Statewide Benchmarking Process Evaluation

Volume 2: Appendix B

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Appendix B   Survey Results by Question

Two telephone surveys, one of initiative "participants" and one of "non-participants" were fielded in November-December of 2011 as part of the California statewide benchmarking process evaluation. The purpose of the surveys was to obtain quantitative information from a representative sample of important subgroups of customers to help answer research questions focused around "customer-driven" benchmarking.

B.1   Methodology

B.1.1 Participant Telephone Survey

"Participants" were defined as individuals, including but not limited to utility customers, who had registered for a utility benchmarking workshop between January 1, 2010 and the date of the data request submitted to the IOUs (September 13, 2011). Workshop instructors and IOU staff were excluded from the Participant group.

Respondents to the participant survey were subdivided into three groups based on three general types of users of Portfolio Manager. These user types were determined based on information gleaned from the interviews and on a review of the workshop registration data. Respondents were allocated to subgroups based on their responses to survey screening questions. The subgroups were:

- End-users (owner, renter, or property manager) who have benchmarked buildings in the past three years.

- End-users (owner, renter, or property manager) who have NOT benchmarked buildings in the past three years.

- Vendors who have benchmarked buildings for customers in the past three years.

A sample was prepared by randomly selecting 1,354 individuals from the population of 1,884 organizations with individuals registered for utility workshops during the time period in question. The individuals were grouped by company affiliation, companies were randomly selected, and the first individual listed for each company was contacted by telephone and recruited for the survey. If this individual was unavailable or no longer with the company, the next individual listed for the same company was contacted, and so forth until the approved sample was exhausted. Up to eight callbacks were made before a determination was made that an individual could not be contacted. A total of 129 respondents completed the participant survey. Because two respondents were removed from the data prior to analysis, the total number of

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respondents in the final sample was 127.[1] As Table B-1 shows, the margin of error ranges from $\pm$12.01% to $\pm$15.6% at the 90% confidence level.

Table B-1: Participant Sample Size and Sampling Error

Survey	Population (Companies)	Sample Size	Sampling Error at 90% Confidence Level
PG&E	923	35	$\pm$13.64
SCE	265	34	$\pm$13.42
SoCalGas	168	24	$\pm$15.59
SDG&E	528	35	$\pm$13.45
Benchmarking End User (EB)	680	43	$\pm$12.15
Non-Benchmarking End User (EN)	695	44	$\pm$12.01
Vendor (V)	509	40	$\pm$12.48

Participant data have been weighted in order for the survey sample to be representative of the number of organizations that attended workshops offered by each of the utilities. We have also estimated the proportion of respondents by each of the three user groups. Because we did not have user group data from the workshops, we estimated the proportions in each group based on screening questions in the survey.

Questions with fewer than 20 respondents are presented as unweighted counts, while those with more than 20 respondents are presented as weighted percentages. Because of this weighting, sub-categories that are in counts will not directly match with the percentages presented when the sample sizes are greater than 20. (Table B-2)

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[1] One respondent in the participant survey was removed from the analysis as their survey responses indicated that they were a workshop trainer. One respondent from Edison International, the holding company for SCE, was removed from the analysis. While the respondent might have attended the workshop in order to learn about benchmarking Edison International buildings we cannot be sure that they did not attend as a representative of SCE.

Table B-2: Participant Population, Sample Sizes, and Weights

	Companies	Sample Size	Weight
PG&E EB	328	12	1.84
PG&E EN	357	12	2.01
PG&E V	238	11	1.46
SCE EB	65	11	0.40
SCE EN	112	12	0.64
SCE V	88	10	0.57
SoCalGas EB	60	8	0.51
SoCalGas EN	60	8	0.51
SoCalGas V	48	8	0.40
SDG&E EB	228	12	1.31
SDG&E EN	166	12	0.95
SDG&E V	135	11	0.78

B.1.2 Non-Participant Telephone Survey

"Non-participants" were defined as current utility commercial customers who to the utilities' knowledge were not registered users of ABS and had not participated in any of the utilities benchmarking workshops. Not all commercial customers are in a position to benchmark buildings using Portfolio Manager. For example, buildings smaller than 5,000 square feet cannot be benchmarked with Portfolio Manager. To both increase the likelihood that the customers in the non-participant group would actually be in a position to benchmark one or more buildings with Portfolio Manager and keep down survey costs, only customers that were sole tenants of a building[2] (either owner-occupiers or renters) and identified in the IOU customer database as medium (i.e. with a max kW between 100 and 500) or large (i.e. with a max kW of greater than 500) commercial customers were eligible for selection. To ensure statewide representation, customers were selected randomly from among the databases of PG&E, SCE, and SDG&E.[3]

A sample was prepared by randomly selecting qualifying organizations from the California statewide customer database. A total of 48 qualified respondents completed the participant survey, from a population of 17,781 organizations with telephone contact information. The margin of error is ±11.9% at the 90% confidence level. (Table B-3)

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[2] As suggested by the address compared to other addresses in the database.
[3] Since SCE and SoCalGas provide electric and gas service, respectively, to the same customers, customers were selected from only one of these utilities' customers.

Table B-3: Non-participant Sample Size and Sampling Error

Population (Companies)	Sample Size	Sampling Error at 90% Confidence Level
17,781	48	±11.9

Non-participant data have been weighted in order for the survey sample to be representative of the statewide population of qualifying commercial customers (Table B-4).

