		
Turn off lights, appliances, equipment you're not using.	Replace incandescents with CFLs.	
Replace incandescents with CFLs.	Use low-wattage light bulbs.	
Save water without spending a cent.	Turn off fluorescent lights if you're going to be gone for more than half an hour, and incandescents every time.	
	Keep fixtures, bulbs, and tubes clean and in working order.	
	Turn off outdoor lighting during the day.	

Appendix H

TIPS PROVIDED IN RESOURCE GUIDEBOOKS		
PGE	SCE/SCG	SDGE
Simple Tips for Saving Energy	Things You Can Do to Save Energy and Money	Things you can do to cut costs
Washer/Dryer		
Replace your clothes washer - the second largest water user in your home.	Dry full loads, but don't overload or over-dry.	
Use cold water to wash your clothes whenever possible.	Separate lightweight and heavy clothes.	
	Clean the lint dryer before every load.	
	Dry two or more loads in a row to take advantage of heat still in the dryer.	
	Periodically make sure the dryer's outside moisture exhaust is open and operating properly.	
Refrigerating/Freezing		
Set your refrigerator to 37deg-40deg and your freezer to 0-5 deg	Set temperature controls.	Keep fridge and freezer in good shape.
	Clean coils.	Keep them cool.
	Don't leave the door open longer than necessary.	Unplug refrigerators and freezers that you're not using.
	Make sure seals are airtight.	Use the right settings.
	Cover liquids and wrap foods tightly.	
	Avoid putting hot foods directly into the fridge or freezer.	
	Allow about two inches clearance on all sides to provide airflow.	
	Keep your fridge or freezer defrosted.	
Cooking		
Use energy-saver cycles on your dishwasher.	Don't preheat your oven if you don't have to.	
	Don't open the oven door while food is cooking.	
	Keep oven and burners clean.	
	Cook by time and temp guides.	
	Use pots and pans that fit the burners.	
	Cover pots when cooking.	
	Never use a gas range for room heating.	
Misc.		
Reduce, reuse, and recycle.	Turn off the TV when no one is watching.	
Buy Energy Star appliances.	Turn off appliances when they are not being used.	
Replace any toilet manufactured before 1999.		
Check your toilet for leaks.		