

Non-Residential Process Evaluation Study: Attachment 3 – Data Collection Resources

Contains:

Attachment 3A – Main Survey Data Collection Resources, Main Survey – Participant Frequency Tables, Main Survey – Nonparticipant Frequency Tables

Attachment 3B – Third Party Data Collection Resources, Third Party Participant and Nonparticipant Frequency Tables

Final Report

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This booklet includes Attachment 3 – Data Collection Resources, of the San Diego Gas & Electric (SDG&E) Nonresidential Process Evaluation for 2010-2012. Specifically, it includes the following files, in the order shown here:

- ◆ Attachment 3A Main Survey – Data Collection Resources, including code books, sampling methodologies, and final disposition report.
- ◆ Main Survey Responses (Frequency Tables) - Participants
- ◆ Main Survey Responses (Frequency Tables) - Nonparticipants
- ◆ Attachment 3B Third Party Survey – Data Collection Resources, including code books and interview guides, for the following Third Party programs: On Bill Financing (OBF) and SaveGas. Data Collection Resources for all other programs evaluated, including other Third Party programs (Direct Install, Premium Efficiency Cooling), are provided in Attachment 3A.
- ◆ Third Party Survey Responses – Participant and Nonparticipant Frequency Tables, for OBF and SaveGas.

The main report volumes (Main Report, Attachment 1 – Portfolio level evaluations, and Attachment 2 – Program-specific evaluations); and Attachment 4 (Evaluability Assessment and Work Plan) are in separate booklets.

The report structure is described in more detail in the “Introduction” section of the Main Report.

ATTACHMENT 3A – DATA COLLECTION RESOURCES

This attachment is part of the SDG&E Nonresidential Process Evaluation project, conducted by the Hescong Mahone Group (HMG) team. This attachment has data collection resources used for the project.

Specifically, this attachment includes:

1. Program staff Interview Guides
 - Kick off meeting interview guide
 - Follow up interview guide
2. Vendor interview guides
 - Participating vendors
 - Nonparticipating vendors
3. Customer survey resources*:
 - Participating customer survey codebooks
 - Nonparticipating customer survey codebook
 - Survey and sampling methodologies
 - Customer survey responses (frequency tables) are attached as separate files
4. Account Executive (AE) forum guide
5. Segment advisor forum guide

All interviews were conducted by evaluation team members. All customer surveys were conducted by Tetra Tech.

*In addition to the main customer survey (conducted by Tetra Tech), Research into Action conducted separate customer surveys for the following third-party programs: On Bill Financing, SaveGas. The data collection resources for these programs are presented separately, in Attachment 3B.

1. PROGRAM STAFF INTERVIEW GUIDES

This chapter includes interview guides primarily for Sempra staff.

1.1 Kick off meeting Interview guide

The following guide was used for the kick off meetings. Most staff interviewed were program managers, although the guide was adjusted for other staff members as well.

1.1.1 Introduction

Summary of key points

- ♦ Interviewee's name, title, date of interview, etc.
- ♦ Key findings
- ♦ General observations - perhaps 'reading between the lines' comments, general trends, big picture observations
- ♦ Any compelling quotes that summarizes a key finding

1.1.2 Information obtained

Provide a summary (1-3 sentences) of each section covered in the staff interview. You can leave this in rough notes (not complete sentences); we might just use this section for internal (team) purposes, not for client. Depending on interviewee, some of these sections will be blank.

Personal Details

Role, job duties, information they'd like to come out of evaluation

Program Details

Program details (or portfolio level) responses – key people involved, who they interact with, key dates for their role.

Suggestions for improvement, recommendations, their suggestions for process evaluation.

Marketing Information

Key market actors, market arena involvement (upstream, downstream, midstream), market barriers, outreach strategies.

Customer Information

Participant satisfaction, feedback on incentive levels, technical assistance. How they track program participants, partial participants

Program Coordination

How program coordinates with other programs (utility and non -utility), other initiatives or regulatory efforts affecting program.

California Strategic Plan

If interviewee is familiar with Strategic plan, how it relates to program (or portfolio), if program will meet goals, other actors that will need to be coordinated to meet Strategic Plan.

PPMs / data tracking

If interviewee is familiar with PPMs, how interviewee tracks PPMs or other progress metrics, other information that should be tracked.

Next Steps

Follow up that is needed

- ◆ Other key stakeholders we should interview
- ◆ What program information will be available
- ◆ Key program information that is missing

1.2 (Post–kick off meeting) Staff Interview guide

The following served as the general interview guide used for program managers and other Sempra staff. All interviews were conducted by the Sempra Nonresidential Process Evaluation team.

The evaluation team modified this general guide for each interview to include more specific questions, based on the program (for program manager interviews) or role of the staff member (for interviews with other staff members, such as marketing, inspections, IT, engineering, and other staff). Also, many general sections were modified or skipped, because they were not applicable, or because much of this information had been collected during the kick-off meeting interviews.

Questions for Program Managers

General questions are listed first, followed by examples of some program-specific questions. (We do not list all program-specific questions here.)

General Questions

Organizational questions – EMI

Part of this evaluation is focused on identifying organizational issues that permeate throughout Sempra. I'm going to ask you some questions about the efficient use of resources, internal program coordination, clarification of roles and responsibilities, and staff retention and turnover within Sempra programs.

Efficient Use of Resources

- ◆ Do you feel that the program offerings for customers are redundant? [If needed] For example, do multiple programs offer one kind of customer the same or very similar services or equipment?
 - Yes
 - No
- ◆ Do you think there is redundancy in staffing, for example, more than 1 person doing the same thing?
 - Yes
 - Which positions or roles?
 - No
- ◆ Do you have any ideas about what could be done to fix these issues?
 - (open-ended)

Internal Program Coordination

- ◆ Is coordinating with other Sempra program staff a challenge for you or your program?
 - Yes
 - In what way?
 - No
- ◆ Do you have any challenges managing your program due to the needs or requests of other programs or staff? [Probe for details, examples]
 - (open-ended)

Clarification of Roles and Responsibilities

- ◆ Does your program coordinate with account executives?
 - Yes
 - No
- ◆ Is this critical to the success of your program?
 - Yes
 - No
- ◆ Do you feel like the AE's goals are aligned with the goals of your program?
 - Yes
 - No
 - What do you think could be done to align AEs' goal with program goals?
(open-ended)

General marketing questions

- ◆ Who is most responsible for marketing the program to potential participants?
 - program staff
 - AEs
 - third-party implementer
- How effective has this lead person /group been in conducting program outreach?
- ◆ What outreach methods have each of the above groups utilized in reaching customers?
 - How effective have each of these methods been?
- ◆ What additional outreach methods are needed to reach the target population?
- ◆ Is the outreach budget sufficient to support the programs?
 - Yes
 - No
 - In what areas is it lacking?

IT and data tracking questions

- ◆ How is the program currently tracking participant application data?
 - Standard program database created for general EE programs
 - Custom program database created by utility IT dept
 - Customer program database created by program staff/contractors

- ◆ Does your current participant database meet your program reporting needs?
 - Yes
 - No
 - How/why not?
- ◆ Are customer leads currently being tracked?
 - Yes
 - How is the program currently tracking customer leads data?
 - What are the pros and cons of your current database(s) created by
 1. the utility IT dept
 2. program staff/contractors
 - No
- ◆ What type of database user training does program staff receive?
 - Instructional materials
 - Face-to-face training
 - None available/offered
- ◆ Do you have any recommendation on improving EE program database applications?
 - Yes
 - What are they?
 - No

Third Party Integration (if applicable)

- ◆ How satisfied are you with the way 3P staff manage project data?
 - Not at all satisfied
 - Somewhat satisfied
 - Satisfied
 - Very Satisfied
 - NA / No opinion
- ◆ Do you feel the 3P firm has allocated sufficient resources to your program to ensure your program performs as expected?
 - Yes
 - No / Not sure (circle one)
 - What resources are lacking?

- Has this discussed this with the 3P firm—what was the result?
 - Why hasn't the 3P firm allocated enough resources to your program?
- ◆ Do you believe the 3P firm has sufficient market knowledge and connections to adequately promote your program?
 - Yes
 - No / Not sure (circle one)
 - Do you feel there are other 3P firms who have stronger relationships and market place knowledge?
- ◆ How regularly does your 3P firm follow Sempra's guidelines concerning the use of Sempra and your utility's logos?
 - Never follows the guidelines
 - Sometimes follows guidelines
 - Almost always follows guidelines
 - Always follows guidelines
 - Not sure / has not opinion
- ◆ Is the 3P firm using appropriate QA?
 - Yes
 - No / Not sure (circle one)
 - In what way is it not appropriate?
 - How will you ensure that they improve?

Benchmarking

- ◆ What has been your experience with benchmarking for your program?
- ◆ Why do some customers decline benchmarking?
- ◆ To what extent does the benchmarking requirement impede or delay participation in IOU programs?
- ◆ Is the benchmarking tool easy to use?
 - Yes
 - No
- ◆ Are benchmarking results easy to interpret?
 - Yes
 - No

- ◆ Are benchmarking results useful?
 - Yes
 - No
- ◆ How could the benchmarking process and results be more useful to customers?

Statewide coordination

- ◆ Do you see value in the statewide coordination of this program?
 - Yes
 - (explain)
 - No
- ◆ Are you aware of the statewide program reporting requirements?
 - Yes
 - Are you currently tracking them?
 - No
- ◆ Are you aware of the statewide energy strategic plan and its linkages with your program?
 - Yes
 - No
- ◆ Does statewide coordination increase the cost of delivering this program?
 - Yes
 - Estimated extent of increase?
 - No
- ◆ Can you recommend ways to improve the statewide coordination process and make it more valuable to SDG&E and its staff?

Regulatory

- ◆ How would you characterize the relationship between the IOU program staff and the CPUC ED? Who at the ED do they routinely interact with?
- ◆ What issues is the CPUC ED most concerned with regarding this particular program?
- ◆ What are the major regulatory requirements that program staff spend their time on [or confirm from notes]
 - e.g., PPMs, DEER, monthly and quarterly reports, Statewide IOU coordination calls, other CPUC calls

[For each regulatory requirement discussed above, ask the following:]

- ◆ Regarding the requirement that <REQ from above>,
 - What are its objectives/intended outcomes?
 - How much of a priority for the state/IOU is this requirement?
 - high
 - medium
 - low
 - ➔ Why?
 - How much effort does it take the IOUs to track, follow and address this requirement?
 - Do you believe this is an appropriate level of effort?
 - Do you have suggestions for getting more value out of this requirement and/or reducing its required level of effort?
 - Are the objectives of this requirement being met?
 - Yes
 - No
 - ➔ Why not?
- ◆ Would you say that the IOU Program Managers are meeting the regulatory requirements in general?
 - Yes
 - No
 - Why not?

Program Specific Questions

HVAC Tune-up

[Laura at TT: I removed the question for 3P HVAC because I've started conducting ongoing calls. I can document questions or focus of my calls as I do them if that's useful for Rob or yourself. In terms of the logic model, because the program is shifting so much we didn't think it was worthwhile to review it again at this point. In time we may look at the QM program and draft that logic model.]

BID

Target sector

- ◆ In which buildings sector(s) are most program projects?
- ◆ In which market sector(s) do you feel the BID program has the most future potential?
- ◆ What are the main differences between this program and the Calculated program? (e.g., customer size, program delivery, incentive structure)
 - Do you think there is any confusion within SCG / SDGE (e.g., with Account Executives or vendors) over these distinctions?

Customers

Based on your experiences with and feedback from participants

- ◆ What program aspects should be changed?
- ◆ Were there problems that needed to be worked out?
 - Yes
 - Can you describe them to me?
 - How would you recommend fixing these problems?
 - No
- ◆ In general, do owners feel that it was worth their effort and expense for program participation?
 - Yes
 - What was it about the owner that led them to make this conclusion?
 - Were they already “sold” on the concept before joining the program?
 - No

Applications

- ◆ How well do you feel the application process is working both for
 - Program staff?
 - Program participants?
- ◆ Do you see the need for any changes to be made?

- Yes
 - Can you provide some examples/suggestions?
- No
 - Why not?

Energy analysis

- ♦ How well do you feel the energy analysis process is working for
 - Program staff?
 - Program participants?
- ♦ Do you see the need for any changes to be made?
 - Yes
 - Can you provide some examples/suggestions?
 - No

Incentive verification and payment

- ♦ Is the incentive payment process currently working optimally or do you see room for improvement?
- ♦ What do you think about the
 - Timeliness of the verification inspection
 - Customer experience during this “last contact” with the utility before the incentive is paid?

Other

- ♦ Do you feel there are other program procedures that could be improved?
 - Yes
 - Which ones?
 - What would you recommend changing?
 - No

SCG ONLY

- ♦ [SCG only] At the kick off meeting, it sounded like this program had 1 participant, with another interested.
 - What is the participation status now?
 - What have you learned so far from these participants
 - Challenges?
 - Successes?

- ◆ [SCG only] This program is supposed to leverage WE&T efforts for marketing.
 - How well do you think this is working?

SDGE ONLY

- ◆ [SDGE only] According to the program reporting, the program should exceed projected kWh savings, but is not on track to meet therm savings. What are your thoughts on
 - how to reach more vendors that deliver therm savings (e.g., HVAC vendors)?
 - encouraging customers to implement such projects?
- ◆ [SDGE only] What do you think the major barriers are to achieving higher therm savings?
- ◆ [SDGE only] Regarding vendors ,
 - How effective have vendors been in driving participation?
 - What proportion of rebates are handled by vendors as opposed to the business customers themselves?

Deemed SCG

How many steps are there in the application review process? What are they? Are any of these redundant or excessive? Which ones? Is there any flexibility in the application review process, or does it follow a regulatory-prescribed process? Has a flow-chart been created to document the rebate processing process?

Have the more streamlined user-friendly applications, which were recently implemented, been successful at reducing the amount of time it takes to process the applications? Have customer errors and unintentional omissions been minimized?

Has the idea of implementing an online application system gained traction? Has the legal department determined a way to create binding contracts without “wet signatures”? Is it possible to integrate an online DB with the CRM?

Do you believe there are other ways to increase the efficiency of rebate processing and improve the turn-around time for customers? How?

How does the inspection process work? What proportion of applications are inspected? Variation among measure types?

Do you believe that the inspection effort undertaken by this program is less than adequate, adequate, or excessive?

(If excessive) Are the inspections excessive from the point of view of the customer or the inspection team?

(If inspection team or both) Do you believe it is possible to optimize inspections so that they are less onerous for the inspection team? How?

(If customer or both) Do you believe it is possible to optimize inspections so that they are less onerous for the customer? How?

How effective have vendors been to drive participation? What proportion of rebates are handled by vendors as opposed to the business customers themselves?

How effective have Commercial and Industrial Service Technicians been at promoting the program and increasing participation? What proportion of rebate applications are the likely results of CST or IST influence? Has a way to track this been implemented?

How effective have Account Executives been at promoting the program and increasing participation? What proportion of rebate applications are the likely results of AE-only influence?

Are the AEs compensated based on performance? Are the CSTs and ISTs?

Who else is responsible for driving participating?

How do you think a Point of Service (POS), or Upstream, rebate would work in this sort of program? Would it be feasible for vendors to screen potential participants for eligibility requirements?

What other program delivery options may be feasible, considering the measure mix and target customer for the deemed program? Why?

Do you believe that benchmarking is useful to the program? Useful to the participants?

Does the benchmarking requirement have any impact on participation? How so? Why?

What, if any, new measures could you foresee this program offering in the future? Why?

Are there any measures that you believe should be discontinued or moved to another program? Which measures? Why?

We would like to request the list of vendors that have signed participation agreements, as well as the list of vendors to which you mail marketing materials. Could you provide this information?

Deemed SDGE

How many steps are there in the application review process? What are they? Are any of these redundant or excessive? Which ones? Is there any flexibility in the application review process, or does it follow a regulatory-prescribed process? Has a flow-chart been created to document the rebate processing process?

Is there any way to reduce the amount of customer information needed on the application while maintaining a high level of confidence that applicants and their equipment are eligible? Do legal considerations mandate certain information be collected? Are CPUC requirements responsible for application length and difficulty? Do you believe there are other ways to increase the efficiency of rebate processing and improve the turn-around time for customers? How?

Why does SDG&E inspect 100% of the rebated equipment delivered through the Deemed program?

Do you believe that the inspection effort – considering the proportion of applications inspected, as well as the inspection activities themselves – undertaken by this program is less than adequate, adequate, or excessive?

(If excessive) Are the inspections excessive from the point of view of the customer or the inspection team?

(If inspection team or both) Do you believe it is possible to optimize inspections so that they are less onerous for the inspection team? How?

(If customer or both) Do you believe it is possible to optimize inspections so that they are less onerous for the customer? How?

What motivates certain vendors to participate in the program? Why does this not motivate other vendors – such as the ones who have signed participation agreements but have not submitted any applications – from participating? [Probe: Is the process to difficult or complicated? Or is the incentive to participate seen as less than adequate?] How effective have participating vendors been to drive participation? What proportion of rebates are handled by vendors as opposed to the business customers themselves? How effective have Account Executives been at promoting the program and increasing participation? What proportion of rebate applications are the likely results of AE-only influence? Are the AEs compensated based on performance?

Who else is responsible for driving participating? What options exist for marketing the program using internal resources? Are internal resources available for marketing efforts?

Why are rebate levels capped at 65% of incremental measure cost? Is this a CPUC-mandated requirement?

Why do chain accounts submit many rebate applications? Must they submit an application for each facility?

How do you think a Point of Service (POS), or Upstream, rebate would work in this sort of program? Would it be feasible for vendors to screen potential participants for eligibility requirements?

What other program delivery options may be feasible, considering the measure mix and target customer for the deemed program? Why?

Do you believe that benchmarking is useful to the program? Useful to the participants?

Does the benchmarking requirement have any impact on participation? How so? Why?

What, if any, new measures could you foresee this program offering in the future? Why?

Are there any measures that you believe should be discontinued or moved to another program? Which measures? Why?

We would like to request the list of vendors that have signed participation agreements, as well as the list of vendors to which you mail marketing materials. Could you provide this information?

Calculated

How have program goals changed over time (are they dynamic)? Have they evolved with the market and regulatory environment, such as with development of the strategic energy plan or standardized program tracking database (2006 – 2008 evaluation cycle)?

What roles do AEs and other sources play in developing projects for the program? Are these channels sufficient to meet program goals?

How effective have vendors been in driving participation? What proportion of rebates are generated by vendors as opposed to the business customers themselves?

How effective have Account Executives been at promoting the program and increasing participation? What proportion of rebate applications are the likely results of AE-only influence?

Are the AEs compensated based on performance?

Who else is responsible for driving participation?

How many steps are there in the application review process? What are they? Are any of these redundant or excessive? Which ones? Is there any flexibility in the application review process, or does it follow a prescribed process?

Previous evaluation highlighted confusion amongst customers when dealing with multiple staff with varying responsibilities: Do program administrative issues remain a barrier to participation or lead to customer dissatisfaction? Do you believe there are other ways to increase the efficiency of rebate processing and improve the turn-around time for customers? How? What do you think about the timeliness of the verification inspection, and the customer experience with this “last touch point” with the customer before the incentive payment is made?

How does the inspection process work? What proportion of applications are inspected?

Variation among measure types?

What, if any, new measures could you foresee this program offering in the future? Why?

Are there any measures that you believe should be discontinued or moved to another program? Which measures? Why?

We would like to request the list of vendors that have signed participation agreements, as well as the list of vendors to which you mail marketing materials. Could you provide this information?

Do you feel there are other program procedures that could be improved? If so, what would you recommend that needs changing?

[SDGE only] According to the program reports, the program is not meeting therm savings. Why are gas savings not being realized? What changes should be made to increase savings? What are your thoughts on how to reach more vendors that deliver therm savings? On selling these projects to customers? What do you think the major barriers are to achieving higher therm savings?

Save Gas HWC (SCG SDG&E)

How often do you communicate with your implementer and by what method? Do you feel he/she lets you know about important information? Do any customer issues come up in these conversations? (How are these issues resolved)

Do you feel the program has secured enough savings to date in order to meet its goals?

Have any changes been made to increase participation?

Are these changes working and will you consider other changes?

What do you think are the barriers to getting more prospective clients? (open-ended response) [Probe for specifics]

PREPS (SCG)

In our initial interview, you noted that the program was still in its early stages. Can you give me an update on the status of the program?

What has the response been so far?

Have any changes been made to increase participation?

Are these changes working and will you consider other changes?

What do you think are the barriers to getting more prospective clients? [Probe for specifics]

Are the program's staff resources adequate to meet the demands of the program? What additional resources do you need?

Do you expect to meet your performance objectives? If not, why not?

OBF (SDG&E)

How well is OBF messaging on other program brochures working?

Do you communicate with other program managers and account executives about marketing? What do you hear from them regarding customer interest in OBF?

What are the OBF application approval and loan monitoring processes at SDG&E? (open-ended response)

(Probe: roles, forms, monitoring)

The utility often returns OBF applications to vendors for clarifications or “rework” on the application. What is the main reason applications need to be reworked? (open-ended response)

What might you do to reduce the number of applications requiring rework? (open-ended response)

What is the OBF vendor certification process? (open-ended response)

Are the certification standards adequate? (Yes/No)

- If No, ASK
- What improvements would you suggest? (open-ended response)

What kind of feedback have you gotten from vendors about the online vendor handbook? (open-ended response)

A couple of months ago you told us there were five loan defaults, how many defaults are there now?

Typically, what are the causes for loan default?

What is your process for approving/denying a loan? (open-ended response)

- Who performs these activities? (open-ended response)

What is the acceptable default rate for the OBF? (percent)

How are the loans financed? (Probe: by the utility, by a bank)

What do you feel is working well about the program? (open-ended response)

What needs to be improved? (open-ended response)

Sample Questions for other Sempra staff

The following shows **sample** questions that the evaluation team asked other (non-program manager) Sempra staff. The interviewer added other questions to the list shown here. Also, other Sempra staff were interviewed than those shown here, including rebate processing, IT, engineering, regulatory, vendor coordinators, and other staff.

PG&E and SCE Deemed program managers re: best practices [to be supplemented with a review of best practices literature and review of similar programs nationwide]

Interview topics we will likely cover:

- ♦ Characterize the level of SW coordination, value of coordinating
- ♦ Describe the regulatory burden, objectives, intended outcomes, how it could be reduced

- ◆ How PG&E/SCE programs differ from Sempra's and what, if any, changes, modifications, improvements are being planned – what could be replicated in Sempra territories (e.g., to increase gas savings) – new measures, delivery strategies, inspection policies, rebate processing [first we will make sure we have a solid understanding of how Sempra does each of these from interviews, document review, etc.]

SCG and SDG&E rebate processing staff

- ◆ Confirm our understanding of how the process works, including how processes differ from the other Sempra utility (and PG&E, SCE)
- ◆ Identify issues, problems, opportunities for improvement
- ◆ Develop understanding why processes are different, if so, and explore whether changes could be made to improve efficiency and customer satisfaction, especially if practices deviate from standard practice in CA and elsewhere

SCG and SDG&E inspections staff

- ◆ Confirm our understanding of how the process works, including how policies and processes differ from the other Sempra utility (and PG&E, SCE)
- ◆ Identify issues, problems, opportunities for improvement
- ◆ Develop understanding why processes are different, if so, and explore whether changes could be made to improve efficiency and customer satisfaction, especially if practices deviate from standard practice in CA and elsewhere
 - Proportion of applications inspected varies among IOUs
 - Application review/QC process varies among IOUs (including the length of time to conduct review)

2. VENDOR INTERVIEW GUIDES

This chapter includes interview guides for participating and nonparticipating vendors (i.e., contractors).

2.1 Questions for Participating vendors

General Questions – Opening

- ♦ Introduction section

Hello, my name is XX, and I’m calling from XX. We are conducting research on behalf of [IOU] to assess services and offerings they provide to their customers. I’m calling to find out about your experience as a trade ally with the [PROGRAM NAME and brief description – see below under Marketing / outreach].

Are you the correct person to speak with? [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY] Please be assured that this isn’t a sales call and that all responses will be treated confidentially.

Respondent background

What is your position title? (open ended response)

What are your responsibilities? (open ended response)

Which sectors do you serve? (choose all that apply – Residential, Agriculture, Industrial, Commercial)

What products do you primarily sell or what services do you offer? Choose all that apply (Motors and pumps/ drives/ lighting/ HVAC / Boilers/ Food Service Equipment / Laundry Equipment/ Retro-commissioning / technical assistance or audits / Other - specify)

Does your company specialize in the specification of energy efficient (rather than standard) technologies? (Y/N/Don’t know / Other – specify)

Marketing / outreach and Program Participation

I’m going to read to you a list of [IOU] programs, with a brief description of each. Please tell me which of these programs you have heard of before this call.

(SDGE – Energy Efficiency Business Rebates - EEBR / SoCal Gas – Energy Efficiency Rebates for Businesses - EERB)– provides fixed-amount rebates for energy efficiency upgrades.

(SDGE - Energy Efficiency Business Incentives - EEBI [Calculated] / SoCal Gas - Energy Efficiency Calculated Incentive [Calculated]) provides custom incentives based on the cost per kWh or therm saved.

(ONLY SDGE) – Energy Savings BID program- provides custom incentives for large energy efficiency projects, or a bundle of energy efficiency projects.

(ONLY SDGE) - On Bill Financing - provides a 0% interest loan for large energy efficiency improvements.

Which of these energy efficiency programs do you participate in?

Are there energy efficiency programs that you are aware of, that you don’t recommend? If so, which ones and why not? (open ended response)

For the programs that you participate in, how did you first hear of them? (vendor rep, Account Executive, program website, through other vendors, conferences or trade association meetings, other - specify)

What considerations or limitations do your customers face when deciding whether to upgrade to energy efficiency equipment? (open ended)

What considerations or limitations do your customers face when deciding whether to participate in an [IOU] program? (open ended) What information or messages have you found to be effective in overcoming those barriers?

Are there any additional tools or support that [IOU] could provide to you to better market energy efficiency equipment / services? (open ended)

Benchmarking

Does the program that you serve include a benchmarking requirement? (Y/N)

For what percent of customers do you help fulfill the benchmarking requirement? (Y/N)

For projects where you assist customers, do you try to enter customer-specific information into the benchmarking software, or do you generally use the software's default values?

Do any customers decide to forgo an energy efficiency program due to the benchmarking requirement? (Y/N) (If YES: About what percent is this?)

How do you think this process can be improved so that more customers are willing to fulfill the benchmarking requirement? (open ended)

Program Specific Questions (one section to be asked of each trade ally)

EEBR (Deemed) (SDGE)

Now we'd like to ask some questions specifically about your involvement in the EEBR Program.

First, how many rebate applications have you applied for or helped customers apply for?

♦ Application Process

For equipment sales that qualify for a program rebate, how often do you complete the application for the customer? Would you say it is:

1. 90%-100% of the time
2. 50%-89% of the time
3. Less than 50% of the time
4. Not sure

And of these projects, for what percent did you receive the rebate instead of the customer? (percent)

Do you pass along any of the savings to the customer? (Y/N)

If YES: Do you think these project "buy-downs" are a key participation driver for customers, or have relatively little purchase influence?

On average, approximately how long does it take for you to receive a rebate from [IOU] on behalf of a customer, once the rebate application has been submitted? (list)

Do you believe that this is an acceptable amount of time? (Y/N)

♦ **Program Design and Participation Experience**

Overall, do the EEBR rebates help to increase your business? (Y/N, also ask if a lot, somewhat, a little, etc.)

About what percentage of your sales receive rebates through the program? (open ended)

Are there any particular EEBR rebates that customers are not interested in, for equipment you offer? If YES: Which equipment, and why is that?

Did you participate in the EEBR program before 2010?

If YES: How do your sales of program equipment now compare to that earlier period? (If difference, probe on impacts of rebate changes, economy, promotion changes, etc.)

Looking forward, is there any energy efficient equipment that you would like to see included in the EEBR Program?

If YES: What equipment would you like to see added? (open ended)

Calculated/EEBI (SDGE)

Program participation

About how long have you been participating in the Calculated program? _____ Months
_____ Years

Sales and Program Impact on Business

How has participating in the program impacted your organization? (Increased / decreased / stayed the same / don't know)

Have your **[sales of measure/service]** that qualify for the program increased since you began your program participation? (Y/N) If so, by how much? (open ended)

Has your program participation increased or decreased your cost of operation? (Y/N) How? (open ended)

About what percentage of your sales receive incentives through the program? (percent)

How often do you suggest a high efficiency option that qualifies for the program to your customers? (open ended) Do you recommend a higher efficiency unit *because* of the program? (Y/N)

Customers Purchasing Behavior

What percentage of your customers bought a higher efficiency **[measure/service]** because of the rebates / price reduction available through the program? (percent)

What percentage of your customers request high efficiency **[measure/service]** or mention participating in the program? (percent)

Program Participation

Is program participation easy for customers? (Y/N) Why or why not? (open ended)

What program changes would increase customers' ease of participation? (open ended)

Have you seen a change in the level of customer interest in the program since you joined the program? (Y/N)

If Yes, what do you think are some of the reasons? (Economic downturn / dissatisfaction with program / other – specify)

Of the sales that qualify for a rebate/price reduction, would you say that you complete the application for the program:

1. 90%-100% of the time
2. 50%-89% of the time
3. Less than 50% of the time
4. Not sure

Do you find any aspects of the application confusing or problematic? If so, which aspects?

Is participation in the program easy for you? (Y/N) How could it be made easier? (open ended)

What barriers prevent you from signing up more customers for the program? (open ended)

What improvements would you suggest for the program? (open ended)

Program Updates and Interaction

When you first became active in the program, did you receive training on the details of the program? (Y/N) [If no training has been received] Would training be useful to you or your staff? (Y/N)

Did you receive marketing material? (Y/N) What marketing materials did you receive from the program implementer? (open ended) Were marketing materials informative? (Y/N) Have they helped you make a sale?

How do you typically learn about changes to the program? (Account Executive / Vendor Rep / other utility staff / program website / other – specify)

Are you satisfied with the account executive or other utility staff you interact with? (Y/N) [IF TIME PERMITS ASK NEXT QUESTION] What type of interactions have you had with them? (open ended) Is there any feedback you would like to give to the program administrators? (open ended)

Would you recommend participating in the program to other contractors? (Y/N)

BID (SDGE)

Now we'd like to ask some questions specifically about your involvement in the Energy Savings BID Program.

Enrollment and participation

About how many projects have you been involved in for this program in the past 2 years?

Do you generally work on defined projects or undefined aggregated projects? (If needed, clarify – for defined, you apply with a particular project in mind. If undefined, you propose the energy savings in the application, and then you find the sites and identify the measures later.)

Do you generally work on custom projects, or on projects with deemed measures?

What type(s) of equipment do you generally install or recommend for installation for the BID Program? Choose all that apply: interior lighting/ exterior lighting/ air conditioner and refrigeration compressors/ Compressor VFDs/ HVAC/ Boilers / Other – please specify.

Do you target equipment that saves electricity, gas, or both? (Electricity / Gas / Both / Don't know)

About what percentage of your sales receive rebates through the program? (percent)

Marketing

Do you approach customers to participate in BID, or do they approach you? If you approach them, how do you identify sites to target?

Do you ever work with SDG&E Account Executives to identify sites?

What are the main reasons why customers choose to participate in BID?

What are the main reasons why customers decline to participate in BID?

Satisfaction with program elements: For each program aspect, how satisfied are you on a scale of 1-5, where 1 is very dissatisfied, 5 is very satisfied?

Application submission

Pre-inspection (verifying old equipment is present)

Deemed savings estimates, for measures with energy savings in DEER or workpapers

Energy savings calculation review for custom measures

Post-inspection (verifying new, efficient equipment is present)

M&V (only for Custom projects, to verify energy savings)

Payment timing and amount

For any element where you are not satisfied, what is the issue?

Energy Savings

I understand that sometimes projects don't hit their projected (or bid) energy savings. About how often does this happen with the projects you work with?

What are some common reasons why projects do not achieve their projected energy savings? Choose all that apply: number of installations change, specifications change, changes in operation schedule, not enough aggregated sites, other - specify)

Program Evolution –

How do you typically learn about changes to the program? (Account Executive / Vendor Rep / other utility staff / program website / other – specify)

I understand that there have been changes to the program since June, as required by the California Public Utilities Commission. For example, deemed savings are tied to DEER or work

papers, and the minimum energy savings threshold per site has increased. Are you aware of these changes? (If not, skip to next section.)

How did you first hear about these changes? (Account Executive / Vendor Rep / other utility staff / program website / other – specify)

Do you feel like you understand all of the changes?

How can SDG&E help vendors adapt to these changes?

Future Participation

Do you plan to participate in this program in the future, under its current implementation plan?

Are there changes you would suggest to the program?

General Closing Questions

Program results and satisfaction

Have the projects that you have assisted changed as a result of program participation? If so, how? (Added more of the same measure / increased efficiency for measure installed / installed measure earlier / other)

Overall, how satisfied would you say you are with the [IOU PROGRAM]? (1-5 scale, where 1 is not at all satisfied and 5 is extremely satisfied.)

Why did you say that? (open ended response)

What's working best about the [IOU PROGRAM] (open ended response)

What area(s) is most in need of improvement with the [IOU PROGRAM]? (open ended response)

We are about to wrap up. Do you have any other comments you'd like to make?

(NOT RIA - IF INDICATED THEY ARE AWARE OF SDGE OBF EARLIER) Finally, there is another survey for vendors that serve the On Bill Financing Program. Would you be willing to participate in another 20-minute interview for this program? (Get name, phone number, email address and inform RIA.)

(RIA for SDGE OBF) Finally, there is another survey for vendors that serve the Calculated, BID, or EEBR programs. Earlier you indicated that you participate in the (A,B,C) programs.

Would you be willing to participate in another 20-minute interview for this/these program(s)? (Get name, phone number, email address and tell other teams.)

Thank you for your time!

2.2 Questions for Nonparticipating vendors

◆ Introduction section

Hello, my name is XX, and I'm calling from XX. We are conducting research on behalf of [IOU] to assess services and offerings they provide to their customers. I'm calling to find out about your experience as a trade ally with [IOU's] nonresidential energy efficiency programs. Are you the

correct person to speak with? [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

Please be assured that this isn't a sales call and that all responses will be treated confidentially.

Respondent background

What is your position title? (open ended response)

What are your responsibilities? (installing equipment / recommending equipment for installation / repairing equipment / management / other - specify)

Which sectors do you serve? (choose all that apply – Residential, Agriculture, Industrial, Commercial)

Do you provide technical assistance or audits to customers, or primarily provide the equipment? (technical assistance and audits / equipment / both / neither or other – specify)

What products do you primarily sell or what services do you offer? Choose all that apply (Motors and pumps/ drives/ lighting/ HVAC / Boilers/ Food Service Equipment / Laundry Equipment/ Retro-commissioning / Other - specify)

Does your company specialize in the specification of energy efficient (rather than standard) technologies? (Y/N/ Don't know / Other - specify)

Marketing / outreach and Program Participation

I'm going to read to you a list of [IOU] programs, with a brief description of each. Please tell me which of these programs you have heard of.

(SDGE – Energy Efficiency Business Rebate program [EEBR]/ SoCal Gas – Energy Efficiency Rebates for Businesses [EERB] provides fixed-amount rebates for energy efficiency upgrades.

(SDGE – Energy Efficiency Business Incentives [Calculated] / SoCal Gas - Energy Efficiency Calculated Incentive [Calculated]) program provides custom incentives based on the cost per kWh or therm saved.

(ONLY SDGE) Energy Savings BID program - provides incentives for large energy efficiency projects, or a bundle of energy efficiency projects.

On Bill Financing provides a 0% interest loan for large energy efficiency improvements

For the programs that you have heard of, how did you first hear about them? (Account Executive / Vendor Rep / Other [IOU] staff / conference or trade association meeting/ [IOU] website / other – please specify)

Which (if any) energy efficiency programs do you participate in?

Are there energy efficiency programs that you are aware of, that you don't recommend? If so, which ones, and why not?

Have you been contacted by someone at [IOU] to support energy efficiency programs? (yes / no / don't know).

If yes,

- Which program(s) did the IOU staff person ask you to support? (list)

- Why have you chosen not to sign a participation agreement for these programs? (open ended)

Please describe any prior experience in participating in energy efficiency projects and/or programs. (open ended response)

What difficulties do your customers face when deciding whether to upgrade to energy efficient equipment? (high upfront cost / lack of familiarity with efficient equipment / other – specify)

What difficulties do your customers face when deciding whether to participate in an [IOU] program? (burdensome paperwork / have not heard of program / rebates or incentive levels too low / other – specify)

Are there any additional tools or support that [IOU] could provide to you in order to better market energy efficiency equipment / services? (Y/N/ Don't know)

If so, what could they provide? (open ended)

Participation interest

For this last section, I will read the program names and descriptions again, and ask which you might be interested in recommending to your customers. Please rate your interest on a 5-point scale, with 1 being not at all interested, and 5 being very interested.

(SDGE – Energy Efficiency Business Rebates - EEBR / SoCal Gas – Energy Efficiency Rebates for Businesses – EERB) provides fixed-amount rebates for energy efficiency upgrades.

Calculated program provides custom incentives based on the cost per kWh or therm saved. (This program applies when a rebate through Deemed isn't available.)

(SDGE only) Energy Savings BID program provides incentives for large energy efficiency projects, or a bundle of energy efficiency projects.

(SDGE only) On Bill Financing provides a 0% interest loan for large energy efficiency improvements

Those are all the questions I have for you. Do you have any other comments you'd like to make?

Thank you for your time!

3. CUSTOMER SURVEY CODEBOOKS

The following are codebooks that the evaluation team used to survey customers. Tetra Tech conducted all surveys.

The participating customer survey is presented first, followed by the nonparticipating customer survey.

We then present the survey and sampling methodology used to draw the customer sample, and the categorization of survey responses (final dispositions).

3.1 Participating customers

SEMPRA UTILITIES

NON-RESIDENTIAL PROCESS EVALUATION (PARTICIPANTS)

NOTES:

1. Variable names are in bold type.
2. A code of -3 means the respondent dropped out of survey, every variable after the last question they answered will be coded as -3.
3. A code of -4 means the question was not asked of the respondent, this could be because of a programming error, and interviewer error (coding a previous, qualifying answer incorrectly), or that the question was added during the survey's fielding period.
4. A code of -5 signifies a unique case where data was retained when a respondent mentioned something that was not one of the choices.
5. A code of -6 means the respondent was skipped from the question due to their response to a previous qualifying question.
6. A code of -7 means not applicable
7. A code of -8 means the respondent answered don't know.
8. A code of -9 means the respondent refused the question.
9. Response categories that contain an asterisk (*) are codes that were added during cleaning because many respondents answered with the same category.

SAMPLE VARIABLES

CaseID	Unique case identifier
Respnum\$	Respondent number
Aapor	Disposition
	1100 Full completed survey
	1200 Survey that was partially completed, at least getting to section F (27 respondents)
IOUFlag	Utility
	1 San Diego Gas and Electric (SDG&E)
	2 Southern California Gas (SCG)
Progflag	Program
	1 Comprehensive Audit (SCG only)
	4 Premium Cooling Efficiency (SDG&E only)
	5 Direct Install (SDG&E)
	6 Deemed
	7 Calculated
	8 Energy Savings BID
Sectflag	Sector
	1 Agriculture
	2 Commercial
	3 Industrial

Measflag	Measure Flag (only used for premium cooling efficiency) 1 HVAC Tune-up 2 HVAC equipment Incentive
Measure	Measure installed
DiFlag	Direct Install Contractor 1 Matrix 2 Synergy 3 Wildan
AcctNum	Utility account number
EvalLead	Evaluation lead
AcctName	Name on the account, mostly often the name of the business
ProgNumb	Program number
IOUClmID	Utility claim ID
IOUPrjID	Utility project ID
Address	Service address
City	Service address city

INTRODUCTION SECTION

INTRO Hello, my name is [INTERVIEWER], and I'm calling from Tetra Tech on behalf [IOU]. They hired us to speak with customers who have participated in their energy efficiency programs. May I speak with [TITLE]? *[IF DON'T HAVE GOOD TITLE, SAY: a facilities manager, or someone who makes decisions regarding equipment upgrades?]*

- 1 Yes
- 2 No

INT2 I'm calling specifically to find out about your experience with the [PROGRAM – brief description] at [ADDRESS] in [CITY]. Are you the correct person to speak with?

- 1 Yes
- 2 No [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

Please be assured that this isn't a sales call and that all responses will be treated confidentially. For quality assurance and training purposes, this call will be recorded.



*NOTE: Questions Sc1 and Sc2 were added about 1/3 of the way through the survey fielding period. It was added to make sure the interviewers were speaking with the correct respondent. If the respondent answered that they were not the best person to speak with, they were skipped out of the program specific questions, the G through L sections.

Sc1 Some of our questions specifically ask about your organization's participation in the [PROGRAM] program, where [IOU] may have provided services or funding for installation of high-efficiency equipment. Are you the best person to ask these program-specific questions?

- 1 Yes, I am *[SKIP TO A1]*
- 2 Yes, but there are others
- 3 No, I am not
- 4 Not asked, program / interviewer error / added question

Sc2 Could you tell me who else we should contact? *[RECORD NAME AND NUMBER IF PROVIDED]*

SECTION A: RESPONDENT AND FACILITY BACKGROUND

A1 *[IF SECTOR=AGRICULTURE, SKIP TO A2]* Thank you. First, what is the main business activity at this facility? *[DO NOT READ LIST]*

- 1 Office
- 2 Retail (non-food) *[ASK A1A]*
- 3 College / University
- 4 School *[ASK A1B]*
- 5 Grocery Store
- 6 Restaurant
- 7 Health Care (other than Hospital) *[ASK A1C]*
- 8 Hospital *[ASK A1D]*
- 9 Hotel or Motel *[ASK A1E]*
- 10 Warehouse
- 11 Construction
- 12 Community Service / Church / Temple / Municipal *[ASK A1F]*
- 13 Industrial Process / Manufacturing / Assembly
- 14 Condo / Apartment
- 15 Greenhouse
- 16 Laundry / Cleaners
- 17 Other *[SPECIFY]*
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

A1oth Other business type specified. *[OPEN ENDED RESPONSE]*

A1A *[ASK IF A1=2]* Is your business in an enclosed mall, strip mall, a stand-alone building, or something else?

- 1 Enclosed mall
- 2 Strip mall
- 3 Stand-alone building
- 4 Something else *[SPECIFY]*
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

A1Aoth Other type of building specified. *[OPEN ENDED RESPONSE]*

A1B *[ASK IF A1=4]* How many students can be seated in all of the classrooms in this building at one time?

- Number of students
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

A1C *[ASK IF A1=7]* Is this an inpatient facility, outpatient facility, or both?

- 1 Inpatient
- 2 Outpatient
- 3 Both
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED



A1D [ASK IF A1=8] Is this an inpatient facility, outpatient facility, or both?

- 1 Inpatient
- 2 Outpatient
- 3 Both
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

A1E [ASK IF A1=9] How many guest rooms or occupant rooms are there in this building?

- ____ Number of rooms
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

A1F [ASK IF A1=12] What is the total seating capacity of the communal areas (e.g., worship areas) in this building?

- ____ Seating capacity
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

A2 What are your responsibilities? [RECORD OPEN ENDED RESPONSE]

SECTION B: ENERGY EFFICIENCY POTENTIAL

B1A [ASK IF IOU=SDG&E] What type of equipment uses the most electricity at your facility?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other [SPECIFY]
- 8 *Refrigerators/chillers/coolers
- 9 *Office equipment (computers, servers, copiers)
- 6 Program skip
- 8 DON'T KNOW [SKIP TO B2A]
- 9 REFUSED [SKIP TO B2A]

B1Aoth Other equipment that uses the most electricity specified. [OPEN ENDED RESPONSE]

B1Aconf [INTERVIEWER: DO NOT READ THIS QUESTION]

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Program skip

B1B [ASK IF IOU=SDG&E] What type of equipment uses the second most electricity at your facility?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other [SPECIFY]
- 8 *Refrigerators/chillers/coolers
- 9 *Office equipment (computers, servers, copiers)
- 6 Program skip
- 8 DON'T KNOW [SKIP TO B2A]
- 9 REFUSED [SKIP TO B2A]

B1Both Other equipment that uses the second most electricity specified. [OPEN ENDED RESPONSE]



B1Bconf [INTERVIEWER: DO NOT READ THIS QUESTION]

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Program skip

B2A What type of equipment uses the most natural gas at your facility?

- 1 Boilers
- 2 HVAC and Furnaces
- 3 Food Service Equipment
- 4 Laundry Equipment
- 5 Pumps
- 6 Other [SPECIFY]
- 7 Doesn't use natural gas [SKIP TO B3]
- 8 Water heater(s)
- 8 DON'T KNOW [SKIP TO B3]
- 9 REFUSED [SKIP TO B3]

B2Aoth Other equipment that uses the most natural gas specified. [OPEN ENDED RESPONSE]

B2Aconf [INTERVIEWER: DO NOT READ THIS QUESTION]

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Program skip

B2B What type of equipment uses the second most natural gas at your facility?

- 1 Boilers
- 2 HVAC and Furnaces
- 3 Food Service Equipment
- 4 Laundry Equipment
- 5 Pumps
- 6 Other *[SPECIFY]*
- 7 Nothing else uses natural gas *[SKIP TO B3]*
- 8 Water heater(s)
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO B3]*
- 9 REFUSED *[SKIP TO B3]*

B2Both Other equipment that uses the second most natural gas specified. *[OPEN ENDED RESPONSE]*

B2Bconf *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Program skip

B3 Has your organization developed a specific policy for the selection of energy-efficient equipment? (EXAMPLES: REQUIREMENT THAT ALL NEW FLUORESCENT LIGHTING SYSTEMS USE ELECTRONIC BALLASTS, OR THAT ALL BOILERS HAVE A MINIMUM THERMAL EFFICIENCY)?