Table B-4: Non-participant Population, Sample Sizes, and Weights for RDD Survey

	Population (Companies)	Sample Size	Weight
PG&E	6,522	21	0.83
SCE	9,542	11	2.34
SDG&E	1,717	16	0.29

B.1.3 Survey Response Rates

Table B-5 presents the response rate for both the participant and non-participant surveys. The response rate for the participant survey was 51%; for the non-participant survey, 8%. The evaluation team believes the much lower response rate for the non-participant survey to be due primarily to two reasons. (1) For the non-participant survey the only contact information available for most organizations was simply the organization name and main phone number. By comparison, the contact information for participants included names, direct telephone numbers, and work cell phone numbers. (2) In addition to the challenge of having to convince the non-participant organizational "gatekeeper" who answered the phone of the value of helping to identify the right person for the interviewer to talk with, for most non-participants contacted the subject of benchmarking was not as salient as it was to the participants, all of whom had enough interest in benchmarking to register for a utility workshop on the subject.

Table B-5: Response Rate

	Participant Response Rate	Non-participant Response Rate
PG&E	47%	10%
SCE	62%	5%
SoCalGas	44%	--
SDG&E	60%	7%
Total	51%	8%

B.2   Tests of Significance and Comparisons of Results

Where differences among survey results for different subgroups are reported as statistically significant, it is always at the 90% confidence level. Results presented as unweighted counts will not directly match with results presented as weighted percentages.

B.3   Interest In and Awareness of Benchmarking

S4. [Workshop Participant Questionnaire (P)] Which of the following statements best describes your interest in benchmarking? And S9. [Non-Participant Questionnaire (NP)] Which of the following statements best describes your organization? (Table B-6 and Table B-7)

S4 question was used in determining the user type for meeting quotas.

Table B-6: Type of Interest in Benchmarking
(participants)

	PG&E	SCE	SDG&E	SoCalGas	Total
Sample size	*35*	*33*	*35*	*24*	*127*
Benchmarking facilities owned by the organization that employs you [END USER--OWNER]	55%β	39%	36%γ	58%	48%
Benchmarking facilities occupied and leased or managed, but not owned, by the organization that employs you [END USER—NOT OWNER, NOT PROPERTY MANAGER]	13%	22%	25%γ	8%	17%
Benchmarking facilities that are managed by the organization that employs you but which are occupied and owned by other organizations [END USER—PROPERTY MANAGER ONLY]	7%	6%	14%	8%	9%
Benchmarking facilities that are occupied, owned, and managed by other organizations? [VENDOR]	27%	33%	25%	25%	27%

β Significantly different from SDG&E at the 90% confidence level.
γ Significantly different from SoCalGas at the 90% confidence level.

Table B-7: User Type of Interest in Benchmarking by Group
(participants; non-participants)

	EB	EN	V	Non-participants
Sample size	*43*	*44*	*40*	*48*
End user--owner	74%ζ	57%	--	63%
End user—not owner, not property manager	17%	30%	--	37%
End user—property manager only	9%	13%	--	1%
Vendor	--	--	100%	--

ζ Significantly different from EN at the 90% confidence level.

S5. (P)/S6. (NP) Which of the following statements best describes your organization's experience with benchmarking *in the past three years*… (Table B-8 and Table B-9)

Table B-8: Organization's Experience with Benchmarking
(participants)

	PG&E	SCE	SDG&E	SoCalGas	All Participants
Sample size	*35*	*33*	*35*	*24*	*127*
Have completed benchmarking at least one building	62%	56%	69%	64%	63%
Have not benchmarked a building in the past three years	39%	44%	31%	36%	37%

Table B-9: Organization's Experience with Benchmarking
(participants; non-participants who have heard of building benchmarking)

	EB	EN	V	Non-participants (count)*
Sample size	*43*	*44*	*40*	*14*
Have completed benchmarking at least one building	100%	--	100%	4
Have not benchmarked a building in the past three years	--	100%	--	10

* Throughout this report, unweighted counts are reported when the sample size is less than 20.

S6. (P)/S7.[4] (NP) Does your organization use ENERGY STAR Portfolio Manager to benchmark buildings? (Table B-10 and Table B-11)

Table B-10: Use of ENERGY STAR Portfolio Manager in the Past Three Years
(participants who have benchmarked at least one building in the last three years)

	PG&E	SCE	SDG&E	SoCalGas (count)	Total
Sample size	*23*	*21*	*23*	*16*	*83*
Yes	92%α	70%βδ	96%	14	90%
No	8%α	0%βδ	4%	2	10%
Don't know	--	<1%	--	--	<1%

α Significantly different from SCE at the 90% confidence level.
β Significantly different from SDG&E at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.

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[4] S7. (NP) were asked: Has your organization used ENERGY STAR Portfolio Manager to benchmark buildings?

Table B-11: Use of ENERGY STAR Portfolio Manager in the Past Three Years
(participants and non-participants who have benchmarked buildings for their organization in the past three years)

	EB	V	Total Benchmarking Participants	Non-participants (count)
Sample size	*43*	*40*	*83*	*3*
Yes	91%	88%	90%	1
No	9%	12%	10%	1
Don't know	<1%	--	<1%	1

S7. (P)/S6A. (NP) Which of the following best describes your role in benchmarking buildings for your organization? (Table B-12)

Table B-12: Role in Benchmarking Buildings for Your Organization
(participant end users and non-participants who have benchmarked at least one building in the last three years)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total End Users	Non-participants (count)
Sample size	*12*	*11*	*12*	*8*	*43*	*4*
Benchmark buildings for own organization	5	4	7	1	73%	3
Another employee benchmarks buildings for own organization	--	1	--	--	2%	1
Another company benchmarks buildings for own organization	1	--	2	1	23%	--

S8. (P) Which best describes your role in benchmarking buildings for your organization? (Table B-13)

Table B-13: Role in Benchmarking Buildings for Your Organization
(participant vendors who have benchmarked at least one building in the last three years)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample size	*11*	*10*	*11*	*8*	*40*
Benchmark buildings for customers	7	7	6	3	82%
Another employee benchmarks buildings for customers	--	--	4	2	18%

S3. (NP) Before this call, had you heard of the term "Building Benchmarking"? (Table B-14)

Table B-14: Previously Heard about Benchmarking (Unaided)
(non-participants)

	Total
Sample Size	*48*
Yes	16%
No	84%
Don't know	--
Refused	--

S4. (NP) Buildings are benchmarked using energy management software that allows customers to track and assess energy consumption. Typically benchmarking provides metrics that assess the energy use intensity and energy performance of the whole building by comparing it to the energy usage of similar buildings. Have you heard of this practice of "Building Benchmarking"? (Table B-15)

Table B-15: Previously Heard about Benchmarking (Aided)
(non-participants who indicated that they were not previously aware of benchmarking)

	Total
Sample Size	*48*
Yes	24%
No	76%
Don't know	--
Refused	--

S5. (NP) What does the term "Building Benchmarking" mean to you? (Table B-16)

Table B-16: Meaning of the Term "Building Benchmarking"
(non-participants who had heard of the term "Building Benchmarking" [unaided])

	Total (count)
Sample Size	*8*
Measuring energy consumption	4
Comparing building energy usage to other buildings	2
Other	1
Don't know	1

BE1. (P/NP) & NB1. (P/NP) How did you first learn about benchmarking? (Table B-17)

Table B-17: How First Learned about Benchmarking
(participant end users; non-participants aware of benchmarking; multiple response)

	EB	EN	Non-participants (count)
Sample size	*43*	*44*	*7*
Utility/EPA/ENERGY STAR Sources			
Utility account manager or other utility representative	6%ζ	28%	1
Utility workshop	9%	18%	1
Utility/EPA website	13%	6%	--
Email or brochure from utility	11%	7%	--
Utility energy-efficiency program	9%	5%	--
ENERGY STAR	--	2%	--
Industry/Other Government Information			
Industry or trade journal, newspaper, or website	11%	6%	--
Through a vendor	7%ζ	--	--
Industry association, such as BOMA	1%	5%	--
Legislation (AB1103 or other)	6%ζ	--	--
Port of San Diego business challenge	--	2%	--
Port District email	--	2%	--
CPUC Community Energy Partnership	1%	--	--
This survey	--	--	2
Word of Mouth/Work/Community Organizations			
Through work	19%	13%	--
Classes/School	--	4%	--
Through building owner	3%	--	--
Word of mouth	1%	--	--
Corporate policy	--	--	1
Self taught	--	--	1
Other	9%ζ	--	1
Don't know	--ζ	6%	1

ζ Significantly different from EN at the 90% confidence level.

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BE2. (P/NP) & NB5. (P/NP) What aspects of benchmarking most interest your organization? (Table B-18)

Table B-18: Most Interesting Aspects of Benchmarking
(participant end users; non-participants; multiple response)

	EB	EN	Non-participants who benchmarked (count)	Non-participants who did not benchmark
Sample size	*43*	*44*	*4*	*43*
Saving energy	18%θ	20%θ	1	37%
Rating performance of buildings	16%θ	15%θ	--	4%
Keeping track of energy use	14%θ	10%θ	1	--
ENERGY STAR certification	14%θ	9%θ	--	--
To qualify for rebates/save money	7%θ	8%θ	--	--
Complying with corporate sustainability or environmental initiative	11%ζθ	--	--	--
Identifying poor performing buildings	5%	3%	--	5%
Possibility of increasing building's value/ marketability	7%ζ	--	--	2%
Improving profitability	1%	4%	--	2%
Identifying efficiency measures	3%	2%	--	8%
LEED certification	4%	--	--	--
Award given by workshop	4%	--	--	--
To offer as a service to clients	--	4%	--	--
Establishing a baseline	--	4%	--	--
Required by AB1103	3%	--	--	--
To see how it affects us financially	--	2%	--	--
Possibility of advertising score/marketing opportunity for organization	1%	--	--	--
Taking a whole building approach to assessing energy usage	1%	--θ	--	7%
Gauging success of energy services contract	--	1%	--	--
Comparing with other buildings	--θ	--θ	--	8%
Reducing energy costs/saving money	--	--	--	6%
Ratings to lighting	--	--	1	--
None/not interested	--	1%θ	--	11%
Other	3%	7%	--	3%
Don't know	1%ζ	17%θ	1	29%

ζ Significantly different from EN at the 90% confidence level.
θ Significantly different from non-participants who did not benchmark at the 90% confidence level.