- 1 Yes
- 2 No
- 8 DON'T KNOW
- 9 REFUSED

B4 *[ASK IF B3=YES]* Can you describe those policies. *[RECORD OPEN ENDED RESPONSE]*



B5 Who makes decisions on equipment purchases or upgrades?
[DO NOT READ, INDICATE ALL THAT APPLY]

- B5_1** Facilities Manager
- B5_2** Building Manager
- B5_3** Energy Manager
- B5_4** Other facilities management/maintenance position
- B5_5** Chief Financial Officer
- B5_6** Other financial/administrative position
- B5_7** Proprietor/Owner
- B5_8** President/CEO
- B5_9** Other *[SPECIFY]*
- B5_10** DON'T KNOW
- B5_11** REFUSED
- B5_12** General Manager
- B5_13** Corporate Office
- B5_14** Board of directors
- B5_15** Respondent

For B5_1 to B5_15

- 0 Not mentioned
- 1 Mentioned

B5oth Other people who make decisions on equipment purchases or upgrades specified.

[OPEN ENDED RESPONSE]

B6 What difficulties have you had, if any, either inside or outside of your company, with purchasing and installing an energy efficiency upgrade through this or any [IOU] program?
[DO NOT READ; INDICATE ALL THAT APPLY]

B6_1 No difficulties

B6_2 Other priorities for capital spending

B6_3 Lack of funds available for investment

B6_4 Lack of financing

B6_5 Amount of management time to oversee projects

B6_6 Incremental cost for more efficient equipment too high / payback period too long

B6_7 Rebate amount not high enough

B6_8 Business hesitant to replace existing working equipment

B6_9 Upper management doesn't see the benefit of energy efficient equipment

B6_10 We lease the space

B6_11 Contractors weren't familiar with program

B6_12 Rebate application process was demanding

B6_13 Economy

B6_14 Other *[SPECIFY]*

B6_15 DON'T KNOW

B6_16 REFUSED

For B6_1 to B6_16

0 Not mentioned

1 Mentioned

B6oth Other difficulties had with purchasing and installing an energy efficiency upgrade through an [IOU] program specified.

[OPEN ENDED RESPONSE]



SECTION C: MARKETING

C1 Now I'm going to ask you some questions about your facility's participation in the [PROGRAM – brief description].

How did you first hear about the program? *[DO NOT READ]*

- 1 [IOU] account executive
- 2 Other [IOU] staff
- 3 [IOU] call center
- 4 [IOU] utility bill insert
- 5 [IOU] mailing (hard copy)
- 6 [IOU] utility email message
- 7 [IOU] web site
- 8 From participation in another [IOU] program *[SPECIFY PROGRAM]*
- 9 Contractor/retailer/supplier/vendor
- 10 Conference/trade show
- 11 Colleague/ Peer
- 12 Television ad
- 13 Print media ad
- 14 Radio ad
- 15 Other *[SPECIFY]*
- 8 DON'T KNOW
- 9 REFUSED

C1_8oth Other program participated in where learned about program specified.

[OPEN ENDED RESPONSE]

C1oth Other way(s) first heard about the program specified. *[OPEN ENDED RESPONSE]*

C2 How would you prefer to receive information and updates about [IOU] energy efficiency programs? *[DO NOT READ]*

- 1 [IOU] account executive
- 2 Other [IOU] staff
- 3 [IOU] call center
- 4 [IOU] utility bill insert
- 5 [IOU] mailing (hard copy)
- 6 [IOU] utility email message
- 7 [IOU] web site
- 8 From participation in another [IOU] program *[SPECIFY PROGRAM]*
- 9 Contractor/retailer
- 10 Conference/trade show
- 11 Colleague/ Peer
- 12 Television ad
- 13 Print media ad
- 14 Radio ad
- 15 Other *[SPECIFY]*
- 8 DON'T KNOW
- 9 REFUSED

C2oth Other way(s) prefer to receive information and updates about [IOU] energy efficiency programs specified. *[OPEN ENDED RESPONSE]*

C3 *[ASK IF C1≠7]* Have you visited the program's website for more information?

- 1 Yes
- 2 No
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED



SECTION D: APPLICATION PROCESS

D1 Why did you participate in this program?
[DO NOT READ; INDICATE ALL THAT APPLY]

- D1_1** To save money
- D1_2** The equipment failed/worked poorly and I needed to replace it
- D1_3** Contractor/engineer/technical assistant recommended we participate
- D1_4** Account executive recommended we participate
- D1_5** Corporate practice
- D1_6** Availability of the [IOU] rebate
- D1_7** Past participation with [IOU] program
- D1_8** Other *[SPECIFY]*
- D1_9** To save energy
- D1_10** To help the environment
- D1_11** DON'T KNOW
- D1_12** REFUSED

For D1_1 to D1_12

- 0 Not mentioned
- 1 Mentioned

D1oth Other reason(s) for program participation specified. *[OPEN ENDED RESPONSE]*

D2a Who was responsible for getting the application completed and submitted?
[DO NOT READ; INDICATE ALL THAT APPLY]

- D2a_1** Internal staff in organization
- D2a_2** Respondent
- D2a_3** Vendor or contractor
- D2a_4** [IOU] Account Executive
- D2a_5** Other [IOU] staff
- D2a_6** Other *[SPECIFY]*
- D2a_7** DON'T KNOW
- D2a_8** REFUSED

For D2a_1 to D2a_8

- 0 Not mentioned
- 1 Mentioned

D2Aoth Other person(s) responsible for completing and submitting application specified.

[OPEN ENDED RESPONSE]

- D2b** *[ASK IF D2a=3,4,5,6]* How likely were you to apply for the rebate on your own, if the [RESPONSE(S) FROM D2a] was unable or unwilling to do so on your behalf? Please rate on a 1 to 10 scale, where 1 is not at all likely and 10 is extremely likely.

___ *[ENTER 1-10]*
-6 Program skip
-8 DON'T KNOW
-9 REFUSED

- D3** *[READ FIRST SENTENCE IF RESPONDENT WASN'T MENTIONED IN D2A]*
We know you may not have personally submitted the application, but you may still have been responsible for some of the steps.

From your perspective, was it very difficult, somewhat difficult, somewhat easy, or very easy to submit the application?

1 Very difficult
2 Somewhat difficult
3 Somewhat easy
4 Very easy
-8 DON'T KNOW
-9 REFUSED

- D4** Did you have any problems with the application process?

1 Yes
2 No *[SKIP TO NEXT SECTION]*
-8 DON'T KNOW *[SKIP TO NEXT SECTION]*
-9 REFUSED *[SKIP TO NEXT SECTION]*

- D5** *[ASK IF D4 = 1]* What were they and how were they resolved? *[RECORD OPEN ENDED RESPONSE- Try to postcode - e.g., finding model number, finding serial number, providing manufacturer specs, not sure about eligibility, etc.]*

**SECTION E: REBATE PROGRAMS**

[SKIP TO NEXT SECTION IF NOT DEEMED, CALCULATED, BID, OR HVAC TUNE-UP]

E0 Did you receive a rebate or incentive as part of your participation in the program?

- 1 Yes
- 2 No *[SKIP TO NEXT SECTION]*
- 3 Contractor received rebate/incentive *[SKIP TO NEXT SECTION]*
- 4 Was on bill financing *[SKIP TO NEXT SECTION]*
- 5 Someone else at company received rebate *[SKIP TO NEXT SECTION]*
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

E1 Were you satisfied with the amount of time it took to receive the rebate?

- 1 Yes
- 2 No
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

E2 Was the rebate or incentive amount you received more, less, or about the same as you expected?

- 1 More
- 2 Less
- 3 About the same
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

SECTION F: BENCHMARKING

F1 Was it you, someone else, or no one that benchmarked your facility's energy use before participating in this program? (IF NEEDED: By "benchmarking", I'm referring to comparing your facility's energy use to a best practices facility, to identify potential energy savings at your facility.)

- 1 Respondent
- 2 Someone else
- 3 No one *[SKIP TO NEXT SECTION]*
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

F2 Did you review the results of the benchmarking process?

- 1 Yes
- 2 No *[SKIP TO NEXT SECTION]*
- 3 Not asked, respondent dropped out of survey
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

F3 How satisfied were you with the information provided through the benchmarking process? Please rate on a 10-point scale, where 1 is not at all satisfied and 10 is extremely satisfied.

- ___ *[ENTER 1-10]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

F4 How could the benchmarking process be changed to make the results more useful to you?

[RECORD OPEN ENDED RESPONSE]



PROGRAM SPECIFIC QUESTIONS

[ASK ONE OF THE FOLLOWING SETS OF QUESTIONS (G-L), DEPENDING ON PROGRAM PARTICIPATION, SKIP PROGRAM SPECIFIC QUESTIONS IF Sc1=3 (NO)]

SECTION G: NONRESIDENTIAL AUDITS (SO CAL GAS ONLY)

G1 By participating in the program, you should have received an energy audit. Do you recall receiving this audit?

- 1 Yes
- 2 No *[SKIP TO NEXT SECTION]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

G2 How many hours did you spend with someone as part of the audit process?

- ___ Number of Hours
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

G3 Did the auditor recommend that you install or replace equipment?

- 1 Yes
- 2 No *[SKIP TO G8a]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G8a]*
- 9 REFUSED *[SKIP TO G8a]*

G4 What equipment was recommended through the audit?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other *[SPECIFY]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G8a]*
- 9 REFUSED *[SKIP TO G8a]*

G4oth Other equipment recommended through the audit specified. *[OPEN ENDED RESPONSE]*

G4conf *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response to G4?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

G5 Did you install any of the recommended equipment?

- 1 Yes
- 2 No *[SKIP TO G8a]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G8a]*
- 9 REFUSED *[SKIP TO G8a]*



G6 [G5<>YES, SKIP TO G8a] Which equipment? [SELECT ALL THAT APPLY]

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other [SPECIFY]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO G7]
- 9 REFUSED [SKIP TO G7]

G6oth Other audit-recommended-equipment installed specified. [OPEN ENDED RESPONSE]

G6conf [INTERVIEWER: DO NOT READ THIS QUESTION]

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

G7 Were you planning to install some, all, or none of this equipment prior to receiving the audit?

- 1 Some
- 2 All
- 3 None
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

G8a As a result of participating in the audit program, did you receive any information regarding other [IOU] programs?

- 1 Yes
- 2 No *[SKIP TO G12A]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G12A]*
- 9 REFUSED *[SKIP TO G12A]*

G8b Did you participate in any of those [IOU] programs?

- 1 Yes
- 2 No *[SKIP TO G12A]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO G12A]*
- 9 REFUSED *[SKIP TO G12A]*

G9 *[IF G8b=1]* Which programs? *[RECORD OPEN ENDED RESPONSE]*

G10 *[IF G8b=1]* Were you planning on participating in this program before the audit was conducted?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

G11 *[IF G8b=1]* As a result of the audit, have you installed any other recommended equipment on your own without assistance from an [IOU] program? *[READ LIST; SELECT ALL THAT APPLY]*



- G11_1** Motors and Pumps
- G11_2** Drives
- G11_3** Lighting
- G11_4** HVAC
- G11_5** Food Service Equipment
- G11_6** Laundry Equipment
- G11_7** Other *[SPECIFY]*
- G11_8** Have not installed other recommended equipment on own
- G11_9** DON'T KNOW *[SKIP TO G12a]*
- G11_10** REFUSED *[SKIP TO G12a]*

For G11_1 to G11_10

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

G11conf *[INTERVIEWER: DO NOT READ THIS QUESTION]*

[IF G8b=1] Was the respondent confident in their response to G11?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

G12 Please tell me how satisfied you were with the following components of the audit using a 1 to 10 scale, where 1 is not at all satisfied and 10 is extremely satisfied.

- G12A** The type of information provided
- G12B** The applicability of the information provided
- G12C** The knowledge of the auditor

For G12a-G12c

- ___ *[ENTER 1-10]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

- G13** Do you have any recommendations for improvements on the audit process?
[RECORD OPEN ENDED RESPONSE]

SECTION H: PREMIUM COOLING EFFICIENCY PROGRAM

- H1** Our records indicate you received [TUNE-UP/INCENTIVE FOR INSTALLING HVAC EQUIPMENT] through the Premium Efficiency Cooling Program. Is that correct?

- 1 Yes *[SKIP TO H3]*
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

- H2** *[IF NOT CORRECT]* What did you receive?

[RECORD OPEN ENDED RESPONSE]

- H3** Who primarily did you work with through this program?

- 1 SDG&E program staff
- 2 Conservation Services Group (CSG) staff
- 3 HVAC contractors
- 4 Manufacturers
- 5 Other *[SPECIFY]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

- H3oth** Other person primarily worked with through the program. *[OPEN ENDED RESPONSE]*

- H5** Did the contractor provide a written report of services performed?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED



H6 Did the contractor discuss the report or services performed with you or your staff?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

H11 Did you conduct routine maintenance or tune-ups on your HVAC system prior to participating in the program? (INTERVIEWER: "routine maintenance" excludes any maintenance on failed or malfunctioning systems.)

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

H12 How often did you conduct maintenance or tune-ups of your system?

[RECORD OPEN ENDED RESPONSE]

H13 Did your participation in the program influence you to change your routine maintenance of your HVAC equipment?

- 1 Yes
- 2 No *[SKIP TO H15]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO H15]*
- 9 REFUSED *[SKIP TO H15]*

H14 [ASK IF H13=1] What did you change?

- 1 Now will do / currently do more frequently
- 2 Now will do / currently do more thoroughly
- 3 Other [SPECIFY]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO H18]
- 9 REFUSED [SKIP TO H18]

[IF MEASFLAG≠2, (DID NOT RECEIVE A REBATE FOR HVAC EQUIPMENT) SKIP TO H18]

H15 Did the equipment replace another piece of equipment, or was it an addition to your facility?

- 1 Replaced equipment
- 2 New addition [SKIP TO H17]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO H17]
- 9 REFUSED [SKIP TO H17]

H16 [IF H15=1] Did the equipment replace...

- 1 Functional, but inefficient equipment
- 2 Functional, and efficient, equipment
- 3 Functional equipment that needed significant repairs
- 4 Failed equipment
- 5 Other [SPECIFY]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

H17 Approximately what percent of the project did the rebate cover?

- Percent
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

H18a Did you install controllers as part of your participation in the program?



- 1 Yes
- 2 No [SKIP TO H21]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO H21]
- 9 REFUSED [SKIP TO H21]

H18b [ASK IF INSTALLED CONTROLLERS, OTHERWISE SKIP TO H21] Think about the equipment for which controllers were installed. What statement is most correct?

- 1 All equipment previously had controllers; the program replaced those controllers
- 2 Some equipment previously had controllers; the program replaced some controllers and added controllers to the equipment where there was none
- 3 None of the equipment previously had controllers
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

H19 What benefits, if any, have you experienced from installation of the controllers?
[DO NOT READ; INDICATE ALL THAT APPLY]

- H19_1** Increased energy savings
- H19_2** Increased comfort
- H19_3** Decreased noise for customers staying in hotel
- H19_4** Improved cooling performance
- H19_5** Other [SPECIFY]
- H19_6** DON'T KNOW
- H19_7** REFUSED
- H19_8** Haven't noticed any benefits so far

For H19_1 to H19_8

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

H19oth Other benefits experienced from installation of the controllers specified.

[OPEN ENDED RESPONSE]

H20 What drawbacks, if any, have you experienced from installation of the controllers?
[DO NOT READ; INDICATE ALL THAT APPLY]

- H20_1 No drawbacks so far
- H20_2 Rooms not as comfortable
- H20_3 More difficult to manage the temperature
- H20_4 Customer complaints
- H20_5 Have had repair issues
- H20_6 Other *[SPECIFY]*
- H20_7 DON'T KNOW
- H20_8 REFUSED

For H20_1 to H20_8

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

H20oth Other drawbacks experienced from installation of the controllers specified.

[OPEN ENDED RESPONSE]

H21 What would you have done differently had the program not been available?
[DO NOT READ; INDICATE ALL THAT APPLY]

- H21_1 Would have done nothing differently
- H21_2 Would not have completed the work or installed the equipment
- H21_3 Installed a lower efficiency equipment / completed a lesser tune-up
- H21_4 Repaired rather than replacing the equipment
- H21_5 Installed less equipment / completed tune-ups on fewer systems
- H21_6 DON'T KNOW
- H21_7 REFUSED
- H21_8 Other *[SPECIFY]*

For H21_1 to H21_8

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

H21oth What else would have been done differently had program not been available specified.



[OPEN ENDED RESPONSE]

H22 Did you receive any other financing to fund the project?

- 1 Yes
- 2 No *[SKIP TO H24INT]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO H24INT]*
- 9 REFUSED *[SKIP TO H24INT]*

H23 *[IF H22=1]* What did you receive?

[RECORD OPEN ENDED RESPONSE; PROBE FOR ON-BILL FINANCING, OTHER MANUFACTURER REBATES, ETC.]

H24INT On a scale of 1 to 10, where 1 is not at all influential and 10 is extremely influential, how influential were the following factors in your decision to [INSTALL THE ENERGY SAVING EQUIPMENT / COMPLETE THE HVAC TUNE-UP]

[READ, LIST ROTATES]

- H24a** Rebate received
- H24b** Information provided by contractor
- H24c** Marketing materials received from the program
- H24d** *[IF H22=1]* Other financing received
- H24e** Company standard practices

For H24a to H24e

- *[ENTER 1-10]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 7 NOT APPLICABLE
- 8 DON'T KNOW
- 9 REFUSED

SECTION I: ENERGY SAVINGS BID PROGRAM

- I1** How satisfied were you with the incentive calculation process used to determine how much assistance you would receive through the program? Please answer on a 10-point scale, where 1 is not at all satisfied, and 10 is extremely satisfied.

— [ENTER 1-10]

- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 7 NOT APPLICABLE
- 8 DON'T KNOW
- 9 REFUSED

- I2** *[ASK IF I1<6] What was the issue? [RECORD OPEN ENDED RESPONSE]*

- I3** Did your energy efficiency project for this program target electricity savings, gas savings, or both?

- 1 Electricity
- 2 Gas
- 3 Both
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

- I4a** Did the planned energy efficiency project differ from what was actually installed?

- 1 Yes
- 2 No *[SKIP TO I6]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO I6]*
- 9 REFUSED *[SKIP TO I6]*

- I4b** What energy efficiency upgrades were included in the planned project in your application?
[RECORD OPEN ENDED RESPONSE]



I6 How did your installed savings compare with the targeted savings in your application? Were your installed savings:

- 1 Much less
- 2 Slightly less
- 3 About the same
- 4 Slightly greater
- 5 Much greater
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

I7 *[SKIP IF I4a <> YES]* Please explain why the installed energy efficiency project differed from the planned project. *[RECORD OPEN ENDED RESPONSE]*

I10 Did you change your plans in order to participate in the [IOU] program?

- 1 Yes
- 2 No *[SKIP TO NEXT SECTION]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO NEXT SECTION]*
- 9 REFUSED *[SKIP TO NEXT SECTION]*

I11 *[ASK IF I10=1]* How so? *[RECORD OPEN ENDED RESPONSE]*

SECTION J: CALCULATED PROGRAM

J1 How satisfied were you with the customized rebate calculation process? Please answer on a 10-point scale, where 1 is not satisfied at all, and 10 is extremely satisfied.

- *[ENTER 1-10]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

J2 *[ASK IF J1<6]* What was the issue? *[RECORD OPEN ENDED RESPONSE]*

J3 Without the program’s assistance, how different might the timing have been for these improvements? Would your organization have undertaken the project:

- 1 About the same time
- 2 1 year later or less
- 3 More than 1 year later
- 4 Never
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON’T KNOW
- 9 REFUSED

SECTION K: DEEMED PROGRAM

K1a We understand you may have also installed other measures, but for the purposes of this survey we are focusing on just one measure. According to our records, you installed [MEASURE]. Is that correct?

- 1 Yes *[SKIP TO K2]*
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON’T KNOW *[SKIP TO K3]*
- 9 REFUSED *[SKIP TO K3]*

K1b *[IF K1a=2] What equipment did you receive? [RECORD OPEN ENDED RESPONSE]*

K2 How likely were you to install the [MEASURE / “EQUIPMENT”] without the rebate? Please answer on a 10-point scale, with 1 being not at all likely to install without rebate, and 10 being extremely likely to install without the rebate.

- ___ [ENTER 1-10]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON’T KNOW
- 9 REFUSED



K3 If you plan to participate in the program again, what types of new equipment do you think you might install through the program? [READ LIST; SELECT ALL THAT APPLY]

- K3_1** Lighting
- K3_2** Food service equipment
- K3_3** HVAC equipment
- K3_4** Water heating
- K3_5** Refrigeration
- K3_6** Laundry equipment
- K3_7** Motors and/or pumps
- K3_8** Drives
- K3_9** Other process-related equipment [SPECIFY]
- K3_10** DON'T KNOW
- K3_11** REFUSED
- K3_12** *None/nothing needs replacing

For K3_1 to K3_12

- 0 Not mentioned
- 1 Mentioned
- 3 Not asked, respondent dropped out of survey
- 6 Program skip

K3oth Other equipment that might be installed through the program, if plan to participate again, specified.

[OPEN ENDED RESPONSE]

K4 Are you interested in any other energy efficient equipment for your business that is currently not offered through the program?

- 1 Yes
- 2 No [SKIP TO NEXT SECTION]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO NEXT SECTION]
- 9 REFUSED [SKIP TO NEXT SECTION]

K5 [IF K4=1] What type(s) of other equipment are you interested in?

[RECORD OPEN ENDED RESPONSE]

SECTION L: DIRECT INSTALL PROGRAM

[IF IOU=SO CAL GAS, SKIP TO SECTION M]

L1 Did more than one SDG&E representative contact you about installing free energy efficiency equipment at your business?

- 1 Yes
- 2 No *[SKIP TO L3]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO L3]*
- 9 REFUSED *[SKIP TO L3]*

L2 *[ASK IF L1=1]* Please explain who contacted you and what was discussed?

[RECORD OPEN ENDED RESPONSE]

L3 Did you receive any follow up from the SDG&E representative who installed the equipment at your business?

- 1 Yes
- 2 No *[SKIP TO L5]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 Don't know *[SKIP TO L5]*
- 9 REFUSED *[SKIP TO L5]*

L4 Did the SDG&E representative tell you about other SDG&E programs?

- 1 Yes
- 2 No
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED



L5 Has anyone else besides SDG&E, such as another contractor or neighborhood business organization, contacted you about installing free energy efficiency equipment at your business?

- 1 Yes
- 2 No *[SKIP TO L7]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO L7]*
- 9 REFUSED *[SKIP TO L7]*

L6 *[ASK IF L5=1]* Please explain who contacted you and what was discussed.

[RECORD OPEN ENDED RESPONSE]

L7 Have you participated in any other SDG&E programs besides the Direct Install program?

- 1 Yes
- 2 No *[SKIP TO M1]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO M1]*
- 9 REFUSED *[SKIP TO M1]*

L8 Which programs have you participated in? *[RECORD OPEN ENDED RESPONSE]*

SECTION M: PROGRAM EXPERIENCE / SATISFACTION

M1 *[SKIP TO M4 IF AUDIT-ONLY PROGRAM]* As part of the program, did someone come to inspect the energy efficient equipment?

- 1 Yes
- 2 No *[SKIP TO M4]*
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO M4]*
- 9 REFUSED *[SKIP TO M4]*

M2 How satisfied were you with the inspection process? Again, please use a 10-point scale, where 1 is not at all satisfied, and 10 is extremely satisfied.

___ [ENTER 1-10]

-3 Not asked, respondent dropped out of survey

-6 Program skip

-8 DON'T KNOW [SKIP TO M4]

-9 REFUSED [SKIP TO M4]

M3 How could the inspection process be improved, if at all? [RECORD OPEN ENDED RESPONSE]

M4 Overall, how satisfied were you with the program? Again, please rate on a 10-point scale, where 1 is not at all satisfied and 10 is extremely satisfied.

___ [ENTER 1-10]

-3 Not asked, respondent dropped out of survey

-8 DON'T KNOW

-9 REFUSED

M5 [ASK IF M4<6] Why do you say this? [RECORD OPEN ENDED RESPONSE]

M6 Would you be interested in participating in this program again? Please rate on a 10-point scale, where 1 is not at all interested and 10 is extremely interested in participating.

___ [ENTER 1-10]

-3 Not asked, respondent dropped out of survey

-8 DON'T KNOW

-9 REFUSED

M7 [ASK IF M6<6] Why do you say that? [RECORD OPEN ENDED RESPONSE]

M8 Besides this program, are you aware of other assistance you could receive from [IOU] to promote energy efficiency in businesses like yours?

1 Yes

2 No [SKIP TO M12]

-8 DON'T KNOW [SKIP TO M12]

-9 REFUSED [SKIP TO M12]



M9 [IF M8=1] What types of programs are you aware of? [RECORD OPEN ENDED RESPONSE]

M10 Has your organization participated in any of the programs you mentioned?

- 1 Yes
- 2 No [SKIP TO M12]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW [SKIP TO M12]
- 9 REFUSED [SKIP TO M12]

M11 [ASK IF M10=1] Which ones has your organization participated in?

[RECORD OPEN ENDED RESPONSE]

M12 [IF IOU = SCG, SKIP TO M16] How interested would you be in using an online tool from SDG&E that shows your business's current energy costs to date for the month and an estimation of what your bill will be? Would you say you are. . .? [READ LIST]

- 1 Not interested at all
- 2 Not very interested
- 3 Somewhat interested
- 4 Very interested
- 3 Not asked, respondent dropped out of survey
- 5 *Already using it / something like it
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

M13 SDG&E "Reduce Your Use" days (also known as "event days") are days when there is an unusually high demand for electricity, such as very hot summer days. Prior to Reduce your Use days, SDG&E notifies customers to reduce their electricity use during peak hours.

In general how difficult would it be for you to shift or make adjustments to your business's electricity usage during weekdays from 11am-6pm? Would it be...?

[READ LIST]

- 1 Very difficult to make
- 2 Somewhat difficult to make
- 3 Not very difficult to make
- 4 Not at all difficult to make
- 3 Not asked, respondent dropped out of survey
- 5 *Already using it / something like it
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

M14 Now I'd like to ask you a question about timing of the notification. How difficult would it be for you to shift or make adjustments to your business's electricity usage from 11am-6pm on Reduce Your Use days, if you received only one day notice? Would it be...? *[READ LIST]*

- 1 Very difficult
- 2 Somewhat difficult
- 3 Not very difficult
- 4 Not at all difficult
- 3 Not asked, respondent dropped out of survey
- 5 *Already using it / something like it
- 6 Program skip
- 8 DON'T KNOW *[SKIP TO M16]*
- 9 REFUSED *[SKIP TO M16]*

*NOTE: Question M14B was added about 2/3 of the way through the survey fielding period. Interviewers were saying respondents were going on about why or why not it would be difficult, this question was added to capture these responses.

M14B Why do you say that it would be [RESPONSE FROM M14]?

[RECORD OPEN ENDED RESPONSE]



M15 Thank you. I only have a few remaining questions.

For the next two questions, I'd like you to again use a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree. How much do you agree that your business has control over the amount of electricity it uses?

- ___ [ENTER 1-10]
- 3 Not asked, respondent dropped out of survey
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

*NOTE: The survey was originally programmed so that SCG customers did not get question M16, 2/3 of the way through the fielding period, we allowed SCG customers to answer. 78 SCG customers were asked the following question, and appear in the dataset.

M16 How much do you agree that energy efficiency is an important consideration when your business buys any devices or equipment that use energy?

[IF NEEDED: Where 1 is strongly disagree and 10 is strongly agree]

- ___ [RECORD NUMBER 1-10]
- 3 Not asked, respondent dropped out of survey
- 4 Not asked, program / interviewer error / added question
- 6 Program skip
- 8 DON'T KNOW
- 9 REFUSED

M17INT I want to describe 2 other programs for which your facility may be eligible. For each, please tell me how interested you might be in participating on a 10-point scale, where 1 is not at all interested, and 10 is extremely interested.

M17a *[ASK IF IOU=SDG&E AND PROGRAM≠BID]* The Energy Savings BID program, which provides incentives for a large energy efficiency project, or a bundle of energy efficiency projects. Projects must save 500,000 kWh or 25,000 therms annually.

M17b An On Bill Financing program ,which provides a zero percent interest rate loan to large energy efficiency improvement projects

For M17a and M17b

— [ENTER 1-10]

-3 Not asked, respondent dropped out of survey

-6 Program skip

-8 DON'T KNOW

-9 REFUSED

M18 Are you planning any repairs or replacements to your equipment in the next 2 years, aside from routine preventative maintenance?

1 Yes

2 No *[SKIP TO M21]*

-3 Not asked, respondent dropped out of survey

-8 DON'T KNOW *[SKIP TO M21]*

-9 REFUSED *[SKIP TO M21]*

M19 *[ASK IF M18=1]* What type(s) of repairs or replacements are you considering at this site?

[RECORD OPEN ENDED RESPONSE]

M20 *[ASK IF M18=1]* Do you plan to participate in an [IOU] program for these purchases?

1 Yes

2 No

-3 Not asked, respondent dropped out of survey

-6 Program skip

-8 DON'T KNOW

-9 REFUSED



M21 Those are all the questions we have for you. Do you have any other comments you would like to make?

[RECORD OPEN ENDED RESPONSE]

END Thank you for your time. Have a nice [day/afternoon/evening].

3.2 Non-participating Customers

SEMPRA UTILITIES

NON-RESIDENTIAL PROCESS EVALUATION (NON-PARTICIPANTS)

NOTE:

- Variable names are in bold type.
- A code of (-3) means partial interview.
- A code of (-6) means programmed skip.
- A code of (-8) means don't know.
- A code of (-9) means refused.
- Questions were asked of all respondents unless indicated otherwise.
- Response codes with an asterisk (*) are recoded responses to open-ended questions, or responses added during data cleaning.

INTRODUCTION SECTION

INTRO Hello, my name is [INTERVIEWER]. We are conducting research on behalf of [IOU] to assess services and offerings they provide to their customers.

May I speak with the facilities manager, or someone who makes decisions regarding equipment upgrades?

1 Yes

2 No [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

INT2 [INTERVIEWER: READ IF THIS IS A NEW PERSON ON THE PHONE: Hi, my name is [INTERVIEWER], and I'm calling on behalf of [IOU]. We are conducting research to assess services and offerings they provide to their customers.]

We are calling regarding the building located at [ADDRESS] in [CITY]. Are you the correct person to speak with?

1 Yes

2 No [IF NO, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

INFO Please be assured that this isn't a sales call and that all responses will be treated confidentially. For quality assurance and training purposes, this call will be recorded.

(Who is doing this study: [IOU] has hired our firm to assess services and offerings they provide to their customers.)

(Why are you conducting this study: Studies like this help [IOU] better understand customers' need for, and interest in, energy efficiency programs and services.)

(Timing: This survey should take between 10 and 15 minutes of your time. Is this a good time for us to speak with you? [IF NOT, SET UP CALL BACK APPOINTMENT OR OFFER TO LET THEM CALL US BACK AT 1-800-454-5070])

(Sales concern: I am not selling anything; we would simply like to learn about your facility needs. Your responses will be kept confidential and not revealed to anyone unless you grant permission. If you would like to talk with someone from Tetra Tech , you can call Mandy Pom at 800-454-5070. If you would like to speak with someone from [IOU] about this study, feel free to call Hector Montes at 858-654-1723, or email him at HMontes@semprautilities.com

[PRESS 1 TO CONTINUE]



SECTION A: RESPONDENT AND FACILITY BACKGROUND

A1 *[IF SECTOR=AGRICULTURE, SKIP TO A2]* Thank you. First, what is the main business activity at this facility? *[DO NOT READ LIST]*

- 1 Office
- 2 Retail (non-food) *[ASK A1A]*
- 3 College / University
- 4 School *[ASK A1B]*
- 5 Grocery Store
- 6 Restaurant
- 7 Health Care (other than Hospital) *[ASK A1C]*
- 8 Hospital *[ASK A1D]*
- 9 Hotel or Motel *[ASK A1E]*
- 10 Warehouse
- 11 Construction
- 12 Community Service / Church / Temple / Municipal *[ASK A1F]*
- 13 Industrial Process / Manufacturing / Assembly
- 14 Condo / Apartment
- 15 Greenhouse
- 16 Laundry/Cleaners
- 17 Other *[SPECIFY]*
- 18 *Agriculture
- 8 DON'T KNOW
- 9 REFUSED

O_A1 OTHER SPECIFY RESPONSE (from A1 above)

A1A *[ASK IF A1=2]* Is your business in an enclosed mall, strip mall, a stand-alone building, or something else?

- 1 Enclosed mall
- 2 Strip mall
- 3 Stand-alone building
- 4 Something else *[SPECIFY]*
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

O_A1A OTHER SPECIFY RESPONSE (from A1a above)

A1B [ASK IF A1=4] How many students can be seated in all of the classrooms in this building at one time?

- Number of students
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

A1C [ASK IF A1=7] Is this an inpatient facility, outpatient facility, or both?

- 1 Inpatient
- 2 Outpatient
- 3 Both
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

A1D [ASK IF A1=8] Is this an inpatient facility, outpatient facility, or both?

- 1 Inpatient
- 2 Outpatient
- 3 Both
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

A1E [ASK IF A1=9] How many guest rooms or occupant rooms are there in this building?

- Number of rooms
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED



A1F [ASK IF A1=12] What is the total seating capacity of the communal areas (e.g., worship areas) in this building?

- _____ Seating capacity
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

A2 What are your responsibilities? [RECORD OPEN ENDED RESPONSE]

A4 Has your facility applied for or participated in an [IOU] program? For example, has your facility received a rebate, audit, incentive, education?

- 1 Yes
- 2 No – Skip to B1a
- 8 DON'T KNOW – Skip to B1a

A4A Did you apply for, or participate in, the [IOU] program in 2009 or before, or was it in 2010 or later?

- 1 Before 2010 – Skip to B1a
- 2 2010 or later
- 6 Programmed skip
- 8 DON'T KNOW – Skip to B1a

A5 Did your facility complete its participation in the program?

- 1 Yes
- 2 No
- 6 Programmed skip

A6 What was the program that your company participated in? (name of program or description)

[If A4a=2, terminate after A6]

SECTION B: ENERGY EFFICIENCY POTENTIAL

B1A *[ASK IF IOU=SDG&E]* What type of equipment uses the most electricity at your facility?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other *[SPECIFY]*
- 6 Programmed skip
- 8 DON'T KNOW *[SKIP TO B2A]*
- 9 REFUSED *[SKIP TO B2A]*

O_B1A OTHER SPECIFY RESPONSE (from B1a above)

B1Aconf *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Programmed skip

B1B *[ASK IF IOU=SDG&E]* What type of equipment uses the second most electricity at your facility?

- 1 Motors and Pumps
- 2 Drives
- 3 Lighting
- 4 HVAC
- 5 Food Service Equipment
- 6 Laundry Equipment
- 7 Other *[SPECIFY]*
- 6 Programmed skip
- 8 DON'T KNOW *[SKIP TO B2A]*
- 9 REFUSED *[SKIP TO B2A]*



O_B1B OTHER SPECIFY RESPONSE (from B1b above)

B1Bconf *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Programmed skip

B2A What type of equipment uses the most natural gas at your facility?

- 1 Boilers
- 2 HVAC and Furnaces
- 3 Food Service Equipment
- 4 Laundry Equipment
- 5 Pumps
- 6 Other *[SPECIFY]*
- 7 Doesn't use natural gas *[SKIP TO B3]*
- 8 Water heater(s)
- 8 DON'T KNOW *[SKIP TO B3]*
- 9 REFUSED *[SKIP TO B3]*

O_B2A OTHER SPECIFY RESPONSE (from B2a above)

B2Aconf *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Programmed skip

B2B What type of equipment uses the second most natural gas at your facility?

- 1 Boilers
- 2 HVAC and Furnaces
- 3 Food Service Equipment
- 4 Laundry Equipment
- 5 Pumps
- 6 Other *[SPECIFY]*
- 7 Nothing else uses natural gas *[SKIP TO B3]*
- 8 Water heater(s)
- 6 Programmed skip
- 8 DON'T KNOW *[SKIP TO B3]*
- 9 REFUSED *[SKIP TO B3]*

O_B2B OTHER SPECIFY RESPONSE (from B2b above)

B2Bconf *[INTERVIEWER: DO NOT READ THIS QUESTION]*

Was the respondent confident in their response for the previous question?

- 1 Yes
- 2 No
- 6 Programmed skip

B3 Has your organization developed a specific policy for the selection of energy-efficient equipment? (EXAMPLES: REQUIREMENT THAT ALL NEW FLUORESCENT LIGHTING SYSTEMS USE ELECTRONIC BALLASTS, OR THAT ALL BOILERS HAVE A MINIMUM THERMAL EFFICIENCY)?

- 1 Yes
- 2 No
- 3 Other
- 8 DON'T KNOW
- 9 REFUSED

O_B3 OTHER SPECIFY RESPONSE (from B3 above)



B4 [ASK IF B3=YES] Can you describe those policies. [RECORD OPEN ENDED RESPONSE]

B5 Who makes decisions on equipment purchases or upgrades?
[DO NOT READ, INDICATE ALL THAT APPLY]

B5_1 Facilities Manager

B5_2 Building Manager

B5_3 Energy Manager

B5_4 Other facilities management/maintenance position

B5_5 Chief Financial Officer

B5_6 Other financial/administrative position

B5_7 Proprietor/Owner

B5_8 President/CEO

B5_9 General Manager

B5_10 Other [SPECIFY]

B5_13 Board of directors

For B5_1 to B5_13

-9 REFUSED

0 Not mentioned

1 Mentioned

O_B5 OTHER SPECIFY RESPONSE (from B5_10 above)

B6 What difficulties have you had, if any, either inside or outside of your company, with purchasing and installing an energy efficiency upgrade through this or any [IOU] program?

[DO NOT READ; INDICATE ALL THAT APPLY]

- B6_1** No difficulties
- B6_2** Other priorities for capital spending
- B6_3** Lack of funds available for investment
- B6_4** Lack of financing
- B6_5** Amount of management time to oversee projects
- B6_6** Incremental cost for more efficient equipment too high / payback period too long
- B6_7** Rebate amount not high enough
- B6_8** Business hesitant to replace existing working equipment
- B6_9** Upper management doesn't see the benefit of energy efficient equipment
- B6_10** We lease the space
- B6_11** Contractors weren't familiar with program
- B6_12** Rebate application process was demanding
- B6_13** Economy
- B6_14** Other *[SPECIFY]*
- B6_17** Have not done any upgrades

For B6_1 to B6_17

- 8 DON'T KNOW
- 0 Not mentioned
- 1 Mentioned

O_B6 OTHER SPECIFY RESPONSE (from B6_14 above)

SECTION C: MARKETING

C1A Before this call, were you aware that [IOU] offers programs to help you increase the energy efficiency of your organization?

- 1 Yes
- 2 No – Skip to C2
- 8 DON'T KNOW – Skip to C2

C1B Which programs were you aware of? (open-ended – gather description of program and [if known] program name)



C1C Did you know that your facility was eligible for any of these programs in the past, but chose not to participate?

- 1 Yes- I was aware that the facility was eligible, but chose not to participate
- 2 No- I was not aware the facility was eligible, or the facility was not eligible for programs
- 3 Other - including if was past participant
- 3 Partial
- 8 DON'T KNOW
- 9 REFUSED

C1D (If C1c=Yes) If so, please describe the program? (prompt with list of program type descriptions if needed)

C1E (If C1c=Yes) Why did you choose not to participate in the program? (open ended)

C1F What type of equipment did you install *without* assistance from the program, that you believe would have been eligible? (Do not read; indicate all that apply)

C1F_1 Motors and Pumps

C1F_2 Drives

C1F_3 Lighting

C1F_4 HVAC and furnaces

C1F_5 Boilers

C1F_6 Food Service Equipment

C1F_7 Laundry Equipment

C1F_8 Other [SPECIFY]

C1F_9 None

C1F_10 Water heaters

For C1F_1 to C1F_10

- 9 REFUSED
- 8 DON'T KNOW
- 6 Programmed skip
- 0 Not mentioned
- 1 Mentioned

O_C1F OTHER SPECIFY RESPONSE (from C1F_8 above)

C1 How did you first hear about the program? *[DO NOT READ]*

- 1 [IOU] account executive
- 2 Other [IOU] staff
- 3 [IOU] call center
- 4 [IOU] utility bill insert
- 5 [IOU] mailing (hard copy)
- 6 [IOU] utility email message
- 7 [IOU] web site
- 8 From participation in another [IOU] program *[SPECIFY PROGRAM]*
- 9 Contractor/retailer/supplier/vendor
- 10 Conference/trade show
- 11 Colleague/ Peer
- 12 Television ad
- 13 Print media ad
- 14 Radio ad
- 15 Other *[SPECIFY]*
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

O_C1 OTHER SPECIFY RESPONSE (from C1 above)



C2 How would you prefer to receive information and updates about [IOU] energy efficiency programs? *[DO NOT READ]*

- C2_1** [IOU] account executive
- C2_2** Other [IOU] staff
- C2_3** [IOU] call center
- C2_4** [IOU] utility bill insert
- C2_5** [IOU] mailing (hard copy)
- C2_6** [IOU] utility email message
- C2_7** [IOU] web site
- C2_8** From participation in another [IOU] program *[SPECIFY PROGRAM]*
- C2_9** Contractor/retailer
- C2_10** Conference/trade show
- C2_11** Colleague/ Peer
- C2_12** Television ad
- C2_13** Print media ad
- C2_14** Radio ad
- C2_15** Other *[SPECIFY]*

For C2_1 to C2_15

- 9 REFUSED
- 8 DON'T KNOW
- 3 Partial
- 0 Not mentioned
- 1 Mentioned

O_C2 OTHER SPECIFY RESPONSE (from C2_15 above)

C3 *[ASK IF C1≠7]* Have you visited the program's website for more information?

- 1 Yes
- 2 No
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

SECTION D: PROGRAM INTEREST

- D1** I would like to describe a few types of [IOU] programs for which your facility may be eligible for participating. For each, please describe your interest in participating on a 1-10 scale (where 1 is not at all interested, and 10 is extremely interested).
- D1A** An audit type program, providing a site walk through and recommendations on energy efficiency upgrades for your facility [SCG Audit / SDG&E Comprehensive Industrial Energy Efficiency]
- D1B** An HVAC Retrocommissioning program, to tune up your HVAC equipment to make it run more efficiently
- D1C** A program to provide premium tune-ups and maintenance of HVAC equipment, and incentives for HVAC equipment and controls [SDGE only - Premium Cooling Efficiency]
- D1D** A Direct Install program, providing free installation of low-cost energy efficiency measures at small to medium sized businesses (demand < 100 kW)
- D1E** A rebate program, where the rebate amounts are based on the equipment installed- [Deemed]
- D1F** An incentive program, where the incentive amount is calculated based on the predicted energy savings [Calculated/ BID]
- D1G** A program offering 0% interest loans for energy efficiency upgrades [OBF]

For D1A to D1G

- | | |
|-----|------------------------|
| ___ | Interest rating (1-10) |
| 11 | Not applicable |
| -3 | Partial |
| -9 | REFUSED |



D2 For the program types for which you are interested, what would motivate your organization to participate? (DO NOT READ UNLESS CUSTOMER NEEDS PROMPT; INDICATE ALL THAT APPLY)

D2_1 Upgrading or replacing equipment

D2_2 Saving money on energy bills

D2_3 Obtaining a rebate

D2_4 Technical assistance

D2_5 Protecting environment

D2_6 Corporate policies

D2_7 Other (specify)

D2_8 Government/non-profit policy

For D2_1 to D2_8

-8 DON'T KNOW

-3 Partial

0 Not mentioned

1 Mentioned

O_D2 OTHER SPECIFY RESPONSE (from D2_7 above)

D3A Why might you not participate in a program? (DO NOT READ; INDICATE ALL THAT APPLY)

D3A_1 Application takes too much time

D3A_2 Rebate not high enough

D3A_3 Don't have enough program information

D3A_4 Don't believe energy savings claims

D3A_5 Other (specify)

D3A_6 Up-front costs

D3A_7 Money issues

For D3A_1 to D3A_7

- 8 DON'T KNOW
- 3 Partial
- 0 Not mentioned
- 1 Mentioned

O_D3A OTHER SPECIFY RESPONSE (from D3A_5 above)

M12 [IF IOU = SCG, SKIP TO M16] How interested would you be in using an online tool from SDG&E that shows your business's current energy costs to date for the month and an estimation of what your bill will be? Would you say you are. . .? *[READ LIST]*

- 1 Not interested at all
- 2 Not very interested
- 3 Somewhat interested
- 4 Very interested
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

M13 SDG&E "Reduce Your Use" days (also known as "event days") are days when there is an unusually high demand for electricity, such as very hot summer days. Prior to Reduce your Use days, SDG&E notifies customers to reduce their electricity use during peak hours.

In general how difficult would it be for you to shift or make adjustments to your business's electricity usage during weekdays from 11am-6pm? Would it be...?

[READ LIST]

- 1 Very difficult to make
- 2 Somewhat difficult to make
- 3 Not very difficult to make
- 4 Not at all difficult to make
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED



M14 Now I'd like to ask you a question about timing of the notification. How difficult would it be for you to shift or make adjustments to your business's electricity usage from 11am-6pm on Reduce Your Use days, if you received only one day notice? Would it be...? *[READ LIST]*

- 1 Very difficult
- 2 Somewhat difficult
- 3 Not very difficult
- 4 Not at all difficult
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW *[SKIP TO M15]*
- 9 REFUSED *[SKIP TO M15]*

M14A Can you elaborate more on your response?

[RECORD OPEN ENDED RESPONSE]

M15 For the next two questions, I'd like you to again use a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree. How much do you agree that your business has control over the amount of electricity it uses?

- ___ Agree/disagree rating (1-10)
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

M16 How much do you agree that energy efficiency is an important consideration when your business buys any devices or equipment that use energy?

[IF NEEDED: Where 1 is strongly disagree and 10 is strongly agree]

- ___ Agree/disagree rating (1-10)
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED

M18 Are you planning any repairs or replacements to your equipment in the next 2 years, aside from routine preventative maintenance?

- 1 Yes
- 2 No *[SKIP TO M21]*
- 3 Partial
- 8 DON'T KNOW *[SKIP TO M21]*
- 9 REFUSED *[SKIP TO M21]*

M19 *[ASK IF M18=YES]* What type(s) of repairs or replacements are you considering at this site?

[RECORD OPEN ENDED RESPONSE]

M20 *[ASK IF M18=YES]* Do you plan to participate in an [IOU] program for these purchases?

- 1 Yes
- 2 No
- 3 Partial
- 6 Programmed skip
- 8 DON'T KNOW
- 9 REFUSED



M21 Those are all the questions we have for you. Do you have any other comments you would like to make?