B.4 Workshop Experience

WS1. (P) What was your primary reason for attending the workshop about ENERGY STAR Portfolio Manager? (Table B-19 and Table B-20)

Table B-19: Main Reasons for Attending the Workshop
(participants by utility)

	PG&E	SCE	SDG&E	SoCalGas	All Participants
Sample size	*35*	*33*	*35*	*24*	*127*
To learn to use Automated Benchmarking Services (electronic meter data upload)	34%β	33%β	8%δ	23%	26%
To better understand benchmarking performed by others	16%	17%	28%	31%	21%
Learn about Portfolio Manager or benchmarking in general	21%	22%	25%γ	8%δ	21%
Benchmarking required for rebates/mandated by utility	3%β	--	17%δ	--	6%
To stay current with the tools/learn about regulations	5%	6%	3%	8%	5%
To see how benchmarking fits with our business/ to offer it as a service	3%	11%	3%	8%	5%
To benchmark my organization's buildings	5%	--δ	6%	--	4%
To benchmark other organizations' buildings	3%	--δ	--δ	--δ	2%
To become more energy efficient	--δ	--δ	3%	8%	2%
Did not attend workshop	--	--	--	8%	1%
Anticipated future requirement	--	6%	--	--	1%
To compare current tools to Portfolio Manager	--	6%	--	--	1%
To see if we could benchmark against like businesses	--	--	--	8%	1%
To ensure proper training of employees	3%	--	--	--	1%
To undertake benchmarking for ourselves	--	--	3%	--	1%
Required for building certification	3%	--	3%	--	1%
Other	5%	--δ	3%	--δ	3%

β Significantly different from SDG&E at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.
γ Significantly different from SoCalGas at the 90% confidence level.

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Table B-20: Main Reasons for Attending the Workshop
(participants by user group)

	EB	EN	V	All Participants
Sample size	*43*	*44*	*40*	*127*
To learn to use Automated Benchmarking Services (electronic meter data upload)	17%ζ	32%	30%	26%
To better understand benchmarking performed by others	22%	19%	24%	21%
Learn about Portfolio Manager or benchmarking in general	20%	26%	18%	21%
Benchmarking required for rebates/mandated by utility	9%	2%	6%	6%
To stay current with the tools/learn about regulations	9%ζ	--η	9%	5%
To see how benchmarking fits with our business/ to offer it as a service	--ζδ	6%	6%	5%
To benchmark my organization's buildings	4%	4%	3%	4%
To benchmark other organizations' buildings	4%	--	--δ	2%
To become more energy efficient	--	2%	--	1%
Did not attend workshop	2%	--	--	1%
Anticipated future requirement	--	2%	--	1%
To compare current tools to Portfolio Manager	2%	--	--	1%
To see if we could benchmark against like businesses	2%	--	--	1%
To ensure proper training of employees	4%	--	--	1%
To undertake benchmarking for ourselves	2%	--	--	1%
Required for building certification	2%	--	--	1%
Other	--ζδ	6%	3%	3%

ζ Significantly different from EN at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.
γ Significantly different from SoCalGas at the 90% confidence level.

WS2. (P) Were there any other reasons? (Table B-21 and Table B-22)

Table B-21: Secondary Reasons for Attending the Workshop
(participants by utility; multiple response)

	PG&E	SCE	SDG&E	SoCalGas	All Participants
Sample size	*35*	*33*	*35*	*23*	*126*
Learn about Portfolio Manager or benchmarking in general	3%β	--βδ	14%	8%	6%
To better understand benchmarking performed by others	5%	--δ	6%	8%	5%
To learn to use Automated Benchmarking Services (electronic meter data upload)	5%	6%	--δ	--δ	3%
To stay current with the tools/learn about regulations	--δ	6%	6%	8%	3%
To see how benchmarking fits with our business/ to offer it as a service	--δ	--δ	6%	--δ	2%
To benchmark my organization's buildings	3%	--δ	--δ	8%	2%
To become more energy efficient/lower energy bills	--δ	6%	--δ	8%	2%
To earn/keep ENERGY STAR certification	--	--	3%	--	1%
To ensure proper training of employees	2%	--	--	--	1%
Other	--	6%	--	--	1%
No other reasons	80%γ	77%	67%	58%	74%

β Significantly different from SDG&E at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.

Table B-22: Secondary Reasons for Attending the Workshop
(participants by user group; multiple response)

	EB	EN	V	All Participants
Sample size	*42*	*44*	*40*	*126*
Learn about Portfolio Manager or benchmarking in general	12%ζ	2%	3%	6%
To better understand benchmarking performed by others	2%	9%	3%	5%
To learn to use Automated Benchmarking Services (electronic meter data upload)	2%	--	5%	3%
To stay current with the tools/learn about regulations	5%	--η	8%	3%
To see how benchmarking fits with our business/ to offer it as a service	--δ	5%	5%	2%
To benchmark my organization's buildings	2%	2%	5%	2%
To become more energy efficient/lower energy bills	--δ	5%	3%	2%
To earn/keep ENERGY STAR certification	2%	--	3%	1%
To ensure proper training of employees	--	--	3%	1%
Other	--	--	3%	1%
No other reasons	74%	77%	63%	71%

ζ Significantly different from EN at the 90% confidence level.
η Significantly different from Vendors at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.

WS3. (P) Was the training provided in the workshop sufficient to allow you to benchmark buildings on your own? (Table B-23 and Table B-24)

Table B-23: Training Sufficient for Benchmarking
(participants by utility)

	PG&E	SCE	SDG&E	SoCalGas	All Participants
Sample size	*35*	*33*	*35*	*23*	*126*
Yes	94%αβγδ	77%	69%	73%	82%
No	--αβγδ	24%	32%δ	18%	14%
Don't know	7%	--δ	--δ	9%	4%

α Significantly different from SCE at the 90% confidence level.
β Significantly different from SDG&E at the 90% confidence level.
γ Significantly different from SoCalGas at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.

Table B-24: Training Sufficient for Benchmarking
(participants by user group)

	EB	EN	V	All Participants
Sample Size	*42*	*44*	*40*	*126*
Yes	85%	73%η	91%	82%
No	15%	17%	9%	14%
Don't know	--ζδ	10%η	--δ	4%

ζ Significantly different from EN at the 90% confidence level.
η Significantly different from Vendors at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.

WS4. (P) In what ways did the training <u>not</u> prepare you to benchmark buildings on your own? (Table B-25 and Table B-26)

Table B-25: Why Training Was Not Sufficient
(participants who said that the training was not sufficient; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample Size	*1*	*8*	*11*	*6*	*26*
Not enough detail/specificity/ lacking in content/ unanswered questions	--	4	3	1	31%
Workshop didn't train us on how to obtain utility bills/energy usage data	--	1	1	3	15%
Workshop didn't provide enough hands-on experience with Portfolio Manager	--	2	--	1	15%
Not applicable to my facilities/not applicable to the way we benchmark our facilities	1	--	3	--	15%
Computers were not working	--	1	1	--	8%
Own lack of knowledge/Need to repeat class a few times to be able to benchmark	--	--	1	1	7%
Other	--	--	2	--	8%
Don't know	--	--	1	--	4%

Table B-26: Why Training Was Not Sufficient
(participants who said that the training was not sufficient; multiple response)

	EB (count)	EN (count)	V (count)	All Participants
Sample Size	*8*	*13*	*5*	*26*
Not enough detail/specificity/ lacking in content/unanswered questions	4	3	--	31%
Workshop didn't train us on how to obtain utility bills/energy usage data	2	2	--	15%
Workshop didn't provide enough hands-on experience with Portfolio Manager	1	2	1	15%
Not applicable to my facilities/ not applicable to the way we benchmark our facilities	--	2	1	15%
Computers were not working	1	1	1	8%
Own lack of knowledge/Need to repeat class a few times to be able to benchmark	--	1	1	7%
Other	1	1	--	8%
Don't know	--	1	--	4%

B.5   Portfolio Manager and ABS Experience

ABS1. (P/NP) Has your organization been able to successfully benchmark buildings using ENERGY STAR Portfolio Manager? (Table B-27 and Table B-28)

Table B-27: Successful Benchmarking of Building Using Portfolio Manager
(participants who had benchmarked buildings in the past three years using Portfolio Manager)

	PG&E	SCE	SDG&E	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*20*	*20*	*20*	*15*	*75*
Yes	94%α	60%βδ	90%	14	89%
No	6%α	40%βδ	10%	--	12%
Don't know	--	--	--	1	1

α Significantly different from SCE at the 90% confidence level.
β Significantly different from SDG&E at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.

Table B-28: Successful Benchmarking of Building Using Portfolio Manager
(participants who had benchmarked buildings in the past three years using Portfolio Manager; non-participants who had benchmarked buildings using Portfolio Manager)

	EB	V	Total Benchmarking Participants	Non-participants (count)
Sample Size	*35*	*40*	*75*	*1*
Yes	84%	94%	88%	--
No	17%	6%	12%	--
Don't know	--	--	--	1

ABS2. (P/NP) Why was your organization unable to benchmark with Portfolio Manager? (Table
B-29 and Table B-30)

Table B-29: Reasons Why Unable to Benchmark with Portfolio Manager
(participants who tried but were not successful benchmarking buildings in the past three years using Portfolio
Manager)

	PG&E (count)	SCE (count)	SDG&E (count)	Total Benchmarking Participants (count)
Sample Size	*2*	*9*	*2*	*13*
We use our own/an alternate approach	--	2	1	3
Don't qualify/outside benchmarking criteria	--	2	--	2
Confusing or difficult to use	--	1	--	1
Type of building I wanted to rate is not included in Portfolio Manager	--	--	1	1
Problems due to having multiple addresses for a building	--	1	--	1
Business decision not yet made	--	1	--	1
Multiple uses of building	--	1	--	1
Other	1	--	--	1
Don't know: Respondent did not do the benchmarking themselves	1	1	--	2

Table B-30: Reasons Why Unable to Benchmark with Portfolio Manage
(participants who tried but were not successful benchmarking buildings using Portfolio Manager; multiple response)

	EB (count)	V (count)	Total Benchmarking Participants (count)
Sample Size	*9*	*4*	*13*
We use our own/an alternate approach	1	2	3
Don't qualify/outside benchmarking criteria	1	1	2
Confusing or difficult to use	1	--	1
Type of building I wanted to rate is not included in Portfolio Manager	1	--	1
Problems due to having multiple addresses for a building	1	--	1
Business decision not yet made	1	--	1
Multiple uses of building	1	--	1
Other	1	--	1
Don't know: Respondent did not do the benchmarking themselves	1	1	2

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ABS3. (P/NP) Have you had any difficulties using ENERGY STAR Portfolio Manager? (Table B-31 and Table B-32)

Table B-31: Difficulties Using Portfolio Manager
(participants who have benchmarked buildings using Portfolio Manager)

	PG&E	SCE	SDG&E	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*20*	*20*	*20*	*15*	*75*
Yes	45%	42%β	78%δ	7	55%
No	55%	49%	22%	7	44%
Don't know: Respondent did not do the benchmarking themselves	--	--	--	1	<1%
Don't know	--	8%	--	--	1%

β Significantly different from SDG&E at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.