- 1 Yes, record comments
- 2 No
- 3 Partial

O_M21 OTHER SPECIFY RESPONSE (from M21 above)

END Thank you for your time. Have a nice [day/afternoon/evening].

SAMPLE AND DATA CLEANING VARIABLES

CASEID	Unique case identification number	
IOU	Investor Owned Utility	
ACCTNUM	Account number	
NAICS	NAICS code	
RESPNUM\$	Respondent number	
COMPLETE	Completion flag	
	1 Complete survey	
	0 Not a complete survey (partial)	
PARTIAL		
	1 Partial survey	
	0 Not a partial survey (complete)	
SUMOFCONSM_TOT_BILLED	MARROON	SDG&E only
KWH	BLUE GAS	
MAXOFDMND_MAX	@2010	THMS SCG only

3.3 Survey and Sampling Methodologies (SDG&E)



3.3.1 Introduction

As part of the Nonresidential process evaluation for SDG&E, the HMG team conducted surveys of customers.

As a preliminary step in the process, we created a sample of customers to contact for the two surveys conducted – those that have participated in energy efficiency programs in the 2010-12 cycle as of Quarter 2 of 2011 (the “participant survey”), and those that are not participating as of Q2 2011 (the “nonparticipant survey”).

This section describes, for each survey, our sampling strategy, followed by a disposition report (i.e., number of responses and categorization of responses by NAICS code.)

3.3.2 Customer sampling restrictions (limiting results)

When reviewing the customer counts and responses for both the participant and nonparticipant surveys, it is important to note that many customers were removed from the sample frames. Customers were removed before and during the survey because of the following:

- On the utility’s do not call list
- Request for customer removal by AE
- Identification through the survey that a central company or individual made purchasing decisions for multiple organizations
- No telephone number for some programs (attempts were made to look up bad telephone numbers)
- [Participant survey] - Participation in multiple programs (e.g., Calculated participants may have participated in the audit program). Only one program was assessed in the survey to avoid overburdening the customer.
- [Nonparticipant survey] - Participation in a program
- Included in the pre-test (small number of cases)

It sometimes was not possible to survey as many customers as we targeted in a segment, because segment included a few, very large customers (e.g., hospitals). Thus, segments with only a few respondents (e.g., military facilities, hospitals) were not well represented.

3.3.3 Pretesting

Tetra Tech, who administered the majority of the customer surveys, conducted six survey pretests prior to implementation. The pretest assessed the wording and order of program-specific and general batteries, calculated survey length, and identified if there were questions that respondents had difficulty answering. Minor changes were made to the instrument as a

result of the pretest, such as: adding skip instructions to avoid redundant questions, clarifying question wording, and adding transition text to aid in the flow of the survey. A small number of questions that were redundant or unnecessary were also removed to reduce length.

3.3.4 Participant Survey

Sampling approach

Our approach for developing a sample of participating customers to survey differed based on the program. If a program was tracked in the utility-wide program database, we pulled the participating customers from the 2011 Q2 database. If not, we obtained lists from the program manager and/or implementation contractor(s).

Some programs had small enough participation that all participants were targeted for the survey, and no sampling was needed. This was because some programs have fewer participation, a low completion rate was expected (i.e., we expected 1 complete per approximately four calls made), customers would be removed from the sample due to AE requests or overlap with other surveys, and/or there were a significant number of participants were listed without phone numbers. For other programs with much larger participation than the number of surveys targeted. In these cases, we drew a sample based on the strategy described in the figure below.



Program	Program ID	Source of participating customers	Sampling strategy used	No. of distinct participants with phone #	No. of completed surveys	Comment
Calculated	SDGE3105, SDGE3109	SDGE program database	None – all participants targeted	215 (215 in sample frame)	34	
Deemed	SDGE3101, SDGE3106, SDGE3110	SDGE program database	None – all participants targeted	2,064 (955 in sample frame)	215	Stratified by end-use equipment installed and segment
BID	SDGE3117	SDGE program database	Stratified by savings, sampled at higher rate for higher savings. For kWh, sampled 1 in 3 (>1 million kWh), 1 in 5 (500K-1 million), 1 in 12 (50K-500K), 1 in 63 (25K – 50K). For therms, sampled 1 in 3 (>5K therms), 1 in 9 (1-5K), 1 in 2 (< 1K – low rate because only 3 participants in this range).	597 (47 in sample frame)	23	
Premium Efficiency Cooling	SDGE3161	SDGE program database	Randomly sampled	480 (168 in sample frame)	28	Substantial duplicates in company names and contacts reduced the sample frame. Given the changes in the program this survey received lower emphasis than other efforts.
SaveGas	SDGE3162	SDGE program database	None – all participants targeted	12	6	
Direct Install	SDGE3167, SDGE3174	SDGE program database and implementation contractor tracking data	None – all participants targeted	Not analyzed (256 in sample frame)	92	Stratified by contractor (Matrix, Synergy and Wilden)
OBF	SDGE3139	SDGE program database	None-all participants were targeted. However, sampling of the OBF population by the	407 (123 in sample frame)	59	

Deemed program reduced the size of the OBF sampling frame. Thus, participants in the Deemed program were slightly underrepresented in the resulting OBF sample frame.

Figure 1 – SDGE Customers Targeted and Surveys conducted

Categorization of Survey Responses (Final Dispositions)

The evaluation team completed 402 participant surveys. The team attempted to contact customers that participated in SDG&E programs from October 4th to November 11th. We achieved a response rate of 24.5% and a cooperation rate of 28%. There were a small number of customers that completed a majority of the survey (through the program-specific questions) that terminated before full completion. We retained the data from 22 of these customers.

Surveys with SaveGas customers were completed separate from the other participant surveys. Research into Action completed surveys with SaveGas customers from 10/19/11 through 11/11/11 with 6 completed (a response rate of 35%). In a collaborative effort, Cadmus conducted surveys of On Bill Financing customers, with 59 completed surveys. (Research into Action worked with Cadmus to develop the survey questions.)

SaveGas and OBF research dispositions are not reflected in the figures below.

Sample Disposition	Number of Sample Points
Starting sample size	1640
Fax/data line	13
Residential number	2
Number not in service	59
No listing	20
Other bad phone #s	24
Duplicate case	87
Adjusted Sample Size	1435
Hard Refusal	29
Soft Refusal	168
Immediate Hang-up	26
Incapable	
Incompletes (partial interviews not retained in the data)	42
Language barrier/non-English	35
Can't find the right person to talk to	49
Doesn't recall participation	37
Unavailable for duration	18
Respondent no longer at company	15
Out of business	12
Called out - 14 attempts	8
Active	594
Completed & Partially Completed Surveys	402
Completed surveys	380
Partials - retained in the data	22
Cooperation Rate	28.0%
Response Rate	24.5%

Figure 2 – Response to SDGE Customer Participant Survey

The next figure documents the total number of completes by program and stratification of interest if applicable (e.g., measure, company). Both partially and fully completed surveys are included in the completed survey counts.

Program / Stratification	Completed Surveys
Total Completes	402
Bid	23
Calculated	34
Industrial	3
Commercial	31
Deemed	225
Food Service Equipment	11
Heat Curtain	3
HVAC Motors	6
Lighting Equipment	131
Motors	1
Pipe insulation	2
Plug load sensors	4
Refrigeration Equipment	51
Steam Trap	1
Water Heater	2
Water tank insulation	1
Window film	12
Premium Cooling Efficiency	28
Direct Install	92
Matrix	32
Synergy	31
Wildan	29

Figure 3 – Partially and Fully Completed Surveys by Program and Stratification

3.3.5 Nonparticipant survey

Sampling Approach

To develop a nonparticipant survey sample, we first stratified the customer database by the 24 segment designations provided by the SDGE Customer Segment department (e.g., biotech, government, university, restaurant, etc.). A segment advisor provided an excel workbook that categorized customers into these segments. We sampled more heavily in segments responsible for a high energy use, and in segments highlighted as important by the Customer Segment department manager (agriculture, Property management).

We then sorted each segment by electricity use. We sampled in each tier, drawing more heavily in the high electricity using categories. We repeated the process for therm use.

Categorization of Survey Responses (Final Dispositions)

We surveyed 121 SDG&E non-residential customers through this nonparticipant survey effort. As with the participant group, the number of completes includes respondents that completed the majority of the survey, in this case interest in SDG&E programs (n=9). The survey fielded October 18, 2011 through November 11, 2011.

The figures below do not include responses for the surveys conducted by Research into Action. Research into Action completed 12 surveys for SaveGas nonparticipants (hotels and motels). There were no nonparticipant surveys done for OBF.

As shown in Figure XX, the overall cooperation and response rate was 21.0 percent. Note that the sample was adjusted for bad telephone numbers and reported participation in other SDG&E programs prior to calculating the response and cooperation rates.

Sample Disposition	Number of Sample Points
Starting sample size	631
Temporarily disconnected	1
Fax/data line	3
Residential number	1
Number not in service	41
Already participating in program	49
Duplicate case	2
Adjusted Sample Size	585
Hard Refusal	43
Soft Refusal	87



Sample Disposition	Number of Sample Points
Immediate Hang-up	4
Incompletes (partial interviews not retained in the data)	3
Can't find the right person to talk to	39
Not SDG&E customer (self-report)	1
Active	287
Completed & Partial Surveys	121
Completed surveys	112
Partials - retained in the data	9
Cooperation Rate	20.7%
Response Rate	20.8%

Figure 4 – Response to Customer Nonparticipant Survey

We reviewed the sampled population with the surveyed population to ensure that the resulting data reflected the population from which the sample was drawn (the sample frame). One means to do that is to review the distribution of customers by the North American Industry Classification System (NAICS) codes captured in the utility's data system. We reviewed the data by NAICS codes, although did review energy usage / billings as well to ensure the survey included high energy users.

The survey completes are fairly reflective of the sample frame. Figure XX provides a summary of percentage of customers within NAICS codes and within the sample frame which illustrates the types of facilities targeted and reached. Note that due to the expansive nature of the NAICS codes we provide the analysis at the highest, two-digit level. There are many subgroups that fall within these NAICS industry classifications.

NAICS Industry Classification	% Representation in Sample Frame	% Representation in Survey Completes
Accommodations and food services	10%	10%
Administration and support and waste management and remediation services	4%	5%
Agriculture, forestry, fishing, hunting	2%	2%
Arts, entertainment, and recreation	3%	2%

NAICS Industry Classification	% Representation in Sample Frame	% Representation in Survey Completes
Construction	1%	0%
Educational services	6%	8%
Finance and insurance	2%	2%
Health care and social assistance	10%	6%
Information	5%	4%
Manufacturing	11%	11%
Mining, quarrying, and oil and gas extraction	0%	0%
Other services except public administration	5%	2%
Professional, technical, and scientific services	6%	12%
Public administration	7%	4%
Real estate and rental and leasing	9%	13%
Retail trade	11%	7%
Transportation and warehousing	2%	2%
Utilities	6%	7%
Wholesale trade	1%	1%

Figure 5 – Characteristics of Nonparticipant Sample Frame and Completes by NAICS Classification

4. ACCOUNT EXECUTIVE FORUM GUIDES

This chapter presents the request for the account executive forum, and the interview guide that was used.

♦ Introduction

For Sempra nonresidential process study, the HMG team is studying the facilitation between the energy efficiency programs and the utility account executives. As part of this effort, the study team proposes holding an account executive forum for each utility to gather insight, feedback, and recommendations. The account executive forum will be facilitated by two HMG team members, Laura Schauer (TetraTech) and Marian Goebes (HMG). Below are specific requests for the forum. Please let us know if you have any further questions. We look forward to your response in organizing the forums.

- ♦ To be held on September 26th – 27^h or September 26th – 27^h, with the first day at one Sempra utility and the second day at the second Sempra utility
- ♦ Ideally, the first day forum will be held in the afternoon (1 – 3 pm) of the first day, and morning (9:30 – 11:30 am) of the second day
- ♦ The forum will be on-site at each utility, in a reserved conference room.
- ♦ The room should be set up in conference table style (one large table with attendees sitting around the table)
- ♦ Ideally, 8-10 account executives attending in each forum. We would like a representative from each division. For SDG&E, we request an account executive representing each business type. For SoCalGas, we request an account executive representing each account executive territory.

4.1.1 Interview Guide

General Questions

Thank you for taking your time to be with us, before, we kick off, could you please introduce yourself and your role with IOU.

[introduce ourselves and process evaluation]

[introduce format] We have an interview guide for this forum. We'll refer to this guide throughout; and will try to focus on key substantive errors we're assessing in our evaluation such as marketing, customer feedback, communications, application processes, etc. However, we want this to be an open dialogue where we capture information that is important to you. So please don't hesitate to bring up other issues that we may not raise.

(Probing questions across: What sector of customers do you primarily work with? Are there any energy efficiency programs where you have more experience than others)

Marketing questions

How do you typically educate customers about the EE programs available to them? (probe for materials use, frequency of training, etc.)

Are customers typically aware of the programs that are available from SCG / SDGE before you speak with them?

In your experience, how effective are the marketing materials provided by the programs? Which programs' materials are working well? Which could use the most improvement?

How do you target customers? (probe for savings potential – for both elec and gas at SDGE).

Do you coordinate with the segment advisors and, if so, how?

Customer feedback

Why do some customers that would benefit from a resource-based program decline to participate? For an audit type program?

What are the barriers to increase program participation?

◆ **Database tracking**

How do you use the program database (CRM)?

What customer information do you track outside of CRM?

What training have you received on using CRM?

How do you think the program database could be improved?

Benchmarking

What has been your experience with benchmarking?

What affect does the benchmarking requirement have on participation? (probe for any impediments, delays, or increase in participation).

Who generally uses the benchmarking tool (e.g., AE, customer, someone else – specify)?
If not the customer, why not?

Why do some customers decline benchmarking?

Are your customers using the benchmarking results? (probe for how they're using them, how often, etc.)

How could the benchmarking results be made more useful to customers?

Rebates / application process

How involved are you in helping your customers complete the application forms or receive rebates?

Are there any programs where the process is particularly difficult of them, or you have to help more? Any where it's a fairly easy process?

How can Sempra make it easier for customers to apply for rebates?

◆ **Audit integration questions**

In your experience, what are the main benefits customers receive from participating in an audit-type program (e.g., RCx, HEEP, LEEP)?

After a customer completes the study/audit, does anyone follow-up with them? Who is this and what is the process?

Do you receive any notification that the audit has been completed (either by program staff or 3P)?

(If follow-up) Do you need to explain any of the study/audit findings? Do you set any time table for completing the recommendations of the study/audit?

What have you found to be the biggest barriers to customers moving from an audit type program to a resource-based program?

◆ **Third-party integration**

How do you interact with third party programs? Is the process any different than how you operate with your internal program managers?

In what ways, if any, do you promote third-party programs to your customers?

Have you received enough information from third-party firms to promote the programs they are managing?

What types of issues do customers contact you with regarding third-party managed programs?

◆ **Organization and internal coordination**

Do you see any gaps in communication or problems with integration with other SDGE / SCG staff (e.g., program managers, marketing department, sector advisors)? If so, what are these?

5. INTERVIEW GUIDE FOR SEGMENT ADVISOR FORUMS

This chapter presents the request for the segment advisor forum, and the interview guide that was used.

Introduction

Laura Schauer (Tetra Tech) and Marian Goebes (HMG) will interview segment advisors for **1 hour** at each utility after the Account Executive forums. The questions below will be used as an interview guide.

Due to the short time frame and multiple segment advisors (4-6), we must minimize the number of questions we ask.

General Questions

♦ Organizational

What are your roles (which sectors do you advise)?

How long have you been in your role?

♦ Marketing

What marketing or outreach activities have you undertaken for your market segment? Which have you found most effective?

Are there marketing initiatives you'd like to undertake but lack the resources (e.g., no time, budget, support)? What are they and what are the barriers to completing them?

From your perspective, are there any specific groups within your market that are being underserved by the programs?

How do you target sectors?

What are your goals? What do they have to meet, what do they have to do?

Is there a process for customer complaints and inquiries on programs?

♦ Coordination

What are your interactions with other parties – inside and outside of your utility (e.g., AE interaction, vendor interaction)? What challenges (if any) do you face with coordination?

How do you interact with and report marketing activity to the PMs? Could this be improved? Do you need more or different info from program managers?

Do you see yourselves as the "primary" marketing channel, or do you rely on others? Are the marketing responsibilities well defined, and has everyone bought into their roles? Are project leads pursued methodically?

For underperforming programs how do you coordinate with program staff (PM, Implementer, AEs) to improve outreach activities?

SDG&E Participant Survey Responses - Frequencies by Question

This file provides participant responses for the SDG&E Nonresidential Process Evaluation. This survey was conducted October 2011 - November 2011 by Tetra Tech, Inc., and the overall study was led by the Heschong Mahone Group, Inc.

Data collection resources, including the survey code books, survey and sampling methodologies, and sample dispositions, are provided in Attachment 3A. **Readers are strongly encouraged to review the survey code book in conjunction with review of the frequency tables to understand the full questions and survey skip logic.** Analysis of the customer surveys are included in the final report volumes, including Main Report, Attachment 1 - Portfolio-level Evaluations, and Attachment 2 - Program Specific Evaluations. Customer survey frequency tables for select 3P programs are provided separately.

Note that some for some questions, respondents could provide more than one response. Consequently, the total number of responses may exceed the n value, and the total percentages of responses may exceed 100%, for some questions.

Are you the best person to ask these program-specific questions? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Not asked, program / interviewer error / added question	.0%	46.4%	.0%	64.9%	58.8%	47.8%	47.3%
Yes, I am	.0%	53.6%	100.0%	34.7%	41.2%	47.8%	52.2%
Yes, but there are others	.0%	.0%	.0%	.4%	.0%	4.3%	.5%
No, I am not	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempre Non-residential Process Evaluation Survey (Participant), Question SC1.

Main business activity (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Retail (non-food)	.0%	10.7%	34.8%	24.4%	20.6%	8.7%	24.6%
Other	.0%	17.9%	23.9%	12.9%	14.7%	52.2%	18.2%
Restaurant	.0%	10.7%	12.0%	19.1%	2.9%	.0%	14.4%
Office	.0%	10.7%	4.3%	8.4%	11.8%	8.7%	8.0%
Industrial Process / Manufacturing / Assembly	.0%	7.1%	3.3%	8.9%	2.9%	.0%	6.5%
Hotel or Motel	.0%	10.7%	.0%	3.6%	20.6%	.0%	4.5%
Condo / Apartment	.0%	.0%	.0%	3.6%	14.7%	8.7%	3.7%
Warehouse	.0%	.0%	2.2%	4.9%	2.9%	4.3%	3.7%
Grocery Store	.0%	.0%	5.4%	3.6%	5.9%	.0%	3.7%
Health Care (other than Hospital)	.0%	3.6%	6.5%	1.8%	.0%	4.3%	3.0%
School	.0%	10.7%	2.2%	2.2%	2.9%	.0%	2.7%
Laundry/Cleaners	.0%	.0%	4.3%	.9%	.0%	.0%	1.5%
Community Service / Church / Temple / Municipal	.0%	3.6%	1.1%	1.8%	.0%	.0%	1.5%
Hospital	.0%	7.1%	.0%	.9%	.0%	4.3%	1.2%
Program skip	.0%	.0%	.0%	2.2%	.0%	.0%	1.2%
College / University	.0%	7.1%	.0%	.4%	.0%	4.3%	1.0%
Construction	.0%	.0%	.0%	.4%	.0%	4.3%	.5%
Greenhouse	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question a1.

Type of retail business facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	91.3%	79.4%	75.6%	65.2%	89.3%	.0%	75.4%
Not asked, program / interviewer error / added question	4.3%	11.8%	10.7%	20.7%	3.6%	.0%	12.2%
Stand-alone building	4.3%	8.8%	6.7%	8.7%	3.6%	.0%	7.0%
Strip mall	.0%	.0%	5.3%	5.4%	3.6%	.0%	4.5%
Something else	.0%	.0%	.9%	.0%	.0%	.0%	.5%
Enclosed mall	.0%	.0%	.4%	.0%	.0%	.0%	.2%
Don't know	.0%	.0%	.4%	.0%	.0%	.0%	.2%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question a1a.

Number of students that can be seated in all classrooms of education facilities (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Maximum capacity of school building	.	1175.0	260.0	777.0	1950.0	.	958.5
	n=0	n=2	n=1	n=4	n=1	n=0	n=8

Sempra Non-residential Process Evaluation Survey (Participant), Question a1b.

Number of students that can be seated in all classrooms of education facilities (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
200	.0%	.0%	.0%	25.0%	.0%	.0%	12.5%
260	.0%	.0%	100.0%	.0%	.0%	.0%	12.5%
908	.0%	.0%	.0%	25.0%	.0%	.0%	12.5%
1000	.0%	50.0%	.0%	50.0%	.0%	.0%	37.5%
1350	.0%	50.0%	.0%	.0%	.0%	.0%	12.5%
1950	.0%	.0%	.0%	.0%	100.0%	.0%	12.5%
Total	n=0	n=2	n=1	n=4	n=1	n=0	n=8

Sempra Non-residential Process Evaluation Survey (Participant), Question a1b.

Type of health care facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	95.7%	100.0%	98.2%	93.5%	96.4%	.0%	97.0%
Outpatient	4.3%	.0%	.9%	6.5%	3.6%	.0%	2.5%
Both	.0%	.0%	.4%	.0%	.0%	.0%	.2%
Inpatient	.0%	.0%	.4%	.0%	.0%	.0%	.2%
Not asked, program / interviewer error / added question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question a1c.

Type of hospital facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	95.7%	100.0%	99.1%	100.0%	92.9%	.0%	98.8%
Both	.0%	.0%	.9%	.0%	7.1%	.0%	1.0%
Inpatient	4.3%	.0%	.0%	.0%	.0%	.0%	.2%
Outpatient	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, program / interviewer error / added question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question a1d.

Number of occupant rooms in hotel/motel facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Number of quest rooms in hotel	.	140.0	.	212.4	180.6	.	187.9
	n=0	n=3	n=0	n=8	n=7	n=0	n=18

Sempra Non-residential Process Evaluation Survey (Participant), Question a1e.

Number of occupant rooms in hotel/motel facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
25	.0%	.0%	.0%	12.5%	.0%	.0%	5.6%
32	.0%	33.3%	.0%	.0%	.0%	.0%	5.6%
37	.0%	.0%	.0%	.0%	14.3%	.0%	5.6%
39	.0%	.0%	.0%	.0%	14.3%	.0%	5.6%
60	.0%	.0%	.0%	.0%	14.3%	.0%	5.6%
68	.0%	.0%	.0%	12.5%	.0%	.0%	5.6%
78	.0%	.0%	.0%	12.5%	.0%	.0%	5.6%
86	.0%	.0%	.0%	12.5%	.0%	.0%	5.6%
94	.0%	.0%	.0%	12.5%	.0%	.0%	5.6%
131	.0%	33.3%	.0%	.0%	.0%	.0%	5.6%
140	.0%	.0%	.0%	.0%	14.3%	.0%	5.6%
161	.0%	.0%	.0%	12.5%	.0%	.0%	5.6%
237	.0%	.0%	.0%	12.5%	.0%	.0%	5.6%
257	.0%	33.3%	.0%	.0%	.0%	.0%	5.6%
271	.0%	.0%	.0%	.0%	14.3%	.0%	5.6%
300	.0%	.0%	.0%	.0%	14.3%	.0%	5.6%
417	.0%	.0%	.0%	.0%	14.3%	.0%	5.6%
950	.0%	.0%	.0%	12.5%	.0%	.0%	5.6%
Total	n=0	n=3	n=0	n=8	n=7	n=0	n=18

Sempra Non-residential Process Evaluation Survey (Participant), Question a1e.

Total seating capacity of communal/worship areas (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Maximum capacity of communal area(s)	.	.	950.0	275.0	.	.	500.0
	n=0	n=0	n=1	n=2	n=0	n=0	n=3

Sempre Non-residential Process Evaluation Survey (Participant), Question a1f.

Total seating capacity of communal/worship areas (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
150	.0%	.0%	.0%	50.0%	.0%	.0%	33.3%
400	.0%	.0%	.0%	50.0%	.0%	.0%	33.3%
950	.0%	.0%	100.0%	.0%	.0%	.0%	33.3%
Total	n=0	n=0	n=1	n=2	n=0	n=0	n=3

Sempre Non-residential Process Evaluation Survey (Participant), Question a1f.

Type of equipment that uses the most electricity at facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
HVAC	47.8%	38.2%	28.4%	22.8%	75.0%	.0%	32.3%
Lighting	13.0%	20.6%	21.3%	25.0%	.0%	.0%	20.1%
Food Service Equipment	.0%	11.8%	14.7%	12.0%	.0%	.0%	11.9%
Other	13.0%	5.9%	10.7%	9.8%	14.3%	.0%	10.4%
*Refrigerators / chillers / coolers	17.4%	2.9%	8.9%	8.7%	7.1%	.0%	8.7%
*Office equipment (computers, servers, copiers)	4.3%	5.9%	3.1%	14.1%	.0%	.0%	5.7%
Motors and Pumps	4.3%	11.8%	6.7%	2.2%	3.6%	.0%	5.7%
Don't know	.0%	.0%	5.3%	2.2%	.0%	.0%	3.5%
Laundry Equipment	.0%	2.9%	.9%	3.3%	.0%	.0%	1.5%
Drives	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b1a.

Confident in answer? Type of equipment that uses the most electricity at facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	.0%	2.2%	5.3%	.0%	.0%	3.5%
Yes	.0%	85.7%	85.9%	79.1%	91.2%	87.0%	82.6%
No	.0%	14.3%	12.0%	15.6%	8.8%	13.0%	13.9%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b1aconf.

Type of equipment that uses the second most electricity at facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Lighting	43.5%	17.6%	33.3%	32.6%	60.7%	.0%	34.3%
HVAC	17.4%	23.5%	15.6%	10.9%	14.3%	.0%	15.2%
*Office equipment (computers, servers, copiers)	.0%	8.8%	8.4%	20.7%	3.6%	.0%	10.4%
Other	13.0%	11.8%	10.7%	10.9%	3.6%	.0%	10.4%
Food Service Equipment	4.3%	5.9%	7.6%	6.5%	10.7%	.0%	7.2%
*Refrigerators / chillers / coolers	13.0%	11.8%	7.1%	4.3%	.0%	.0%	6.7%
Don't know	8.7%	5.9%	3.6%	6.5%	3.6%	.0%	4.7%
Motors and Pumps	.0%	8.8%	5.8%	2.2%	.0%	.0%	4.5%
Program skip	.0%	.0%	5.3%	2.2%	.0%	.0%	3.5%
Laundry Equipment	.0%	2.9%	1.3%	3.3%	3.6%	.0%	2.0%
Drives	.0%	.0%	.9%	.0%	.0%	.0%	.5%
Refused	.0%	2.9%	.4%	.0%	.0%	.0%	.5%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b1b.

Confident in answer? Type of equipment that uses the second most electricity at facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	3.6%	8.7%	9.3%	8.8%	8.7%	8.7%
Yes	.0%	78.6%	71.7%	70.2%	88.2%	73.9%	72.9%
No	.0%	17.9%	19.6%	20.4%	2.9%	17.4%	18.4%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b1bconf.

Type of equipment that uses the most natural gas at facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Doesn't use natural gas	4.3%	17.6%	35.6%	54.3%	25.0%	.0%	35.8%
Food Service Equipment	.0%	23.5%	21.3%	9.8%	14.3%	.0%	17.2%
Boilers	47.8%	29.4%	10.7%	6.5%	32.1%	.0%	14.9%
HVAC and Furnaces	13.0%	8.8%	13.3%	12.0%	21.4%	.0%	13.2%
Water heater	8.7%	14.7%	5.3%	9.8%	7.1%	.0%	7.5%
Don't know	8.7%	5.9%	9.3%	4.3%	.0%	.0%	7.2%
Other	13.0%	.0%	1.8%	2.2%	.0%	.0%	2.2%
Laundry Equipment	.0%	.0%	1.8%	1.1%	.0%	.0%	1.2%
Pumps	.0%	.0%	.9%	.0%	.0%	.0%	.5%
Refused	4.3%	.0%	.0%	.0%	.0%	.0%	.2%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b2a.

Confident in answer? Type of equipment that uses the most natural gas at facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	25.0%	58.7%	44.9%	23.5%	17.4%	43.3%
Yes	.0%	64.3%	37.0%	51.1%	73.5%	69.6%	51.7%
No	.0%	10.7%	4.3%	4.0%	2.9%	13.0%	5.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b2aconf.

Type of equipment that uses the second most natural gas at facility (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	17.4%	23.5%	44.9%	58.7%	25.0%	.0%	43.3%
Nothing else uses natural gas	39.1%	17.6%	15.1%	23.9%	7.1%	.0%	18.2%
Water heater	8.7%	14.7%	9.8%	7.6%	10.7%	.0%	9.7%
Food Service Equipment	.0%	8.8%	8.9%	2.2%	21.4%	.0%	7.7%
HVAC and Furnaces	13.0%	2.9%	5.8%	4.3%	17.9%	.0%	6.5%
Don't know	4.3%	8.8%	5.8%	1.1%	3.6%	.0%	4.7%
Boilers	4.3%	2.9%	5.3%	.0%	7.1%	.0%	4.0%
Laundry Equipment	4.3%	14.7%	2.2%	1.1%	.0%	.0%	3.0%
Other	8.7%	2.9%	2.2%	1.1%	7.1%	.0%	2.7%
Pumps	.0%	2.9%	.0%	.0%	.0%	.0%	.2%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b2b.

Confident in answer? Type of equipment that uses the second most natural gas at facility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	35.7%	83.7%	65.8%	50.0%	60.9%	66.2%
Yes	.0%	50.0%	12.0%	28.4%	50.0%	30.4%	28.1%
No	.0%	14.3%	4.3%	5.8%	.0%	8.7%	5.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b2bconf.

Has your organization developed a specific policy for the selection of energy-efficient equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	14.3%	7.6%	6.7%	11.8%	8.7%	8.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Yes	.0%	39.3%	14.1%	29.8%	26.5%	47.8%	27.6%
No	.0%	46.4%	78.3%	63.6%	61.8%	43.5%	64.4%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b3.

Decision-maker for utility purchases or upgrades (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Proprietor/Owner makes decisions on equipment purchases or upgrades	.0%	26.5%	39.6%	63.0%	14.3%	.0%	39.8%
Other person makes decisions on equipment purchases or upgrades	21.7%	20.6%	12.9%	14.1%	25.0%	.0%	15.2%
Other facilities management/maintenance position makes decisions on equipment purchases or upgrades	17.4%	11.8%	13.3%	7.6%	21.4%	.0%	12.7%
Facilities Manager makes decisions on equipment purchases or upgrades	21.7%	11.8%	10.2%	1.1%	35.7%	.0%	10.7%
President/CEO/Vice President makes decisions on equipment purchases or upgrades	4.3%	5.9%	9.3%	5.4%	7.1%	.0%	7.7%
*Corporate office makes decisions on equipment purchases or upgrades	8.7%	.0%	8.4%	4.3%	.0%	.0%	6.2%
*Respondent makes decisions on equipment purchases or upgrades	4.3%	5.9%	4.4%	7.6%	10.7%	.0%	5.7%
*Board/Board of directors makes decisions on equipment purchases or upgrades	8.7%	20.6%	3.1%	3.3%	7.1%	.0%	5.2%
Other financial/administrative position makes decisions on equipment purchases or upgrades	.0%	2.9%	6.7%	2.2%	7.1%	.0%	5.0%
Building Manager makes decisions on equipment purchases or upgrades	13.0%	2.9%	5.3%	2.2%	.0%	.0%	4.5%
General Manager makes decisions on equipment purchases or upgrades	4.3%	8.8%	3.6%	1.1%	3.6%	.0%	3.5%
Energy Manager makes decisions on equipment purchases or upgrades	.0%	2.9%	1.3%	.0%	10.7%	.0%	1.7%
Chief Financial Officer makes decisions on equipment purchases or upgrades	.0%	.0%	1.8%	1.1%	7.1%	.0%	1.7%
Don't know who makes decisions on equipment purchases or upgrades	4.3%	.0%	.4%	.0%	.0%	.0%	.5%
Refused B5 question	4.3%	.0%	.0%	.0%	.0%	.0%	.2%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question b5.

Difficulties with purchasing/installing energy efficiency upgrades through utility programs (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
No difficulties with purchasing and installing energy efficiency upgrade through [IOU] programs	.0%	53.6%	85.9%	68.0%	50.0%	60.9%	69.2%
Other difficulties faced when purchasing equipment through [IOU] programs	.0%	17.9%	7.6%	17.8%	38.2%	21.7%	17.4%
Lack of funds available for investment is a difficulty faced when purchasing equipment through [IOU] programs	.0%	17.9%	.0%	6.7%	5.9%	.0%	5.5%
Rebate application process was demanding is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	3.6%	5.9%	8.7%	3.0%
Don't know if had any difficulties when purchasing equipment through [IOU] program	.0%	3.6%	4.3%	3.1%	.0%	.0%	3.0%
Lack of financing is a difficulty faced when purchasing equipment through [IOU] programs	.0%	7.1%	.0%	.9%	2.9%	.0%	1.2%
Amount of management time to oversee projects is a difficulty faced when purchasing equipment through [IOU] programs	.0%	3.6%	.0%	.9%	2.9%	.0%	1.0%
Other priorities for capital spending is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.9%	.0%	4.3%	.7%
Incremental cost for more efficient equipment too high / payback period too long is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.4%	.0%	4.3%	.5%
Rebate amount not high enough is a difficulty faced when purchasing equipment through [IOU] programs	.0%	3.6%	.0%	.4%	.0%	.0%	.5%
We lease the space is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	2.2%	.0%	.0%	.0%	.5%
Upper management doesn't see the benefit of energy efficient equipment is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.4%	.0%	.0%	.2%
Contractors weren't familiar with program is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.0%	2.9%	.0%	.2%
Economy is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.0%	2.9%	.0%	.2%
Refused B6 question	.0%	.0%	.0%	.0%	2.9%	.0%	.2%
Business hesitant to replace existing working equipment is a difficulty faced when purchasing equipment through [IOU] programs	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempre Non-residential Process Evaluation Survey (Participant), Question b6.

How respondent first heard about the program (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Contractor/retailer/supplier/vendor	8.7%	26.5%	41.8%	19.6%	39.3%	.0%	33.3%
[IOU] account executive	43.5%	35.3%	8.9%	26.1%	14.3%	.0%	17.4%
Other [IOU] staff	.0%	5.9%	7.6%	20.7%	.0%	.0%	9.5%
Don't know	17.4%	2.9%	9.8%	4.3%	3.6%	.0%	8.0%
Other	8.7%	2.9%	8.4%	6.5%	3.6%	.0%	7.2%
Colleague/ Peer	8.7%	8.8%	6.2%	6.5%	14.3%	.0%	7.2%
[IOU] mailing (hard copy)	.0%	2.9%	4.9%	3.3%	3.6%	.0%	4.0%
[IOU] web site	4.3%	5.9%	3.6%	2.2%	7.1%	.0%	3.7%
[IOU] call center	.0%	5.9%	.9%	6.5%	.0%	.0%	2.5%
Conference/trade show	4.3%	.0%	2.2%	1.1%	3.6%	.0%	2.0%
[IOU] utility bill insert	.0%	.0%	2.7%	1.1%	3.6%	.0%	2.0%
[IOU] utility email message	.0%	2.9%	1.8%	.0%	3.6%	.0%	1.5%
Print media ad	.0%	.0%	.0%	2.2%	.0%	.0%	.5%
From participation in another [IOU] program	.0%	.0%	.9%	.0%	.0%	.0%	.5%
Radio ad	.0%	.0%	.4%	.0%	.0%	.0%	.2%
Television ad	.0%	.0%	.0%	.0%	3.6%	.0%	.2%
Refused	4.3%	.0%	.0%	.0%	.0%	.0%	.2%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question c1.

How respondent prefers to receive information and updates regarding energy efficiency programs (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
[IOU] utility email message	65.2%	58.8%	45.3%	31.5%	50.0%	.0%	44.8%
[IOU] mailing (hard copy)	4.3%	14.7%	31.1%	39.1%	14.3%	.0%	28.9%
[IOU] account executive	26.1%	20.6%	4.4%	7.6%	21.4%	.0%	9.0%
[IOU] utility bill insert	.0%	.0%	5.8%	2.2%	3.6%	.0%	4.0%
[IOU] call center	.0%	.0%	2.7%	8.7%	.0%	.0%	3.5%
Contractor/retailer/supplier/vendor	4.3%	2.9%	2.2%	3.3%	3.6%	.0%	2.7%
Other	.0%	.0%	2.7%	1.1%	3.6%	.0%	2.0%
Don't know	.0%	2.9%	2.2%	2.2%	.0%	.0%	2.0%
Other [IOU] staff	.0%	.0%	1.3%	4.3%	.0%	.0%	1.7%
[IOU] web site	.0%	.0%	2.2%	.0%	.0%	.0%	1.2%
Colleague/ Peer	.0%	.0%	.0%	.0%	3.6%	.0%	.2%
Radio ad	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Print media ad	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Television ad	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Conference/trade show	.0%	.0%	.0%	.0%	.0%	.0%	.0%
From participation in another [IOU]	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question c2.

Have you visited the program's website for more information? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	3.6%	1.1%	1.8%	.0%	.0%	1.5%
Program skip	.0%	7.1%	2.2%	3.6%	5.9%	4.3%	3.7%
Yes	.0%	39.3%	15.2%	32.0%	44.1%	69.6%	31.8%
No	.0%	50.0%	81.5%	62.7%	50.0%	26.1%	62.9%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question c3.

Why respondent participated in this program (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
To save money is reason for program participation	.0%	32.1%	53.3%	56.0%	47.1%	47.8%	52.5%
*To save energy was reason for program participation	.0%	35.7%	38.0%	27.1%	17.6%	43.5%	30.3%
Availability of the [IOU] rebate is reason for program participation	.0%	28.6%	15.2%	25.3%	14.7%	34.8%	22.9%
Participated in program for another reason	.0%	10.7%	13.0%	9.8%	29.4%	21.7%	12.9%
The equipment failed/worked poorly and needed to be replaced is reason for program participation	.0%	14.3%	9.8%	13.3%	5.9%	.0%	11.2%
*To help environment was reason for program participation	.0%	7.1%	6.5%	7.6%	.0%	13.0%	7.0%
Contractor/engineer/technical assistant recommended we participate is reason for program participation	.0%	14.3%	2.2%	4.0%	.0%	.0%	3.7%
Account executive recommended we participate	.0%	3.6%	4.3%	1.8%	.0%	4.3%	2.5%
Don't know why participated in program	.0%	3.6%	.0%	2.7%	2.9%	.0%	2.0%
Corporate practice is reason for program participation	.0%	.0%	.0%	1.3%	.0%	4.3%	1.0%
Past participation with [IOU] program is reason for program participation	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Refused D1 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempre Non-residential Process Evaluation Survey (Participant), Question d1.

Person responsible for completing and submitting the application (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Respondent was responsible for completing and submitting application	.0%	53.6%	73.9%	53.8%	55.9%	56.5%	58.7%
Vendor or contractor was responsible for completing and submitting application	.0%	17.9%	8.7%	28.9%	38.2%	26.1%	24.1%
Internal staff in organization was responsible for completing and submitting application	.0%	35.7%	9.8%	19.6%	14.7%	13.0%	17.7%
Don't know who was responsible for completing and submitting the application	.0%	3.6%	2.2%	5.8%	.0%	4.3%	4.2%
Somebody else was responsible for completing and submitting application	.0%	3.6%	3.3%	2.2%	2.9%	8.7%	3.0%
[IOU] Account Executive was responsible for completing and submitting application	.0%	.0%	5.4%	1.3%	.0%	4.3%	2.2%
Other [IOU] staff was responsible for completing and submitting application	.0%	.0%	2.2%	1.8%	.0%	.0%	1.5%
Refused D2A question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempre Non-residential Process Evaluation Survey (Participant), Question d2a.

Likelihood of respondent applying for rebate if person mentioned in d2a was unable/unwilling to do so (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Likelihood of applying for rebate on own if other party wasn't able to do so	.	5.3	4.0	5.9	7.5	7.0	5.8
	n=0	n=6	n=17	n=75	n=14	n=7	n=119

Sempra Non-residential Process Evaluation Survey (Participant), Question d2b.

Likelihood of respondent applying for rebate if person mentioned in d2a was unable/unwilling to do so (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	16.7%	35.3%	12.0%	7.1%	.0%	14.3%
2	.0%	.0%	17.6%	10.7%	7.1%	14.3%	10.9%
3	.0%	33.3%	.0%	10.7%	7.1%	.0%	9.2%
4	.0%	.0%	.0%	5.3%	.0%	14.3%	4.2%
5	.0%	16.7%	11.8%	12.0%	.0%	.0%	10.1%
6	.0%	.0%	5.9%	2.7%	.0%	.0%	2.5%
7	.0%	.0%	5.9%	5.3%	7.1%	14.3%	5.9%
8	.0%	.0%	17.6%	12.0%	28.6%	28.6%	15.1%
9	.0%	.0%	5.9%	.0%	.0%	.0%	.8%
10	.0%	33.3%	.0%	29.3%	42.9%	28.6%	26.9%
Total	n=0	n=6	n=17	n=75	n=14	n=7	n=119

Sempra Non-residential Process Evaluation Survey (Participant), Question d2b.

Was it very difficult, somewhat difficult, somewhat easy, or very easy to submit the application? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	8.7%	11.8%	13.8%	6.5%	3.6%	.0%	10.9%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Very difficult	.0%	5.9%	3.1%	1.1%	.0%	.0%	2.5%
Somewhat difficult	26.1%	17.6%	14.2%	2.2%	10.7%	.0%	12.2%
Somewhat easy	43.5%	47.1%	35.6%	27.2%	53.6%	.0%	36.3%
Very easy	21.7%	17.6%	33.3%	63.0%	32.1%	.0%	38.1%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question d3.

Did you have any problems with the application process? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	6.5%	10.2%	5.9%	13.0%	8.5%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Yes	.0%	7.1%	2.2%	10.2%	11.8%	21.7%	9.0%
No	.0%	92.9%	91.3%	79.6%	82.4%	65.2%	82.6%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question d4.

Did you receive a rebate or incentive as part of your participation in the program? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Yes	82.6%	55.9%	45.3%	.0%	28.6%	.0%	36.8%
Program skip	.0%	.0%	.0%	100.0%	.0%	.0%	22.9%
No	.0%	38.2%	28.0%	.0%	32.1%	.0%	21.1%
Don't know	4.3%	2.9%	16.4%	.0%	28.6%	.0%	11.7%
Contractor received rebate/incentive	4.3%	2.9%	8.0%	.0%	10.7%	.0%	5.7%
Someone else at company received rebate	4.3%	.0%	1.3%	.0%	.0%	.0%	1.0%
Was on bill financing	.0%	.0%	.9%	.0%	.0%	.0%	.5%
Refused	4.3%	.0%	.0%	.0%	.0%	.0%	.2%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question e0.

Were you satisfied with the amount of time it took to receive the rebate? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	4.4%	2.9%	8.7%	3.2%
Program skip	.0%	71.4%	100.0%	54.7%	44.1%	17.4%	63.2%
Not asked, program / interviewer error / added question	.0%	.0%	.0%	.4%	.0%	.0%	.2%
Yes	.0%	28.6%	.0%	33.3%	44.1%	73.9%	28.6%
No	.0%	.0%	.0%	7.1%	8.8%	.0%	4.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question e1.

Was the rebate or incentive amount you received more, less, or about the same as you expected? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	4.3%	.0%	.0%	.0%	.0%	.0%	.2%
Don't know	4.3%	5.9%	1.3%	.0%	3.6%	.0%	1.7%
Program skip	17.4%	44.1%	54.7%	100.0%	71.4%	.0%	63.2%
Not asked, program / interviewer error / added question	.0%	.0%	.4%	.0%	.0%	.0%	.2%
More	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Less	.0%	2.9%	2.7%	.0%	7.1%	.0%	2.2%
About the same	73.9%	47.1%	40.9%	.0%	17.9%	.0%	32.3%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempre Non-residential Process Evaluation Survey (Participant), Question e2.

Person responsible for benchmarking energy use before program participation (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
No one	21.7%	35.3%	35.1%	51.1%	46.4%	.0%	38.8%
Someone else	52.2%	32.4%	24.0%	18.5%	25.0%	.0%	25.1%
Respondent	26.1%	20.6%	26.2%	16.3%	17.9%	.0%	22.9%
Don't know	.0%	11.8%	14.7%	14.1%	10.7%	.0%	13.2%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempre Non-residential Process Evaluation Survey (Participant), Question f1.

Did you review the results of the benchmarking process? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	3.6%	2.2%	.0%	2.9%	.0%	1.0%
Program skip	.0%	57.1%	65.2%	49.8%	47.1%	21.7%	52.0%
Not asked, respondent dropped out of survey	.0%	.0%	1.1%	.0%	.0%	.0%	.2%
Yes	.0%	21.4%	18.5%	31.6%	41.2%	56.5%	30.1%
No	.0%	17.9%	13.0%	18.7%	8.8%	21.7%	16.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question f2.

Satisfaction with information provided through benchmarking process (scale 1-10) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the information provided by the benchmarking process	.	7.2	8.0	7.6	7.2	7.1	7.5
	n=0	n=6	n=17	n=69	n=14	n=13	n=119

Sempra Non-residential Process Evaluation Survey (Participant), Question f3.

Satisfaction with information provided through benchmarking process (scale 1-10) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
3	.0%	.0%	.0%	2.9%	.0%	.0%	1.7%
4	.0%	.0%	.0%	2.9%	.0%	.0%	1.7%
5	.0%	16.7%	29.4%	10.1%	7.1%	30.8%	15.1%
6	.0%	.0%	.0%	8.7%	7.1%	.0%	5.9%
7	.0%	33.3%	5.9%	21.7%	50.0%	7.7%	21.8%
8	.0%	50.0%	17.6%	23.2%	28.6%	53.8%	27.7%
9	.0%	.0%	.0%	5.8%	7.1%	7.7%	5.0%
10	.0%	.0%	47.1%	24.6%	.0%	.0%	21.0%
Total	n=0	n=6	n=17	n=69	n=14	n=13	n=119

Sempra Non-residential Process Evaluation Survey (Participant), Question f3.

Do you recall receiving this energy audit? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	100.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g1.

Number of hours spent as part of the audit process (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Number of hours spent with someone as part of the audit process	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question g2.

Did the auditor recommend that you install or replace equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	100.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g3.

Equipment recommended through audit (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	100.0%	100.0%	99.6%	97.8%	100.0%	.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	.4%	2.2%	.0%	.0%	.7%
Other	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Laundry Equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Food service equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
HVAC	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Lighting	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Drives	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Motors and pumps	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempre Non-residential Process Evaluation Survey (Participant), Question g4.

Confident in answer? Equipment recommended through audit (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	100.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g4conf.

Did you install any of the recommended equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	100.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g5.

Equipment installed as recommended by audit (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	100.0%	100.0%	99.6%	97.8%	100.0%	.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	.4%	2.2%	.0%	.0%	.7%
Other	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Laundry Equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Food service equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
HVAC	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Lighting	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Drives	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Motors and pumps	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g6.

Confident in answer? Equipment installed as recommended by audit (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	100.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g6conf.

Were you planning to install some, all, or none of this equipment prior to receiving the audit? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	100.0%	100.0%	99.6%	97.8%	100.0%	.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	.4%	2.2%	.0%	.0%	.7%
None	.0%	.0%	.0%	.0%	.0%	.0%	.0%
All	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Some	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempre Non-residential Process Evaluation Survey (Participant), Question g7.

As a result of participating in the audit program, did you receive any information regarding other utility programs? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	100.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g8a.

Did you participate in any of the utility programs suggested as part of the audit program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	100.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g8b.

Were you planning on participating in this program before the audit was conducted? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	100.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g10.

Equipment installed as a result of the audit without assistance from utility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Motors and Pumps have been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Drives have been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Lighting has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
HVAC equipment has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Food Service Equipment has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Laundry Equipment has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Other equipment has been installed without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Have not installed other recommended equipment without assistance as result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know if installed any equipment on own without assistance as a result of the audit	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused G11 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question g11.

Confident in answer? Equipment installed as a result of the audit without assistance from utility (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	100.0%	99.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	.0%	.0%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question g11conf.

Satisfaction with the type of information provided through audit (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the type of information provided by the audit	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question g12a.

Satisfaction with the applicability of the information provided through audit (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the applicability of the information provided by the audit	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question g12b.

Satisfaction with the knowledge of the auditor (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the knowledge of the auditor	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question g12c.

Did you receive a tune-up/incentive for installing HVAC equipment through the Premium Efficiency Cooling Program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	10.7%	.0%	.0%	.0%	.0%	.7%
Program skip	.0%	.0%	97.8%	99.6%	100.0%	100.0%	92.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	89.3%	.0%	.0%	.0%	.0%	6.2%
No	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h1.

Who primarily did you work with through the Premium Efficiency Cooling Program? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	100.0%	100.0%	99.6%	97.8%	10.7%	.0%	93.0%
HVAC contractors	.0%	.0%	.0%	.0%	60.7%	.0%	4.2%
SDG&E program staff	.0%	.0%	.0%	.0%	10.7%	.0%	.7%
Not asked, respondent dropped out of survey	.0%	.0%	.4%	2.2%	.0%	.0%	.7%
Other	.0%	.0%	.0%	.0%	7.1%	.0%	.5%
Don't know	.0%	.0%	.0%	.0%	7.1%	.0%	.5%
Manufacturers	.0%	.0%	.0%	.0%	3.6%	.0%	.2%
Conservation Services Group (CSG) staff	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h3.

Did the contractor provide a written report of services performed? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	17.9%	.0%	.0%	.0%	.0%	1.2%
Program skip	.0%	10.7%	97.8%	99.6%	100.0%	100.0%	93.0%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	57.1%	.0%	.0%	.0%	.0%	4.0%
No	.0%	14.3%	.0%	.0%	.0%	.0%	1.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h5.

Did the contractor discuss the report or services performed with you or your staff? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	3.6%	.0%	.0%	.0%	.0%	.2%
Program skip	.0%	10.7%	97.8%	99.6%	100.0%	100.0%	93.0%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	60.7%	.0%	.0%	.0%	.0%	4.2%
No	.0%	25.0%	.0%	.0%	.0%	.0%	1.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h6.

Did you conduct routine maintenance or tune-ups on your HVAC system prior to participating in the program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	10.7%	97.8%	99.6%	100.0%	100.0%	93.0%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	85.7%	.0%	.0%	.0%	.0%	6.0%
No	.0%	3.6%	.0%	.0%	.0%	.0%	.2%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h11.

Did your participation in the program influence you to change your routine maintenance of your HVAC equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	10.7%	97.8%	99.6%	100.0%	100.0%	93.0%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	25.0%	.0%	.0%	.0%	.0%	1.7%
No	.0%	64.3%	.0%	.0%	.0%	.0%	4.5%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h13.

Changes made as result of participation in Premium Cooling Efficiency Program (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	100.0%	100.0%	99.6%	97.8%	75.0%	.0%	97.5%
Other	.0%	.0%	.0%	.0%	10.7%	.0%	.7%
Now will do/currently do more frequently	.0%	.0%	.0%	.0%	10.7%	.0%	.7%
Not asked, respondent dropped out of survey	.0%	.0%	.4%	2.2%	.0%	.0%	.7%
Don't know	.0%	.0%	.0%	.0%	3.6%	.0%	.2%
Now will do/currently do more thoroughly	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h14.

Did the equipment replace another piece of equipment, or was it an addition to your facility? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	100.0%	100.0%	99.6%	97.8%	92.9%	.0%	98.8%
Not asked, respondent dropped out of survey	.0%	.0%	.4%	2.2%	.0%	.0%	.7%
Replaced equipment	.0%	.0%	.0%	.0%	7.1%	.0%	.5%
New addition	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h15.

Condition of the replaced equipment (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	100.0%	100.0%	99.6%	97.8%	92.9%	.0%	98.8%
Not asked, respondent dropped out of survey	.0%	.0%	.4%	2.2%	.0%	.0%	.7%
Failed equipment	.0%	.0%	.0%	.0%	3.6%	.0%	.2%
Functional, but inefficient equipment	.0%	.0%	.0%	.0%	3.6%	.0%	.2%
Other	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Functional equipment that needed significant repairs	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Functional, and efficient, equipment	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h16.

Percentage of overall project cost covered by program (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Percent of project rebate paid for	.	.	.	.	.	.	.
	n=0	n=0	n=0	n=0	n=0	n=0	n=0

Sempra Non-residential Process Evaluation Survey (Participant), Question h17.

Did you install controllers as part of your participation in the program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	7.1%	.0%	.0%	.0%	.0%	.5%
Program skip	.0%	10.7%	97.8%	99.6%	100.0%	100.0%	93.0%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	7.1%	.0%	.0%	.0%	.0%	.5%
No	.0%	75.0%	.0%	.0%	.0%	.0%	5.2%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h18a.

Think about the equipment for which controllers were installed. What statement is most correct? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	100.0%	100.0%	99.6%	97.8%	92.9%	.0%	98.8%
Not asked, respondent dropped out of survey	.0%	.0%	.4%	2.2%	.0%	.0%	.7%
Some equipment had controllers; the program replaced some controllers and added controllers to equipment that had none	.0%	.0%	.0%	.0%	3.6%	.0%	.2%
Don't know	.0%	.0%	.0%	.0%	3.6%	.0%	.2%
None of the equipment previously had controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
All equipment previously had controllers; the program replaced those controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h18b.

Benefits experienced as result of the controllers (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Have noticed other benefits since installing controllers	.0%	50.0%	.0%	.0%	.0%	.0%	50.0%
Haven't noticed any benefits so far since installing controllers	.0%	50.0%	.0%	.0%	.0%	.0%	50.0%
Increased energy savings since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Increased comfort since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Decreased noise for customers staying in hotel since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Improved cooling performance since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know if experienced any benefits since controller installation	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused H19 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=2	n=0	n=0	n=0	n=0	n=2

Sempre Non-residential Process Evaluation Survey (Participant), Question h19.

Drawbacks experienced as result of the controllers (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
No drawbacks so far from installing controllers	.0%	100.0%	.0%	.0%	.0%	.0%	100.0%
Rooms not as comfortable since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
More difficult to manage the temperature since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Customer complaints since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Have had repair issues since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Experienced other drawbacks since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know if experienced any drawbacks since installing controllers	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused H2O question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=2	n=0	n=0	n=0	n=0	n=2

Sempre Non-residential Process Evaluation Survey (Participant), Question h20.

What respondent would have done differently if program had not been available (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Would have done nothing differently if program wasn't available	.0%	48.0%	.0%	.0%	.0%	.0%	48.0%
Would not have completed the work or installed the equipment if program wasn't available	.0%	20.0%	.0%	.0%	.0%	.0%	20.0%
Would have done something else if program wasn't available	.0%	20.0%	.0%	.0%	.0%	.0%	20.0%
Repaired rather than replacing the equipment if program wasn't available	.0%	8.0%	.0%	.0%	.0%	.0%	8.0%
Installed a lower efficiency equipment / completed a lesser tune-up if program wasn't available	.0%	4.0%	.0%	.0%	.0%	.0%	4.0%
Installed less equipment / completed tune-ups on fewer systems if program wasn't available	.0%	4.0%	.0%	.0%	.0%	.0%	4.0%
Don't know if anything would have been done differently without program	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused H21 question	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=0	n=25	n=0	n=0	n=0	n=0	n=25

Sempre Non-residential Process Evaluation Survey (Participant), Question h21.

Did you receive any other financing to fund the project? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	3.6%	.0%	.0%	.0%	.0%	.2%
Program skip	.0%	10.7%	97.8%	99.6%	100.0%	100.0%	93.0%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	3.6%	.0%	.0%	.0%	.0%	.2%
No	.0%	82.1%	.0%	.0%	.0%	.0%	5.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question h22.

Level of influence of rebate received on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence of the rebate received had in decision to [complete tune-up/install equipment]	.	6.2	.	.	.	.	6.2
	n=0	n=19	n=0	n=0	n=0	n=0	n=19

Sempra Non-residential Process Evaluation Survey (Participant), Question h24a.

Level of influence of rebate received on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	21.1%	.0%	.0%	.0%	.0%	21.1%
2	.0%	5.3%	.0%	.0%	.0%	.0%	5.3%
3	.0%	5.3%	.0%	.0%	.0%	.0%	5.3%
7	.0%	5.3%	.0%	.0%	.0%	.0%	5.3%
8	.0%	42.1%	.0%	.0%	.0%	.0%	42.1%
9	.0%	10.5%	.0%	.0%	.0%	.0%	10.5%
10	.0%	10.5%	.0%	.0%	.0%	.0%	10.5%
Total	n=0	n=19	n=0	n=0	n=0	n=0	n=19

Sempra Non-residential Process Evaluation Survey (Participant), Question h24a.

Influence of information provided by contractor on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence of the information provided by the contractor had in decision to [complete tune-up/install equipment]	.	6.9	.	.	.	.	6.9
	n=0	n=23	n=0	n=0	n=0	n=0	n=23

Sempre Non-residential Process Evaluation Survey (Participant), Question h24b.

Influence of information provided by contractor on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	8.7%	.0%	.0%	.0%	.0%	8.7%
4	.0%	8.7%	.0%	.0%	.0%	.0%	8.7%
5	.0%	8.7%	.0%	.0%	.0%	.0%	8.7%
6	.0%	8.7%	.0%	.0%	.0%	.0%	8.7%
7	.0%	17.4%	.0%	.0%	.0%	.0%	17.4%
8	.0%	13.0%	.0%	.0%	.0%	.0%	13.0%
9	.0%	26.1%	.0%	.0%	.0%	.0%	26.1%
10	.0%	8.7%	.0%	.0%	.0%	.0%	8.7%
Total	n=0	n=23	n=0	n=0	n=0	n=0	n=23

Sempre Non-residential Process Evaluation Survey (Participant), Question h24b.

Influence of program marketing materials on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence of the marketing materials received from the program had in decision to [complete tune-up/install equipment]	.	5.5	.	.	.	.	5.5
	n=0	n=23	n=0	n=0	n=0	n=0	n=23

Sempra Non-residential Process Evaluation Survey (Participant), Question h24c.

Influence of program marketing materials on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	21.7%	.0%	.0%	.0%	.0%	21.7%
4	.0%	8.7%	.0%	.0%	.0%	.0%	8.7%
5	.0%	13.0%	.0%	.0%	.0%	.0%	13.0%
6	.0%	8.7%	.0%	.0%	.0%	.0%	8.7%
7	.0%	21.7%	.0%	.0%	.0%	.0%	21.7%
8	.0%	13.0%	.0%	.0%	.0%	.0%	13.0%
9	.0%	8.7%	.0%	.0%	.0%	.0%	8.7%
10	.0%	4.3%	.0%	.0%	.0%	.0%	4.3%
Total	n=0	n=23	n=0	n=0	n=0	n=0	n=23

Sempra Non-residential Process Evaluation Survey (Participant), Question h24c.

Influence of other financing received on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence of the other financing received had in decision to [complete tune-up/install equipment]	.	10.0	.	.	.	.	10.0
	n=0	n=1	n=0	n=0	n=0	n=0	n=1

Sempra Non-residential Process Evaluation Survey (Participant), Question h24d.

Influence of other financing received on decision to install equipment/complete tune-up (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
10	.0%	100.0%	.0%	.0%	.0%	.0%	100.0%
Total	n=0	n=1	n=0	n=0	n=0	n=0	n=1

Sempra Non-residential Process Evaluation Survey (Participant), Question h24d.

Influence of company standard practices on decision to install equipment/complete tune-up (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Influence the company standard practices had in the decision to [complete tune-up/install equipment]	.	6.5	.	.	.	.	6.5
	n=0	n=22	n=0	n=0	n=0	n=0	n=22

Sempra Non-residential Process Evaluation Survey (Participant), Question h24e.

Influence of company standard practices on decision to install equipment/complete tune-up (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	9.1%	.0%	.0%	.0%	.0%	9.1%
2	.0%	4.5%	.0%	.0%	.0%	.0%	4.5%
4	.0%	4.5%	.0%	.0%	.0%	.0%	4.5%
5	.0%	18.2%	.0%	.0%	.0%	.0%	18.2%
6	.0%	9.1%	.0%	.0%	.0%	.0%	9.1%
7	.0%	18.2%	.0%	.0%	.0%	.0%	18.2%
8	.0%	4.5%	.0%	.0%	.0%	.0%	4.5%
9	.0%	13.6%	.0%	.0%	.0%	.0%	13.6%
10	.0%	18.2%	.0%	.0%	.0%	.0%	18.2%
Total	n=0	n=22	n=0	n=0	n=0	n=0	n=22

Sempra Non-residential Process Evaluation Survey (Participant), Question h24e.

Mean response: Level of satisfaction with rebate calculation process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level of the incentive calculation process used to determine amount of assistance	.	.	.	.	.	7.7	7.7
	n=0	n=0	n=0	n=0	n=0	n=21	n=21

Sempra Non-residential Process Evaluation Survey (Participant), Question i1.

Mean response: Level of satisfaction with rebate calculation process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
5	.0%	.0%	.0%	.0%	.0%	19.0%	19.0%
6	.0%	.0%	.0%	.0%	.0%	4.8%	4.8%
7	.0%	.0%	.0%	.0%	.0%	9.5%	9.5%
8	.0%	.0%	.0%	.0%	.0%	42.9%	42.9%
9	.0%	.0%	.0%	.0%	.0%	4.8%	4.8%
10	.0%	.0%	.0%	.0%	.0%	19.0%	19.0%
Total	n=0	n=0	n=0	n=0	n=0	n=21	n=21

Sempra Non-residential Process Evaluation Survey (Participant), Question i1.

Did your energy efficiency project for this program target electricity savings, gas savings, or both? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Program skip	.0%	100.0%	99.6%	97.8%	100.0%	.0%	93.5%
Electricity	65.2%	.0%	.0%	.0%	.0%	.0%	3.7%
Both	34.8%	.0%	.0%	.0%	.0%	.0%	2.0%
Not asked, respondent dropped out of survey	.0%	.0%	.4%	2.2%	.0%	.0%	.7%
Gas	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question i3.

Did the planned energy efficiency project differ from what was actually installed? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	.0%	93.5%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	.0%	.7%
Yes	.0%	.0%	.0%	.0%	.0%	8.7%	.5%
No	.0%	.0%	.0%	.0%	.0%	91.3%	5.2%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question i4a.

How did your installed savings compare with the targeted savings in your application? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	13.0%	.0%	.0%	.0%	.0%	.0%	.7%
Program skip	.0%	100.0%	99.6%	97.8%	100.0%	.0%	93.5%
Not asked, respondent dropped out of survey	4.3%	.0%	.4%	2.2%	.0%	.0%	1.0%
Much less	13.0%	.0%	.0%	.0%	.0%	.0%	.7%
Slightly less	13.0%	.0%	.0%	.0%	.0%	.0%	.7%
About the same	21.7%	.0%	.0%	.0%	.0%	.0%	1.2%
Slightly greater	26.1%	.0%	.0%	.0%	.0%	.0%	1.5%
Much greater	8.7%	.0%	.0%	.0%	.0%	.0%	.5%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question i6.

Did you change your plans in order to participate in the [IOU] program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	4.3%	.2%
Program skip	.0%	100.0%	97.8%	99.6%	100.0%	.0%	93.5%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.4%	.0%	4.3%	1.0%
Yes	.0%	.0%	.0%	.0%	.0%	17.4%	1.0%
No	.0%	.0%	.0%	.0%	.0%	73.9%	4.2%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question i10.

Level of satisfaction with custom rebate calculation process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level with the customized rebate calculation process	.	.	.	.	6.8	.	6.8
	n=0	n=0	n=0	n=0	n=30	n=0	n=30

Sempra Non-residential Process Evaluation Survey (Participant), Question j1.

Level of satisfaction with custom rebate calculation process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	.0%	.0%	.0%	3.3%	.0%	3.3%
3	.0%	.0%	.0%	.0%	6.7%	.0%	6.7%
5	.0%	.0%	.0%	.0%	23.3%	.0%	23.3%
6	.0%	.0%	.0%	.0%	3.3%	.0%	3.3%
7	.0%	.0%	.0%	.0%	16.7%	.0%	16.7%
8	.0%	.0%	.0%	.0%	30.0%	.0%	30.0%
9	.0%	.0%	.0%	.0%	3.3%	.0%	3.3%
10	.0%	.0%	.0%	.0%	13.3%	.0%	13.3%
Total	n=0	n=0	n=0	n=0	n=30	n=0	n=30

Sempra Non-residential Process Evaluation Survey (Participant), Question j1.

Without the program's assistance, when would you have undertaken the project, if at all? (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Program skip	95.7%	.0%	99.6%	97.8%	100.0%	.0%	90.5%
Not asked, respondent dropped out of survey	4.3%	2.9%	.4%	2.2%	.0%	.0%	1.2%
About the same time	.0%	35.3%	.0%	.0%	.0%	.0%	3.0%
1 year later or less	.0%	17.6%	.0%	.0%	.0%	.0%	1.5%
More than 1 year later	.0%	29.4%	.0%	.0%	.0%	.0%	2.5%
Never	.0%	14.7%	.0%	.0%	.0%	.0%	1.2%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question j3.

Confirmation of measure installed (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	1.8%	.0%	.0%	1.0%
Program skip	.0%	100.0%	97.8%	.0%	97.1%	95.7%	43.0%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	.9%	2.9%	4.3%	1.5%
Yes	.0%	.0%	.0%	94.2%	.0%	.0%	52.7%
No	.0%	.0%	.0%	3.1%	.0%	.0%	1.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question k1a.

Likelihood of installing the equipment without rebate (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Likelihood of installing the equipment without the rebate	.	.	.	5.0	.	.	5.0
	n=0	n=0	n=0	n=208	n=0	n=0	n=208

Sempre Non-residential Process Evaluation Survey (Participant), Question k2.

Likelihood of installing the equipment without rebate (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	.0%	.0%	26.4%	.0%	.0%	26.4%
2	.0%	.0%	.0%	8.2%	.0%	.0%	8.2%
3	.0%	.0%	.0%	7.7%	.0%	.0%	7.7%
4	.0%	.0%	.0%	2.9%	.0%	.0%	2.9%
5	.0%	.0%	.0%	14.4%	.0%	.0%	14.4%
6	.0%	.0%	.0%	5.3%	.0%	.0%	5.3%
7	.0%	.0%	.0%	4.3%	.0%	.0%	4.3%
8	.0%	.0%	.0%	8.2%	.0%	.0%	8.2%
9	.0%	.0%	.0%	4.3%	.0%	.0%	4.3%
10	.0%	.0%	.0%	18.3%	.0%	.0%	18.3%
Total	n=0	n=0	n=0	n=208	n=0	n=0	n=208

Sempre Non-residential Process Evaluation Survey (Participant), Question k2.

Equipment respondent might install if participating in program again (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Lighting might be installed if participated in program again	.0%	.0%	.0%	36.1%	.0%	.0%	36.1%
HVAC equipment might be installed if participated in program again	.0%	.0%	.0%	36.1%	.0%	.0%	36.1%
Refrigeration equipment might be installed if participated in program again	.0%	.0%	.0%	23.7%	.0%	.0%	23.7%
Don't know what other equipment might be installed through program	.0%	.0%	.0%	22.4%	.0%	.0%	22.4%
Food service equipment might be installed if participated in program again	.0%	.0%	.0%	19.2%	.0%	.0%	19.2%
Water heating equipment might be installed if participated in program again	.0%	.0%	.0%	14.2%	.0%	.0%	14.2%
Motors and/or pumps might be installed if participated in program again	.0%	.0%	.0%	11.9%	.0%	.0%	11.9%
Other process-related equipment might be installed if participated in program again	.0%	.0%	.0%	9.6%	.0%	.0%	9.6%
Drives might be installed if participated in program again	.0%	.0%	.0%	8.7%	.0%	.0%	8.7%
Laundry equipment might be installed if participated in program again	.0%	.0%	.0%	5.5%	.0%	.0%	5.5%
*None/nothing needs replacing	.0%	.0%	.0%	5.0%	.0%	.0%	5.0%
Refused K3 question	.0%	.0%	.0%	.5%	.0%	.0%	.5%
Total	n=0	n=0	n=0	n=219	n=0	n=0	n=219

Sempre Non-residential Process Evaluation Survey (Participant), Question k3.

Are you interested in any other energy efficient equipment for your business that is currently not offered through the program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	.0%	12.4%	.0%	.0%	7.0%
Program skip	.0%	100.0%	97.8%	.4%	97.1%	95.7%	43.3%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	2.2%	2.9%	4.3%	2.2%
Yes	.0%	.0%	.0%	11.6%	.0%	.0%	6.5%
No	.0%	.0%	.0%	73.3%	.0%	.0%	41.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question k4.

Did more than one SDG&E representative contact you about installing free energy efficiency equipment at your business? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	6.5%	.0%	.0%	.0%	1.5%
Program skip	.0%	100.0%	.0%	97.8%	97.1%	95.7%	75.4%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	2.2%	2.9%	4.3%	2.2%
Yes	.0%	.0%	18.5%	.0%	.0%	.0%	4.2%
No	.0%	.0%	72.8%	.0%	.0%	.0%	16.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question I1.

Did you receive any follow up from the SDG&E representative who installed the equipment at your business? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	3.3%	.0%	.0%	.0%	.7%
Program skip	.0%	100.0%	.0%	97.8%	97.1%	95.7%	75.4%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	2.2%	2.9%	4.3%	2.2%
Yes	.0%	.0%	52.2%	.0%	.0%	.0%	11.9%
No	.0%	.0%	42.4%	.0%	.0%	.0%	9.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question I3.

Did the SDG&E representative tell you about other SDG&E programs? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	7.6%	.0%	.0%	.0%	1.7%
Program skip	.0%	100.0%	45.7%	97.8%	97.1%	95.7%	85.8%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	2.2%	2.9%	4.3%	2.2%
Yes	.0%	.0%	13.0%	.0%	.0%	.0%	3.0%
No	.0%	.0%	31.5%	.0%	.0%	.0%	7.2%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question I4.

Has anyone else besides SDG&E contacted you about installing free energy efficiency equipment at your business? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	1.1%	.0%	.0%	.0%	.2%
Program skip	.0%	100.0%	.0%	97.8%	97.1%	95.7%	75.4%
Not asked, respondent dropped out of survey	.0%	.0%	2.2%	2.2%	2.9%	4.3%	2.2%
Yes	.0%	.0%	10.9%	.0%	.0%	.0%	2.5%
No	.0%	.0%	85.9%	.0%	.0%	.0%	19.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question I5.

Have you participated in any other SDG&E programs besides the Direct Install program? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	2.2%	.0%	.0%	.0%	.5%
Program skip	.0%	100.0%	.0%	97.8%	97.1%	95.7%	75.4%
Not asked, respondent dropped out of survey	.0%	.0%	3.3%	2.2%	2.9%	4.3%	2.5%
Yes	.0%	.0%	9.8%	.0%	.0%	.0%	2.2%
No	.0%	.0%	84.8%	.0%	.0%	.0%	19.4%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question 17.

As part of the program, did someone come to inspect the energy efficient equipment? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	10.7%	7.6%	10.7%	5.9%	8.7%	9.5%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, respondent dropped out of survey	.0%	.0%	3.3%	3.1%	2.9%	4.3%	3.0%
Yes	.0%	67.9%	47.8%	64.4%	85.3%	87.0%	63.9%
No	.0%	21.4%	41.3%	21.8%	5.9%	.0%	23.6%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question m1.

Level of satisfaction with inspection process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level with the inspection process	.	7.8	9.1	9.0	8.1	9.1	8.8
	n=0	n=18	n=44	n=141	n=27	n=20	n=250

Sempra Non-residential Process Evaluation Survey (Participant), Question m2.

Level of satisfaction with inspection process (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	.0%	.0%	.7%	7.4%	.0%	1.2%
2	.0%	.0%	.0%	.7%	.0%	.0%	.4%
3	.0%	.0%	.0%	.0%	3.7%	.0%	.4%
4	.0%	.0%	.0%	.7%	.0%	.0%	.4%
5	.0%	11.1%	2.3%	3.5%	.0%	.0%	3.2%
6	.0%	5.6%	2.3%	1.4%	.0%	5.0%	2.0%
7	.0%	27.8%	6.8%	2.8%	.0%	10.0%	5.6%
8	.0%	16.7%	20.5%	19.9%	37.0%	15.0%	21.2%
9	.0%	27.8%	11.4%	12.8%	22.2%	10.0%	14.4%
10	.0%	11.1%	56.8%	57.4%	29.6%	60.0%	51.2%
Total	n=0	n=18	n=44	n=141	n=27	n=20	n=250

Sempra Non-residential Process Evaluation Survey (Participant), Question m2.

Satisfaction with program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Satisfaction level with the program	.	7.4	8.7	8.0	7.3	8.4	8.1
	n=0	n=27	n=86	n=212	n=33	n=22	n=380

Sempra Non-residential Process Evaluation Survey (Participant), Question m4.

Satisfaction with program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	3.7%	2.3%	4.7%	3.0%	.0%	3.7%
2	.0%	.0%	.0%	.9%	.0%	.0%	.5%
3	.0%	7.4%	1.2%	.5%	9.1%	4.5%	2.1%
4	.0%	.0%	1.2%	2.8%	3.0%	.0%	2.1%
5	.0%	7.4%	3.5%	5.2%	9.1%	4.5%	5.3%
6	.0%	3.7%	4.7%	4.2%	3.0%	.0%	3.9%
7	.0%	11.1%	3.5%	8.5%	12.1%	18.2%	8.4%
8	.0%	37.0%	15.1%	22.2%	27.3%	22.7%	22.1%
9	.0%	11.1%	14.0%	17.0%	15.2%	9.1%	15.3%
10	.0%	18.5%	54.7%	34.0%	18.2%	40.9%	36.6%
Total	n=0	n=27	n=86	n=212	n=33	n=22	n=380

Sempra Non-residential Process Evaluation Survey (Participant), Question m4.

Level of interest in participating in the program again (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Interest level in participating in the program again	.	8.3	9.0	8.5	8.1	8.5	8.6
	n=0	n=28	n=86	n=216	n=32	n=22	n=384

Sempre Non-residential Process Evaluation Survey (Participant), Question m6.

Level of interest in participating in the program again (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	7.1%	3.5%	5.1%	9.4%	4.5%	5.2%
2	.0%	.0%	1.2%	.5%	.0%	.0%	.5%
3	.0%	.0%	1.2%	.9%	3.1%	4.5%	1.3%
4	.0%	.0%	.0%	.5%	.0%	.0%	.3%
5	.0%	3.6%	3.5%	5.6%	3.1%	.0%	4.4%
6	.0%	3.6%	1.2%	3.7%	.0%	.0%	2.6%
7	.0%	7.1%	2.3%	4.2%	9.4%	4.5%	4.4%
8	.0%	21.4%	10.5%	12.5%	12.5%	31.8%	13.8%
9	.0%	7.1%	4.7%	11.6%	15.6%	4.5%	9.6%
10	.0%	50.0%	72.1%	55.6%	46.9%	50.0%	57.8%
Total	n=0	n=28	n=86	n=216	n=32	n=22	n=384

Sempre Non-residential Process Evaluation Survey (Participant), Question m6.

Besides this program, are you aware of other utility assistance you could receive to promote energy efficiency? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	7.1%	2.2%	1.3%	8.8%	.0%	2.5%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, respondent dropped out of survey	.0%	.0%	7.6%	3.6%	2.9%	4.3%	4.2%
Yes	.0%	46.4%	20.7%	28.4%	55.9%	78.3%	33.1%
No	.0%	46.4%	69.6%	66.7%	32.4%	17.4%	60.2%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question m8.

Has your organization participated in any of the programs you mentioned? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	3.6%	.0%	.9%	.0%	.0%	.7%
Program skip	.0%	53.6%	71.7%	68.0%	41.2%	17.4%	62.7%
Not asked, respondent dropped out of survey	.0%	.0%	7.6%	4.4%	2.9%	4.3%	4.7%
Yes	.0%	42.9%	6.5%	14.7%	41.2%	65.2%	19.9%
No	.0%	.0%	14.1%	12.0%	14.7%	13.0%	11.9%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question m10.

Interest in using an online tool that shows current monthly energy costs to date and bill estimation (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	1.3%	1.1%	.0%	.0%	1.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
*Already using it/something like it	.0%	.0%	.4%	.0%	.0%	.0%	.2%
Not asked, respondent dropped out of survey	4.3%	2.9%	4.4%	7.6%	.0%	.0%	4.7%
Not interested at all	.0%	11.8%	12.0%	9.8%	7.1%	.0%	10.4%
Not very interested	.0%	8.8%	8.9%	14.1%	3.6%	.0%	9.2%
Somewhat interested	34.8%	20.6%	30.7%	31.5%	21.4%	.0%	29.6%
Very interested	60.9%	55.9%	42.2%	35.9%	67.9%	.0%	44.8%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question m12.

Difficulty for respondent's business to shift energy use from 11:00-6:00 (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	.0%	1.8%	.0%	.0%	.0%	1.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
*Already using it/something like it	4.3%	2.9%	.4%	.0%	.0%	.0%	.7%
Not asked, respondent dropped out of survey	4.3%	2.9%	4.4%	7.6%	.0%	.0%	4.7%
Very difficult	43.5%	38.2%	59.1%	42.4%	42.9%	.0%	51.5%
Somewhat difficult	26.1%	32.4%	21.3%	23.9%	39.3%	.0%	24.4%
Not very difficult	8.7%	17.6%	8.0%	18.5%	14.3%	.0%	11.7%
Not at all difficult	13.0%	5.9%	4.9%	7.6%	3.6%	.0%	6.0%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question m13.

Difficulty for respondent's business to shift energy use from 11:00-6:00 with one day notice (by program)							
	Energy Savings BID	Calculated	Deemed	Direct Install	Premium Cooling Efficiency	Comprehensive Audit	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	4.3%	2.9%	.9%	.0%	.0%	.0%	1.0%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
*Already using it/something like it	4.3%	2.9%	.4%	.0%	.0%	.0%	.7%
Not asked, respondent dropped out of survey	4.3%	2.9%	4.4%	7.6%	.0%	.0%	4.7%
Very difficult	43.5%	44.1%	58.2%	46.7%	42.9%	.0%	52.5%
Somewhat difficult	26.1%	26.5%	24.9%	23.9%	39.3%	.0%	25.9%
Not very difficult	8.7%	14.7%	7.1%	10.9%	7.1%	.0%	8.7%
Not at all difficult	8.7%	5.9%	4.0%	10.9%	10.7%	.0%	6.5%
Total	n=23	n=34	n=225	n=92	n=28	n=0	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question m14.

Level of agreement that respondent's business has control over energy use (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Level of agreement that the business has control over the amount of electricity it uses	.	6.1	7.2	6.0	6.8	6.0	6.4
	n=0	n=28	n=84	n=212	n=32	n=20	n=376

Sempra Non-residential Process Evaluation Survey (Participant), Question m15.

Level of agreement that respondent's business has control over energy use (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	10.7%	6.0%	11.8%	3.1%	5.0%	9.3%
2	.0%	.0%	8.3%	4.7%	.0%	10.0%	5.1%
3	.0%	7.1%	3.6%	6.1%	6.3%	5.0%	5.6%
4	.0%	3.6%	1.2%	4.2%	6.3%	10.0%	4.0%
5	.0%	25.0%	8.3%	17.9%	15.6%	5.0%	15.4%
6	.0%	10.7%	3.6%	6.1%	15.6%	20.0%	7.4%
7	.0%	14.3%	10.7%	11.3%	9.4%	10.0%	11.2%
8	.0%	7.1%	17.9%	15.1%	18.8%	20.0%	15.7%
9	.0%	.0%	7.1%	4.7%	.0%	5.0%	4.5%
10	.0%	21.4%	33.3%	17.9%	25.0%	10.0%	21.8%
Total	n=0	n=28	n=84	n=212	n=32	n=20	n=376

Sempra Non-residential Process Evaluation Survey (Participant), Question m15.

Agreement that energy efficiency is an important consideration when respondent purchases equipment (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Level of agreement that energy efficiency is an important consideration when business buys devices that use energy	.	8.9	8.9	8.6	9.2	9.2	8.8
	n=0	n=28	n=83	n=213	n=32	n=21	n=377

Sempra Non-residential Process Evaluation Survey (Participant), Question m16.

Agreement that energy efficiency is an important consideration when respondent purchases equipment (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	.0%	2.4%	2.3%	.0%	.0%	1.9%
2	.0%	3.6%	.0%	.5%	.0%	.0%	.5%
3	.0%	.0%	.0%	1.4%	.0%	.0%	.8%
4	.0%	.0%	1.2%	.9%	.0%	.0%	.8%
5	.0%	3.6%	2.4%	3.8%	.0%	.0%	2.9%
6	.0%	7.1%	4.8%	2.3%	3.1%	.0%	3.2%
7	.0%	3.6%	.0%	8.0%	12.5%	9.5%	6.4%
8	.0%	7.1%	18.1%	16.9%	9.4%	14.3%	15.6%
9	.0%	14.3%	10.8%	11.3%	12.5%	19.0%	11.9%
10	.0%	60.7%	60.2%	52.6%	62.5%	57.1%	56.0%
Total	n=0	n=28	n=83	n=213	n=32	n=21	n=377

Sempra Non-residential Process Evaluation Survey (Participant), Question m16.

Level of interest in Energy Savings BID program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Interest level of the Energy Savings BID program	.	7.8	5.9	5.6	7.8	.	6.1
	n=0	n=28	n=76	n=194	n=30	n=0	n=328

Sempre Non-residential Process Evaluation Survey (Participant), Question m17a.

Level of interest in Energy Savings BID program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	7.1%	23.7%	23.2%	3.3%	.0%	20.1%
2	.0%	3.6%	3.9%	3.6%	.0%	.0%	3.4%
3	.0%	.0%	2.6%	6.2%	3.3%	.0%	4.6%
4	.0%	.0%	2.6%	2.1%	.0%	.0%	1.8%
5	.0%	7.1%	14.5%	12.9%	13.3%	.0%	12.8%
6	.0%	3.6%	3.9%	5.2%	6.7%	.0%	4.9%
7	.0%	10.7%	6.6%	8.8%	13.3%	.0%	8.8%
8	.0%	17.9%	10.5%	14.4%	16.7%	.0%	14.0%
9	.0%	14.3%	2.6%	4.1%	3.3%	.0%	4.6%
10	.0%	35.7%	28.9%	19.6%	40.0%	.0%	25.0%
Total	n=0	n=28	n=76	n=194	n=30	n=0	n=328

Sempre Non-residential Process Evaluation Survey (Participant), Question m17a.

Level of interest in On Bill financing program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Interest level of the On Bill Financing program	.	6.3	5.1	5.7	6.7	6.1	5.7
	n=0	n=26	n=82	n=207	n=31	n=20	n=366

Sempra Non-residential Process Evaluation Survey (Participant), Question m17b.

Level of interest in On Bill financing program (1-10 scale) (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
1	.0%	23.1%	36.6%	27.1%	22.6%	15.0%	27.9%
2	.0%	3.8%	6.1%	4.3%	.0%	5.0%	4.4%
3	.0%	.0%	2.4%	3.9%	3.2%	15.0%	3.8%
4	.0%	.0%	1.2%	1.4%	3.2%	10.0%	1.9%
5	.0%	15.4%	9.8%	9.7%	3.2%	5.0%	9.3%
6	.0%	3.8%	2.4%	5.3%	6.5%	5.0%	4.6%
7	.0%	.0%	3.7%	7.2%	6.5%	.0%	5.5%
8	.0%	15.4%	9.8%	13.0%	12.9%	5.0%	12.0%
9	.0%	3.8%	2.4%	3.4%	.0%	.0%	2.7%
10	.0%	34.6%	25.6%	24.6%	41.9%	40.0%	27.9%
Total	n=0	n=26	n=82	n=207	n=31	n=20	n=366

Sempra Non-residential Process Evaluation Survey (Participant), Question m17b.

Are you planning any repairs or replacements to your equipment in the next 2 years, aside from routine preventative maintenance? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	3.6%	4.3%	8.9%	11.8%	4.3%	7.5%
Program skip	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Not asked, respondent dropped out of survey	.0%	.0%	7.6%	4.9%	5.9%	8.7%	5.5%
Yes	.0%	42.9%	23.9%	25.8%	35.3%	43.5%	28.4%
No	.0%	53.6%	64.1%	60.4%	47.1%	43.5%	58.7%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question m18.

Do you plan to participate in a utility program for these purchases? (by program)							
	Comprehensive Audit	Premium Cooling Efficiency	Direct Install	Deemed	Calculated	Energy Savings BID	Total
Refused	.0%	.0%	.0%	.0%	.0%	.0%	.0%
Don't know	.0%	3.6%	3.3%	2.2%	2.9%	4.3%	2.7%
Program skip	.0%	57.1%	68.5%	69.3%	58.8%	47.8%	66.2%
Not asked, respondent dropped out of survey	.0%	.0%	7.6%	4.9%	5.9%	8.7%	5.5%
Yes	.0%	35.7%	17.4%	20.4%	29.4%	39.1%	22.6%
No	.0%	3.6%	3.3%	3.1%	2.9%	.0%	3.0%
Total	n=0	n=28	n=92	n=225	n=34	n=23	n=402

Sempra Non-residential Process Evaluation Survey (Participant), Question m20.

SDG&E Non-Participant Survey Responses - Frequencies by Question

This file provides non-participant responses for the SDG&E Nonresidential Process Evaluation. This survey was conducted October 2011 - November 2011 by Tetra Tech, Inc., and the overall study was led by the Heschong Mahone Group, Inc.

Data collection resources, including the survey code books, survey and sampling methodologies, and sample dispositions, are provided in Attachment 3A. **Readers are strongly encouraged to review the survey code book in conjunction with review of the frequency tables to understand the full questions and survey skip logic.** Analysis of the customer surveys are included in the final report volumes, including Main Report, Attachment 1 - Portfolio-level Evaluations, and Attachment 2 - Program Specific Evaluations. Customer survey frequency tables for select 3P programs are provided separately.

Note that some for some questions, respondents could provide more than one response. Consequently, the total number of responses may exceed the n value, and the total percentages of responses may exceed 100%, for some questions.

Main business activity	
Other	28.9%
Restaurant	13.2%
Office	12.4%
Industrial process/manufacturing/assembly	9.9%
Retail (non-food)	7.4%
Health Care (other than Hospital	5.0%
Grocery store	5.0%
School	5.0%
Condo/apartment	4.1%
Community service/church/temple/municipal	2.5%
Greenhouse	1.7%
College/university	1.7%
*Agriculture	.8%
Laundry/cleaner	.8%
Warehouse	.8%
Hospital	.8%
Construction	.0%
Hotel or motel	.0%
Programmed skip	.0%
Don't know	.0%
Refused	.0%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1.

Type of retail business facility	
Programmed skip	92.6%
Stand alone building	3.3%
Something else	1.7%
Strip mall	1.7%
Enclosed mall	.8%
Don't know	.0%
Refused	.0%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1a.

Mean number of students that can be seated in all classrooms of education facilities	
Number of students in all classrooms	1055.6
	n=5

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question a1b.

Number of students that can be seated in all classrooms of education facilities	
98	20.0%
230	20.0%
950	20.0%
1000	20.0%
3000	20.0%
Total	n=5

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question a1b.

Type of health care facility	
Programmed skip	95.0%
Outpatient	3.3%
Both	.8%
Inpatient	.8%
Don't know	.0%
Refused	.0%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question a1c.

Type of hospital facility	
Programmed skip	99.2%
Both	.8%
Outpatient	.0%
Inpatient	.0%
Don't know	.0%
Refused	.0%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question a1d.

Mean number of occupant rooms in hotel/motel facility	
Number of guest rooms	.
	n=0

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a1e.

Mean total seating capacity of communal/worship areas	
Total seating capacity	490.0
	n=2

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question a1f.

Total seating capacity of communal/worship areas	
180	50.0%
800	50.0%
Total	n=2

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question a1f.

Has your facility applied for or participated in a utility program?	
Refused	.0%
Don't know	16.5%
Programmed skip	.0%
Yes	5.0%
No	78.5%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a4.

Time period participated in utility program	
Programmed skip	95.0%
Before 2010	5.0%
2010 or later	.0%
Don't know	.0%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question a4a.

Type of equipment that uses the most electricity at facility	
HVAC	33.9%
Other	25.6%
Lighting	17.4%
Food service equipment	11.6%
Don't know	6.6%
Motors and pumps	4.1%
Laundry equipment	.8%
Drives	.0%
Programmed skip	.0%
Refused	.0%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question b1a.

Did your facility complete its participation in the program?	
Refused	.0%
Don't know	.0%
Programmed skip	100.0%
Yes	.0%
No	.0%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question a5.

Confident in answer? Type of equipment that uses the most electricity at facility	
Refused	.0%
Don't know	.0%
Programmed skip	6.6%
Yes	81.8%
No	11.6%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b1aconf.

Type of equipment that uses the second most electricity at facility	
Lighting	30.6%
Other	27.3%
HVAC	19.0%
Programmed skip	6.6%
Food service equipment	5.8%
Don't know	5.8%
Motors and pumps	3.3%
Laundry equipment	.8%
Refused	.8%
Drives	.0%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question b1b.

Confident in answer? Type of equipment that uses the second most electricity at facility	
Refused	.0%
Don't know	.0%
Programmed skip	13.2%
Yes	65.3%
No	21.5%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question b1bconf.

Type of equipment that uses the most natural gas at facility	
Doesn't use natural gas	30.6%
Food service equipment	13.2%
Boilers	13.2%
Don't know	11.6%
HVAC and furnaces	10.7%
Water heater	9.9%
Other	7.4%
Laundry equipment	2.5%
Pumps	.8%
Programmed skip	.0%
Refused	.0%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b2a.

Confident in answer? Type of equipment that uses the most natural gas at facility	
Refused	.0%
Don't know	.0%
Programmed skip	42.1%
Yes	52.1%
No	5.8%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question b2aconf.

Type of equipment that uses the second most natural gas at facility	
Programmed skip	42.1%
Doesn't use natural gas	24.8%
Water heater	10.7%
Food service equipment	5.8%
HVAC and furnaces	5.8%
Don't know	4.1%
Other	2.5%
Boilers	2.5%
Laundry equipment	1.7%
Pumps	.0%
Refused	.0%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question b2b.

Confident in answer? Type of equipment that uses the second most natural gas at facility	
Refused	.0%
Don't know	.0%
Programmed skip	71.1%
Yes	24.0%
No	5.0%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question b2bconf.

Has your organization developed a specific policy for the selection of energy-efficient equipment?	
Refused	.0%
Don't know	13.2%
Programmed skip	.0%
Yes	18.2%
No	63.6%
Other	5.0%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b3.

Decision-maker for utility purchases or upgrades	
Person who makes decisions on equipment - other	51.2%
Person who makes decisions on equipment - proprietor/owner	28.9%
Person who makes decisions on equipment - facilities manager	10.7%
Person who makes decisions on equipment - general manager	9.1%
Person who makes decisions on equipment - other financial/administrative position	8.3%
Person who makes decisions on equipment - other facilities management/maintenance	7.4%
Person who makes decisions on equipment - president/CEO	6.6%
Person who makes decisions on equipment - board of directors	4.1%
Person who makes decisions on equipment - building manager	2.5%
Person who makes decisions on equipment - CFO	1.7%
Person who makes decisions on equipment - energy manager	.0%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question b5.

Difficulties with purchasing/installing energy efficiency upgrades through utility programs	
Difficulties with purchasing/installing an EE upgrade - no difficulties	73.6%
Difficulties with purchasing/installing an EE upgrade - other	10.9%
Difficulties with purchasing/installing an EE upgrade - lack of funds available for investments	8.2%
Difficulties with purchasing/installing an EE upgrade - have not done any upgrades	4.5%
Difficulties with purchasing/installing an EE upgrade - lack of financing	1.8%
Difficulties with purchasing/installing an EE upgrade - incremental cost	.9%
Difficulties with purchasing/installing an EE upgrade - lease space	.9%
Difficulties with purchasing/installing an EE upgrade - rebate application process demanding	.9%
Difficulties with purchasing/installing an EE upgrade - other priorities for capital spending	.0%
Difficulties with purchasing/installing an EE upgrade - amount of mgmt time	.0%
Difficulties with purchasing/installing an EE upgrade - rebate amount not high enough	.0%
Difficulties with purchasing/installing an EE upgrade - hesitant to replace existing equipment	.0%
Difficulties with purchasing/installing an EE upgrade - mgmt doesn't see benefit	.0%
Difficulties with purchasing/installing an EE upgrade - contractors not familiar with program	.0%
Difficulties with purchasing/installing an EE upgrade - economy	.0%
Total	n=110

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question b6.