Table B-32: Difficulties Using Portfolio Manager
(participants and non-participants who have benchmarked buildings using Portfolio Manager)

	EB	V	Total Benchmarking Participants	Non-participants (count)
Sample Size	*35*	*40*	*75*	*1*
Yes	62%	47%	55%	--
No	36%	52%	44%	--
DON'T KNOW: Respondent did not do the benchmarking themselves	--	1%	<1%	1
Don't know	2%	--	1%	--

ABS4. (P)/S8. (NP) Which of the following best describes how your organization currently transfers energy use data into ENERGY STAR Portfolio Manager? (Table B-33 and Table B-34)

Table B-33: Transfer of Energy Use Data into Portfolio Manager
(participants who have benchmarked buildings in the past three years using Portfolio Manager)

	PG&E	SCE	SDG&E	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*20*	*20*	*20*	*15*	*75*
Enter building and energy consumption information into Portfolio Manager by hand, one building at a time	39%	34%	45%	5	40%
Use the ABS, to automatically transfer energy consumption data only	36%	18%	37%	6	34%
Upload building and energy consumption data for 10 or more buildings from an Excel spreadsheet	10%	18%	10%	1	11%
Use the Automated Benchmarking System, or ABS, to automatically transfer building and/or energy consumption data from a service or product provider that is not the utility into Portfolio Manager	10%	12%	--δ	--	6%
Enter data into Portfolio Manager in more than one way	--	6%	--	1	1%
Use none of the methods mentioned	--	--	4%	--	1%
Haven't used it yet	--	8%	--	--	1%
Don't know: Respondent did not do the benchmarking themselves	5%	--	--	2	3%
Don't know	--	4%	4%	--	2%

δ Significantly different from all participants at the 90% confidence level.

Table B-34: Transfer of Energy Use Data into Portfolio Manager
(participants who have benchmarked buildings in the past three years using Portfolio Manager; non-participants who have benchmarked buildings using Portfolio Manager)

	EB	V	Total Benchmarking Participants	Non-participants (count)
Sample Size	*35*	*40*	*75*	*1*
Enter building and energy consumption information into Portfolio Manager by hand, one building at a time	37%	42%	40%	1
Use ABS to automatically transfer energy consumption data only from the utility into Portfolio Manager	43%η	25%	34%	--
Upload building and energy consumption data for 10 or more buildings from an Excel spreadsheet using a template from Portfolio Manager	10%	12%	11%	--
Use the ABS to automatically transfer building and/or energy consumption data from a service or product provider that is not the utility into Portfolio Manager	5%	8%	6%	--
Haven't used it yet	2%	--	1%	--
Enter data into Portfolio Manager in more than one way	--	3%	1%	--
Use none of the methods mentioned	--	3%	1%	--
Don't know: Respondent did not do the benchmarking themselves	1%	6%	3%	--
Don't know	1%	2%	2%	--

η Significantly different from Vendors at the 90% confidence level.

ABS5. (P)/ABS6. (NP) For which utilities do you transfer data with the utility's Automated Benchmarking Service? (Table B-35 and Table B-36)

Table B-35: Utilities Transferring Data with ABS
(participants who have benchmarked buildings in the past three years using Portfolio Manager and used ABS to automatically transfer energy consumption data only from the utility; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*7*	*4*	*7*	*6*	*24*
Pacific Gas and Electric	6	--	--	--	42%
San Diego Gas and Electric	--	--	7	2	35%
Southern California Edison	--	4	1	5	23%
Southern California Gas	--	1	--	2	6%
Don't know	1	--	--	--	8%

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Table B-36: User Groups Transferring Data with ABS
(participants who have benchmarked buildings in the past three years using ESPM and used ABS to automatically transfer energy consumption data only from the utility; multiple response

	EB	V	Total Benchmarking Participants
Sample Size	*14*	*10*	*24*
Percent transferring data with more than one utility	14%	30%	21%
No	79%	70%	75%
Don't know	7%	--	4%

ABS6. (P)/ABS5. (NP) In the last three years, has your organization tried to use the Automated Benchmarking Service to automatically transfer building energy use data from the utility to ENERGY STAR Portfolio Manager? (Table B-37 and Table B-38)

Table B-37: Tried to Use ABS
(participants who have benchmarked buildings in the past three years using Portfolio Manager and uploaded data by hand or from Excel using a template from Portfolio Manager)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*10*	*10*	*11*	*6*	*37*
Yes	3	1	3	1	24%
No	6	8	8	5	74%
Don't know	1	1	--	--	3%

Table B-38: Tried to Use ABS
(participants who have benchmarked buildings in the past three years using Portfolio Manager and uploaded data by hand or from Excel using a template from Portfolio Manager; non-participants who have benchmarked buildings using Portfolio Manager)

	EB (count)	V	Total Benchmarking Participants	Non-participants (count)
Sample Size	*16*	*21*	*37*	*1*
Yes	2	30%	24%	--
No	12	65%	74%	1
Don't know	1	6%	3%	--

ABS7. (P/NP) Why did your organization stop using the Automated Benchmarking Service? (Table B-39 and Table B-40)

Table B-39: Why Stopped Using ABS
(participants who have benchmarked in the past three years using Portfolio Manager and tried to use ABS; multiple response)

	Total Benchmarking Participants (count)
Sample size	*8*
Confusing or difficult to use	1
Problems getting authorizations from tenants or others	1
Could not identify all meters	1
Technical problems setting up account	1
Received confusing error codes	1
Change in direction of company focus	1
Withdrew from full time market	1
Data/software wouldn't download	1
We help our customers get set up with ABS but do not use it ourselves	1
Other	1
Don't know: Respondent did not do the benchmarking themselves	1

Table B-40: Why Stopped Using ABS
(participants who have benchmarked in the past three years using Portfolio Manager and tried to use ABS; multiple response)

	EB (count)	V (count)	Total Benchmarking Participants (count)
Sample size	*3*	*5*	*8*
Confusing or difficult to use	--	1	1
Problems getting authorizations from tenants or others	--	1	1
Could not identify all meters	--	1	1
Technical problems setting up account	--	1	1
Received confusing error codes	1	--	1
Change in direction of company focus	--	1	1
Withdrew from full time market	--	1	1
Data/software wouldn't download	1	--	1
We help our customers get set up with ABS but do not use it ourselves	--	1	1
Other	--	1	1
Don't know: Respondent did not do the benchmarking themselves	1	--	1

ABS8. (P) Have you had any difficulties using the Automated Benchmarking Service to import the buildings energy use data electronically into ENERGY STAR Portfolio Manager? (Table B-41 and Table B-42)

Table B-41: Any Difficulties Using ABS
(participants who have benchmarked buildings in the past three years using Portfolio Manager and used ABS to automatically transfer energy consumption data only from the utility)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*7*	*4*	*7*	*7*	*25*
Yes	5	3	4	4	70%
No	2	1	3	3	30%

Table B-42: Any Difficulties Using ABS
(participants who have benchmarked buildings in the past three years using Portfolio Manager and used ABS to automatically transfer energy consumption data only from the utility)

	EB (count)	V (count)	Total Benchmarking Participants
Sample Size	*14*	*11*	*25*
Yes	10	6	70%
No	4	5	30%

ABS9. (P) Tell me what kinds of difficulties you experienced with the Automated Benchmarking Service. (Table B-43 and Table B-44)

Table B-43: Difficulties Using ABS
(participant end users who have benchmarked buildings in the past three years using Portfolio Manager and used ABS to automatically transfer energy consumption data only from the utility and had difficulties using ABS; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants (count)
Sample size	*5*	*3*	*4*	*4*	*16*
Problems obtaining utility usage data	3	2	2	2	9
Difficulty getting training/customer support from utility	--	1	--	2	3
Automatic reporting stops when meter ID numbers change	2	1	--	--	3
Problems getting authorizations from tenants or others	--	--	1	1	2
Problems due to having multiple addresses for a building	--	2	--	--	2
Confusing or difficult to use	--	--	1	--	1
Problems deleting a meter	--	--	1	--	1
Difficulty getting approval from utility to set up account to benchmark customer's building	--	--	--	1	1
Problems reconciling electric and gas data from different utilities	--	--	1	--	1

Table B-44: Difficulties Using ABS
(participants who have benchmarked in the past three years using Portfolio Manager and used ABS to automatically transfer energy consumption data only from the utility and had difficulties using ABS; multiple response)

	EB (count)	V (count)	Total Benchmarking Participants (count)
Sample size	*10*	*6*	*16*
Problems obtaining utility usage data	6	3	9
Difficulty getting training/customer support from utility	1	2	3
Automatic reporting stops when meter ID numbers change	2	1	3
Problems getting authorizations from tenants or others	2	--	2
Problems due to having multiple addresses for a building	2	--	2
Confusing or difficult to use	1	--	1
Problems deleting a meter	1	--	1
Difficulty getting approval from utility to set up account to benchmark customer's building	--	1	1
Problems reconciling electric and gas data from different utilities	--	1	1

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ABS10. (P)/ ABS4. (NP) Tell me what kinds of difficulties you experienced with ENERGY STAR Portfolio Manager. (Table B-45 and Table B-46)

Table B-45: Difficulties Using Portfolio Manager
(participants who have benchmarked buildings in the past three years using Portfolio Manager and had difficulty using Portfolio Manager; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants
Sample size	*7*	*8*	*14*	*6*	*35*
Confusing or difficult to use	--	2	4	1	20%
Identifying/measuring each space in the building, esp. for irregular buildings	--	2	2	1	13%
Automatic reporting flaws/inaccurate scores	2	--	2	2	12%
Received confusing error codes/error messages reset values	1	--	1	--	9%
System couldn't handle type of building	--	1	2	1	9%
Lack of/slow customer support	--	1	2	--	8%
Could not identify all meters	--	2	1	--	7%
Problems with data supplied by customer/utility	1	--	1	--	7%
One meter for more than one building	1	1	--	--	7%
Forgetting the password/password issues	--	--	2	--	6%
Problems deleting a meter	--	2	--	1	5%
Unable to generate a report	--	1	1	--	4%
Length of time for data entry	--	1	1	--	4%
Problems identifying building versus campus	--	--	1	--	4%
Difficulty getting approval from utility to set up account to benchmark customer's building	--	--	--	2	3%
Cost	--	--	1	--	2%
Data going back only 12 months is not helpful enough	--	1	--	--	2%
Problems due to having multiple addresses for a building	--	1	1	--	1%
Other	2	--	--	--	9%
Don't know	1	--	--	--	6%