Were you aware that your utility offers programs to help you increase the energy efficiency of your organization?	
Refused	.0%
Don't know	5.0%
Programmed skip	.0%
Partial	.0%
Yes	61.2%
No	33.9%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question c1a.

Did you know that your facility was eligible for any of these programs in the past, but chose not to participate?	
Don't know	11.6%
Programmed skip	38.8%
Partial	1.7%
Yes-I was aware that the facility was eligible, but chose not to participate	15.7%
No-I was not aware that the facility was eligible, or the facility was not eligible for programs	26.4%
Other-including if was past participant	5.8%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question c1c.

Reason for not participating in the past	
Equipment installed w/o program - none	47.5%
Equipment installed w/o program - lighting	22.0%
Equipment installed w/o program - other	20.3%
Equipment installed w/o program - HVAC and furnaces	13.6%
Equipment installed w/o program - drivers	6.8%
Equipment installed w/o program - food service equipment	5.1%
Equipment installed w/o program - water heaters	5.1%
Equipment installed w/o program - motors and pumps	3.4%
Equipment installed w/o program - boilers	.0%
Equipment installed w/o program - laundry equipment	.0%
Total	n=59

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question c1f.

How respondent first heard about the program	
Programmed skip	38.8%
Other	9.1%
IOU utility bill insert	9.1%
IOU account exec	9.1%
IOU mailing (hard copy)	6.6%
Contractor/retailer	5.8%
Don't know	5.8%
Partial	2.5%
Television ad	1.7%
Conference/trade show	1.7%
From participation in another IOU program	1.7%
IOU web site	1.7%
IOU utility email message	1.7%
Other IOU staff	1.7%
Radio ad	.8%
Print media ad	.8%
Colleague/peer	.8%
IOU call center	.8%
Refused	.0%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question c1.

How respondent prefers to receive information and updates regarding energy efficiency programs	
Prefer to hear about programs - IOU mailing (hard copy)	47.4%
Prefer to hear about programs - IOU utility email message	44.8%
Prefer to hear about programs - IOU utility bill insert	10.3%
Prefer to hear about programs - IOU account exec	5.2%
Prefer to hear about programs - other	5.2%
Prefer to hear about programs - other IOU staff	1.7%
Prefer to hear about programs - IOU web site	1.7%
Prefer to hear about programs - IOU call center	.9%
Prefer to hear about programs - print media ad	.9%
Prefer to hear about programs - participation in another IOU program	.0%
Prefer to hear about programs - contractor/retailer	.0%
Prefer to hear about programs - conference/trade show	.0%
Prefer to hear about programs - colleague/peer	.0%
Prefer to hear about programs - television ad	.0%
Prefer to hear about programs - radio ad	.0%
Total	n=116

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question c2.

Have you visited the program's website for more information?	
Refused	.0%
Don't know	.0%
Programmed skip	1.7%
Partial	3.3%
Yes	17.4%
No	77.7%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question c3.

Mean response: Level of interest in audit type program	
Program interest - audit program	6.2
	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1a.

Level of interest in audit type program	
Not at all interested	20.2%
2	1.8%
3	4.4%
4	2.6%
5	7.9%
6	6.1%
7	10.5%
8	16.7%
9	8.8%
Extremely interested	18.4%
Not applicable	2.6%
Total	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1a.

Mean response: Level of interest in HVAC Retrocommissioning program	
Program interest - HVAC retrocommissioning program	6.1
	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1b.

Level of interest in HVAC Retrocommissioning program	
Not at all interested	19.3%
2	7.0%
3	3.5%
4	.9%
5	13.2%
6	2.6%
7	7.0%
8	14.9%
9	5.3%
Extremely interested	19.3%
Not applicable	7.0%
Total	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1b.

Mean response: Level of interest in a program to provide premium tune-ups and maintenance of HVAC equipment	
Program interest - HVAC tune-up & maintenance program	5.8
	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1c.

Level of interest in a program to provide premium tune-ups and maintenance of HVAC equipment	
Not at all interested	21.1%
2	6.1%
3	6.1%
4	3.5%
5	13.2%
6	3.5%
7	6.1%
8	12.3%
9	5.3%
Extremely interested	15.8%
Not applicable	7.0%
Total	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1c.

Mean response: Level of interest in Direct Install program	
Program interest - direct install program	7.2
	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1d.

Level of interest in Direct Install program	
Not at all interested	13.2%
2	1.8%
3	2.6%
4	1.8%
5	11.4%
6	5.3%
7	7.0%
8	14.0%
9	7.0%
Extremely interested	23.7%
Not applicable	12.3%
Total	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1d.

Mean response: Level of interest in rebate program	
Program interest - rebate program	7.1
	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1e.

Level of interest in rebate program	
Not at all interested	10.5%
2	1.8%
3	1.8%
4	2.6%
5	9.6%
6	9.6%
7	8.8%
8	15.8%
9	9.6%
Extremely interested	26.3%
Not applicable	3.5%
Total	n=114

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d1e.

Mean response: Level of interest in incentive program, where the incentive amount is based on the predicted energy savings	
Program interest - incentive program	6.8
	n=114

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question d1f.

Level of interest in incentive program, where the incentive amount is based on the predicted energy savings	
Not at all interested	7.0%
2	2.6%
3	3.5%
4	4.4%
5	20.2%
6	5.3%
7	9.6%
8	14.9%
9	7.0%
Extremely interested	21.9%
Not applicable	3.5%
Total	n=114

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question d1f.

Mean response: Level of interest in a program offering 0% interest loans for energy efficiency upgrades	
Program interest - 0% interest loan program	5.4
	n=114

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question d1g.

Level of interest in a program offering 0% interest loans for energy efficiency upgrades	
Not at all interested	32.5%
2	4.4%
3	1.8%
5	13.2%
6	3.5%
7	7.9%
8	10.5%
9	4.4%
Extremely interested	14.0%
Not applicable	7.9%
Total	n=114
Sempra Non-residential Process Evaluation Survey (Non-Participant), Question d1g.	

Potential motivating factors for participating in program	
Reason to participate in program - saving money on energy bills	50.0%
Reason to participate in program - other	46.2%
Reason to participate in program - obtaining a rebate	12.5%
Reason to participate in program - upgrading or replacing equipment	10.6%
Reason to participate in program - protecting environment	2.9%
Reason to participate in program - gov't/non-profit policy	1.0%
Reason to participate in program - technical assistance	.0%
Reason to participate in program - corporate policies	.0%
Total	n=104

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d2.

Reasons for not participating	
Reason not to participate in program - other	55.1%
Reason not to participate in program - money issues	17.3%
Reason not to participate in program - application takes too much time	12.2%
Reason not to participate in program - up-front costs	9.2%
Reason not to participate in program - don't have enough program info	8.2%
Reason not to participate in program - don't believe energy savings claims	8.2%
Reason not to participate in program - rebate not high enough	4.1%
Total	n=98

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question d3a.

Interest in using an online tool that shows current monthly energy costs to date and bill estimation	
Refused	.0%
Don't know	1.7%
Programmed skip	.0%
Partial	5.8%
Not interested at all	10.7%
Not very interested	15.7%
Somewhat interested	37.2%
Very interested	28.9%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question m12.

Difficulty for respondent's business to shift energy use from 11:00-6:00	
Refused	.0%
Don't know	2.5%
Programmed skip	.0%
Partial	5.8%
Very difficult to make	50.4%
Somewhat difficult to make	23.1%
Not very difficult to make	12.4%
Not at all difficult to make	5.8%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question m13.

Difficulty for respondent's business to shift energy use from 11:00-6:00 with one day notice	
Refused	.0%
Don't know	2.5%
Programmed skip	.0%
Partial	6.6%
Very difficult	61.2%
Somewhat difficult	15.7%
Not very difficult	9.9%
Not at all difficult	4.1%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question m14.

Mean response: Level of agreement that respondent's business has control over energy use	
Business has control over the amount of electricity it uses	6.1
	n=109

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m15.

Level of agreement that respondent's business has control over energy use	
Strongly disagree	9.2%
2	3.7%
3	7.3%
4	5.5%
5	16.5%
6	9.2%
7	15.6%
8	11.9%
9	5.5%
Strongly agree	15.6%
Total	n=109

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m15.

Mean response: Agreement that energy efficiency is an important consideration when respondent purchases equipment	
Energy efficiency is an important consideration when buying new equipment	8.3
	n=111

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m16.

Agreement that energy efficiency is an important consideration when respondent purchases equipment	
Strongly disagree	1.8%
3	2.7%
4	.9%
5	4.5%
6	6.3%
7	10.8%
8	19.8%
9	10.8%
Strongly agree	42.3%
Total	n=111

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m16.

Planning any repairs or replacements to your equipment in the next 2 years, aside from routine preventative maintenance?	
Refused	.0%
Don't know	2.5%
Programmed skip	.0%
Partial	7.4%
Yes	24.0%
No	66.1%
Total	n=121

Sempra Non-residential Process Evaluation Survey (Non-Participant), Question m18.

Do you plan to participate in a utility program for these purchases?	
Refused	.0%
Don't know	5.0%
Programmed skip	68.6%
Partial	7.4%
Yes	14.0%
No	5.0%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question m20.

Do you have any other comments you would like to make?	
Programmed skip	.0%
Partial	7.4%
Yes, record verbatim comments	13.2%
No	79.3%
Total	n=121

Sempre Non-residential Process Evaluation Survey (Non-Participant), Question m21.

ATTACHMENT 3B – THIRD PARTY PROGRAM DATA COLLECTION RESOURCES

This attachment is part of the HMG team Nonresidential Process Evaluation. This attachment presents data collection resources for the following third party programs: SaveGas, and On Bill Financing. It includes interview guides for the program staff (e.g., program manager) and the implementation contractor, customer survey questions, and vendor interview guides. All data collection activities for these programs (including customer surveys) were conducted by Research into Action. The one exception was On Bill Financing customer surveys, which were conducted by a CPUC contractor, in a collaborative effort.

Data collection resources for all other nonresidential programs are presented in Attachment 3A.

Customer survey results are provided in a separate file.

1.1 Effectiveness of Third Party Implementation (SDG&E)

1.1.1 Description of Methodology

Effectiveness of 3P implementation was a high-level synthesis of data gathered from various sources; consisting of a review of evaluated 3P program report drafts, 3P program staff and implementer interview summaries, AE focus group summaries, and marketing staff interviews. Separate evaluation teams gathered all data and summaries submitted these data to us for this high-level review.

We reviewed staff interview and implementer summaries, and participant data for the following four 3P programs:

- ◆ Premium Efficiency Cooling
- ◆ Commercial Direct Install
- ◆ SaveGas – Hot Water Control
- ◆ Retrocommissioning

1.1 SaveGas

1.1.1 Description of Methodology

The major research activities consisted of review of program documentation, in-depth interviews with implementation staff, focus groups with AEs, and surveys with participants.

Document review consisted of review of the Program Implementation Plan (PIP) and the EDC's SaveGas website¹.

We conducted in-depth interviews with implementation staff in September/October of 2011 to understand program processes and issues of concern to utility and implementer staff:

- ◆ SDG&E program manager
- ◆ Implementer staff (EDC president and vice-president)

These interviews followed up kick-off interviews with program managers and were used to design the survey instruments.

Populations

We conducted surveys with program participants, partial participants, and nonparticipants in the SaveGas program during October/November of 2011. Interviewees included general managers, facilities managers, and engineering staff members at hotels and motels. The sample included:

¹ www.savegas.com

- ◆ Hotels and motels that are utility customers
- ◆ Range of sizes, in terms of number of rooms
- ◆ Focused on chains

Participants

All contacts in the participant population were targeted for this evaluation. Participants, consisting of hotels with installed units, were selected from call lists provided by the utility. Some contacts were removed from the sample due to AE requests or overlap with other surveys.

Non-Participants

Non-participants are utility customers who have not participated in the SaveGas program. About one third of non-participant contacts were supplied by EDC as potential customers who declined participation (did not install monitoring units). Two thirds of non-participant contacts were derived from NAICS coded lists focusing on hotels and motels. We focused on chains to ensure a larger number of rooms, but we also spoke with some smaller hotels to provide breadth.

Sampling

At the initiation of the evaluation, only two program participants had enrolled in the SaveGas program. Because of the low number of participants for each utility, we estimated a total of five completes for program participants per utility. A total of 17 program participants had enrolled by the roll-out time for SoCal Gas and 11 for SDG&E. Six program participants were surveyed for SoCal Gas and 6 were surveyed for SDG&E.

To better understand why the enrollment was so low for the SaveGas program an estimated 30 completes for non-participants was proposed in the workplan. We were given a short list of EDC-contacted non-participants by EDC and used those to contact and survey a total of 14 for SoCal Gas and 5 for SDG&E. Additionally, we surveyed non-participants who had not been contacted by EDC. We surveyed a total of 34 non-participants, these include both SoCal Gas and SDG&E clients.

Analysis

While this report is specific to SDG&E, the experiences with the technology and implementer (EDC) are the same for customers of both SDG&E and SoCal Gas. Examination of the customer data did not reveal any differences between utility datasets. Therefore, we took advantage of the greater reliability provided by combining the customer data from the two utilities. Of the 12 participants, six were from the SDG&E territory and six were from the SoCal Gas territory. Of the 48 non-participants, 12 were from the SDG&E territory and 36 were from the SoCal Gas territory.

1.1.2 Program Staff Interview Guide

Sempra Portfolio Evaluation

SaveGas Program Manager Interview Guide (SDG&E)

September, 2011

INTERVIEWEE NAME:

INTERVIEW DATE:

COHORT:

INTERVIEWER:

WORK BREAK-DOWN

1. Generally, how do you spend your time when working on the SaveGas program? [If needed] How much time do you typically spend on these activities?

EFFICIENT USE OF RESOURCES

2. Do you feel that the program offerings for customers are redundant? [If needed] For example, do multiple programs offer one kind of customer the same or very similar services or equipment?
3. Do you think there is redundancy in staffing, for example, more than 1 person doing the same thing?
4. Which positions or roles?
5. Do you have any ideas about what could be done to fix these issues?

INTERNAL PROGRAM COORDINATION

6. Is coordinating with other Sempra program staff a challenge for you or the SaveGas program?
7. In what way is coordinating with other Sempra program staff a challenge?
8. Do you have any challenges managing the SaveGas program due to the needs or requests of other programs or staff? [Probe for details, examples]

CLARRIFICATION OF ROLES AND RESPONSIBILITIES

9. Does your program coordinate with account executives?
10. Is this critical to the success of the SaveGas program?
11. Do you feel like the account executive's goals are aligned with the goals of the SaveGas program?
12. What do you think could be done to align account executives' goal with program goals?

GENERAL MARKETING QUESTIONS

13. Who is most responsible for marketing the program to potential participants?
14. How effective has this lead person /group been in conducting program outreach?
15. What outreach methods have each of [the above groups] used in reaching customers?
16. How effective have each of these methods been?
17. What additional outreach methods are needed to reach the target population?

18. Is the outreach budget sufficient to support the programs, and in particular, the SaveGas program?
19. In what areas is it lacking?

IT and DATA TRACKING

20. How is the program currently tracking participant application data?
21. Does your current participant database meet the SaveGas program reporting needs?
22. Are customer leads currently being tracked?
23. What type of database user training does program staff receive?
24. Do you have any recommendation on improving EE program database applications?

THIRD PARTY INTEGRATION

25. How often do you communicate with 3P staff and by what method?
26. Do you feel he lets you know about important information?
27. Do any customer issues come up in these conversations? (How are these issues resolved)
28. How satisfied are you with the way 3P staff manage project data?
29. Do you feel the 3P firm has allocated sufficient resources to the SaveGas program to ensure it performs as expected?
30. Do you believe the 3P firm has sufficient market knowledge and connections to adequately promote the SaveGas program?
31. How regularly does your 3P firm follow Sempra's guidelines concerning the use of Sempra and your utility's logos?
32. Is the 3P firm using appropriate QA?

BENCHMARKING

33. What has been your experience with benchmarking for the SaveGas program?
34. Why do some customers decline benchmarking?
35. To what extent does the benchmarking requirement impede or delay participation in IOU programs?
36. Is the benchmarking tool easy to use?
37. Are benchmarking results easy to interpret?
38. Are benchmarking results useful?
39. How could the benchmarking process and results be more useful to customers?

REGULATORY

40. How would you characterize the relationship between the IOU program staff and the CPUC Energy Division? Who at the Energy Division do they routinely interact with?
41. What issues is the CPUC ED most concerned with regarding this particular program?
42. What are the major regulatory requirements that program staff spend their time on [or confirm from notes] (Probe for each response item below: What are its objectives / intended outcomes? How high is the priority 1) for the State, 2) for the IOU >High / Medium / Low : Why?)
43. How much effort does it take the IOUs to track, follow and address this requirement?

- 44. Do you believe this is an appropriate level of effort?
- 45. Do you have suggestions for getting more value out of this requirement and/or reducing its required level of effort?
- 46. Are the objectives of this requirement being met?
- 47. Would you say that the IOU Program Managers are meeting the regulatory requirements in general?

PROGRAM SPECIFIC

- 48. Do you feel the SaveGas program as secured enough savings to date to meet its goals?
- 49. Have any changes been made to increase participation?
- 50. Are these changes working and will you consider other changes?
- 51. What do you think are the barriers to getting more prospective clients? (open-ended response) [Probe for specifics]

1.1.3 Implementer Interview Guide

Sempra Portfolio Evaluation

3P Implementer Interview Guide

September 2011

INTERVIEWEE NAME:

INTERVIEW DATE:

COHORT:

INTERVIEWER:

RESPONDENT BACKGROUND

- 52. What activities do you perform for the SaveGas program?

PROMOTION

- 53. What kinds of marketing materials/guidelines has SEMPRA given you?
- 54. How do you market the SaveGas program to potential program participants?
- 55. Trade show
- 56. Bill insert
- 57. Brochure
- 58. Word of mouth
- 59. Phone call
- 60. Door-to-door
- 61. Other
- 62. How do you make the first contact with prospective participants?
- 63. Are there any challenges to making these first contacts?
- 64. When discussing the program with prospective participants, what do you do to sell the program?

PARTICIPATION DECISION

65. How many prospects have you contacted about the SaveGas program? (Get #)
66. Generally, how many web presentations do you conduct?
67. And, how many audits do you conduct?
68. And, about how many test units have you put in?
69. What percent of those prospects declined to participate in the SaveGas program? (%)
70. At what stage do prospects typically decline? [Probe for % and % decline at each stage]
71. Initial contact
72. Web presentation
73. Audit, Test unit
74. Primary installation
75. What reasons did they give you for not participating in the program?
76. Typically, how do you address these concerns?
77. Do you think that the test unit helps convince prospects to participate?

WEB PRESENTATION

78. Please describe how you give a web presentation to customers? Is there a presenter or is it user driven?
79. What are the key points of the presentation?
80. What parts of the web presentation are helpful to prospects?
81. What parts, do you think could use improving?
82. Can we view the web presentation at some point?

COORDINATION/INTERACTION

83. Whom at SCG and SDG&E do you primarily work with? [Get name and role]
84. Are there any additional tools or support that SCG or SDG&E could give you to help market the SaveGas program?
85. If Yes: What could they provide?
86. What is the program process flow (probe for role of technicians)?
87. Do you have a diagram?
88. If they have technicians, can you give us the contact information for one of your technicians?
89. What is the typical timeline for installation?
90. How do you coordinate installation with technicians?
91. Once you've installed a system, what are your processes for maintaining the system?
92. How are things working with the technicians that conduct audits or perform installations?

INSTALLATION/MONITORING

93. What data do you collect from the systems? When do you collect data? How are these data collected?
94. Are you familiar with any data quality issues?
95. If yes, do you know the cause of these issues?
96. What formal training do you provide participants for the online monitoring system?

97. What have you heard from clients about their experiences with the online monitoring system?

98. Have you faced issues commissioning the system? Please describe?

BARRIERS

99. What, do you think are the barriers to participation?

100. What would increase program participation?

101. Does your physical location in Northern California negatively affect your day-to-day sales work in Southern California?

102. Do you think the economy has influenced your sales rate? How so?

CLOSING

103. What would you like to learn from this evaluation?

DATA TO ASK FOR

104. List of non-participants who have been contacted by EDC

1.1.4 Customer Survey Guides

Participating Customer Survey Guide

Q1 IOU

- ◆ SDG&E
- ◆ SoCal Gas

Q2 Interview Information

Name of Interviewee

Date of Interview

Interviewer Name

Q3 Hello, my name is [NAME] from Research Into Action, calling on behalf of SDG&E. We are working with SDG&E to evaluate the services and offerings they provide to their customers. I'm calling specifically to find out about your experience with the SaveGas program, administered by EDC tech. The Save Gas program provides technical assistance, training, and cost sharing on water heating measures. Are you familiar with EDC's SaveGas program? Are you the correct person to speak with? Please be assured that this isn't a sales call and that all responses are confidential. Is this a good time to talk? If not, when might I speak with you for 20 minutes?(If NO, take down contact information and end survey)

- ◆ Yes: Take survey
- ◆ No: Collect contact data

Q4 If not correct person, ask who is

Name of new contact

Title

Phone number

Best time to reach them

Q5 If Q3=No Then End of survey

Q6 What is the main business activity at this facility?

- ◆ Hotel or Motel
- ◆ Other _____

Q7 How many guest rooms or occupant rooms are there?

Q8 What are your responsibilities?

Q9 What types of equipment uses the most electricity at your facility?

- ◆ Motors and Pumps
- ◆ Drives
- ◆ Lighting
- ◆ HVAC
- ◆ Food Service Equipment
- ◆ Laundry Equipment
- ◆ Other _____
- ◆ Don't Know
- ◆ Refused

Q10 What types of equipment uses the second most electricity at your facility?

- ◆ Motors and Pumps
- ◆ Drives
- ◆ Lighting
- ◆ HVAC
- ◆ Food Service Equipment
- ◆ Laundry Equipment
- ◆ Other _____
- ◆ Don't Know

- ◆ Refused

Q11 What types of equipment uses the most natural gas at your facility?

- ◆ Boilers
- ◆ HVAC and Furnaces
- ◆ Food Service Equipment
- ◆ Laundry Equipment
- ◆ Pumps
- ◆ Other _____
- ◆ Don't Know
- ◆ Refused

Q12 What types of equipment uses the second most natural gas at your facility?

- ◆ Boilers
- ◆ HVAC and Furnaces
- ◆ Food Service Equipment
- ◆ Laundry Equipment
- ◆ Pumps
- ◆ Other _____
- ◆ Don't Know
- ◆ Refused

Q13 Has your organization developed a specific policy for the selection of energy efficient equipment? [For example: A requirement that all new fluorescent lighting systems use electronic ballasts, or that all boilers have a minimum thermal efficiency.]

- ◆ Yes - Please describe those policies. _____
- ◆ No _____
- ◆ Don't Know _____
- ◆ Refused

Q14 Who makes decisions on equipment purchases or upgrades? (Mark all that apply - don't read answer choices)

- ◆ Facilities Manager
- ◆ Building Manager
- ◆ Energy Manager
- ◆ Other facilities management/ maintenance position
- ◆ Chief Financial Officer
- ◆ Other financial/ administration position
- ◆ Proprietor/ Owner
- ◆ President/ CEO
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q15 What difficulties have you had, either inside or outside your company, with purchasing and installing an energy efficiency upgrade through this or any SDG&E program? (Mark all that apply - don't read answer choices)

- ◆ No difficulties
- ◆ Other priorities for capital spending
- ◆ Lack of funds available for investment
- ◆ Lack of financing
- ◆ Amount of management time to oversee projects
- ◆ Incremental cost for more efficient equipment too high/ Payback period too long
- ◆ Rebate amount not high enough
- ◆ Business hesitant to replace existing working equipment
- ◆ Upper management doesn't see the benefit of energy efficient equipment
- ◆ We lease the space
- ◆ Contractors weren't familiar with program
- ◆ Rebate application process was demanding
- ◆ Economy
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q16 Now I'm going to ask you some questions about your facility's participation in the SaveGas program. Program Description: The Save Gas program provides technical assistance, training, and cost sharing on water heating measures

Q17 How did you first hear about the program? (Mark all that apply - don't read answer choices)

- ◆ SDG&E account executive
- ◆ Other SDG&E staff
- ◆ SDG&E call center
- ◆ SDG&E utility bill insert
- ◆ SDG&E mailing (hard copy)
- ◆ SDG&E utility email message
- ◆ SDG&E website
- ◆ From participation in another SDG&E program (Enter in program name) _____
- ◆ Contractor/ retailer
- ◆ Conference/ trade show
- ◆ Colleague/ Peer
- ◆ Television ad
- ◆ Print media ad
- ◆ Radio ad

- ◆ Other _____
- ◆ Don't Know
- ◆ Refused
- ◆ 3P Implementer

Q18 How would you prefer to receive information and updates about SDG&E energy efficiency programs? (Mark all that apply - don't read answer choices)

- ◆ SDG&E account executive
- ◆ Other SDG&E staff
- ◆ SDG&E call center
- ◆ SDG&E utility bill insert
- ◆ SDG&E mailing (hard copy)
- ◆ SDG&E utility email message
- ◆ SDG&E website
- ◆ Contractor/ retailer
- ◆ Conference/ trade show
- ◆ Colleague/ Peer
- ◆ Television ad
- ◆ Print media ad
- ◆ Radio ad
- ◆ Other _____
- ◆ Don't Know
- ◆ Refused
- ◆ 3P Implementer

Q19 Why did you participate in this program? (Mark all that apply - don't read answer choices)

- ◆ To save money
- ◆ The equipment failed/worked poorly and I needed to replace it
- ◆ Contractor/ engineer/ technical assistant recommended we participate
- ◆ Account executive recommended we participate
- ◆ Corporate practice
- ◆ Availability of the SDG&E rebate
- ◆ Past participation with SDG&E program
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q20 Did you complete an audit for your system?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know
- ◆ Refused

Q21 Did the audit reveal any new information to you?

- ◆ Yes _____

- ◆ No _____
- ◆ Don't know _____
- ◆ Refused
- ◆
- ◆ Q22 Did you view the web demonstration for the SaveGas program?
- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q23 What aspects of the web demonstration were helpful to you?

Q24 What aspects of the web demonstration could be improved?

Q25 Did you pencil out the savings you'd get from the SaveGas program?

- ◆ Yes - What was the minimum break-even point? _____
- ◆ No _____
- ◆ Don't know _____
- ◆ EDC did this as a way to sell the program _____
- ◆ Refused

Q26 What was influential in your decision to participate? (Choose all that apply)

- ◆ Saving money on utility bills
- ◆ Desire to be current on technology
- ◆ Company policies favoring sustainability
- ◆ Program covered retrofit costs
- ◆ Being alerted to maintenance issues
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q27 Did you have any concerns about the... If Yes: [PROBE: What are your concerns?]

	Yes	No (put X if NO)
Monitoring		
Consistent heating		
Dependable performance		

Q28 Did you raise these concerns with program staff?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q29 Did program staff address your concerns?

- ☐ Yes - How? _____
- ☐ No - What didn't they address? _____
- ☐ Don't know _____
- ☐ Refused

Q30 Overall, how has the system worked for you?

Q31 How much energy/money do you think you're saving because of this program?

Q32 Have there been any difficulties with the monitoring or boiler system?

Q33 Do you have problems understanding the online monitoring system?

- ◆ Yes - What are the problems? _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q34 As part of the program, did someone from SDG&E come to inspect the energy efficient equipment?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q35 How could the inspection process be improved?

Q36 On a scale of 1 to 5, where 1 means "not at all helpful" and 5 means "extremely helpful", how helpful were the following to you in understanding the program?

	1 - Not at all helpful	2	3	4	5 - Extremely helpful	Don't know	Refused
Program Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Web Presentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing Materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program Website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q37 On a scale of 1 to 5, where 1 means "not at all satisfied" and 5 means "extremely satisfied", how satisfied were you with the following:

	1 - Not at all satisfied	2	3	4	5 - Extremely satisfied	Don't know	Refused
Inspection/audit process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scheduling process to install the system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Installation as a whole	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance of the online monitoring system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SaveGas Technician	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q38 Overall, how satisfied were you with the program? Again, please rate on a 5 point scale, where 1 is not at all satisfied and 5 is extremely satisfied.

- ◆ 1 - Not at all satisfied
- ◆ 2 - Not satisfied
- ◆ 3 - Somewhat satisfied
- ◆ 4 - Satisfied
- ◆ 5 - Extremely Satisfied
- ◆ Don't know
- ◆ Refused

Q39 Can you explain?

Q40 On a scale of 1 to 5, how interested would you be in participating in this program again? Where 1 is not at all interested, and 5 is extremely interested in participating.

- ◆ 1 - Not at all interested
- ◆ 2 - Not interested
- ◆ 3 - Somewhat interested
- ◆ 4 - Interested
- ◆ 5 - Extremely interested
- ◆ Don't know
- ◆ Refused

Q41 Please explain?

Q42 Besides this program, are you aware of other assistance you could receive from SDG&E to promote energy efficiency for businesses like yours?

- ◆ Yes - What types of programs? _____
- ◆ No _____
- ◆ Don't Know _____
- ◆ Refused
- ◆
- ◆ Q43 Has your organization participated in any of the programs you mentioned?
- ◆ Yes - Which ones? _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q44 Are you planning any repairs or replacements to your equipment in the next two years?

- ◆ Yes - What types are you considering? _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q45 Do you plan to participate in a SDG&E program for these purchases?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q46 I know your time is valuable but I've got a couple more questions if you have the time for them.

Q47 How interested would you be in using an online tool from SDG&E that shows your business's current energy costs to date for the month and an estimation of what your bill will be? Would you say you are...?

- ◆ Not interested at all
- ◆ Not very interested
- ◆ Somewhat interested
- ◆ Very interested
- ◆ Don't know
- ◆ Refused

Q48 SDG&E "Reduce your use" days (also known as "event days") are days when there is unusually high demand for electricity, such as very hot summer days. One day in advance of a "Reduce your use" day, SDG&E will notify you and ask you to reduce your business's electricity use between the hours of 11 am and 6pm the following day. In general how difficult would it be for you to shift or make adjustments to your business's electricity usage during weekdays from 11am to 6pm? Would it be...?

- ◆ Very difficult to make
- ◆ Somewhat difficult to make
- ◆ Not very difficult to make
- ◆ Not at all difficult to make
- ◆ Don't know
- ◆ Refused

Q49 How difficult would it be for you to shift or make adjustments to your business's electricity usage from 11am-6pm on Reduce your Use days with only one day notice? Would it be...?

- ◆ Very difficult
- ◆ Not very difficult
- ◆ Not at all difficult
- ◆ Don't know
- ◆ Somewhat difficult
- ◆ Refused

Q50 For the next two questions, I'd like you to use a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree. How much do you agree that your business has control over the amount of electricity it uses.

- ◆ 1 - Not at all interested
- ◆ 2
- ◆ 3
- ◆ 4
- ◆ 5
- ◆ 6
- ◆ 7
- ◆ 8
- ◆ 9
- ◆ 10 - Extremely interested
- ◆ Don't know
- ◆ Refused

Q51 How much do you agree that energy efficiency is an important consideration when your business buys any devices or equipment that uses energy?

- ◆ 1 - Not at all interested
- ◆ 2
- ◆ 3
- ◆ 4
- ◆ 5
- ◆ 6
- ◆ 7
- ◆ 8
- ◆ 9
- ◆ 10 - Extremely interested
- ◆ Don't know
- ◆ Refused

Q52 I want to describe 2 other programs from which your facility may be eligible. For each, please tell me how interested you might be in participating on a 10 point scale, where 1 is not at all interested and 10 is extremely interested.

Q53 The Energy Savings BID program, which provides incentives for a large energy efficiency project, or a bundle of energy efficiency projects. Projects must save 500,000 kWh or 25,000 therms annually.

- ◆ 1 - Not at all interested
- ◆ 2
- ◆ 3
- ◆ 4
- ◆ 5
- ◆ 6
- ◆ 7
- ◆ 8
- ◆ 9
- ◆ 10 - Extremely interested
- ◆ Don't know
- ◆ Refused

Q54 An On Bill Financing program, which provides a zero percent interest rate loan to large energy efficiency improvement projects.

- ◆ 1 - Not at all interested
- ◆ 2
- ◆ 3
- ◆ 4
- ◆ 5
- ◆ 6
- ◆ 7
- ◆ 8
- ◆ 9
- ◆ 10 - Extremely interested
- ◆ Don't know
- ◆ Refused

Q55 Who was responsible for getting the application completed and submitted? (Mark all that apply - don't read answer choices)

- ◆ Internal staff in organization
- ◆ Vendor or contractor
- ◆ SDG&E Account Executive
- ◆ Other SDG&E staff

- ◆ Other _____
- ◆ Don't know
- ◆ Refused
- ◆ Respondent

Q56 How likely were you to apply for the rebate on your own, if the [Q55 Choice] was unable or unwilling to do so on your behalf? Please rate on a 1 to 5 scale, where 1 is "not at all likely" and 5 is "extremely likely".

- ◆ 1 - Not at all likely
- ◆ 2 - Not likely
- ◆ 3 - Somewhat Likely
- ◆ 4 - Likely
- ◆ 5 - Extremely likely
- ◆ Don't know
- ◆ Refused

Q57 Was it very difficult, difficult, somewhat difficult, somewhat easy, or very easy to submit the application

- ◆ 1 - Very Difficult
- ◆ 2 - Somewhat Difficult
- ◆ 3 - Neutral
- ◆ 4 - Somewhat Easy
- ◆ 5 - Very Easy
- ◆ Don't know
- ◆ Refused

Q58 Did you have any problems with the application process?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q59 What were they and how were they resolved? (try to postcode - e.g., finding model number, finding serial number, providing manufacturer specs, not sure about eligibility, etc.)

Q60 Did you receive a rebate in the SaveGas program?

- ◆ Yes _____
- ◆ No _____

- ◆ Don't know _____
- ◆ Refused

Q61 Were you satisfied with the amount of time it took to receive the rebate?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't Know _____
- ◆ Refused

Q62 Was the rebate or incentive amount you received more, about the same, or less than you expected?

- ◆ More _____
- ◆ About the same _____
- ◆ Less _____
- ◆ Don't Know _____

Q63 Those are all the questions we have for you. Do you have any other comments you would like to make?

Q64 Thank you for your time!

Non-Participating Customer Survey Guide

Q1 IOU

- ◆ SDG&E
- ◆ SoCal Gas

Q2 Hello, my name is _____ and I'm calling on behalf of SDG&E. We are conducting research on behalf of SDG&E to assess the services they provide to their customers. I'm calling specifically to find out about your experience with the SaveGas program, administered by EDC tech. I would like to speak to you for approximately 10-15 minutes with you? Is this a good time? Please be assured that this isn't a sales call and that all responses will be treated confidentially.

[Description:] The Save Gas program provides technical assistance, training, and cost sharing on water heating measures.

[IF NOT RESPONDENT, COLLECT CORRECT CONTACT INFORMATION AND RESTART SURVEY]

Q3 Participant Info

- ◆ Name of Interviewee
- ◆ Date
- ◆ Name of Interviewer

Q4 How would you characterize your business?[Read categories if needed]

- ◆ Hotel or Motel
- ◆ Laundry / Cleaners
- ◆ Other _____
- ◆ Refused
- ◆ Don't know

Q5 How many guest rooms or occupant rooms are there?

Q6 What are your responsibilities?

Q7 Has your facility applied or participated in an SDG&E program? For example, has your facility received a rebate, audit, incentive, or education?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q8 If so, what was the program, and did your facility complete its participation in the program?

Q9 Are you familiar with the SaveGas program

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q10 How did you first hear about the SaveGas program?

- ◆ EDC Staff (SaveGas people)
- ◆ SDG&E account executive
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q11 Initially, why did you consider the SaveGas program? [Probe: What did you hope to get out of the program?]

Q12 Did you have concerns about the program?

- ◆ Yes - What were they? _____
- ◆ No
- ◆ Don't know
- ◆ Refused

Q13 Did program staff address your concerns?

- ◆ Yes - How? _____
- ◆ No - Why not? _____
- ◆ Don't know
- ◆ Refused

Q14 What would have been your "break-even" point to decide to participate? [Probe: ROI?]

Q15 Did you view the web demonstration for the SaveGas program?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q16 What aspects of the web demonstration were helpful to you?

Q17 What aspects of the web demonstration could be improved?

Q18 On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful were the following?

	1 - Not at all helpful	2	3	4	5 - Very helpful	N/A	Don't know	Refused
Program staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Web presentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q19 Why did you choose not to participate in the SaveGas program?

Q20 How could your experience have been improved?

Q21 Do you plan to replace or repair any gas-using equipment in the next 2 years?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q22 Which equipment?

- ◆ Boilers
- ◆ Furnaces
- ◆ Food Service Equipment
- ◆ Laundry Equipment

- ◆ Pumps
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q23 Do you plan to replace or repair any electricity -using equipment in the next 2 years?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q24 Which equipment?

- ◆ Motors and pumps
- ◆ Drives
- ◆ Lighting
- ◆ HVAC
- ◆ Food Service Equipment
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q25 How likely are you to consider energy-efficiency when installing or replacing energy-using products for your organization? Please give me a rating from 0 to 10, (where 10 means you're EXTREMELY likely to consider energy-efficient products, and 0 means you're NOT AT ALL LIKELY to consider energy efficient products.

- ◆ 0 - Not at all likely
- ◆ 1
- ◆ 2
- ◆ 3
- ◆ 4
- ◆ 5
- ◆ 6
- ◆ 7
- ◆ 8
- ◆ 9
- ◆ 10 - Extremely likely
- ◆ Don't know
- ◆ Refused

Q26 Why is this?

Q27 Has your organization developed a specific policy for the selection of energy-efficient equipment?[e.g. Requirement that all new fluorescent lighting systems use electronic ballasts, or that all new motors be premium efficiency.]

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q28 Please describe those policies?

Q29 Who makes decisions on equipment purchases or upgrades?

- ◆ Facilities manager
- ◆ Building manager
- ◆ Energy manager
- ◆ Other facilities management / maintenance position
- ◆ Chief Financial Officer (CFO)
- ◆ Other financial / administrative position
- ◆ Proprietor / Owner
- ◆ President / CEO
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q30 Have you had any challenges with purchasing or installing energy efficiency equipment?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q31 If so, What were these challenges?(Do not read, mark all that apply)

- ◆ No difficulties
- ◆ Other priorities for capital spending
- ◆ Lack of funds available for investment
- ◆ Lack of financing
- ◆ Amount of management time to oversee projects
- ◆ Incremental cost for more efficient equipment too high / payback period too long

- ◆ Business hesitant to replace existing working equipment
- ◆ Upper management doesn't see the benefit of energy efficiency equipment
- ◆ Not sure which equipment to choose
- ◆ Desired equipment not available _____
- ◆ We lease space
- ◆ Economy
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q32 Before this call, were you aware that SDG&E offers programs to help you increase the energy efficiency of your organization? Aside from the SaveGas program?

- ◆ Yes _____
- ◆ No _____
- ◆ Don't know _____
- ◆ Refused

Q33 Which programs were you aware of?(Gather description of program and, if known, program name)

Q34 Did you know that your facility was eligible for any of these programs, and chose not to participate?

- ☐ Yes _____
- ☐ No _____
- ☐ Don't know _____
- ☐ Refused

Q35 If so, please describe the program?(Prompt with list of program type descriptions if needed)

Q36 Why did you choose not to participate in the program?

Q37 What type of equipment did you install without assistance from the program, that you believe would have been eligible?

- ◆ Motors and pumps
- ◆ Drives
- ◆ Lighting

- ◆ HVAC and furnaces
- ◆ Boilers
- ◆ Food service equipment
- ◆ Laundry equipment
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q38 How did you first hear about the program?

- ◆ SDG&E account executive
- ◆ Other SDG&E staff
- ◆ SDG&E call center
- ◆ SDG&E utility bill insert
- ◆ SDG&E mailing
- ◆ SDG&E utility email message
- ◆ SDG&E web site
- ◆ From participation in another SDG&E program _____
- ◆ Contractor / Retailer
- ◆ Conference / Trade show
- ◆ Colleague
- ◆ Television ad
- ◆ Print media ad
- ◆ Radio ad
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q39 How would you prefer to receive information and updates about SDG&E energy efficiency programs?

- ◆ SDG&E account executive
- ◆ Other SDG&E staff
- ◆ SDG&E call center
- ◆ SDG&E utility bill insert
- ◆ SDG&E mailing
- ◆ SDG&E utility email message
- ◆ SDG&E web site
- ◆ From participation in another SDG&E program _____
- ◆ Contractor / Retailer
- ◆ Conference / Trade show
- ◆ Colleague
- ◆ Television ad

- ◆ Print media ad
- ◆ Radio ad
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q40 I would like to describe a few types of SDG&E programs for which your facility may be eligible for participating. For each, please describe your interest in participating on a 1-5 scale, where 1 is not at all interested, and 5 is extremely interested, and N/A if you don't think the program applies to your facility.

	1 - Not at all interested	2	3	4	5 - Extremely interested	N/A	Don't Know
An audit type program, providing a site walk through and recommendations on energy efficiency upgrades for your facility. [SCG= Audit, SDG&E= Comprehensive Industrial Energy Efficiency]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An HVAC Retro-commissioning program, to tune up your HVAC equipment to make it run more efficiently.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A program to provide premium tune-ups and maintenance of HVAC equipment, and incentives for HVAC equipment and controls [Premium Cooling Efficiency]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A direct install program, providing free installation of	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

low-cost energy efficiency measures at small to medium sized businesses (demand < 100kW)							
A rebate program, where the rebate amounts are based on the equipment installed [Deemed]	○	○	○	○	○	○	○
An incentive program, where the incentive amount is calculated based on the predicted energy savings [Calculated / BID]	○	○	○	○	○	○	○
A program offering 0% interest loans for energy efficiency upgrades [OBF]	○	○	○	○	○	○	○
A program that provides technical assistance, training, and cost sharing on water heating measures. [SaveGas]	○	○	○	○	○	○	○

Q41 Comments

Q42 For the program types for which you are interested, what would motivate your organization to participate? (Do not read unless customer needs prompt)

- ◆ Upgrading or replacing equipment
- ◆ Saving money on energy bills
- ◆ Obtaining a rebate
- ◆ Technical assistance
- ◆ Protecting environment
- ◆ Corporate policies
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q43 Why might you NOT participate in a program? (Do not read)

- ◆ Application takes too much time
- ◆ Rebate not high enough
- ◆ Don't have enough program information
- ◆ Don't believe energy savings claims
- ◆ Other _____
- ◆ Don't know
- ◆ Refused

Q44 Those are all the questions I have for you. Do you have any other comments you would like to make?

Q45 Thank you for your time!

1.1 On Bill Financing

1.1.1 Description of Methodology

The research team conducted the evaluation of the OBF program. The major research activities included:

- ◆ Review of program documentation
- ◆ In-depth interviews with utility staff
- ◆ Survey of participants, and vendors

Review of program documentation consisted of review of the Program Implementation Plan, 2006-08 Program Evaluation study, program website, and application forms.

We conducted in-depth interviews with the SEMPRA program designer and program manager. The in-depth interviews followed up on kick-off interviews focusing on the program processes, issues of concern to program management, and status of the program. This information was used to design the survey instruments.

Populations

The research team conducted surveys with program participants and vendors who offer OBF.

Participants

The program participant sample-frame was generated by random selection from SDG&E's project database. Most respondents were small commercial gas consumers, 10% of the sample included large commercial gas consumers.

Vendors

The vendor sample-frame was generated by random selection from a list of OBF qualified vendors, provided by SDG&E. Vendors included company owners and contractors who install program qualified measures at OBF participant locations.

1.1.2 Program Staff Interview Guide

Warm Up Questions

1. As I understand it, you are the program manager for [Insert IOU name]'s On-Bill Finance program. What is your history with the program?
2. What are your responsibilities (day to day, design, policy, customer support)?

General Questions

3. What are the goals for the OBF program?
4. How are program funds currently distributed among applicants? [i.e., first come first serve] Who decides this?
5. What are the OBF application approval and loan monitoring processes at [Insert IOU name]'s? (open-ended response)
 - ♦ What processes?
 - ♦ Who is responsible for the processes?

- ♦ What forms and monitoring activities are involved?
6. The utility often returns OBF applications to vendors for clarifications or “rework” on the application. What is the main reason applications need to be reworked? (open-ended response) What is the OBF vendor certification process? (open-ended response)
- ♦ Are the certification standards adequate?

Marketing

7. How is the On-Bill Finance program marketed? (Ask open-ended, and then ask specifically about: Utility account executives, Trade shows, Contractors, Industry associations, Word-of-mouth, Marketing materials, Mailers, Advertising, Outdoor ads, Trade publications, Other))
- ♦ Do you communicate with other program managers and account executives about marketing? What do you hear from them regarding customer interest in OBF?
 - ♦ Which marketing activities are working best? Why do you feel these activities are working well?
8. What training have contractors received regarding the OBF program? If yes, did it include tips on marketing the program?

Customers

9. How frequently are applications rejected? What is the most common reason for rejecting an application? (probe: does not pass positive cash flow requirement, payback period too long, etc)
10. Have you noticed any changes in DSM program participation or demand as a result of offering OBF?
- ♦ Among which customer segments? (small/large/taxpayer funded)
11. On what percentage of eligible projects is OBF being used?
12. Do you think OBF helps customers overcome the first cost barrier to energy upgrades?
13. What do customers like about OBF?
14. What objections or concerns about OBF are you hearing from customers? Ask open-ended, and then ask specifically about:
- ♦ Reluctance to take on additional debt for non-core activities?

- ◆ Lack of technical assistance and procurement service support?
- ◆ Cumbersomeness of the decision making process (budgeting process)?
- ◆ Lack of a compelling value proposition, with energy costs at 2-4% of operating budgets?
- ◆ Performance risk?
- ◆ Split incentives?
- ◆ Program application process?
- ◆ Other?

15. At what points are customers most likely to drop out of the OBF program?

- ◆ For what reasons?

IOU Experiences/Concerns

16. What is the OBF default rate?

17. Typically, what are the causes for loan default?

18. What are the implications for default for the customer? [probe disconnect]

- ◆ For the utility?

19. How does the IOU manage risks associated with the program? [probe for security requirements: property lien, personal guarantee, etc.]

20. What are your fixed and variable costs for supporting OBF and how many transactions is it associated with?

21. What long term obligations do the IOUs take on when they offer this type of financing program?

22. What are the biggest challenges utilities face with the OBF program? Ask open-ended, and then ask specifically about:

- ◆ Having to come up with the loan capital
- ◆ The lending process of approving and originating the loans
- ◆ The billing process
- ◆ The collection process for overdue payments
- ◆ The risk of default

23. What challenges do you see in scaling up the current program?

24. Do you think OBF, as it's currently implemented is a good idea? Why or why not?

25. What could be done to make OBF more attractive to IOUs?

Market Assessment

26. What are the pertinent legal and regulatory issues surrounding OBF?
- ♦ How does it affect the program?
27. How are the loans financed? (Probe: by the utility, by a bank)
28. What are your thoughts about accessing additional capital for the program? Ask open-ended, and then ask specifically about: third-party lenders; utility capital; ratepayers (service benefit charges); QECBs (Qualified Energy Conservation Bonds)?
29. What do you think about a third party capital provider model where a lender originates and services the obligation, so that the IOU's only role would be to put the monthly loan payment on the utility bill and pass the payments along to the bank? What would be the disadvantages?
30. What are your thoughts about use of credit enhancement, such as loan loss reserves, loan guarantees, or interest rate buydowns? Who should provide these enhancements?
31. What issues would be involved in switching to a tariff-based model where the payment obligation is associated with the power meter (and the obligation could pass to the new owner upon resale of the property)?
32. What about a combination of 3rd party lending and tariff based obligation?
- ♦ How would partial payments be handled?
 - ♦ Would changes need to be made to the current shut-off provisions?
33. Has the utility ever had an energy service contracting arm? If so, how was that experience? Would the utility ever consider doing it again under better circumstances?

Closing Questions

34. What do you feel is working well about the program? What needs to be improved?
35. Is there anyone else you recommend we speak with to get additional perspectives on the program? [Note to interviewer: get name, organization, and contact info. Also, ask why respondent thinks this person's perspective would be helpful].
36. If we have additional follow up questions, would you mind if we contacted you again?

1.1.3 Vendor Survey Guide

Introduction section – HMG

Intro script

Hello, my name is [XX], and I'm calling from [XX]. We are conducting research on behalf of San Diego Gas & Electric and the California Public Utilities Commission to provide recommendations on improving their energy efficiency programs to better serve their customers. I'm calling specifically to find out about your experience with the On Bill Financing program. I would like to speak for approximately 30 minutes with you or someone else familiar with your company's projects that were part of the program. All responses will be treated confidentially.

Respondent Background

1. What is your title and what are your responsibilities?
2. How did you first learn about San Diego Gas & Electric's on-bill financing program?
3. Is your business participating as a vendor in other utility-run OBF programs in California?
4. How many employees work at your location?
5. Would you consider yourself / company to be a project aggregator—a company that aggregates applications for other vendors and submits them to the utility?

Respondent Participation Decisions

6. What aspect of the program made you want to participate as a vendor?
7. Has your experience with the program differed from what you expected? If so, how?
8. Did you have any difficulties becoming a participating vendor? (Probe: training requirements, floating project costs until IOU payment disbursed, time commitment, etc.)
9. How many projects do you complete a year as part of the IOUs' energy efficiency programs, on average?
 - What percentage of these would you say use OBF?
 - Would you say that percentage is growing over time?
10. Of your job financed with OBF, how important was on-bill financing in enabling you to secure those jobs, on a scale of one to five, where 1 means "not at all important" and 5 means "very important"?
 - Why do you say that?

11. What equipment, financed through OBF, do you typically install for customers?
 - [If mention more than lighting] We are interested in your experience selling more comprehensive efficiency projects--that is, those that include more than just lighting. What challenges have you come across when selling comprehensive efficiency projects and how did you overcome those challenges?
 - [If mention more than lighting] Do you think OBF helps you sell more comprehensive projects?
12. If the OBF program started requiring vendors to sell more comprehensive projects (defined as projects that include more than just lighting), how would your company adapt to the requirement to install comprehensive projects if nothing else changed in the program? What kind of support, if any, would be useful to enable you to sell more comprehensive projects? (if interviewing lighting vendor, ask specifically what would make them interested in working with other vendors)
 - Customer Participation Decisions
13. When you discuss financing options with energy-efficiency program participants, which of their departments typically are involved in decision making? (Probe: Accounting/Finance, Engineering, Operations, Facilities managers, Don't know, Other)
14. What criteria (e.g., payback, return on investment (ROI), availability of capital, financing) do customers use in assessing whether they will go through with an energy efficiency investment? What criteria do they use to assess whether or not to use financing? (Probe: does project size matter)
15. The utility categorizes OBF participants as: taxpayer funded (government/institutional), small commercial/industrial/agriculture, and medium to large (>200 kW) commercial/industrial/agriculture. What is the main category your OBF customers fall into?
16. Did customers have any concerns about the OBF program? (Probe: Are customers concerned that the program financing will negatively affect their balance sheet or reduce their borrowing capacity? Have to move soon?)
17. How do customers who do not use OBF usually pay for energy-efficiency improvements? (Probe: Upfront with cash, payment plan, obtain loan from bank, rebates etc.)
18. If you could only offer customers rebates or financing through the utility, but not both, which would you choose to offer?
19. In the future, 0% financing may not be available. If on-bill financing carried an interest rate competitive with the market, would you still offer it to your customers?

Program Promotion

20. Do you incorporate the OBF program into your promotional efforts? If so, how?
21. Which of your promotional activities have been most successful at enrolling organizations in OBF? Why do you think those were particularly successful?
22. When explaining OBF to customers, how do you describe what participants are responsible for? (open-ended)
 - Participant is responsible for 3 , 5, or 10 years of monthly payments
 - It's like receiving measures for 'free'
 - Participant won't notice any difference
 - Sometimes monthly bill is a little higher if organization reduces energy use activities
 - Other: _____
23. To which kinds of organizations do you promote OBF and why?
24. Are there kinds of eligible organizations to which you do not promote OBF? For what reasons?

Support Offered by IOU

- ♦ We would like to know how well OBF resources support your ability to promote the OBF program. On a scale of one to five, where 1 means "not at all helpful or supportive" and 5 means "very helpful or supportive," please rate the following items: [Ask follow-up questions if rating <4].
25. Program marketing materials
 - 25a. What aspects of the marketing materials have not supported your promotion activities?
 26. OBF Vendor handbook or guidelines
 - 26a. What aspects of the handbook make it difficult to promote OBF?
 27. OBF training from the utility (SDG&E/SCE only)
 - 27a. What aspects of the training make it difficult to promote OBF?
 28. Utility Staff
 - 28a. How do utility staff make it difficult to promote OBF?

Application Process and Rework

29. Were you responsible for any part of the application process (including the savings workbook)?

- If Yes, ASK
- 29a. What challenges, if any, did you encounter in completing an application?
- 29b. Were any of your applications returned for clarification or rework?
- 29c. Were any of your applications rejected? If yes, were any applications were rejected because the project didn't meet payback criteria? If so, and how did you and the client solve the problem?
- 29d. What might be done to reduce the number of applications requiring rework?

Communication

30. Are you able to communicate with utility staff in a timely manner concerning OBF topics and issues? (Yes/No)
- If No, ASK: Can you describe any situations in which communication was not timely? From your perspective, what was the cause of the slowness?

Closing Question

31. In the future, do you plan to continue promoting on-bill financing for efficiency projects?

1.1.4 Participant Survey Guides

Screening

- A1. Our records indicate that your organization received a loan from [IOU NAME] to pay for energy-efficiency improvements. We were informed that the best person to speak with regarding the loan program, also called on-bill financing program, is _____. Is this accurate and is he/she available?
1. Yes [GO TO Q0]
 2. No [ASK TO SPEAK TO THE PERSON IN THE ORGANIZATION WHO KNOWS THE MOST ABOUT THE PROGRAM. IF THE PERSON TELLS YOU IT IS NOT A CONVENIENT TIME GO TO QA1A]
- 98. Don't know [GO TO QA2]
- 99. Refused [THANK AND TERMINATE]

- A1a. Is there a more convenient time that I could call back? [EMPHASIZE THAT “IT IS IMPORTANT FOR [UTILITY] TO INCLUDE YOUR OPINIONS IN THIS STUDY TO BETTER SERVE YOUR NEEDS.”]
- A2. The purpose of this call is to obtain advice from participating organizations on how [IOU NAME]’s loan program can be improved to help businesses make energy conservation investments. As a decision maker at a participating organization, your opinions are very important. Would you like to answer some questions about your experience with the on-bill financing program? All answers will be kept confidential.
1. Yes [IF RESPONDENT ASKS HOW LONG, SAY “20 TO 30 MINUTES.”]
 2. Not a good time [THANK AND ASK FOR A BETTER TIME]
 3. Not interested [THANK AND TERMINATE]
- A3. Are you customer of [UTILITY]?
4. Yes
 5. No [THANK AND TERMINATE]
 - 98. Don’t know [THANK AND TERMINATE]
- A4. Did your organization finance an investment in an energy conservation project using a loan from [IOU NAME]?
1. Yes
 2. No [THANK AND TERMINATE]
 - 98. Don’t know [THANKS AND TERMINATE]
 - 99. Refused [THANK AND TERMINATE]

Source of Program Information

First, I’d like to ask you some questions about your decision to participate in the loan, or OBF, program and the equipment you installed.

[IF ASKED: THE PROGRAM OFFERS ZERO PERCENT FINANCING TO NONRESIDENTIAL CUSTOMERS WHO MAKE QUALIFYING ENERGY CONSERVATION INVESTMENTS AT THEIR PLACE OF BUSINESS. THE LOAN IS THEN REPAID THROUGH A LINE ITEM ON THE UTILITY BILL.]

- B1. How did you find out about [IOU NAME]’s OBF program? [DO NOT READ, PROMPT IF NECESSARY. CHECK ALL THAT APPLY OR RECORD VERBATIM.]
1. Contractor/installer
 2. (Newspaper/magazine/print media)
 3. ([UTILITY] account manager or program staff)
 4. ([UTILITY] physical mail)
 5. ([UTILITY] Web site)

- 6. Word-of-mouth
- 7. (Other [SPECIFY] _____.)
- 98. (Don't know)
- 99. (Refused)

Decision Making Process

- C1. What types of equipment were financed through the OBF program? [OPEN ENDED]
- C2. Why did you decide to install and finance that equipment through [IOU NAME]'s OBF program? (Multiple responses possible)
 - 1. Old/failing equipment
 - 2. Expansion
 - 3. Manage energy costs
 - 4. Project ROI/payback
 - 5. Availability of incentives
 - 6. Availability of up front financing
 - 7. Availability of 0% financing
 - 8. Convenient application process
 - 9. Other _____
 - 10. Don't know
 - 11. Refused
- C3. If OBF was not available, would your organization have continued with its energy conservation investment?
 - 1. Yes
 - 2. No [SKIP C4]
 - 3. Don't know
- C4. Did the availability of OBF influence you to do any of the following: (yes/no/don't know)
 - C1. Conduct the project sooner?
 - C2. Increase the amount of equipment purchased?
 - C3. Purchase higher quality/more efficient equipment?
 - C4. Did not result in any changes to planned project?
 - C4a. How would you have paid for the energy efficiency investment if the OBF program were not available?
 - 1. With cash
 - 2. Unsecured loan from bank
 - 3. Secured loan
 - 4. Issue a bond / sell stock
 - 4. Other _____
 - 98. Don't know

-99. Refused

C5. Why did you decide to use the OBF program instead of other financing sources?
(Multiple responses possible)

1. Convenience
2. Better rates
3. Better terms
4. Other financing options not available
5. Didn't look for other financing sources
6. Other _____

C6. Did the OBF loan cover all equipment and installation costs?

1. Yes
 2. No ([SPECIFY WHAT WASN'T COVERED] _____)
- 98. Don't know
- 99. Refused

○ C7 Which of the following best describes how the loan payback period figured into your organization's decision to participate in the OBF? [read options]

- 1 Was not concerned with the payback period
- 2 Payback period was adequate
- 3 Would have liked a longer payback period (ASK: How long?)
- 4 Would have liked a shorter payback period (ASK: How long?)
- 5 Don't know
- 6 Other _____

○ C8 Which of the following best describes how the loan maximum/minimum value figured into your organization's decision to participate in the OBF? [read options]

- 1 Was not concerned with the amount, Amount was adequate,
- 2 Would have liked a larger amount (ASK: How much?)
- 3 Would have liked a smaller amount (ASK: How much?)
- 4 Don't know
- 5 Other _____

○ C9 While considering the OBF program, did you have any questions about program requirements (Yes/ No) Who did you ask?

- 1 Representative of the efficiency staff

- 2 SDG&E account executive
- 3 Contractor/vendor
- 4 OBF staff
- 5 Other:_____
- C10 Did you get the assistance you needed? (Yes/No)
- C11 If C10 = NO ASK: What additional assistance did you need?
 - C12 How clearly did the OBF contract language explain what your organization needed to do to achieve financing?
 - 1 Completely clear
 - 2 Somewhat clear (What was not clear?)
 - 3 Not clear/had issues (What was not clear?)

Loan Repayment Process

- D1. Have you received a utility bill that included your OBF payment?
 - 1. Yes
 - 2. No [SKIP TO D2]
 - 98. Don't know
 - 99. Refused
- D1a. Was the payment consistent with your expectations?
 - 1. Yes
 - 2. No [PROBE: HOW SO?] _____)
 - 98. Don't know
 - 99. Refused
- D2. Have you experienced any difficulties with your OBF payment on your utility bill?
 - 1. Yes [PROBE: WHAT KIND?] _____)
 - 2. No
 - 98. Don't know
 - 99. Refused

D3. With OBF, you have the ability to repay the loan through your utility bill instead of dealing with a separate bill, and you can see changes in energy consumption as a result of the energy conservation project being financed. Do you find this to be a valuable feature of the program? [SCALE 1-4, 1 = NOT VALUABLE, 4 = VERY VALUABLE]

D3a. [IF 2 OR LOWER] Why low value?

D4. Is the property where the utility financed energy-improvements were made owner occupied or tenant occupied?

1. Owner Occupied
2. Tenant Occupied

Participation Under Alternate Loan Terms and Incentive Structures

E1. Let's talk for a minute about the offer you received from the utility, and what you liked about it. Which was more important in your decision to make energy-efficiency improvements: the rebates, or the availability of upfront financing through a 0% interest loan?

1. Rebates
2. 0% Financing

E1a. Why do you say that? [open ended]

E2. Assuming the rebates stayed the same, but the loan carried a low interest rate between 3-5%, would you still have used the utility loan and made the energy-efficiency improvements?

1. Yes
2. No, would not have used the loan but would have installed the energy –efficiency improvements
3. No, would not have made any energy-efficiency improvements

E3. Now suppose that the interest rate stayed at 0%, but the rebates were reduced 20-30%. Would you still have used the utility loan and made the energy-efficiency improvements?

1. Yes
2. No, would not have used the loan but would have installed the energy –efficiency improvements
3. No, would not have made any energy-efficiency improvements

E4. Suppose there was a small loan origination fee, perhaps 2% of the loan amount. Would you still have used the utility loan and made the energy-efficiency improvements?

1. Yes
2. No, would not have used the loan but would have installed the energy –efficiency improvements
3. No, would not have made any energy-efficiency improvements

- E5. Did you have any concerns about taking on this debt to finance energy-efficiency improvements? (probe: future difficulty obtaining credit, debt service ability)
1. Yes
 2. No
- E5a. What were your concerns? [open ended]
- E6. How important was it that the estimated savings would completely cover the loan payments? For example, if the savings only covered 90% of the loan payment would that have been acceptable, so long as the net ROI on the project was positive?
1. Acceptable
 2. Not acceptable

Customer Satisfaction

"I am now going to ask you about how satisfied you were with the program overall, the billing process, and the equipment or services you received. For each of my questions, I'd like you to tell me your level of satisfaction using a scale from 1 to 5, with 1 being very dissatisfied, 2 being somewhat dissatisfied, 4 being somewhat satisfied and 5 being very satisfied for each question."

- F1. How satisfied are you with the clarity and accuracy of the information you received on the OBF program? [SCALE 1-5, -98 = Don't know, -99 = Refused]
- F1a. [FOR F1 =1-2] You indicated you were dissatisfied with the information you received on the OBF program. Why did you say that? [OPEN END]
- F2. How satisfied are you with the loan application process? [SCALE 1-5, -98 = Don't know, -99 = Refused]
- F2a. [FOR F2 =1-2] You indicated you were dissatisfied with the loan application process. Why did you say that? [OPEN END]
- F3. Are there other types of equipment that you wanted to purchase using OBF that you were not able to due to program requirements?
1. Yes [PROBE: WHAT KIND AND WHY WAS IT NOT QUALIFIED?]
_____)
 2. No
- 98. Don't know
- 99. Refused
- F4. Are there any features of the [IOU NAME]'s OBF program as a whole you would change? [DO NOT READ LIST; INDICATE ALL THAT APPLY]
1. Loan term (shorter, longer better?)
 2. Loan amounts (smaller, larger better?)

- 3. Processing Time
- 4. (Wouldn't change anything/keep program as is)
- 5. (Would have liked clearer program information) [SPECIFY]_____)
- 6. (Would have liked more or better access to program information)
[SPECIFY]_____)
- 7. (Other [SPECIFY]_____)
- 98. (Don't know)
- 99. (Refused)

F5. As a result of your involvement with the [UTILITY] OBF Program, would you say you are more satisfied, just as satisfied, or less satisfied with [UTILITY] as your energy provider?

- 1. More satisfied
- 2. Equally satisfied
- 3. Less satisfied
- 98. Don't know
- 99. Refused

Customer Demographics

"Now I have just a few final questions."

G1. What is the best way to promote this program to businesses like yours? [DO NOT READ, PROMPT IF NECESSARY. CHECK ALL THAT APPLY OR RECORD VERBATIM.]

- 1. Trade shows
- 2. Word of mouth
- 3. Contractors
- 4. Trade associations
- 5. (Other [SPECIFY]_____)

G2. What % of your organization's operating budget does the gas and electric bill represent?
[PERCENTAGE] _____)

[THANK & TERMINATE]

CUSTOMER SURVEY RESPONSES FOR SELECT 3P PROGRAMS

This file provides customer survey responses for the following select third party (3P) programs in the San Diego Gas & Electric (SDG&E) Nonresidential Process Evaluation: SaveGas, On Bill Financing (OBF). With the exception of OBF, this survey was conducted October 2011 - November 2011 by Research into Action, and the overall study was led by the Heschong Mahone Group, Inc. The OBF survey was conducted by the Cadmus Group in a collaborative effort.

Data collection resources, including the survey code books, survey and sampling methodologies, and sample dispositions, are provided in Attachment 3B. Analysis of the customer surveys are included in the final report volumes, including Main Report, Attachment 1 - Portfolio-level Evaluations, and Attachment 2 - Program Specific Evaluations. Customer survey frequency tables for all other programs in the evaluation (including other third party programs) are provided separately.

1.1 SaveGas (Survey concurrently at SDG&E and SoCalGas)

Participating Customer Summary Data

Q6_ - What is the main business activity at this facility?

	Frequency	Percent
Hotel or Motel	11	91.7
Other	1	8.3
Total	12	100.0

Q7 - How many guest rooms or occupant rooms are there?

	Frequency	Percent
64	1	8.3
73	1	8.3
182	1	8.3
211	1	8.3
216	1	8.3
227	1	8.3
296	1	8.3
300	1	8.3
304	1	8.3
380	1	8.3
384	1	8.3
415	1	8.3
Total	12	100.0

Q10 - What types of equipment uses the second most electricity at your facility?

	Frequency	Percent
Laundry Equipment	1	8.3
Other	1	8.3
Total	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

Q11 - What types of equipment uses the most natural gas at your facility?

	Frequency	Percent
Boilers	5	41.7
Food Service Equipment	1	8.3
Laundry Equipment	1	8.3
Other	3	25.0
Total	10	83.3
Not Selected	2	16.7
Grand Total	12	100.0

Q12 - What types of equipment uses the second most natural gas at your facility?

	Frequency	Percent
Boilers	2	16.7
Food Service Equipment	1	8.3
Laundry Equipment	4	33.3
Other	2	16.7
Don't Know	1	8.3
Total	10	83.3
Not Selected	2	16.7
Grand Total	12	100.0

Q13 - Has your organization developed a specific policy for the selection of energy efficient equipment?...

	Frequency	Percent
Yes - Please describe those policies.	5	41.7
No	6	50.0
Don't Know	1	8.3
Total	12	100.0

Q14_1 - Who makes decisions on equipment purchases or upgrades? -Facilities Manager

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

Q14_4 - Who makes decisions on equipment purchases or upgrades? -Other facilities management/ maintenance position

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

Q14_7 - Who makes decisions on equipment purchases or upgrades? -Proprietor/ Owner

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

Q14_9 - Who makes decisions on equipment purchases or upgrades? -Other

	Frequency	Percent
Selected	10	83.3
Not Selected	2	16.7
Grand Total	12	100.0

Q15_1 - What difficulties have you had -No difficulties

	Frequency	Percent
Selected	8	66.7
Not Selected	4	33.3
Grand Total	12	100.0

Q15_12 - What difficulties have you had -Rebate application process was demanding

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

Q15_14 - What difficulties have you had -Other

	Frequency	Percent
Selected	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

Q17 - How did you first hear about the program?

	Frequency	Percent
Account Execute	3	25.0
Email from IOU	1	8.3
Colleague	1	8.3
Hotel association meeting	1	8.3
Corporate gave info	3	25.0

3P Implementer	2	16.7
Don't know	1	8.3
Total	12	100.0

Q18 - How would you prefer to receive information and updates?

	Frequency	Percent
Email from IOU	12	100.0

Q19_1 - Why did you participate in this program? -To save money

	Frequency	Percent
Selected	6	50.0
Not Selected	6	50.0
Grand Total	12	100.0

Q19_6 - Why did you participate in this program? -Availability of the IOU rebate

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

Q19_8 - Why did you participate in this program? -Other

	Frequency	Percent
Selected	8	66.7
Not Selected	4	33.3
Grand Total	12	100.0

Q20 - Did you complete an audit for your system?

	Frequency	Percent
Yes	9	75.0
Don't know	3	25.0
Total	12	100.0

Q21 - Did the audit reveal any new information to you?

	Frequency	Percent
No	8	66.7
Don't know	1	8.3
Total	9	75.0
Not Selected	3	25.0

Grand Total	12	100.0
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Q22 - Did you view the web demonstration for the SaveGas program?

	Frequency	Percent
Yes	8	66.7
No	3	25.0
Don't know	1	8.3
Total	12	100.0

**Q25_1 - Did you pencil out the savings you'd get from the SaveGas program?-Yes -
What was the minimum break-even point?**

	Frequency	Percent
Selected	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

Q25_3 - Did you pencil out the savings you'd get from the SaveGas program?-No

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

**Q25_4 - Did you pencil out the savings you'd get from the SaveGas program?-No-
TEXT**

	Frequency	Percent
	11	91.7
just started	1	8.3
Total	12	100.0

**Q25_5 - Did you pencil out the savings you'd get from the SaveGas program?-Don't
know**

	Frequency	Percent
Selected	3	25.0
Not Selected	9	75.0
Grand Total	12	100.0

**Q25_7 - Did you pencil out the savings you'd get from the SaveGas program?-EDC
did this as a way to sell the program**

	Frequency	Percent
Selected	3	25.0
Not Selected	9	75.0

Grand Total	12	100.0
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Q25_9 - Did you pencil out the savings you'd get from the SaveGas program?

	Frequency	Percent
Yes	4	33.3
3P Implementer did this	3	25.0
Don't know	5	41.7
Total	12	100.0

Q26_1 - What was influential in your decision to participate? -Saving money on utility bills

	Frequency	Percent
Selected	7	58.3
Not Selected	5	41.7
Grand Total	12	100.0

Q26_2 - What was influential in your decision to participate? -Desire to be current on technology

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

Q26_3 - What was influential in your decision to participate? -Company policies favoring sustainability

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

Q26_4 - What was influential in your decision to participate? -Program covered retrofit costs

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

Q26_5 - What was influential in your decision to participate? -Being alerted to maintenance issues

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7

Grand Total	12	100.0
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Q26_6 - What was influential in your decision to participate? -Other

	Frequency	Percent
Selected	8	66.7
Not Selected	4	33.3
Grand Total	12	100.0

Q26_8 - What was influential in your decision to participate? -Don't know

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

Q28 - Did you raise these concerns with program staff?

	Frequency	Percent
Yes	6	50.0
No	1	8.3
Total	7	58.3
Not Selected	5	41.7
Grand Total	12	100.0

Q29 - Did program staff address your concerns?

	Frequency	Percent
Yes - How?	6	50.0
Not Selected	6	50.0
Grand Total	12	100.0

Q33 - Do you have problems understanding the online monitoring system?

	Frequency	Percent
Yes - What are the problems?	1	8.3
No	9	75.0
Don't know	2	16.7
Total	12	100.0

Q34_ - As part of the program, did someone from IOU come to inspect th...

	Frequency	Percent
Yes	9	75.0

No	1	8.3
Don't know	2	16.7
Total	12	100.0

Q36_1 - On a scale of 1 to 5, How helpful were the following in understanding the program?.-Program Staff

	Frequency	Percent
3	2	16.7
4	3	25.0
5 - Extremely helpful	6	50.0
Don't know	1	8.3
Total	12	100.0

Q36_2 - On a scale of 1 to 5, How helpful were the following in understanding the program?.-Web Presentation

	Frequency	Percent
2	1	8.3
3	1	8.3
4	2	16.7
5 - Extremely helpful	6	50.0
Don't know	2	16.7
Total	12	100.0

Q36_3 - On a scale of 1 to 5, How helpful were the following in understanding the program?.-Marketing Materials

	Frequency	Percent
3	1	8.3
4	2	16.7
5 - Extremely helpful	1	8.3
Don't know	8	66.7
Total	12	100.0

Q36_4 - On a scale of 1 to 5, How helpful were the following in understanding the program?.-Program Website

	Frequency	Percent
4	4	33.3
5 - Extremely helpful	4	33.3
Don't know	4	33.3
Total	12	100.0

**Q37_1 - On a scale of 1 to 5, How satisfied were you with the following?.-
Inspection/audit process**

	Frequency	Percent
3	1	8.3
4	5	41.7
5 - Extremely satisfied	3	25.0
Don't know	3	25.0
Total	12	100.0

**Q37_2 - On a scale of 1 to 5, How satisfied were you with the following?.-Scheduling
process to install the system**

	Frequency	Percent
4	2	16.7
5 - Extremely satisfied	9	75.0
Don't know	1	8.3
Total	12	100.0

**Q37_3 - On a scale of 1 to 5, How satisfied were you with the following?.-Installation
as a whole**

	Frequency	Percent
3	1	8.3
4	1	8.3
5 - Extremely satisfied	9	75.0
Don't know	1	8.3
Total	12	100.0

**Q37_4 - On a scale of 1 to 5, How satisfied were you with the following?.-
Performance of the online monitoring system**

	Frequency	Percent
3	1	8.3
4	4	33.3
5 - Extremely satisfied	5	41.7
Don't know	2	16.7
Total	12	100.0

**Q37_5 - On a scale of 1 to 5, How satisfied were you with the following?.-SaveGas
Technician**

	Frequency	Percent
4	2	16.7
5 - Extremely satisfied	7	58.3

Don't know	3	25.0
Total	12	100.0

Q38 - Overall, how satisfied were you with the program?

	Frequency	Percent
3	1	8.3
4	4	33.3
5 - Extremely Satisfied	4	33.3
Don't know	2	16.7
Total	11	91.7
Not Selected	1	8.3
Grand Total	12	100.0

Q40 - On a scale of 1 to 5, how interested would you be in participating in this program again?

	Frequency	Percent
4	3	25.0
5 - Extremely interested	7	58.3
Don't know	2	16.7
Total	12	100.0

Q42 - Besides this program, are you aware of other assistance you could receive from IOU

	Frequency	Percent
Yes - What types of programs?	7	58.3
No	3	25.0
Total	10	83.3
Not Selected	2	16.7
Grand Total	12	100.0

Q43 - Has your organization participated in any of the programs you mentioned?

	Frequency	Percent
Yes - Which ones?	4	33.3
No	2	16.7
Total	6	50.0
Not Selected	6	50.0
Grand Total	12	100.0

Q44 - Are you planning any repairs or replacements to your equipment in the next two years?

	Frequency	Percent
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Yes - What types are you considering?	5	41.7
No	7	58.3
Total	12	100.0

Q45 - Do you plan to participate in a IOU program for these purchases...

	Frequency	Percent
Yes	5	41.7
Not Selected	7	58.3
Grand Total	12	100.0

Q46 - I know your time is valuable but I've got a couple more questions if you have the time for them.

	Frequency	Percent
Selected	11	91.7
Not Selected	1	8.3
Grand Total	12	100.0

Q47 - How interested would you be in using an online tool from SDG E that shows your business's current en...

	Frequency	Percent
Somewhat interested	1	8.3
Very interested	3	25.0
Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

Q48 - SDG E "Reduce your use" days (also known as "event days") are days when there is unusually high dema...

	Frequency	Percent
Very difficult to make	2	16.7
Somewhat difficult to make	1	8.3
Not at all difficult to make	1	8.3
Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

Q49 - How difficult would it be for you to shift or make adjustments to your business's electricity usage...

	Frequency	Percent
Not very difficult	1	8.3
Not at all difficult	1	8.3
Total	2	16.7

Not Selected	10	83.3
Grand Total	12	100.0

Q50 - How much do you agree that your business has control over the amount of electricity it uses?

	Frequency	Percent
3	1	8.3
6	3	25.0
Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

Q51 - How much do you agree that energy efficiency is an important consideration when your business buys a...

	Frequency	Percent
7	1	8.3
10 - Strongly agree	3	25.0
Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

Q52 - I want to describe 2 other programs from which your facility may be eligible. For each, please tell...

	Frequency	Percent
Selected	6	50.0
Not Selected	6	50.0
Grand Total	12	100.0

Q53 - The Energy Savings BID program, which provides incentives for a large energy efficiency project, or...

	Frequency	Percent
1 - Not at all interested	2	16.7
8	1	8.3
Total	3	25.0
Not Selected	9	75.0
Grand Total	12	100.0

Q54 - An On Bill Financing program, which provides a zero percent interest rate loan to large energy effic...

	Frequency	Percent
Don't know	1	8.3
8	1	8.3
10 - Extremely interested	2	16.7

Total	4	33.3
Not Selected	8	66.7
Grand Total	12	100.0

**Q55_1 - Who was responsible for getting the application completed and submitted?
-Internal staff in organization**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q55_2 - Who was responsible for getting the application completed and submitted?
-Vendor or contractor**

	Frequency	Percent
Selected	1	8.3
Not Selected	11	91.7
Grand Total	12	100.0

**Q55_5 - Who was responsible for getting the application completed and submitted?
-Other**

	Frequency	Percent
Selected	7	58.3
Not Selected	5	41.7
Grand Total	12	100.0

**Q55_7 - Who was responsible for getting the application completed and submitted?
-Don't know**

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

**Q55_9 - Who was responsible for getting the application completed and submitted?
-Respondent**

	Frequency	Percent
Selected	2	16.7
Not Selected	10	83.3
Grand Total	12	100.0

**Q56 - How likely were you to apply for the rebate on your own, if the
\${q://QID36/ChoiceGroup/SelectedChoi...}**

	Frequency	Percent
3 - Somewhat Likely	1	8.3

Not Selected	11	91.7
Grand Total	12	100.0

Q57 - Was it very difficult, difficult, somewhat difficult, somewhat easy, or very easy to submit the appl...

	Frequency	Percent
2	1	8.3
4	3	25.0
5 - Very Easy	1	8.3
Don't know	6	50.0
Total	11	91.7
Not Selected	1	8.3
Grand Total	12	100.0

Q58 - Did you have any problems with the application process?

	Frequency	Percent
No	5	41.7
Not Selected	7	58.3
Grand Total	12	100.0

Non-Participating Customer Summary Data

How would you characterize your business?[Read categories if needed]

	Frequency	Percent
Hotel or Motel	48	100.0

Has your facility applied or participated in an IOU program? Fo...

	Frequency	Percent
Yes	16	33.3
No	24	50.0
Don't know	8	16.7
Total	48	100.0

Are you familiar with the SaveGas program

	Frequency	Percent
Yes	7	14.6
No	40	83.3
Don't know	1	2.1

Total	48	100.0
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How did you first hear about the SaveGas program?

	Frequency	Percent
EDC Staff (SaveGas people)	1	2.1
Other	5	10.4
Don't know	1	2.1
Total	7	14.6
Not Selected	41	85.4
Grand Total	48	100.0

Did you have concerns about the program?

	Frequency	Percent
Yes - What were they?	3	6.3
No	3	6.3
Don't know	1	2.1
Total	7	14.6
Not Selected	41	85.4
Grand Total	48	100.0

Did program staff address your concerns?

	Frequency	Percent
Yes - How?	1	2.1
No - Why not?	2	4.2
Total	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

Did you view the web demonstration for the SaveGas program?

	Frequency	Percent
Yes	3	6.3
No	2	4.2
Don't know	1	2.1
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful were...-Program staff

	Frequency	Percent
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4	2	4.2
5 - Very helpful	2	4.2
N/A	1	2.1
Don't know	1	2.1
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful wer...-Web presentation

	Frequency	Percent
3	1	2.1
4	1	2.1
5 - Very helpful	2	4.2
N/A	1	2.1
Don't know	1	2.1
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful wer...-Marketing materials

	Frequency	Percent
4	1	2.1
5 - Very helpful	2	4.2
N/A	2	4.2
Don't know	1	2.1
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

On a scale of 1 to 5, where 1 means "Not at all helpful" and 5 means "Very helpful," how helpful wer...-Program website

	Frequency	Percent
4	1	2.1
5 - Very helpful	2	4.2
N/A	1	2.1
Don't know	2	4.2
Total	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

Do you plan to replace or repair any gas-using equipment in the next 2 years?

	Frequency	Percent
Yes	22	45.8
No	23	47.9
Don't know	3	6.3
Total	48	100.0

Which equipment?-Boilers

	Frequency	Percent
Selected	15	31.3
Not Selected	33	68.8
Grand Total	48	100.0

Which equipment?-Food Service Equipment

	Frequency	Percent
Selected	10	20.8
Not Selected	38	79.2
Grand Total	48	100.0

Which equipment?-Laundry Equipment

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

Which equipment?-Pumps

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

Which equipment?-Other

	Frequency	Percent
Selected	8	16.7
Not Selected	40	83.3
Grand Total	48	100.0

Repair/replace if breaks down

	Frequency	Percent
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Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

Up to Corporate

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

Do you plan to replace or repair any electricity -using equipment in the next 2 years?

	Frequency	Percent
Yes	6	12.5
No	5	10.4
Total	11	22.9
Not Selected	37	77.1
Grand Total	48	100.0

Which equipment?-Motors and pumps

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

Which equipment?-HVAC

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

Which equipment?-Other

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

How likely are you to consider energy-efficiency when installing or replacing energy-using products...

	Frequency	Percent
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6	5	10.4
7	1	2.1
8	8	16.7
9	4	8.3
10 - Extremely likely	29	60.4
Don't know	1	2.1
Total	48	100.0

Has your organization developed a specific policy for the selection of energy-efficient equipment? [...]

	Frequency	Percent
Yes	15	31.3
No	31	64.6
Don't know	2	4.2
Total	48	100.0

Who makes decisions on equipment purchases or upgrades?-Facilities manager

	Frequency	Percent
Selected	5	10.4
Not Selected	43	89.6
Grand Total	48	100.0

Who makes decisions on equipment purchases or upgrades?-Building manager

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

Who makes decisions on equipment purchases or upgrades?-Other facilities management / maintenance position

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

Who makes decisions on equipment purchases or upgrades?-Proprietor / Owner

	Frequency	Percent
Selected	26	54.2
Not Selected	22	45.8

Grand Total	48	100.0
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Who makes decisions on equipment purchases or upgrades?-Engineer

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

Who makes decisions on equipment purchases or upgrades?-GM

	Frequency	Percent
Selected	12	25.0
Not Selected	36	75.0
Grand Total	48	100.0

Who makes decisions on equipment purchases or upgrades?-Corporate

	Frequency	Percent
Selected	4	8.3
Not Selected	44	91.7
Grand Total	48	100.0

Who makes decisions on equipment purchases or upgrades?-Other

	Frequency	Percent
Selected	24	50.0
Not Selected	24	50.0
Grand Total	48	100.0

Have you had any challenges with purchasing or installing energy efficiency equipment?

	Frequency	Percent
Yes	3	6.3
No	40	83.3
Don't know	2	4.2
Total	45	93.8
Not Selected	3	6.3
Grand Total	48	100.0

If so, What were these challenges?-Other

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9

Grand Total	48	100.0
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Before this call, were you aware that IOU offers programs to he...

	Frequency	Percent
Yes	19	39.6
No	28	58.3
Don't know	1	2.1
Total	48	100.0

Did you know that your facility was eligible for any of these programs, and chose not to participate...

	Frequency	Percent
Yes	3	6.3
No	11	22.9
Don't know	3	6.3
Total	17	35.4
Not Selected	31	64.6
Grand Total	48	100.0

What type of equipment did you install without assistance from the program, that you believe would h...-Lighting

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

What type of equipment did you install without assistance from the program, that you believe would h...-Boilers

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

What type of equipment did you install without assistance from the program, that you believe would h...-Other

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

How did you first hear about the program?

	Frequency	Percent
IOU account executive	4	8.3
IOU staff	1	2.1
IOU call center	1	2.1
IOU mailing	2	4.2
IOU utility email message	2	4.2
Contractor / Retailer	1	2.1
Other	5	10.4
Don't know	1	2.1
Total	17	35.4
Not Selected	31	64.6
Grand Total	48	100.0

How would you prefer to receive information and updates about IOU

	Frequency	Percent
IOU account executive	7	14.6
IOU mailing	17	35.4
IOU utility email message	21	43.8
IOU web site	1	2.1
Other	2	4.2
Total	48	100.0

I would like to describe a few types of IOU programs for which...-An audit type program, providing a site walk through and recommendations on energy efficiency upgrades for your facility. [SCG= Audit, SDG&E= Comprehensive Industrial Energy Efficiency]

	Frequency	Percent
1 - Not at all interested	3	6.3
2	3	6.3
3	6	12.5
4	4	8.3
5 - Extremely interested	25	52.1
N/A	3	6.3
Don't Know	3	6.3
Total	47	97.9
Not Selected	1	2.1
Grand Total	48	100.0

I would like to describe a few types of IOU programs for which...-An HVAC Retro-commissioning program, to tune up your HVAC equipment to make it run more efficiently.

	Frequency	Percent
1 - Not at all interested	5	10.4

2	1	2.1
3	4	8.3
4	4	8.3
5 - Extremely interested	24	50.0
N/A	7	14.6
Don't Know	3	6.3
Total	48	100.0

I would like to describe a few types of IOU programs for which...-A program to provide premium tune-ups and maintenance of HVAC equipment, and incentives for HVAC equipment and controls [Premium Cooling Efficiency]

	Frequency	Percent
1 - Not at all interested	2	4.2
2	1	2.1
3	2	4.2
4	1	2.1
5 - Extremely interested	3	6.3
Don't Know	1	2.1
Total	10	20.8
Not Selected	38	79.2
Grand Total	48	100.0

I would like to describe a few types of IOU programs for which...-A direct install program, providing free installation of low-cost energy efficiency measures at small to medium sized businesses (demand < 100kW)

	Frequency	Percent
2	2	4.2
3	1	2.1
4	6	12.5
5 - Extremely interested	30	62.5
N/A	3	6.3
Don't Know	4	8.3
Total	46	95.8
Not Selected	2	4.2
Grand Total	48	100.0

I would like to describe a few types of IOU programs for which...-A rebate program, where the rebate amounts are based on the equipment installed [Deemed]

	Frequency	Percent
3	4	8.3
4	4	8.3
5 - Extremely interested	33	68.8
N/A	1	2.1

Don't Know	4	8.3
Total	46	95.8
Not Selected	2	4.2
Grand Total	48	100.0

I would like to describe a few types of IOU programs for which....An incentive program, where the incentive amount is calculated based on the predicted energy savings [Calculated / BID]

	Frequency	Percent
3	5	10.4
4	5	10.4
5 - Extremely interested	31	64.6
Don't Know	4	8.3
Total	45	93.8
Not Selected	3	6.3
Grand Total	48	100.0

I would like to describe a few types of IOU programs for which....A program offering 0% interest loans for energy efficiency upgrades [OBF]

	Frequency	Percent
1 - Not at all interested	6	12.5
3	7	14.6
4	5	10.4
5 - Extremely interested	18	37.5
N/A	1	2.1
Don't Know	9	18.8
Total	46	95.8
Not Selected	2	4.2
Grand Total	48	100.0

I would like to describe a few types of IOU programs for which....A program that provides technical assistance, training, and cost sharing on water heating measures. [SaveGas]

	Frequency	Percent
1 - Not at all interested	1	2.1
3	3	6.3
4	4	8.3
5 - Extremely interested	12	25.0
N/A	1	2.1
Don't Know	4	8.3
Total	25	52.1
Not Selected	23	47.9
Grand Total	48	100.0

For the program types for which you are interested, what would motivate your organization to partici...-Upgrading or replacing equipment

	Frequency	Percent
Selected	6	12.5
Not Selected	42	87.5
Grand Total	48	100.0

For the program types for which you are interested, what would motivate your organization to partici...-Saving money on energy bills

	Frequency	Percent
Selected	27	56.3
Not Selected	21	43.8
Grand Total	48	100.0

For the program types for which you are interested, what would motivate your organization to partici...-Obtaining a rebate

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

For the program types for which you are interested, what would motivate your organization to partici...-Protecting environment

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

For the program types for which you are interested, what would motivate your organization to partici...-Other

	Frequency	Percent
Selected	16	33.3
Not Selected	32	66.7
Grand Total	48	100.0

Why might you NOT participate in a program?-Application takes too much time

	Frequency	Percent
Selected	3	6.3
Not Selected	45	93.8
Grand Total	48	100.0

Why might you NOT participate in a program?-Rebate not high enough

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

Why might you NOT participate in a program?-Don't believe energy savings claims

	Frequency	Percent
Selected	2	4.2
Not Selected	46	95.8
Grand Total	48	100.0

Why might you NOT participate in a program?-Other

	Frequency	Percent
Selected	28	58.3
Not Selected	20	41.7
Grand Total	48	100.0

Why might you NOT participate in a program?-Don't know

	Frequency	Percent
Selected	8	16.7
Not Selected	40	83.3
Grand Total	48	100.0

Why might you NOT participate in a program?-Refused

	Frequency	Percent
Selected	1	2.1
Not Selected	47	97.9
Grand Total	48	100.0

1.2 On Bill Financing (OBF)

Vendor Summary Data

What is your title and what are your responsibilities?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid CEO	1	5.3	5.3	5.3

EE Specialist	1	5.3	5.3	10.5
exec account rep, handle lighting upgrades	1	5.3	5.3	15.8
Managing Director	1	5.3	5.3	21.1
managing manager - develop all turn key financing	1	5.3	5.3	26.3
Office manager, does billing	1	5.3	5.3	31.6
operations	1	5.3	5.3	36.8
owner	1	5.3	5.3	42.1
president	1	5.3	5.3	47.4
President	3	15.8	15.8	63.2
President of company	1	5.3	5.3	68.4
President of company. Responsible for everything. Submit all jobs, and sign the contracts. Follow all the procedures of OBF.	1	5.3	5.3	73.7
President. Responsible for everything.	1	5.3	5.3	78.9
rebate administrator, i handle all the rebates	1	5.3	5.3	84.2
Regional sales manager for MSI. Trains lighting distributors to offer OBF. Is manufactures' representative.	1	5.3	5.3	89.5
Vice President, deal with customers in signing paperwork and	1	5.3	5.3	94.7
VP	1	5.3	5.3	100.0
Total	19	100.0	100.0	

Q3_7_Recode: How did your company first learn about SDGE's on-bill financing program?-

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2	10.5	10.5	10.5
Does not recall	1	5.3	5.3	15.8
Email from IOU	1	5.3	5.3	21.1
Factory Representative	1	5.3	5.3	26.3
IOU AE	3	15.8	15.8	42.1
IOU meeting with vendors	1	5.3	5.3	47.4

IOU vendor representative	1	5.3	5.3	52.6
Learned about OBF from others while working on projects	3	15.8	15.8	68.4
Own research	1	5.3	5.3	73.7
PECI	2	10.5	10.5	84.2
Prior OBF experience at other company	2	10.5	10.5	94.7
Seminar/ Convention / Workshop	1	5.3	5.3	100.0
Total	19	100.0	100.0	

How long has your business been participating as a vendor in this program?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1 year	4	21.1	21.1	21.1
	2 years	4	21.1	21.1	42.1
	3 years	6	31.6	31.6	73.7
	4 years	2	10.5	10.5	84.2
	5 years	3	15.8	15.8	100.0
	Total	19	100.0	100.0	

Is your business participating, or planning to participate as a vendor in other utility-run OBF prog....IS CURRENTLY PARTICIPATING at other IOUs (type names of IOUs)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	11	57.9	100.0	100.0
Missing	System	8	42.1		
Total		19	100.0		

Is your business participating, or planning to participate as a vendor in other utility-run OBF prog....IS CURRENTLY PARTICIPATING at other IOUs (type names of IOUs)-TEXT

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		8	42.1	42.1	42.1
	PG&E done a couple and SCE booked though	1	5.3	5.3	47.4
	PGE, SCE	1	5.3	5.3	52.6
	SCE	3	15.8	15.8	68.4
	SCE and PG&E	1	5.3	5.3	73.7

SCE, PGE	4	21.1	21.1	94.7
tried to use sce's it is newer they put a lower limit and it books up so quick	1	5.3	5.3	100.0
Total	19	100.0	100.0	

Is your business participating, or planning to participate as a vendor in other utility-run OBF prog...-Is NOT participating at other IOUs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	5	26.3	100.0	100.0
Missing	System	14	73.7		
Total		19	100.0		

Is your business participating, or planning to participate as a vendor in other utility-run OBF prog...-DNK if participating at other IOUs

		Frequency	Percent
Missing	System	19	100.0

Is your business participating, or planning to participate as a vendor in other utility-run OBF prog...-IS PLANNING TO participate at other IOUs (type names of IOUs)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	3	15.8	100.0	100.0
Missing	System	16	84.2		
Total		19	100.0		

Is your business participating, or planning to participate as a vendor in other utility-run OBF prog...-MAYBE planning to participate at other IOUs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

Is your business participating, or planning to participate as a vendor in other utility-run OBF prog...-Is NOT planning to participate at other IOUs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	6	31.6	100.0	100.0

Missing	System	13	68.4
Total		19	100.0

Is your business participating, or planning to participate as a vendor in other utility-run OBF prog...-DNK if planning to participate at other IOUs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

Q5_Recode: How many employees work at your location?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	3	15.8	15.8	15.8
	10	1	5.3	5.3	21.1
	2	2	10.5	10.5	31.6
	20	1	5.3	5.3	36.8
	25	1	5.3	5.3	42.1
	30	1	5.3	5.3	47.4
	300	1	5.3	5.3	52.6
	4	1	5.3	5.3	57.9
	5	2	10.5	10.5	68.4
	50	1	5.3	5.3	73.7
	6	2	10.5	10.5	84.2
	8	2	10.5	10.5	94.7
	9	1	5.3	5.3	100.0
Total		19	100.0	100.0	

Would you consider yourself / company to be a project a...

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	4	21.1	21.1	21.1
	No	14	73.7	73.7	94.7
	Do Not Know	1	5.3	5.3	100.0
Total		19	100.0	100.0	

Q8_RC_client_requested

		Frequency	Percent
Missing	System	19	100.0

Q8_RC_Encouraged_by_Factory_Rep/Customer_Request

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	2	10.5	100.0	100.0
Missing	System	17	89.5		
Total		19	100.0		

Q8_RC_Easier_to_sell_Projects

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	9	47.4	100.0	100.0
Missing	System	10	52.6		
Total		19	100.0		

Q8_RC_No_Project_costs_for_customer / Convenient_For_Customer

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	7	36.8	100.0	100.0
Missing	System	12	63.2		
Total		19	100.0		

Q8_RC_Economic_Downturn

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	2	10.5	100.0	100.0
Missing	System	17	89.5		
Total		19	100.0		

Q8_RC_Environmental_values

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

Q48_RC: Has your experience with the program differed from what you expected? If so, how?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Application process takes longer than expected	2	10.5	10.5	10.5
	Confusion between engineering, EE program, and OBF departments leading to longer application and repayment timelines than expected	2	10.5	10.5	21.1
	Did not anticipate change to 3 year payback would move customers to DI lighting programs	2	10.5	10.5	31.6
	Difficult time communicating with IOU about OBF projects	1	5.3	5.3	36.8
	Difficult time staying current with OBF rule changes and other EE program rule changes	3	15.8	15.8	52.6
	Exceeding expectations / Program processes more convenient than expected	2	10.5	10.5	63.2
	Meeting Expectations	5	26.3	26.3	89.5
	More confusion between engineering, EE program, and OBF departments at IOU than expected	1	5.3	5.3	94.7
	Vendor responsible for more application activities than expected	1	5.3	5.3	100.0
	Total	19	100.0	100.0	

**Did you have any difficulties becoming a participating vendor? -
Certification requirements**

		Frequency	Percent
Missing	System	19	100.0

**Did you have any difficulties becoming a participating vendor? -
Time Commitment**

		Frequency	Percent
Missing	System	19	100.0

**Did you have any difficulties becoming a participating vendor? -
Floating project cost until the utility's payment is disbursed**

		Frequency	Percent
Missing	System	19	100.0

Did you have any difficulties becoming a participating vendor?-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	7	36.8	100.0	100.0
Missing	System	12	63.2		
Total		19	100.0		

Did you have any difficulties becoming a participating vendor?-Other-TEXT

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		12	63.2	63.2	63.2
	no	4	21.1	21.1	84.2
	no - obf has gotten easier over time all others have gotten more complicated -	1	5.3	5.3	89.5
	no nothing	1	5.3	5.3	94.7
	No problems.	1	5.3	5.3	100.0
Total		19	100.0	100.0	

Did you have any difficulties becoming a participating vendor?-Do Not Know

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	2	10.5	100.0	100.0
Missing	System	17	89.5		
Total		19	100.0		

How many projects do you complete a year as part of the utility's energy efficiency programs, on ave...

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	5.3	5.3
	2-4	1	5.3	5.3	10.5
	5	2	10.5	10.5	21.1
	10-15	2	10.5	10.5	31.6
	16-19	1	5.3	5.3	36.8
	20-29	4	21.1	21.1	57.9

30-50	2	10.5	10.5	68.4
100+	5	26.3	26.3	94.7
Other	1	5.3	5.3	100.0
Total	19	100.0	100.0	

What percentage of projects would you say use On-Bill Financing?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	5-9%	1	5.3	5.3	5.3
	10-19%	3	15.8	15.8	21.1
	20-25%	1	5.3	5.3	26.3
	31-49%	2	10.5	10.5	36.8
	50-75%	3	15.8	15.8	52.6
	76%-99%	3	15.8	15.8	68.4
	100%	6	31.6	31.6	100.0
	Total	19	100.0	100.0	

Would you say that percentage is growing over time?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	7	36.8	36.8	36.8
	No	5	26.3	26.3	63.2
	Not sure / Do Not Know	2	10.5	10.5	73.7
	Other	5	26.3	26.3	100.0
	Total	19	100.0	100.0	

On a scale of one to five, where 5 means very important and 1 means not at all important ?
How i...

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	5.3	5.3
	3	2	10.5	10.5	15.8
	4	3	15.8	15.8	31.6
	5	13	68.4	68.4	100.0
	Total	19	100.0	100.0	

Q14_RC: Please tell me why you gave a rating of to the importance o...

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Difficulty explaining OBF to customers	1	5.3	5.3	5.3
	Help sell projects / Customers can not afford projects without OBF	11	57.9	57.9	63.2
	Larger projects are not covered by OBF	1	5.3	5.3	68.4
	No up front cash and bill neutral attractive to customers	4	21.1	21.1	89.5
	Vendor feels comfortable offering OBF	1	5.3	5.3	94.7
	Vendor offers own financing, dislikes competing with OBF	1	5.3	5.3	100.0
	Total	19	100.0	100.0	

What equipment, financed through OBF, do you typically install for customers?-Lighting measures

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	17	89.5	100.0	100.0
Missing	System	2	10.5		
	Total	19	100.0		

What equipment, financed through OBF, do you typically install for customers?-HVAC

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	2	10.5	100.0	100.0
Missing	System	17	89.5		
	Total	19	100.0		

What equipment, financed through OBF, do you typically install for customers?-Boilers

		Frequency	Percent
Missing	System	19	100.0

What equipment, financed through OBF, do you typically install for customers?-Refrigeration

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	4	21.1	100.0	100.0

Missing	System	15	78.9
Total		19	100.0

What equipment, financed through OBF, do you typically install for customers?-Office Equipment

		Frequency	Percent
Missing	System	19	100.0

What equipment, financed through OBF, do you typically install for customers?-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	6	31.6	100.0	100.0
Missing	System	13	68.4		
Total		19	100.0		

Q16_RC: What challenges have you come across when selling efficiency projects that include non-lighting equi...

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		12	63.2	63.2	63.2
	Low quality performance of high efficiency measures	1	5.3	5.3	68.4
	No difficulty because vendor is currently offering non-lighting	2	10.5	10.5	78.9
	Upgrading existing analogue equipment at customer sites are not covered by IOU's programs	1	5.3	5.3	84.2
	Vendor lacks experience with non-lighting EE programs	1	5.3	5.3	89.5
	Vendor lacks knowledge about installing non-lighting measures	2	10.5	10.5	100.0
Total		19	100.0	100.0	

What challenges have you come across when selling efficiency projects that include non-lighting equi...

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		11	57.9	57.9	57.9

core business is refrigeration	1	5.3	5.3	63.2
Currently offer more than just lighting.	1	5.3	5.3	68.4
for the client - no objection as long as they understand what they are selling them. need someone to bridge discipline engineer/economics. the process in general - the hardest thing is getting through the utility incentive programs - hard to get through- because can't get oBF without other programs. allow projects to go through OBF without rebates. engeineering review is still necessary but no participation is necessary to other programs.	1	5.3	5.3	73.7
Installed high efficiency motors burn out.	1	5.3	5.3	78.9
Old technology, such as analogue connections, and the utility does not include this in rebate programs. this causes more out of pocket expense for customer.	1	5.3	5.3	84.2
the knowledge that vendor has is less. Knows lighting. Takes well trained person to install non-lighting measures.	1	5.3	5.3	89.5
Took 90 days to get paid for project activities.	1	5.3	5.3	94.7
vendor does not know those measures as well. Vendor is mostly a lighting contractor. Would like to be able to help people with those measures.	1	5.3	5.3	100.0

Total	19	100.0	100.0	
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Q17_RC: Do you think OBF helps you sell more projects that include non-lighting equipment?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	14	73.7	73.7	73.7

Core business is non-lighting	1	5.3	5.3	78.9
Yes	2	10.5	10.5	89.5
Yes. OBF covers costs customers can not afford	1	5.3	5.3	94.7
Yes. OBF helps cover cost enabling customers to aggregate lighting/non-lighting into one project	1	5.3	5.3	100.0
Total	19	100.0	100.0	

Q18_RC: If the OBF program required vendors to include non-lighting equipment services/installations, how wo...

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Believes current repayment interval of 5 years requires comprehensive measure offering	2	10.5	10.5	10.5
Needs to consider ROI before answering	1	5.3	5.3	15.8
No change b/c currently offering non-lighting measures	6	31.6	31.6	47.4
Willing to offer non-lighting measures	2	10.5	10.5	57.9
Would not offer OBF	2	10.5	10.5	68.4
Would offer OBF / loose some existing lighting only projects	1	5.3	5.3	73.7
Would partner w/ other vendors	5	26.3	26.3	100.0
Total	19	100.0	100.0	

Q19_RC: What kind of support, if any, would be useful to enable you to sell more projects that include non-l...

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	5.3	5.3	5.3
Assistance in aggregating projects w/ other vendors	2	10.5	10.5	15.8
Assistance with benchmarking	1	5.3	5.3	21.1
Better IOU OBF application processing with other IOU programs	1	5.3	5.3	26.3
Cooperation with utility staff	1	5.3	5.3	31.6

Engineering assistance with savings calculations	1	5.3	5.3	36.8
Grow project size by covering direct install measures w/ OBF	2	10.5	10.5	47.4
Higher rebates	1	5.3	5.3	52.6
Higher rebates / project management support	1	5.3	5.3	57.9
Need education about IOU's non-lighting programs	2	10.5	10.5	68.4
Needs mechanism to shield liability from partnering vendor(s)'s work	1	5.3	5.3	73.7
No suggestion	3	15.8	15.8	89.5
Sales leads of OBF qualified customers	1	5.3	5.3	94.7
Technical training for work with non-lighting measures	1	5.3	5.3	100.0
Total	19	100.0	100.0	

When you discuss financing options with energy-efficiency program participants, which of their departments do you discuss with?--Owner

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	8	42.1	100.0	100.0
Missing	System	11	57.9		
Total		19	100.0		

When you discuss financing options with energy-efficiency program participants, which of their departments do you discuss with?--Onsite Manager / General Manager

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	3	15.8	100.0	100.0
Missing	System	16	84.2		
Total		19	100.0		

When you discuss financing options with energy-efficiency program participants, which of their departments do you discuss with?--HQ / Upper Management

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	6	31.6	100.0	100.0
Missing	System	13	68.4		
Total		19	100.0		

When you discuss financing options with energy-efficiency program participants, which of their depar...-Accounting / Finance

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	10	52.6	100.0	100.0
Missing	System	9	47.4		
Total		19	100.0		

When you discuss financing options with energy-efficiency program participants, which of their depar...-Engineering

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

When you discuss financing options with energy-efficiency program participants, which of their depar...-Operations

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

When you discuss financing options with energy-efficiency program participants, which of their depar...-Facilities managers

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	8	42.1	100.0	100.0
Missing	System	11	57.9		
Total		19	100.0		

When you discuss financing options with energy-efficiency program participants, which of their depar...-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	4	21.1	100.0	100.0
Missing	System	15	78.9		
Total		19	100.0		

When you discuss financing options with energy-efficiency program participants, which of their depar...-Other-TEXT

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	15	78.9	78.9	78.9
Board of directors, planned communities	1	5.3	5.3	84.2
go into retail - large businesses	1	5.3	5.3	89.5
maintenance / operations. The OBF program changed in 2010, change was only the owner of the company or board of directors could sign the OBF documents. To submit to board of directors is very difficult. Vendor lost jobs after rule change b/c had to convince more board members.	1	5.3	5.3	94.7
varies - sometimes it is the facility engineer sometimes we're brought into the CEO CFO person.	1	5.3	5.3	100.0
Total	19	100.0	100.0	

When you discuss financing options with energy-efficiency program participants, which of their depar...-Do Not Know

	Frequency	Percent
Missing System	19	100.0

What criteria do customers use in assessing if they will go through with an energy efficiency invest...-Payback period

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1	5	26.3	100.0	100.0
Missing System	14	73.7		
Total	19	100.0		

What criteria do customers use in assessing if they will go through with an energy efficiency invest...-(ROI) Return on Investment

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1	12	63.2	100.0	100.0
Missing System	7	36.8		
Total	19	100.0		

What criteria do customers use in assessing if they will go through with an energy efficiency invest...-Availability of Capital

		Frequency	Percent
Missing	System	19	100.0

What criteria do customers use in assessing if they will go through with an energy efficiency invest...-Require / want new equipment

		Frequency	Percent
Missing	System	19	100.0

What criteria do customers use in assessing if they will go through with an energy efficiency invest...-Financing

		Frequency	Percent
Missing	System	19	100.0

What criteria do customers use in assessing if they will go through with an energy efficiency invest...-Improved product performance (e.g. brighter lights, more comfortable temperature)

		Frequency	Percent
Missing	System	19	100.0

What criteria do customers use in assessing if they will go through with an energy efficiency invest...-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	13	68.4	100.0	100.0
Missing	System	6	31.6		
Total		19	100.0		

Q21_RC

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		10	52.6	52.6	52.6
	Avoiding up front costs	3	15.8	15.8	68.4
	Equipment quality	1	5.3	5.3	73.7

Total savings	4	21.1	21.1	94.7
Vendor's reputation	1	5.3	5.3	100.0
Total	19	100.0	100.0	

What criteria do customers use in assessing if they will go through with an energy efficiency invest...-Other-TEXT

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	6	31.6	31.6	31.6
Avoiding out of pocket costs	1	5.3	5.3	36.8
belief in savings. reputation of the vendor / contractor	1	5.3	5.3	42.1
Calculations and energy analysis. They want documentation that the program is legitimate. Also want to see the product, be able to evaluate performance and esthetics.	1	5.3	5.3	47.4
cost effective	1	5.3	5.3	52.6
debt off balance sheet	1	5.3	5.3	57.9
how much money will save, overall project costs	1	5.3	5.3	63.2
if need to use their own money	1	5.3	5.3	68.4
Payback under 2 years is attractive to customers. Warranty on lighting lamp is only 2 years.	1	5.3	5.3	73.7
Perform audit and show savings calculation	1	5.3	5.3	78.9
Quality of the quipment. Is it an improvement? Warranty and maintenance costs. Savings calculations.	1	5.3	5.3	84.2
show me how much money i'm going to save	1	5.3	5.3	89.5
t12s are being eliminated and incentives are going away	1	5.3	5.3	94.7
we take on financial risk to help sell - coop type feeling	1	5.3	5.3	100.0
Total	19	100.0	100.0	

What criteria do customers use in assessing if they will go through with an energy efficiency invest....-Do Not Know

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

What criteria do they use to assess whether or not to use financing? (Probe: does project size matte....-Ability to scale size of project

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

What criteria do they use to assess whether or not to use financing? (Probe: does project size matte....-Convenience

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

What criteria do they use to assess whether or not to use financing? (Probe: does project size matte....-Loan length

		Frequency	Percent
Missing	System	19	100.0

What criteria do they use to assess whether or not to use financing? (Probe: does project size matte....-Impact on credit

		Frequency	Percent
Missing	System	19	100.0

What criteria do they use to assess whether or not to use financing? (Probe: does project size matte....-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	17	89.5	100.0	100.0
Missing	System	2	10.5		

Total	19	100.0
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Q22_RC: What criteria do they use to assess whether or not to use financing? (Probe: does project size matte

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	3	15.8	15.8	15.8
Available capital to spend	7	36.8	36.8	52.6
Avoiding up front cost	5	26.3	26.3	78.9
Concern over debt being reported	1	5.3	5.3	84.2
Total financial savings	1	5.3	5.3	89.5
Vendor only offers OBF	1	5.3	5.3	94.7
Zero percent financing	1	5.3	5.3	100.0
Total	19	100.0	100.0	

The utility categorizes OBF participants as: Taxpayer funded (government/institutional) Sma...

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Taxpayer funded	1	5.3	5.3	5.3
Small commercial/industrial/agriculture	11	57.9	57.9	63.2
Medium to Large commercial/industrial/agriculture	5	26.3	26.3	89.5
Other	2	10.5	10.5	100.0
Total	19	100.0	100.0	

From the following list, would you say those customers use OBF because ...-They had capital but found 0% attractive

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1	11	57.9	100.0	100.0
Missing System	8	42.1		
Total	19	100.0		

From the following list, would you say those customers use OBF because ...-OBF was convenient and made project approval easier

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1	15	78.9	100.0	100.0

Missing	System	4	21.1
Total		19	100.0

From the following list, would you say those customers use OBF because ...-OBF allows them to fund larger energy efficiency projects

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	15	78.9	100.0	100.0
Missing	System	4	21.1		
Total		19	100.0		

From the following list, would you say those customers use OBF because ...-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

Q24_RC: From the following list, would you say those customers use OBF because

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		18	94.7	94.7	94.7
	No up front costs	1	5.3	5.3	100.0
Total		19	100.0	100.0	

From the following list, would you say those customers use OBF because ...-Do Not Know

		Frequency	Percent
Missing	System	19	100.0

Q25_RC: Did customers have any concerns about the OBF program? (Probe: Are customers concerned that the pr...

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		2	10.5	10.5	10.5
	Complications with OBF application	2	10.5	10.5	21.1
	Concern over loan obligation if no longer in business.	2	10.5	10.5	31.6

Concern that savings will not cover project cost	1	5.3	5.3	36.8
Customer confusion when savings do not cover costs	1	5.3	5.3	42.1
No concerns	3	15.8	15.8	57.9
No concerns/mistrust once customer becomes educated about OBF	8	42.1	42.1	100.0
Total	19	100.0	100.0	

**How do customers who do not use OBF usually pay for energy-efficiency improvements?-
Upfront with cash**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	16	84.2	100.0	100.0
Missing	System	3	15.8		
Total		19	100.0		

How do customers who do not use OBF usually pay for energy-efficiency improvements?-Payment plan

		Frequency	Percent
Missing	System	19	100.0

How do customers who do not use OBF usually pay for energy-efficiency improvements?-Bank loan

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

How do customers who do not use OBF usually pay for energy-efficiency improvements?-Rebates / incentives

		Frequency	Percent
Missing	System	19	100.0

How do customers who do not use OBF usually pay for energy-efficiency improvements?-Issue bond(s)

		Frequency	Percent
Missing	System	19	100.0

**How do customers who do not use OBF usually pay for energy-efficiency improvements?-
Other**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

**How do customers who do not use OBF usually pay for energy-efficiency improvements?-
Other-TEXT**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		18	94.7	94.7	94.7
	use vendors financing	1	5.3	5.3	100.0
Total		19	100.0	100.0	

**How do customers who do not use OBF usually pay for energy-efficiency improvements?-Do
Not Know**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	2	10.5	100.0	100.0
Missing	System	17	89.5		
Total		19	100.0		

**If you could only offer customers rebates or financing through the utility, but not both, which
woul...**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rebates	5	26.3	26.3	26.3
	Financing	13	68.4	68.4	94.7
	Refused to decide	1	5.3	5.3	100.0
Total		19	100.0	100.0	

**Q27_RC: If you could only offer customers rebates or financing through the utility, but not
both, which woul**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		1	5.3	5.3	5.3
	Business not sustainable with only one mechanism	1	5.3	5.3	10.5
	Concern about reporting debt	1	5.3	5.3	15.8

Easier to sell project	1	5.3	5.3	21.1
Financing supports larger projects / higher quality equipment	1	5.3	5.3	26.3
Instability of rebates leads to preference for OBF	1	5.3	5.3	31.6
No up front costs	3	15.8	15.8	47.4
OBF covers more of the project costs	6	31.6	31.6	78.9
Rebates reduce customer repayment obligations	1	5.3	5.3	84.2
Vendor has more experience offering rebates	1	5.3	5.3	89.5
Vendor offers own financing	2	10.5	10.5	100.0
Total	19	100.0	100.0	

Q28_RC: In the future, 0% financing may not be available. If on-bill financing carried an interest rate comp...

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Stop actively offering to customers / only offer at customer request	1	5.3	5.3	5.3
	Would not offer OBF	3	15.8	15.8	21.1
	Would offer OBF	9	47.4	47.4	68.4
	Would offer OBF, but concerned that few customers would use OBF	6	31.6	31.6	100.0
	Total	19	100.0	100.0	

Q30_RC: How do your customers learn about OBF from your company?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Customers learn about OBF from IOU	1	5.3	5.3	5.3
	Discuss OBF in initial customer contact	13	68.4	68.4	73.7
	Discuss OBF in second customer contact, proposal phase	1	5.3	5.3	78.9
	Discuss OBF when discussing financing with customer	1	5.3	5.3	84.2

OBF explained to customer by IOU project management company	2	10.5	10.5	94.7
Offer OBF following audit	1	5.3	5.3	100.0
Total	19	100.0	100.0	

Q31_RC: Which of your activities have been most successful at encouraging organizations to enroll in OBF?...

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	3	15.8	15.8	15.8
Discussing application and verification process	1	5.3	5.3	21.1
Discussing payback process	2	10.5	10.5	31.6
Emphasizing 0% financing	3	15.8	15.8	47.4
Emphasizing bill neutrality	1	5.3	5.3	52.6
Emphasizing no up front costs	2	10.5	10.5	63.2
Estimate / calculate savings with the customer	2	10.5	10.5	73.7
Reassuring customer of program's legitimacy	3	15.8	15.8	89.5
Vendor / customer dialogue	2	10.5	10.5	100.0
Total	19	100.0	100.0	

When explaining OBF to customers how do you describe what participants are responsible for?-Participant is responsible for 3 , 5, or 10 years of monthly payments

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1	8	42.1	100.0	100.0
Missing System	11	57.9		
Total	19	100.0		

When explaining OBF to customers how do you describe what participants are responsible for?-It's like receiving measures for 'free'

	Frequency	Percent
Missing System	19	100.0

When explaining OBF to customers how do you describe what participants are responsible for?-There are no upfront costs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	6	31.6	100.0	100.0
Missing	System	13	68.4		
Total		19	100.0		

When explaining OBF to customers how do you describe what participants are responsible for?-Participant won't notice any difference

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	5	26.3	100.0	100.0
Missing	System	14	73.7		
Total		19	100.0		

When explaining OBF to customers how do you describe what participants are responsible for?-Sometimes monthly bill is a little higher if organization reduces energy use activities

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

When explaining OBF to customers how do you describe what participants are responsible for?-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	10	52.6	100.0	100.0
Missing	System	9	47.4		
Total		19	100.0		

Q32_RC: When explaining OBF to customers how do you describe what participants are responsible for?-

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		11	57.9	57.9	57.9
	Bill neutral / New equipment	1	5.3	5.3	63.2
	Discuss disconnection if loan not repaid	1	5.3	5.3	68.4
	Estimate monthly savings	1	5.3	5.3	73.7

Explain application process	1	5.3	5.3	78.9
Explain repayment	4	21.1	21.1	100.0
Total	19	100.0	100.0	

When explaining OBF to customers how do you describe what participants are responsible for?-Do Not Know

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	2	10.5	100.0	100.0
Missing	System	17	89.5		
Total		19	100.0		

We are interested in knowing more about the types of organizations you offer OBF to.

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	19	100.0	100.0	100.0

Typically, what size are these companies?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	<100	1	5.3	5.3	5.3
	<50	1	5.3	5.3	10.5
	1-300 employees.	1	5.3	5.3	15.8
	10-15, or 40 people. Smaller	1	5.3	5.3	21.1
	100 employees	1	5.3	5.3	26.3
	16 sites in school district - huge mall - BIG	1	5.3	5.3	31.6
	50-100 employees	1	5.3	5.3	36.8
	don't know - done a lot of kaisers in area and some offices - larger sized	1	5.3	5.3	42.1
	Home Owner Assoc., only had one client	1	5.3	5.3	47.4
	large schools and large companies. K-12; 50+ employees for businesses	1	5.3	5.3	52.6
	Medium sized businesses	1	5.3	5.3	57.9
	Not sure	2	10.5	10.5	68.4
	Small and large companies	1	5.3	5.3	73.7

small business	1	5.3	5.3	78.9
small groceries and gas stations	1	5.3	5.3	84.2
Small.	1	5.3	5.3	89.5
sq 40,000 to 300,000 typical commercial office building all the way up to industrial	1	5.3	5.3	94.7
sq footage - 3 to 10, 000 sq ft business	1	5.3	5.3	100.0
Total	19	100.0	100.0	

What business sector are they in?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid				
Car dealerships	1	5.3	5.3	5.3
Car dealerships, gas stations, convenience stores	1	5.3	5.3	10.5
Churches	1	5.3	5.3	15.8
commercial and industrial - health	1	5.3	5.3	21.1
commercial industrial	1	5.3	5.3	26.3
commercial office to one big facility with manufacturing - all verticals	1	5.3	5.3	31.6
Commercial, food, flowers	1	5.3	5.3	36.8
commercial/retail	1	5.3	5.3	42.1
education	1	5.3	5.3	47.4
education - large commercial	1	5.3	5.3	52.6
Gas stations, grocery stores, municipalities, hospitals	1	5.3	5.3	57.9
Gas stations, liqure stores, health centers, resturants.	1	5.3	5.3	63.2
manufacturing, retail, hospitality	1	5.3	5.3	68.4
NA	1	5.3	5.3	73.7
no - varies	1	5.3	5.3	78.9
Resutrants, fast foods, gas stations	1	5.3	5.3	84.2
retail	1	5.3	5.3	89.5

Retail	1	5.3	5.3	94.7
Small to medium commercial sector	1	5.3	5.3	100.0
Total	19	100.0	100.0	

What other characteristics do these companies have in common?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	3	15.8	15.8	15.8
Businesses with high wattage,e older technology with long hours of operation.	1	5.3	5.3	21.1
Car dealerships use a lot of lighting.	1	5.3	5.3	26.3
Clients that are looking to update facilities	1	5.3	5.3	31.6
Customers want to save money. No common altruistic thread, only a few are interested in ecological interests. A lot of customers do not believe in global warming.	1	5.3	5.3	36.8
High power usage with older equipment. Must use \$5K in electricity a month.	1	5.3	5.3	42.1
in san diego and need lightes	1	5.3	5.3	47.4
LDS churches 90%.	1	5.3	5.3	52.6
mechanical equipment - always have similar designs - size dictates strategy	1	5.3	5.3	57.9
NA	1	5.3	5.3	63.2
Need to lower overhead. Most of these customers are open 24 hrs / day.	1	5.3	5.3	68.4
no	1	5.3	5.3	73.7
retail - production - deal with customers a lot	1	5.3	5.3	78.9
size - looking for bigger projects	1	5.3	5.3	84.2
they all need lighting from morning until late evening. going good 12 to 16 hours a day.	1	5.3	5.3	89.5

they're usually independently owned owner operator	1	5.3	5.3	94.7
Use track lighting, directional accent light.	1	5.3	5.3	100.0
Total	19	100.0	100.0	

Are there kinds of organizations to which you do not promote OBF? For what reasons?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	5.3	5.3	5.3
anything over the limit on the program	1	5.3	5.3	10.5
Corporations. Corporations have too much red tape to make decisions	1	5.3	5.3	15.8
Does not offer to small 'mom and pop' companies b/c they will not qualify for OBF. The size of the job would be too small b/c of OBF restrictions. \$5,000 project minimum.	1	5.3	5.3	21.1
don't call on the small and medium sized business	1	5.3	5.3	26.3
Don't promote OBF unless customer asks for it.	1	5.3	5.3	31.6
Government organizations. Difficult to find someone to sign loan documents. When government organization is interested in a project they already have funding lined up.	1	5.3	5.3	36.8
if business is too small that they have project <\$5,000.	1	5.3	5.3	42.1
Municipalities with demand response programs where they can finance through different mechanisms.	1	5.3	5.3	47.4
NA	1	5.3	5.3	52.6
no	2	10.5	10.5	63.2
No	2	10.5	10.5	73.7

no - as long as they fit criteria to be in it.	1	5.3	5.3	78.9
no - they're happy to promote OBF to all their clients	1	5.3	5.3	84.2
No.	1	5.3	5.3	89.5
Smaller facilities.	1	5.3	5.3	94.7
typically larger companies with capital budgets that wouldn't be interested	1	5.3	5.3	100.0
Total	19	100.0	100.0	

We would like to know how well OBF resources support your ability to promote the OBF program. On a s... : 1= Not Helpful / Supportive....5 = Helpful / Supportive-Marketing materials

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	5.3	5.3
	2	3	15.8	15.8	21.1
	3	5	26.3	26.3	47.4
	4	5	26.3	26.3	73.7
	5	4	21.1	21.1	94.7
	No Answer	1	5.3	5.3	100.0
	Total	19	100.0	100.0	

We would like to know how well OBF resources support your ability to promote the OBF program. On a s... : 1= Not Helpful / Supportive....5 = Helpful / Supportive-Online handbook

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2	1	5.3	5.6	5.6
	3	1	5.3	5.6	11.1
	4	6	31.6	33.3	44.4
	5	4	21.1	22.2	66.7
	No Answer	6	31.6	33.3	100.0
	Total	18	94.7	100.0	
Missing	System	1	5.3		
	Total	19	100.0		

We would like to know how well OBF resources support your ability to promote the OBF program. On a s... : 1= Not Helpful / Supportive....5 = Helpful / Supportive-Other OBF training

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2	1	5.3	5.3	5.3
	3	5	26.3	26.3	31.6
	4	3	15.8	15.8	47.4
	5	7	36.8	36.8	84.2
	No Answer	3	15.8	15.8	100.0
	Total	19	100.0	100.0	

We would like to know how well OBF resources support your ability to promote the OBF program. On a s... : 1= Not Helpful / Supportive....5 = Helpful / Supportive-Working with utility staff

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	5.3	5.3
	3	4	21.1	21.1	26.3
	4	3	15.8	15.8	42.1
	5	10	52.6	52.6	94.7
	No Answer	1	5.3	5.3	100.0
	Total	19	100.0	100.0	

Q35_2_1_1_RC: We would like to know how well OBF resources support your ability to promote the OBF program. On a s... : If < 4, Why did you rate this item the way you did?-Marketing materials-Reason

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		10	52.6	52.6	52.6
	Customers do not read the marketing materials	1	5.3	5.3	57.9
	Has not used IOU's marketing materials	2	10.5	10.5	68.4
	Materials needs more content educating customer about OBF	4	21.1	21.1	89.5
	Prefers marketing material as customer bill insert	1	5.3	5.3	94.7
	Prefers more simplified materials	1	5.3	5.3	100.0
	Total	19	100.0	100.0	

Q35_2_2_1_RC: We would like to know how well OBF resources support your ability to promote the OBF program. On a s... : If < 4, Why did you rate this item the way you did?-Online handbook-Reason

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	14	73.7	73.7	73.7
Concern that rules in handbook are changing	1	5.3	5.3	78.9
handbook is not user friendly	1	5.3	5.3	84.2
Has not used online handbook	3	15.8	15.8	100.0
Total	19	100.0	100.0	

Q35_2_3_1_RC: We would like to know how well OBF resources support your ability to promote the OBF program. On a s... : If < 4, Why did you rate this item the way you did?-Other OBF training-Reason

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	14	73.7	73.7	73.7
Desires more training concerning customer eligibility	1	5.3	5.3	78.9
Did not use training	2	10.5	10.5	89.5
Train lacks realistic application	1	5.3	5.3	94.7
Training lacks training for use of IOU'd software and website	1	5.3	5.3	100.0
Total	19	100.0	100.0	

Q35_2_4_1_RC: We would like to know how well OBF resources support your ability to promote the OBF program. On a s... : If < 4, Why did you rate this item the way you did?-Working with utility staff-Reason

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	10	52.6	52.6	52.6
IOU does not communicate reasons why applications are out of compliance	1	5.3	5.3	57.9
OBF staff are difficult to contact	2	10.5	10.5	68.4
OBF staff are not knowledgeable	1	5.3	5.3	73.7
OBF staff are not responsive / staff do not communicate program changes	1	5.3	5.3	78.9
OBF staff are not responsive because they lack knowledge about EE measures	1	5.3	5.3	84.2

OBF staff are responsive	1	5.3	5.3	89.5
OBF staffs responsiveness depends on who is the contact	1	5.3	5.3	94.7
Vendor had communication difficulties	1	5.3	5.3	100.0
Total	19	100.0	100.0	

Were you responsible for any part of the OBF application process on behalf of your customers, includ...-Yes

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	17	89.5	100.0	100.0
Missing	System	2	10.5		
Total		19	100.0		

Were you responsible for any part of the OBF application process on behalf of your customers, includ...-No

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

Were you responsible for any part of the OBF application process on behalf of your customers, includ...-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

Were you responsible for any part of the OBF application process on behalf of your customers, includ...-Other-TEXT

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		18	94.7	94.7	94.7
	sales people would get it together and then i would get our invoice together. field person did this	1	5.3	5.3	100.0
Total		19	100.0	100.0	

Were you responsible for any part of the OBF application process on behalf of your customers, includ...-Do Not Know

		Frequency	Percent
Missing	System	19	100.0

Q39_RC: Did you encounter any difficulties, such as rejected applications? [Probe if any applications were r...

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	5	26.3	26.3	26.3
Application process is improving as vendor learns the process	2	10.5	10.5	36.8
Application rejection rate is improving	1	5.3	5.3	42.1
Applications rejected because customer qualified for direct install	1	5.3	5.3	47.4
Believes OBF staff rejects application because they are not reading applications correctly	1	5.3	5.3	52.6
Customer ineligible for OBF	2	10.5	10.5	63.2
Difficulty with application formatting	1	5.3	5.3	68.4
Difficulty with savings calculations for customers with multiple accounts	1	5.3	5.3	73.7
IOU takes too much time to determine customers' OBF eligibility	1	5.3	5.3	78.9
Need new OBF contract with the customer when project costs change	1	5.3	5.3	84.2
OBF does not cover project because EE measure not covered by IOU	1	5.3	5.3	89.5
Variation in vendor and IOU's savings calculations requires application rework	1	5.3	5.3	94.7
Vendor likes the improvements made to the application process	1	5.3	5.3	100.0
Total	19	100.0	100.0	

Were any of your applications returned for clarification or rework?-Yes

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	11	57.9	100.0	100.0
Missing	System	8	42.1		
Total		19	100.0		

Were any of your applications returned for clarification or rework?-No

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	5	26.3	100.0	100.0
Missing	System	14	73.7		
Total		19	100.0		

Were any of your applications returned for clarification or rework?-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

Were any of your applications returned for clarification or rework?-Other-TEXT

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		18	94.7	94.7	94.7
	If issues come up get notified by email.	1	5.3	5.3	100.0
Total		19	100.0	100.0	

Were any of your applications returned for clarification or rework?-Do Not Know

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	5.3	100.0	100.0
Missing	System	18	94.7		
Total		19	100.0		

What are some things that could be done to reduce the number of applications requiring rework?

		Frequency	Percent	Valid Percent	Cumulative Percent
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Valid	8	42.1	42.1	42.1
A few were returned if not meet qualifications. Worked with IOU to help qualify customer.	1	5.3	5.3	47.4
looking at the savings and providing that before hand and payback.	1	5.3	5.3	52.6
Most applications are returned for rework. Data was entered in the wrong location = application returned for rework. Respondent believes rework is a stall tactic to keep SDGE from paying on time.	1	5.3	5.3	57.9
Most common reason is that cost of the project has been changed.	1	5.3	5.3	63.2
Need better explanation about payback calculations	1	5.3	5.3	68.4
no - i htink we just had to become familiar with it. once you know it but there were a lot of particular things that you run into that the class doesn't teach completely.	1	5.3	5.3	73.7
Not sure.	1	5.3	5.3	78.9
Often returned by engineering department for clarification. Most problems are with engineering department.	1	5.3	5.3	84.2
see earlier - be clearer about what is needed upfront. simplified formatting put in training	1	5.3	5.3	89.5

Sometimes final project is more or less than the proposed = need to rework application. application should still be good if it is within 5-10% of estimate. Believes utility's cost to re-evaluate the project is more expensive than dealing with soft cost at end of project. NY has program called national grid, combination of DI and OBF. They have independent engineering firms that audit / coordinate projects. Likes this program b/c independent engineers do site estimates.

1 5.3 5.3 94.7

three were changes on the project requiring rework.

1 5.3 5.3 100.0

Total 19 100.0 100.0

Are you able to communicate with utility staff in a timely manner concerning OBF topics and issues?-Yes

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	13	68.4	100.0	100.0
Missing	System	6	31.6		
Total		19	100.0		

Are you able to communicate with utility staff in a timely manner concerning OBF topics and issues?-No

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	3	15.8	100.0	100.0
Missing	System	16	84.2		
Total		19	100.0		

Are you able to communicate with utility staff in a timely manner concerning OBF topics and issues?-Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	5	26.3	100.0	100.0
Missing	System	14	73.7		
Total		19	100.0		

Q_42_3_RC: Are you able to communicate with utility staff in a timely manner concerning OBF topics and issues?-

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	16	84.2	84.2	84.2
Communication depends on having correct staff's email address	1	5.3	5.3	89.5
Communication is limited because it is restricted to email	1	5.3	5.3	94.7
Minor delay in communication	1	5.3	5.3	100.0
Total	19	100.0	100.0	

Are you able to communicate with utility staff in a timely manner concerning OBF topics and issues?-Do Not Know

	Frequency	Percent
Missing System	19	100.0

Why has communication not been timely

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	16	84.2	84.2	84.2
Most difficult department to deal with. Does not respond to phone calls. Will respond to email. takes 2-3 days.	1	5.3	5.3	89.5
see notes previous - email only - takes forever to get anything done because often don't know the status of things... need online status	1	5.3	5.3	94.7
Submits projects for approval, and have follow up questions. Most time not hear back from staff. Most of the difficulty are with approval from engineering.	1	5.3	5.3	100.0
Total	19	100.0	100.0	

In the future, do you plan to continue promoting on-bill financing for efficiency projects?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	19	100.0	100.0	100.0

Participant Summary Data

B1 How did you first find out about <IOU>'s on-bill finance program?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Contractor/installer	38	64.4	64.4	64.4
	<IOU> account manager or program staff	1	1.7	1.7	66.1
	<IOU> physical mail or email	2	3.4	3.4	69.5
	Word-of-mouth	7	11.9	11.9	81.4
	Other (SPECIFY:)	6	10.2	10.2	91.5
	Don't know	5	8.5	8.5	100.0
	Total	59	100.0	100.0	

B1 OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		52	88.1	88.1	88.1
	ACCOUNT REP AND ALSO THIRD PARTY ENERGY GROUP	1	1.7	1.7	89.8
	AN ENERGY ANALYSIS COMPANY PECI	1	1.7	1.7	91.5
	CONTRACTOR OR A PERSON FROM SDGE	1	1.7	1.7	93.2
	ECO GREEN TALKED TO US	1	1.7	1.7	94.9
	GLOBAL POWER DOES MAINTENANCE TO MY GENERATOR - contactor or vendor	1	1.7	1.7	96.6
	I CONTACTED THEM ABOUT IT BY PHONE	1	1.7	1.7	98.3
	USED TO BE IN THE INDUSTRY SO I KNEW PEOPLE	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

TO C1AM2 "C1A Who is involved in making decisions about energy-efficiency projects at your company, and what are their positions or roles?"

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Owner	29	49.2	49.2	49.2

Upper Management/Executive Management	24	40.7	40.7	89.8
Facility Manager	2	3.4	3.4	93.2
Engineering	1	1.7	1.7	94.9
Other (SPECIFY:)	2	3.4	3.4	98.3
Don't know	1	1.7	1.7	100.0
Total	59	100.0	100.0	

C1AM2

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	1.7	12.5	12.5
	2	4	6.8	50.0	62.5
	6	1	1.7	12.5	75.0
	97	2	3.4	25.0	100.0
	Total	8	13.6	100.0	
Missing	System	51	86.4		
Total		59	100.0		

C1A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		51	86.4	86.4	86.4
	ASSISTANT DIRECTOR OF FACILITY OPERATIONS	1	1.7	1.7	88.1
	BOARD OF DIRECTORS OF HOMEOWNERS ASSOCIATION	1	1.7	1.7	89.8
	CHURCH COUNSEL	1	1.7	1.7	91.5
	GENERAL MANAGER	1	1.7	1.7	93.2
	OPERATIONS MANAGER	1	1.7	1.7	94.9
	STORE DIRECTOR	1	1.7	1.7	96.6
	SUPERINTENDANT	1	1.7	1.7	98.3
	TRIBAL COUNCIL	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

C2 What types of equipment did your company finance through the on-bill finance program?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Lighting equipment only	44	74.6	74.6	74.6
	Lighting and another type of equipment, such as heating or r	9	15.3	15.3	89.8
	Or equipment not related to lighting	6	10.2	10.2	100.0
	Total	59	100.0	100.0	

C2A At the time that you participated in on-bill financing, did you consider or were you offered other types of equipment besides lighting?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	32	54.2	72.7	72.7
	Yes, RECORD COMMENTS	7	11.9	15.9	88.6
	Don't know	5	8.5	11.4	100.0
	Total	44	74.6	100.0	
Missing	System	15	25.4		
Total		59	100.0		

C2A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		52	88.1	88.1	88.1
	AIR CONDITIONING AND EVERYTHING THEY COULD OFFER	1	1.7	1.7	89.8
	COOL CURTAINS FOR REFRIGERATION	1	1.7	1.7	91.5
	FRIDGE	1	1.7	1.7	93.2
	I'VE BEEN IN BUSINESS THREE YEARS SO EVERYTHING IS UP TO CODE	1	1.7	1.7	94.9
	SOLAR STUFF AND SOME INDUCTION UNITS	1	1.7	1.7	96.6
	TALKED ABOUT CHANGING OUT SOME OF THE FANS AND STUFF	1	1.7	1.7	98.3
	THEY OFFERED BUT WE NOT INTERESTED IN AC AND REFRIGERATION	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

C2B Why didn't you install the other equipment?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	RECORD COMMENTS	7	11.9	100.0	100.0
Missing	System	52	88.1		
Total		59	100.0		

C2B OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		52	88.1	88.1	88.1
	ALREADY DID ABOUT 2 YEARS EARLIER	1	1.7	1.7	89.8
	DIDN'T PENCIL OUT	1	1.7	1.7	91.5
	DIDN'T WANT TO	1	1.7	1.7	93.2

I DIDN'T NEED IT	1	1.7	1.7	94.9
MOTOR FOR THE FRIDGE FAN - THEY SAID NOT NOW	1	1.7	1.7	96.6
RIGHT NOW WE ARE IN THE PROCESS	1	1.7	1.7	98.3
WE HAD EVALUATIONS IN THE PAST PAN OUT COST WISE - THERE HAS TO BE ROI	1	1.7	1.7	100.0
Total	59	100.0	100.0	

C3 What is the main reason for using on-bill financing?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	RECORD COMMENTS	57	96.6	96.6	96.6
	Don't know - DO NOT READ	2	3.4	3.4	100.0
	Total	59	100.0	100.0	

C3 OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		2	3.4	3.4	3.4
	0% AND ALSO IF WE HIT OUR SAVINGS TARGET IT WOULD EARN US MORE	1	1.7	1.7	5.1
	AS FAR AS I KNOW IT WAS EASIER AND WE SAVE	1	1.7	1.7	6.8
	BASICALLY BECAUSE ITS A FREE LOAN	1	1.7	1.7	8.5
	BECAUSE IT WAS A GOOD CHUNK OF CHANGE TO PUT OUT ALL AT ONCE	1	1.7	1.7	10.2
	BECAUSE THAT IS WHAT HE RECOMMENDED	1	1.7	1.7	11.9
	BECAUSE THERE IS NO COST UP FRONT	1	1.7	1.7	13.6
	CAUSE WE COULDN'T AFFORD IT ALL AT ONCE	1	1.7	1.7	15.3
	CONVENIENCE	1	1.7	1.7	16.9
	COST - NOT A BUNCH OF ITEMS SO WE COULDN'T JUST PAY FOR IT	1	1.7	1.7	18.6
	DIDN'T HAVE THE CASH	1	1.7	1.7	20.3
	EASIER - FINANCIALLY	1	1.7	1.7	22.0
	EASIER FOR US TO ACCESS	1	1.7	1.7	23.7
	FOR THE LIGHTING	1	1.7	1.7	25.4
	I HAVE NO IDEA - ALL I KNOW IS THEY SAID IT WILL BE NO CHARGE TO ME	1	1.7	1.7	27.1
	I THINK THEY SAY WE GOING TO SAVE MONEY	1	1.7	1.7	28.8
	IT MADE SENSE	1	1.7	1.7	30.5
	IT SEEMED LIKE A NO BRAINER	1	1.7	1.7	32.2
	IT SEEMED LIKE AN ATTRACTIVE PROGRAM - LOWER BILL	1	1.7	1.7	33.9

IT WAS A GOOD DEAL - WE WERE WE HAD A FEW LIGHTS GO OUT AND WE HAD TO REPLACE THEM ANYWAY AND WE UPGRADED AT NO COST TO US AND SAVE WIN WIN SAVE THE ENVIRONMENT	1	1.7	1.7	35.6
IT WAS AVAILABLE	1	1.7	1.7	37.3
IT WAS BASICALLY FREE MONEY	1	1.7	1.7	39.0
IT WAS CONVENIENT	1	1.7	1.7	40.7
ITS A KIND OF WELL ESPECIALLY IN THE ECONOMY TIMES RIGHT NOW AND WE CANT AFFORD TO PAY THE MONEY YOU KNOW	1	1.7	1.7	42.4
JUST STRICTLY BUDGET	1	1.7	1.7	44.1
JUST TO THE LIGHTING WE HAD WAS OLD AND USING LOTS OF ENERGY	1	1.7	1.7	45.8
LOWER MONTHLY PRICE	1	1.7	1.7	47.5
MY BILL WOULD REMAIN THE SAME	1	1.7	1.7	49.2
NEW STYLE LIGHTING LOOKED GOOD	1	1.7	1.7	50.8
O PERCENT INTEREST	1	1.7	1.7	52.5
OBVIOUSLY IN THREE YEARS OUR POWER BILL WILL DROP DRASTICALLY AND I GOT NEW EVERYTHING SO IT HELPED ME OUT SERVICE WISE	1	1.7	1.7	54.2
ONE OF THE REASONS WAS NO OUT OF POCKET COST	1	1.7	1.7	55.9
Organization did not have sufficient cash and needed financing - (coded before changed to open)	1	1.7	1.7	57.6
REDUCTION OF THE COST	1	1.7	1.7	59.3
SAVE ENERGY AND LOWER PAYMENT	1	1.7	1.7	61.0
SAVE MONEY	1	1.7	1.7	62.7
SAVE MONEY I GUESS	1	1.7	1.7	64.4
THE EXPENSE OF THE CONVERSION IS NOT SOMETHING I WOULD HAVE DONE UNLESS IT WASN'T REALLY - IN THIS DAY AND AGE WITH BUSINESS LIKE IT IS I DIDN'T WANT TO ADD TO BOTTOM LINE	1	1.7	1.7	66.1
THE PRODUCT THAT WE RECEIVED WAS AVAILABLE ONLY THROUGH PROGRAM	1	1.7	1.7	67.8
TO CONSERVE ENERGY AND BRING COST OF ENERGY DOWN	1	1.7	1.7	69.5
TO HELP COVER THE COST	1	1.7	1.7	71.2
TO USE IT FOR THE LIGHTS LED LIGHTS SO BRIGHT AND HE SAYS ITS WHATEVER YOUR GOING TO PAY YOU SAVE ON YOUR BILL	1	1.7	1.7	72.9
TOO MUCH TO PAY AT ONCE	1	1.7	1.7	74.6
TRYING TO SAVE SOME MONEY	1	1.7	1.7	76.3
VIRTUALLY IMPOSSIBLE TO GET A LOAN	1	1.7	1.7	78.0
WE DID LIKE WHAT WE SAW THERE	1	1.7	1.7	79.7
WE KNEW WE WERE GOING TO HAVE TO CHANGE OUT BECAUSE OUR LAMPS ARE NO LONGER GOING TO BE MADE	1	1.7	1.7	81.4
WE WERE MINDFUL OF CASH AND WANTED TO REDUCE ENERGY CONSUMPTION	1	1.7	1.7	83.1

WE WOULD BE SAVING ENERGY AND THAT SAVINGS WOULD PAY FOR UPGRADE	1	1.7	1.7	84.7
WELL - ITS UM - OBVIOUSLY IT IS BASICALLY CASH FLOW - THE SAVINGS MORE THAN OFFSET THE MONTHLY PAYMENT	1	1.7	1.7	86.4
WELL I MEAN MY LIGHTS WERE NOT THAT GOOD THEY WERE OLD AND USED OLD BULB AND ALWAYS BURN	1	1.7	1.7	88.1
WELL IT ALLOWED US TO UPGRADE AT NO ADDITIONAL MONTHLY COST	1	1.7	1.7	89.8
WELL OBVIOUSLY TO SAVE ENERGY	1	1.7	1.7	91.5
YOUR ORGANIZATION COULD HAVE PAID OUT OF POCKET BUT THOUGHT THE 0% FINANCING WAS ATTRACTIVE	3	5.1	5.1	96.6
YOUR ORGANIZATION HAD SUFFICIENT CASH BUT OBF MADE THE PROJECT APPROVAL PROCESS EASIER	1	1.7	1.7	98.3
YOUR ORGANIZATION HAD SUFFICIENT CASH, BUT OBF MADE THE PROJECT APPROVAL PROCESS EASIER	1	1.7	1.7	100.0
Total	59	100.0	100.0	

C4 Did your organization look into obtaining financing from other sources outside the on-bill financing program?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	54	91.5	91.5	91.5
	Yes, RECORD COMMENTS	3	5.1	5.1	96.6
	Don't know	2	3.4	3.4	100.0
	Total	59	100.0	100.0	

C4 OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		56	94.9	94.9	94.9
	CALIFORNIA ENERGY COMMISSION LOAN	1	1.7	1.7	96.6
	CAPITAL FINANCE COMPANY - WE HAD FINANCING AVAILABLE BUT 0% MAKES MORE SENSE	1	1.7	1.7	98.3
	WE LOOKED AT WASHER AND DRYER - /P YEAH WE LOOKED IT	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

C4A What was the main reason for using utility on-bill financing instead of other financing sources?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	RECORD COMMENTS	3	5.1	100.0	100.0
Missing	System	56	94.9		
Total		59	100.0		

C4A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		56	94.9	94.9	94.9
	BECAUSE ITS GOING TO PAY OFF IN FIVE YEARS AND CURRENTLY IT IS CHARGING IN OUR ACCOUNT	1	1.7	1.7	96.6
	LOWER INTEREST	1	1.7	1.7	98.3
	ON BILL FINANCING OFFERING WAS BETTER FINANCIALLY (0% INTEREST, NO FEES)	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

C5 Did your organization have any concerns about using on-bill financing to pay for the energy-efficiency project?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	15	25.4	25.4	25.4
	No	44	74.6	74.6	100.0
	Total	59	100.0	100.0	

C5A What were your concerns?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Taking on debt/balance sheet concerns	1	1.7	6.7	6.7
	Not realizing energy savings/Performance of equipment/Return	4	6.8	26.7	33.3
	Other (SPECIFY:)	10	16.9	66.7	100.0
	Total	15	25.4	100.0	
Missing	System	44	74.6		
Total		59	100.0		

C5A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		49	83.1	83.1	83.1
	ABOUT THE WORK	1	1.7	1.7	84.7
	ENERGY COSTS ARE NOT FIXED SO WE ARE SAVING ELECTRICITY BUT WERE CONCERNED WE WERE NOT GOING TO SAVE MONEY OR ROI ON LIGHTING AND AC	1	1.7	1.7	86.4
	I KEPT HEARING IT WAS NO INTEREST BUT EXACT DOLLAR AMOUNTS WERE VAGUE AND WAS FINALLY CONVINCED	1	1.7	1.7	88.1
	I PROBABLY COULD HAVE DONE THE WORK CHEAPER THAN WHAT THEY CHARGED	1	1.7	1.7	89.8
	I WAS CONCERNED THAT IT WAS A MERCHANDIZING MARKETING EFFORT THAT WOULD NOT PAY OFF	1	1.7	1.7	91.5

I WASN'T SURE WHAT THEY SEND THE COMPANY THE CONTRACTOR FOR SOMETHING THAT COST 2 DOLLAR THEY CHARGE 10 THOUSAND DOLLARS AND THEY FINANCE IT - THE CONTRACT WAS NOT CLEAR AND THE JOB WAS DONE CHEAP AND SIX MONTHS LATER THE SAME LIGHTING MORE THEY CHEATING THE SITUATION IM NOT HAPPY - WE GOT CHEATED WE HAVE TO PAY FOR IT OVER FIVE YEARS	1	1.7	1.7	93.2
IT IS A CONTRACT SO YOU WANT TO MAKE SURE INFO IS CORRECT	1	1.7	1.7	94.9
PAYING TOO MUCH FOR THE LIGHTING	1	1.7	1.7	96.6
THE COMPANIES INVOLVED MOST OF THEM USED A REVERSE - FIGURED OUT HOW MUCH MONEY THEY COULD GET FROM THE UTILITY AND THEY BID THE PROJECT THAT MUCH AND THEY ARE ALL RUNNING THAT SAME SCAM - THE PROBLEM YOU HAVE IS IN REALITY EVERYBODY IS GETTING REAMED - IT WAS RIDICULOUS - ONE BID DROPPED FROM 50000 TO 20000 AFTER I DECLINED AND THEY RAN THE CALCULATION AGAIN	1	1.7	1.7	98.3
THE LOCATION I DID BEFORE HALF THE PROPERTY GOT LEASED OUT AND THE LEASE DOES NOT USE 99 PERCENT OF LIGHTING AND AS LONG AS THEY DON'T TURN THEM ON I DON'T SAVE A NICKEL	1	1.7	1.7	100.0
Total	59	100.0	100.0	

C6 Which of the following best describes how the loan repayment period figured into the decision to use on-bill financing?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	You were not concerned with the repayment period	7	11.9	11.9	11.9
	Repayment period was adequate	43	72.9	72.9	84.7
	You would have liked a longer repayment period	4	6.8	6.8	91.5
	Or you would have liked a shorter repayment period	4	6.8	6.8	98.3
	Don't know - DO NOT READ	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

C6A How long?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	RECORD COMMENTS	7	11.9	87.5	87.5
	Don't know	1	1.7	12.5	100.0
	Total	8	13.6	100.0	
Missing	System	51	86.4		
Total		59	100.0		

C6A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		52	88.1	88.1	88.1
	1 YEAR	1	1.7	1.7	89.8
	2	1	1.7	1.7	91.5
	36 MONTHS	1	1.7	1.7	93.2
	4 YEARS	1	1.7	1.7	94.9
	LESS THAN 2 YEARS	1	1.7	1.7	96.6
	PAYMENT IS TOO MUCH - I DON'T KNOW MAYBE 2 OR 3 MORE YEARS	1	1.7	1.7	98.3
	SEEING AS HOW IT IS BASED ON ESTIMATED SAVINGS YOUR PRETTY MUCH STUCK	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

C7 Would you have preferred a larger or smaller loan than what was available through the program?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No, loan size was fine	42	71.2	71.2	71.2
	Yes I would have liked a larger loan amount	2	3.4	3.4	74.6
	Yes, I would have liked a smaller loan amount	10	16.9	16.9	91.5
	Don't know	5	8.5	8.5	100.0
	Total	59	100.0	100.0	

C7A How much and why?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	RECORD COMMENTS	10	16.9	83.3	83.3
	Don't know	2	3.4	16.7	100.0
	Total	12	20.3	100.0	
Missing	System	47	79.7		
Total		59	100.0		

C7A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		49	83.1	83.1	83.1
	BECAUSE RIGHT NOW THE ECONOMY IS BAD AND IT WAS SUPPOSED TO HELP THE BILL BUT IT WENT UP FROM 1200 TO LIKE 1800	1	1.7	1.7	84.7
	COUPLE THOUSAND??	1	1.7	1.7	86.4
	IF I COULD HAVE BOUGHT THEM CHEAPER	1	1.7	1.7	88.1

MAYBE 2 YEARS MORE /P PAYMENT WILL BE DEDUCTED OVER LESS	1	1.7	1.7	89.8
OF COURSE SMALLER WOULD BE BETTER	1	1.7	1.7	91.5
PROJECT COST LESS WOULD BE NICE	1	1.7	1.7	93.2
THE WAY I HAVE RIGHT NOW ITS ALRIGHT	1	1.7	1.7	94.9
WE ARE LOOKING AT THINGS IN THE FUTURE	1	1.7	1.7	96.6
WE LOOK AT ANYTHING FROM LESS THAN FIVE YEARS TO DOWN TO LESS THAN SIX MONTHS AND A YEAR - FASTER PAYBACK IS BETTER	1	1.7	1.7	98.3
WHO DOESN'T WANT TO PAY LESS	1	1.7	1.7	100.0
Total	59	100.0	100.0	

C8 If on-bill financing had not been available, would your organization still have considered or completed an energy-efficiency project or would it have not done a project at all?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Still would have completed a project/or looked into a smaller	15	25.4	25.4	25.4
	Would not have gone through with a project	42	71.2	71.2	96.6
	Don't know	2	3.4	3.4	100.0
	Total	59	100.0	100.0	

C8A Would you have completed the project at the time that you did or would you have done it later?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Same time	4	6.8	26.7	26.7
	Would have delayed the project	9	15.3	60.0	86.7
	Don't know	2	3.4	13.3	100.0
	Total	15	25.4	100.0	
Missing	System	44	74.6		
Total		59	100.0		

C8B Would the efficiency of the equipment you installed been at the same level or would it have been less efficient?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Same efficiency level	11	18.6	73.3	73.3
	More efficient	1	1.7	6.7	80.0
	Don't know	3	5.1	20.0	100.0
	Total	15	25.4	100.0	
Missing	System	44	74.6		
Total		59	100.0		

Q8B1 OPEN

		Frequency	Percent
Missing	System	59	100.0

C8C Would you have installed the same quantity of equipment or would you have installed a different quantity?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Same quantity	10	16.9	66.7	66.7
	More	2	3.4	13.3	80.0
	Less	3	5.1	20.0	100.0
	Total	15	25.4	100.0	
Missing	System	44	74.6		
Total		59	100.0		

C9 If on-bill financing had not been available, how would you have paid for the energy-efficiency project you installed?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	With available cash or company funds	10	16.9	66.7	66.7
	Secured loan from a lender	1	1.7	6.7	73.3
	Would have leased the equipment	1	1.7	6.7	80.0
	Would not have gone ahead with the project	1	1.7	6.7	86.7
	Don't know	2	3.4	13.3	100.0
	Total	15	25.4	100.0	
Missing	System	44	74.6		
Total		59	100.0		

C9 OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		57	96.6	96.6	96.6
	JUST WOULD NOT DO IT	1	1.7	1.7	98.3
	WE WOULD LEASE THE EQUIPMENT	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

D1 If you had to select either the rebates or zero percent financing, but not both, what would you have selected?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rebates	20	33.9	33.9	33.9
	0% Financing	29	49.2	49.2	83.1
	Don't know	10	16.9	16.9	100.0
	Total	59	100.0	100.0	

D1A Why do you say that?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	RECORD COMMENTS	49	83.1	83.1	83.1
	Don't know	10	16.9	16.9	100.0
	Total	59	100.0	100.0	

D1A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		10	16.9	16.9	16.9
	0% THERE YOU GO	1	1.7	1.7	18.6
	28000\$ IS 28000\$	1	1.7	1.7	20.3
	ACTUALLY THE ENERGY SAVING PROJECT ALREADY HAS THE INCENTIVE THERE ABOUT THE SAME AMOUNT AS THE REBATE	1	1.7	1.7	22.0
	ACTUALLY YOU KNOW I DON'T THINK WE I AM TRYING TO THINK BACK - IF WE COULD GET REBATE THAT WOULD BE GREAT	1	1.7	1.7	23.7
	BECAUSE I DIDN'T HAVE MONEY AT THE TIME	1	1.7	1.7	25.4
	BECAUSE IT IS NOT COSTING US OUT OF OUR POCKET	1	1.7	1.7	27.1
	BECAUSE REALLY THE 0 FINANCE I COULD PROBABLY IT WILL BE HELPFUL FOR ME	1	1.7	1.7	28.8
	BECAUSE THE REBATE IS ALWAYS - I MEAN PEOPLE LIKE THE REBATE COMPARED TO IF THEY HAVE TO PAY	1	1.7	1.7	30.5
	BECAUSE THEY SAY WE WANT TO SAVE ENERGY BUT WE PAY FOR IT I DON'T SEE A DIFFERENCE	1	1.7	1.7	32.2
	BIGGER PERCENT OF COST COVERED BY REBATE	1	1.7	1.7	33.9
	CHEAPER	1	1.7	1.7	35.6
	COST BENEFIT ANALYSIS	1	1.7	1.7	37.3
	COST LESS MONEY	1	1.7	1.7	39.0
	EASIER	1	1.7	1.7	40.7
	I DON'T KNOW	1	1.7	1.7	42.4
	I DON'T KNOW OF COURSE BECAUSE INTEREST	1	1.7	1.7	44.1
	I DON'T KNOW WOULD HAVE TO SEE WHICH IS GREATER VALUE	1	1.7	1.7	45.8
	I DON'T REMEMBER ANY REBATES	1	1.7	1.7	47.5
	I HAD THE ABILITY TO PAY	1	1.7	1.7	49.2
	I HAVE TO PAY ANYWAY	1	1.7	1.7	50.8
	I WOULD CHOOSE THE ONE WHERE THEY PAY FOR IT	1	1.7	1.7	52.5
	IF IT COST TOO MUCH UP FRONT WE WOULD NOT HAVE DONE IT	1	1.7	1.7	54.2
	IF WE CAN BUY IT FOR LESS AND WE CAN AFFORD TO PAY THAT IS THE WAY GO	1	1.7	1.7	55.9

INSTANT AND NO CHANGE TO CASH FLOW	1	1.7	1.7	57.6
IT GIVES US MORE MONTH TO MONTH CONSISTENCY	1	1.7	1.7	59.3
IT KIND OF PAYS OFF SHORT TERM	1	1.7	1.7	61.0
IT SEEMED LIKE IT WAS EASIER INSTEAD OF THE REBATE	1	1.7	1.7	62.7
IT WOULD DEPEND ON SIZE OF REBATES	1	1.7	1.7	64.4
ITS GOING TO BE PAYING LATER	1	1.7	1.7	66.1
JUST NOTHING UP FRONT	1	1.7	1.7	67.8
JUST THINK SO	1	1.7	1.7	69.5
MAKES LIFE EASIER	1	1.7	1.7	71.2
MAKES SO MUCH SENSE	1	1.7	1.7	72.9
NO INTEREST	1	1.7	1.7	74.6
REBATE IS MONEY BACK TO ME	1	1.7	1.7	76.3
REBATES DON'T GET YOU THERE	1	1.7	1.7	78.0
REBATES NOT THAT IMPORTANT	1	1.7	1.7	79.7
REDUCE MY MONTHLY EXPENSES	1	1.7	1.7	81.4
SAVE MORE	1	1.7	1.7	83.1
THAT DIDN'T COST ANYTHING	1	1.7	1.7	84.7
THE REBATES DONE RIGHT AWAY	1	1.7	1.7	86.4
THE WAY STUFF WORKS - TAX REASONS	1	1.7	1.7	88.1
WE ARE IN A RECESSION SO THE FACT OF THE MATTER IS THAT YOU KNOW EVEN IF WE HAD A REBATE FOR THE COST OF THE BULBS WE STILL WOULD HAVE HAD TO COME UP WITH THE CASH	1	1.7	1.7	89.8
WE WERE NOT DOING TOO GOOD BACK THEN	1	1.7	1.7	91.5
WE WILL TAKE REBATES - WE ARE HEALTHY ENOUGH TO PAY FOR THINGS UP FRONT CASH OVER CREDIT	1	1.7	1.7	93.2
WELL ACTUALLY THE REBATE PAID A LOT	1	1.7	1.7	94.9
WELL I MEAN THE OWNER CAN ANSWER ALL THESE QUESTION	1	1.7	1.7	96.6
WHENEVER WE DO SOMETHING WE TRY TO PAY IT OFF INSTEAD OF FINANCING	1	1.7	1.7	98.3
WOULD FIT INTO OUR BUDGET	1	1.7	1.7	100.0
Total	59	100.0	100.0	

Initial percent asked

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	5 percent	20	33.9	33.9	33.9
	6 percent	19	32.2	32.2	66.1
	7 percent	20	33.9	33.9	100.0
	Total	59	100.0	100.0	

D2 Would you have implemented the same project using on-bill financing if your monthly payments were calculated using a (5%,6%,7%) interest rate?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	6	10.2	10.2	10.2
	No	38	64.4	64.4	74.6
	Don't know	15	25.4	25.4	100.0
	Total	59	100.0	100.0	

Higher percent asked

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	7	20	33.9	33.9	33.9
	8	19	32.2	32.2	66.1
	9	20	33.9	33.9	100.0
	Total	59	100.0	100.0	

Lower percent asked

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	3	20	33.9	33.9	33.9
	4	19	32.2	32.2	66.1
	5	20	33.9	33.9	100.0
	Total	59	100.0	100.0	

D2A Would you have implemented the same project using on-bill financing if your monthly payments were calculated using a <7,8,9%> percent interest rate?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	1.7	16.7	16.7
	No	4	6.8	66.7	83.3
	Don't know	1	1.7	16.7	100.0
	Total	6	10.2	100.0	
Missing	System	53	89.8		
Total		59	100.0		

D2B Would you have implemented the same project using on-bill financing if your monthly payments were calculated using a <3,4,5%> percent interest rate?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	3	5.1	5.7	5.7

	No	27	45.8	50.9	56.6
	Don't know	23	39.0	43.4	100.0
	Total	53	89.8	100.0	
Missing	System	6	10.2		
Total		59	100.0		

D3 If rebates were cut in half for on-bill financing projects, but the interest rate stayed at 0%, would you still be interested in using on-bill financing for energy-efficient projects?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes, would be interested even with halved rebates	34	57.6	57.6	57.6
	No, would not be interested if rebates were halved	6	10.2	10.2	67.8
	Don't know	19	32.2	32.2	100.0
	Total	59	100.0	100.0	

E1 I am now going to ask a few questions regarding your experience with loan repayment. Have you received and seen a utility bill that included your loan installment?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	44	74.6	74.6	74.6
	No, haven't received a bill with loan installment yet	4	6.8	6.8	81.4
	No, I do not handle utility bill payment	10	16.9	16.9	98.3
	Don't know	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

E2 Have you experienced any difficulties with loan repayment through your utility bill?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	6	10.2	13.6	13.6
	No	38	64.4	86.4	100.0
	Total	44	74.6	100.0	
Missing	System	15	25.4		
Total		59	100.0		

TO E2AM4 "E2A What kind of difficulty? "

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Bill was difficult to understand	1	1.7	16.7	16.7
	Other (SPECIFY:)	5	8.5	83.3	100.0
	Total	6	10.2	100.0	
Missing	System	53	89.8		
Total		59	100.0		

E2AM2

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (SPECIFY:)	1	1.7	100.0	100.0
Missing	System	58	98.3		
Total		59	100.0		

E2AM3

		Frequency	Percent
Missing	System	59	100.0

E2AM4

		Frequency	Percent
Missing	System	59	100.0

E2A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		53	89.8	89.8	89.8
	HE LIED TO ME - SAID I WAS GOING TO SAVE 200 BUT IT WAS ONLY LIKE 120 SAVE - FINALLY 199 ABOVE MY BILL - NEVER DID IT - HE LIED TO ME - MY BROTHER SAID THEY GOING TO GET YOU AND THEY DID - THE GUY WAS CROOKED - 11000 FOR A 3000 DOLLAR JOB	1	1.7	1.7	91.5
	I DIDN'T KNOW I HAD TO PAY	1	1.7	1.7	93.2
	I DON'T SEE THAT PART THAT SPELLS OUT CLEARLY WHAT MY REPAYMENTS MADE AND HOW MUCH I OWE	1	1.7	1.7	94.9
	ITS HARD TO PAY OFF THAT MUCH	1	1.7	1.7	96.6
	PRICE WENT UP PROBABLY BECAUSE PEEK ENERGY RATES DURING SUMMER COINCIDED WITH BEGINNING OF PAYMENT	1	1.7	1.7	98.3
	THEY CHARGED TOO MUCH \$14000 FOR A PROJECT BUT I COULD DO IT FOR \$4000	1	1.7	1.7	100.0
Total		59	100.0	100.0	

E3 With on-bill financing, you have the ability to repay the loan through your utility bill instead of dealing with a separate bill. Do you find this to be a valuable feature of the program?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	53	89.8	89.8	89.8
	No	6	10.2	10.2	100.0
Total		59	100.0	100.0	

E4 Currently, the money for on-bill financing loans comes from your utility and not from a traditional lender, such as a bank. Assuming the loan installments remained on the utility bill, would you prefer that the loan money came from your utility or from

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Utility	23	39.0	39.0	39.0
	Don't have a preference	33	55.9	55.9	94.9
	Don't know	3	5.1	5.1	100.0
	Total	59	100.0	100.0	

E4A Why do you say that?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	RECORD COMMENTS	38	64.4	64.4	64.4
	Don't know	20	33.9	33.9	98.3
	Refused	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

E4A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		21	35.6	35.6	35.6
	??YOU CAN PAY FOR IT??	1	1.7	1.7	37.3
	0% WHY GO THROUGH APPLICATION PROCESS WITH A BANK	1	1.7	1.7	39.0
	AS LONG AS THE TERMS WERE THE SAME	1	1.7	1.7	40.7
	BECAUSE THE PROBLEM HERE THE PEOPLE THE CONTRACTOR WHO COME WE DON'T KNOW WHO IS GOOD GUY OR BAD GUY BUT WE HEAR THEY ARE FROM SPGE WE KNOW WE CAN TRUST	1	1.7	1.7	42.4
	CAUSE IT IS ALL ONE PAGE	1	1.7	1.7	44.1
	DOESN'T MATTER	1	1.7	1.7	45.8
	DON'T CARE	1	1.7	1.7	47.5
	HONESTLY FOR ALL I KNOW IT COMES FROM A BANK	1	1.7	1.7	49.2
	I DON'T KNOW IT SEEMS TO WORK FOR US	1	1.7	1.7	50.8
	I DON'T WANT TO PAY BANK INTEREST	1	1.7	1.7	52.5
	I TRUST THE COMPANY	1	1.7	1.7	54.2
	I WOULD HAVE TO MAKE TWO PAYMENTS THEN	1	1.7	1.7	55.9
	I WOULD PREFER WHERE I CAN GET THE MONEY FOR LESS	1	1.7	1.7	57.6
	I WOULD RATHER DEAL WITH ONE BILL	1	1.7	1.7	59.3
	IF I WOULD AGREE TO IT WOULD BE GREAT BUT I DIDN'T AGREE TO IT I WAS CHEATED	1	1.7	1.7	61.0

IF ITS FROM A BANK I HAVE TO PAY FOR THAT - FROM UTILITY LITERALLY I AM NOT PAYING FOR IT EXCEPT OUT OF MY SAVINGS	1	1.7	1.7	62.7
IN THE END YOU HAVE TO PAY EITHER ONE	1	1.7	1.7	64.4
IT DOESN'T REALLY MATTER	1	1.7	1.7	66.1
IT IS MUCH EASIER THE WAY IT IS BEING DONE NOW	1	1.7	1.7	67.8
IT JUST MAKES IT CLEARER	1	1.7	1.7	69.5
IT MAKES IT EASIER TO CUT JUST ONE CHECK /p IT DOESN'T REALLY MATTER	1	1.7	1.7	71.2
ITS FINE	1	1.7	1.7	72.9
ITS GOOD YOU KNOW NOTHING WRONG WITH THAT THANKS FOR THE LED - IT HELPS US OUT	1	1.7	1.7	74.6
ITS JUST SIMPLE MORE DIRECT	1	1.7	1.7	76.3
ITS LIKE I SEE WHAT IS GOING ON THE BILL	1	1.7	1.7	78.0
ITS THROUGH ONE BILLING INVOICE	1	1.7	1.7	79.7
MORE CONVENIENT - NO WORRY	1	1.7	1.7	81.4
MY COMPANY DOESN'T LIKE TO TAKE MONEY FROM BANK	1	1.7	1.7	83.1
NICE TO KEEP LESS PEOPLE INVOLVED	1	1.7	1.7	84.7
PROBABLY DOESN'T MATTER	1	1.7	1.7	86.4
SINGLE BILL	1	1.7	1.7	88.1
THEY DON'T SAY ANYTHING TO ME	1	1.7	1.7	89.8
UTILITY ITS COMING MOST CONVENIENCE WE DON'T HAVE WRITE ANOTHER CHECK\\\\\\\\\\	1	1.7	1.7	91.5
WE DON'T NEED IT FROM THE BANK	1	1.7	1.7	93.2
WE JUST DON'T WANT PAY	1	1.7	1.7	94.9
WELL ITS MORE CONVENIENT	1	1.7	1.7	96.6
WHAT'S GOING TO BE THE DIFFERENCE IF IT IS THE SAME	1	1.7	1.7	98.3
YOU CAN SEE WHAT YOUR SAVING	1	1.7	1.7	100.0
Total	59	100.0	100.0	

**F1 Was
there
anything
about the
loan
application
process
which
caused
you
difficulty?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No/Nothing	51	86.4	86.4	86.4

Yes, RECORD COMMENTS	8	13.6	13.6	100.0
Total	59	100.0	100.0	

F1 OPEN

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	51	86.4	86.4	86.4
DELAYS IN COMMUNICATION BETWEEN CONTRACTORS AND SPGE - RIGHT HAND DIDN'T KNOW WHAT THE LEFT HAND WAS DOING	1	1.7	1.7	88.1
IT TAKES A LONG TIME TO GET APPROVAL	1	1.7	1.7	89.8
TEDIOUS - A LOT TO FILL OUT AND GETTING VENDOR TO CONNECT WITH SPGE AND DELAYS IT WASN'T EASY	1	1.7	1.7	91.5
THE COMPANY THAT I WAS DEALING WITH I NEVER REALLY FULLY TRUSTED THEM	1	1.7	1.7	93.2
THE LEAD TIME ON ORDERING FIXTURES TOOK A LITTLE LONGER THAN EXPECTED SO OUR DATE WAS AFTER THE FACT	1	1.7	1.7	94.9
TOOK A LONG TIME - ALMOST A YEAR	1	1.7	1.7	96.6
TOOK LONGER THAN I THOUGHT - SEEMED TO TAKE FOREVER	1	1.7	1.7	98.3
TRYING TO GET THE RIGHT FORMS FILLED OUT	1	1.7	1.7	100.0
Total	59	100.0	100.0	

F1A Is there anything that could have been done to make the application process easier?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid No/Nothing	47	79.7	79.7	79.7
Yes, RECORD COMMENTS	12	20.3	20.3	100.0
Total	59	100.0	100.0	

F1A OPEN

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	47	79.7	79.7	79.7
AGAIN ITS A LENGTHY PROCESS	1	1.7	1.7	81.4
BETTER EDUCATION TO THE CONTRACTORS	1	1.7	1.7	83.1
I JUST WORKED WITH THE CONTRACTOR IF THEY WOULD HAVE CONTACTED CONSUMER DIRECTLY THAT MIGHT CLARIFY THINGS A LITTLE MORE	1	1.7	1.7	84.7
IF SPGE DID WORK WITHOUT OUTSIDE VENDORS	1	1.7	1.7	86.4

IT WAS ALL AN ESTIMATE OF THE SAVINGS SO THE ESTIMATES OF THE SAVINGS SHOW NO INCREASE IN THE COST SO BASED ON INFORMATION WE DECIDED TO DO IT I DON'T KNOW IF THE COST OF REPAIRS WAS CALCULATED AS WELL BECAUSE THERE WAS A LIMIT THAT NEEDED TO BE PAID BACK IN 4 YEARS BUT IF I FIND A DIFFERENT VENDOR WHO CAN DO THE WORK FOR LESS - WHO IS LOOKING AT THAT	1	1.7	1.7	88.1
MORE EDUCATION AND AWARENESS OF THE FORMS AND HOW TO FILL THEM OUT PROPERLY	1	1.7	1.7	89.8
MORE REASONABLE LENGTH OF TIME TO GET PAID - 90 DAYS INSTEAD OF 9 MONTHS	1	1.7	1.7	91.5
PROCESS PAPERWORK FASTER	1	1.7	1.7	93.2
SOMEBODY SHOULD WALK INTO STORE AND SAID I WILL TAKE CARE OF EVERYTHING FOR YOU	1	1.7	1.7	94.9
THE CONTRACTOR DIDN'T HAVE THE LIGHTING THEY CAME OUT AND DID PART OF THE PROJECT AND SOME OF THE STUFF WAS ON BACK ORDER - KIND OF FRUSTRATING - WE WERE DEALING WITH PHILIPS - A LARGE LIGHTING CORPORATION	1	1.7	1.7	96.6
WE GOT EVERYTHING APPROVED - GOT WORK DONE AND APPROVED - SUBMITTED THE BILL - IT TOOK ABOUT A YEAR - EVERYTHING WAY PRE APPROVED IN ADVANCE BUT THE ACTUAL FUNDING TOOK LONGER THAN ANTICIPATED	1	1.7	1.7	98.3
WHEN YOU THEY APPROVE YOUR INCENTIVE OR REBATE AND THE FINANCING COVERS THE NET COST AND THE INCENTIVES CAN BE PERFORMANCE BASED AND PAID OUT OVER A WHILE - SO YOU CAN GET REIMBURSED FOR ALL YOUR COST - BUT IF YOU DON'T REALIZE ENERGY SAVINGS - YOUR LOAN AMOUNT YOU WOULD HAVE LIKED IT TO BE LARGER - SHORT CASHED?	1	1.7	1.7	100.0
Total	59	100.0	100.0	

F2 Did you use a vendor for the energy-efficiency project?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	56	94.9	94.9	94.9
	No	2	3.4	3.4	98.3
	Don't know	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

F2A How many bids or quotes did you obtain for the project?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	39	66.1	69.6	69.6
	2	8	13.6	14.3	83.9
	3	7	11.9	12.5	96.4
	4	1	1.7	1.8	98.2
	Don't know	1	1.7	1.8	100.0

	Total	56	94.9	100.0
Missing	System	3	5.1	
Total		59	100.0	

F2B Did you have any difficulty working with your vendor on the project?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No/Nothing	50	84.7	89.3	89.3
	Yes, RECORD COMMENTS	6	10.2	10.7	100.0
	Total	56	94.9	100.0	
Missing	System	3	5.1		
Total		59	100.0		

F2B OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		53	89.8	89.8	89.8
	GO GREEN - THEY CANNOT BE TRUSTED - THEY SAY THEY GOING TO DO THE LIGHTING BACK AND FORTH WE WERE WAITING FOR THE FIXTURES - HE WAS BUSY - OVERALL HE IS A WORTHLESS GUY	1	1.7	1.7	91.5
	I HAD A FEW CONCERNS ABOUT THE SEALING AROUND REFRIGERATOR DOORS AFTER WORK WAS DONE	1	1.7	1.7	93.2
	I HAD TO CALL THE PEOPLE TO FIX DEFECTIVE PART AND I HAD TO CHASE THEM DOWN AND GOT THE RUN AROUND	1	1.7	1.7	94.9
	IN THE EXPLANATION	1	1.7	1.7	96.6
	IT WAS IN REGARDS TO HOW WE WERE GOING TO SET UP LIGHTING AND ELECTRICAL PROBLEMS	1	1.7	1.7	98.3
	PROBLEMS WITH BILLING AND THEY CHARGED AND THEY GOT WRONG LIGHTS AT FIRST - I WISH I HAD BEEN ABLE TO KNOW WHAT IT LOOKED LIKE BEFORE THEY PUT IT IN	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

F2C Would a utility approved list of vendors have made it easier for you to select a vendor?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	37	62.7	62.7	62.7
	No	18	30.5	30.5	93.2
	Don't know	4	6.8	6.8	100.0
	Total	59	100.0	100.0	

F3 How clearly did the on-bill financing program guidelines explain what your organization needed to do to participate? Would you say...

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very clearly	44	74.6	74.6	74.6
	Somewhat clearly	11	18.6	18.6	93.2
	Or not clearly, had issues	2	3.4	3.4	96.6
	Don't know - DO NOT READ	2	3.4	3.4	100.0
	Total	59	100.0	100.0	

F3A What was not clear?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	RECORD COMMENTS	9	15.3	69.2	69.2
	Don't know	4	6.8	30.8	100.0
	Total	13	22.0	100.0	
Missing	System	46	78.0		
Total		59	100.0		

F3A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		50	84.7	84.7	84.7
	AGAIN JUST TRYING TO UNDERSTAND FORM AND THE PROCESS AND WHAT WE WERE SUPPOSED TO CALCULATE IT SEEMED TO BE MORE INVOLVED	1	1.7	1.7	86.4
	I HESITATED A LOT - THE LADY CLARIFIED	1	1.7	1.7	88.1
	MAYBE THE TIME FRAMES	1	1.7	1.7	89.8
	THE FIRST TIME IS ALWAYS THE HARDEST	1	1.7	1.7	91.5
	THEY COME TO YOU VERY QUICK JUST SIGN HERE AND WE CHANGE YOUR LIGHTS AND IT WAS NOT CLEAR AT ALL - LATER THEY SAY YOU SIGNED WHY DIDN'T YOU READ IT	1	1.7	1.7	93.2
	THEY DON'T EXPLAIN NOTHING	1	1.7	1.7	94.9
	THEY JUST SAID HEY THIS IS A FREE PROGRAM	1	1.7	1.7	96.6
	TO BE HONEST SOMEWHAT CLEAR IT WAS OK - I CANT SAY TOO CLEAR	1	1.7	1.7	98.3
	YEAH BECAUSE SEE IN THE BEGINNING THEY SAY SEE ITS NOT GOING TO COST YOU NOTHING BUT AFTER THAT WE FIND OUT ITS NOT FREE LIKE WE WROTE THE PAPER WAS SAYING LIKE THERE IS LOAN - PAYMENT - THERE IS I CALLED THEM AGAIN AND HE EXPLAIN TO ME AND SHOWED ME A LOT A STORES THEY DID SO I DID IT	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

F4 Did your organization request assistance to help you decide whether or not to use on-bill financing?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	5	8.5	8.5	8.5
	No	53	89.8	89.8	98.3
	Don't know	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

F4A Who did you ask?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	<IOU> efficiency program staff	2	3.4	40.0	40.0
	Other (SPECIFY:)	2	3.4	40.0	80.0
	Don't know	1	1.7	20.0	100.0
	Total	5	8.5	100.0	
Missing	System	54	91.5		
Total		59	100.0		

F4A OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		57	96.6	96.6	96.6
	DON'T KNOW COMPANY NAME	1	1.7	1.7	98.3
	THE ENERGY AUDITING COMPANY I MENTIONED EARLIER - THEY WERE A KIND OF INTERMEDIARY	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

F4B Did you get the assistance you needed?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes/received assistance/did not need assistance	4	6.8	80.0	80.0
	Don't know	1	1.7	20.0	100.0
	Total	5	8.5	100.0	
Missing	System	54	91.5		
Total		59	100.0		

F4B OPEN

		Frequency	Percent
Missing	System	59	100.0

F5 Did on-bill financing cover all design, equipment and installation costs?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	57	96.6	96.6	96.6
	No/Nothing, RECORD COMMENTS	2	3.4	3.4	100.0
	Total	59	100.0	100.0	

F5 OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		57	96.6	96.6	96.6
	NOT LABOR ON INSTALLATION	1	1.7	1.7	98.3
	OTHER WIRING ISSUES NOT INCLUDED	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

F6A As a result of your experience with on-bill financing, would you say you are more likely, equally likely, or less likely to pursue energy-efficient projects for your organization?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	More likely	48	81.4	81.4	81.4
	Equally likely	6	10.2	10.2	91.5
	Less likely	3	5.1	5.1	96.6
	Don't know	2	3.4	3.4	100.0
	Total	59	100.0	100.0	

TO G1M5 "G1 What is the best way to promote this program to businesses like yours? "

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Trade shows	1	1.7	1.7	1.7
	Word of mouth	4	6.8	6.8	8.5
	Vendors	7	11.9	11.9	20.3
	Other (SPECIFY:)	38	64.4	64.4	84.7
	Don't know	9	15.3	15.3	100.0
	Total	59	100.0	100.0	

G1M2

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Vendors	3	5.1	60.0	60.0
	Trade associations	1	1.7	20.0	80.0

	Other (SPECIFY:)	1	1.7	20.0	100.0
	Total	5	8.5	100.0	
Missing	System	54	91.5		
Total		59	100.0		

G1M3

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (SPECIFY:)	2	3.4	100.0	100.0
Missing	System	57	96.6		
Total		59	100.0		

G1M4

		Frequency	Percent
Missing	System	59	100.0

G1M5

		Frequency	Percent
Missing	System	59	100.0

G1 OPEN

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		18	30.5	30.5	30.5
	A PERSON FROM THE UTILITY COMES TO MY BUSINESS EXPLAINING PROGRAM - NOT THE VENDORS AND INSTALLERS	1	1.7	1.7	32.2
	ALL OF THE ABOVE AND MAKE SURE THEY ARE LOOKING AT THE TOTAL AMOUNT PAID AND IF THEY SET UP A SYSTEM WHERE THE VENDORS CAN GET AS MUCH AS THEY CAN - IS OWNERSHIP REALLY GETTING THE BEST DEAL HERE? I DON'T KNOW	1	1.7	1.7	33.9
	AMERICAN ASSOCIATION OF CLINICAL CHEMISTS	1	1.7	1.7	35.6
	ANNUAL REVIEW DOOR TO DOOR TO BUSINESS JUST CALL TO MAKE APPOINTMENT	1	1.7	1.7	37.3
	CONTACT THE LARGE PROPERTY MANAGEMENT COMPANIES AND THE LARGE HOMEOWNERS ASSOCIATIONS - SAN DIEGO COUNTY MAGAZINE TO ALL PROPERTY MANAGEMENT COMMON ASSESSMENT? COMMUNITY ASSOCIATION INSTITUTE OF SAN DIEGO	1	1.7	1.7	39.0
	CONTRACTORS GOING DOOR TO DOOR	1	1.7	1.7	40.7
	CONTRACTORS MORE INFORMED AND BRING IT TO THE TABLE AS A SERVICE	1	1.7	1.7	42.4
	DIRECT MAIL	1	1.7	1.7	44.1

DIRECT MAILING - SEPARATE FROM BILL - TO ENVIRONMENTAL HEALTH AND SAFETY GUYS	1	1.7	1.7	45.8
DON'T GO THROUGH VENDORS - A LIST OF BAD VENDORS OR VENDORS TO WATCH OUT FOR	1	1.7	1.7	47.5
DOOR TO DOOR - PERSON TO PERSON - OR INTERNET /P LIKE A WEB SITE	1	1.7	1.7	49.2
EMAIL	3	5.1	5.1	54.2
FACE TO FACE	1	1.7	1.7	55.9
FLYERS	2	3.4	3.4	59.3
HAVING CONTRACTORS GO OUT THERE AND TALK TO RETAILERS	1	1.7	1.7	61.0
IF ANY UTILITY COMPANY MAKES THIS MANDATORY PARTICIPATION TO THE CITY	1	1.7	1.7	62.7
IF THEY (SDG&E) CAME OUT AND KNOCKED ON OUR DOOR WITH LIST OF APPROVED VENDORS	1	1.7	1.7	64.4
INSERT IN THE BILL	1	1.7	1.7	66.1
INSERT IN THE BILLS BUT IT DEPENDS ON THE SIZE OF THE BUSINESS because the accounts payable people who look at bills are not the ones who make decisions about upgrades	1	1.7	1.7	67.8
INSERTS IN THE BILL - LISTS OF PARTICIPATING VENDORS - MORE CONFIDENCE - NOT JUST PEOPLE COMING IN ASKING YOU TO SIGN THINGS	1	1.7	1.7	69.5
INSERTS IN THE BILL OR SENDING SOMEONE FROM SPGE WITH THEIR PROGRAM OFFER	1	1.7	1.7	71.2
MAIL	2	3.4	3.4	74.6
MAILING SEPARATE FROM BILL	1	1.7	1.7	76.3
MORE ADVERTISEMENT - SMALL BUSINESSES	1	1.7	1.7	78.0
NEWSPAPER - HOME FURNISHING BUSINESS MAGAZINE AND FURNITURE TODAY	1	1.7	1.7	79.7
NOTICE IN THE BILLS THEMSELVES	1	1.7	1.7	81.4
PHONE	1	1.7	1.7	83.1
PHONE CALL	1	1.7	1.7	84.7
PROGRAM SELLS ITSELF	1	1.7	1.7	86.4
PUBLIC SERVICE ANNOUNCEMENTS ON RADIO OR TV	1	1.7	1.7	88.1
REFERENCE IN AREA LIKE IN THE COMMUNITY OF SOMEWHAT SIMILAR PROPERTIES	1	1.7	1.7	89.8
SENDING LETTERS	1	1.7	1.7	91.5
SNAIL MAIL	1	1.7	1.7	93.2
SOMEONE CAME TO MY BUSINESS IF I REMEMBER THAT IS BEST FOR ME	1	1.7	1.7	94.9
TV	1	1.7	1.7	96.6

WELL FIRST OF ALL I'VE SEEN A LOT AND THEY NEED TO MAKE SURE THESE COMPANIES ARE PUTTING OUT EQUIPMENT THAT BREAKS = THEY SAID FIVE YEAR WARRANTEE BUT ITS BEEN 3 MONTHS AND BULBS ALREADY BURNING OUT AND THERE IS NO WARRANTEE	1	1.7	1.7	98.3
YOU GO TO PRESENT THE PRODUCT	1	1.7	1.7	100.0
Total	59	100.0	100.0	

TIME IN MINUTES

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	6	4	6.8	6.8	6.8
	7	2	3.4	3.4	10.2
	8	9	15.3	15.3	25.4
	9	13	22.0	22.0	47.5
	10	3	5.1	5.1	52.5
	11	5	8.5	8.5	61.0
	12	4	6.8	6.8	67.8
	13	4	6.8	6.8	74.6
	14	6	10.2	10.2	84.7
	15	2	3.4	3.4	88.1
	16	3	5.1	5.1	93.2
	18	1	1.7	1.7	94.9
	21	2	3.4	3.4	98.3
	23	1	1.7	1.7	100.0
Total		59	100.0	100.0	

RECORD ANY COMMENTS

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	RECORD COMMENTS MADE DURING INTERVIEWING	1	1.7	100.0	100.0
Missing	System	58	98.3		
Total		59	100.0		

F6 OPEN

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	58	98.3	98.3	98.3

ONE OF THE BUSINESS I SOLD RIGHT AFTER THEY DID THE JOB AND ALL OF A SUDDEN THEY DEMANDED THE FULL 10 THOUSAND DOLLARS OUT OF MY OWN POCKET RIGHT AWAY - THE LIGHTS ARE STILL INSTALLED IN THAT BUILDING - YOU TALK ABOUT FINANCING WHERE IS THE FINANCING AND THE NEW OWNERS SHOULD HAVE TO PAY	1	1.7	1.7	100.0
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Total	59	100.0	100.0	
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