Table B-46: Difficulties Using Portfolio Manager
(participants who have benchmarked buildings in the past three years and had difficulty using Portfolio Manager; multiple response)

	EB (count)	V (count)	Total Benchmarking Participants
Sample size	*19*	*16*	*35*
Confusing or difficult to use	7	1	20%
Indentifying/measuring each space in the building, esp. for irregular buildings	4	2	13%
Automatic reporting flaws/inaccurate scores	1	3	12%
Received confusing error codes/error messages reset values	1	1	9%
System couldn't handle type of building	3	1	9%
Lack of/slow customer support	1	2	8%
Could not identify all meters	2	1	7%
Problems with data supplied by customer/utility	--	2	7%
One meter for more than one building	1	1	7%
Forgetting the password/password issues	1	1	6%
Problems deleting a meter	2	--	5%
Unable to generate a report	1	1	4%
Length of time for data entry	--	2	4%
Problems identifying building versus campus	1	--	4%
Difficulty getting approval from utility to set up account to benchmark customer's building	1	1	3%
Cost	--	1	2%
Data going back only 12 months is not helpful enough	--	1	2%
Problems due to having multiple addresses for a building	1	--	1%
Other	--	2	9%
Don't know	1	--	6%

ABS11. (P)/ ABS8. (NP) For buildings that meet certain qualifications, Portfolio Manager should produce a benchmark score from 0 to 100. For all other buildings, Portfolio Manager should produce EUI, which is Energy Use Intensity or energy use per square foot. Has your organization been able to obtain a benchmark score from Portfolio Manager for buildings that should qualify for a score? (Table B-47 and Table B-48)

Table B-47: Obtained a Benchmark Score from Portfolio Manager
(participants who have benchmarked buildings in the past three years using Portfolio Manager)

	PG&E	SCE	SDG&E	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*20*	*20*	*20*	*15*	*75*
Yes	84%α	60%	75%	13 (86%)	78%

No	13%	30%	15%	--	16%
Other	--	10%	5%	--	1%
DON'T KNOW: Respondent did not do the benchmarking themselves	3%	--	--	2 (14%)	3%

α Significantly different from SCE at the 90% confidence level.

Table B-48: Obtained a Benchmark Score from Portfolio Manager
(participants who have benchmarked buildings in the past three years using Portfolio Manager)

	EB	V	Total Benchmarking Participants
Sample Size	*35*	*40*	*75*
Yes	75%	80%	78%
No	19%	9%	16%
Other	3%	3%	1%
DON'T KNOW: Respondent did not do the benchmarking themselves	3%	6%	3%
Don't know	--	3%	2%

ABS12. (P)/ ABS9. (NP) Did you contact technical support at [UTILITY NAME] for help with Portfolio Manager or the Automated Benchmarking Service? (Table B-49 and Table B-50)

Table B-49: Contacted Technical Support
(participants who have benchmarked buildings in the past three years using Portfolio Manager)

	PG&E	SCE	SDG&E	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*20*	*20*	*20*	*15*	*75*
Yes	30%β	44%	62%δ	4	41%
No	64%β	56%	38%	10	54%
Don't know	6%	--δ	--δ	1	4%

β Significantly different from SDG&E at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.

Table B-50: Contacted Technical Support
(participants and non-participants who have benchmarked buildings in the past three years using Portfolio Manager; non-participants who have benchmarked buildings using Portfolio Manager)

	EB	V	Total Benchmarking Participants	Non-participants (count)
Sample Size	*35*	*40*	*75*	*1*
Yes	50%	32%	41%	--
No	42%η	68%	54%	1
Don't know	8%δ	--	4%	--

η Significantly different from Vendors at the 90% confidence level.

ABS13. (P)/ABS10. (NP) Was technical support able to resolve your problem? (Table B-51 and Table B-52)

Table B-51: Technical Support Able Resolve Problem
(participants who have benchmarked buildings in the past three years using Portfolio Manager and who contacted technical support)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*6*	*9*	*11*	*4*	*30*
Yes	3	7	9	3	70%
No	3	2	2	1	30%

Table B-52: Technical Support Able Resolve Problem
(participants who have benchmarked buildings in the past three years using Portfolio Manager and who contacted technical support)

	EB (count)	V (count)	Total Benchmarking Participants
Sample Size	*18*	*12*	*30*
Yes	12	10	70%
No	6	2	30%

ABS14. (P)/ABS11 (NP) Using a scale of 0 to 10, where 0 = "not at all satisfied" and 10 = "very satisfied," how satisfied would you say you were with technical support overall? (Table B-53 and Table B-54)

Table B-53: Satisfaction with Technical Support
(participants who have benchmarked buildings in the past three years using Portfolio Manager and who contacted technical support)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*6*	*9*	*11*	*4*	*30*
Very satisfied (10)	1	--	1	1	11%
9	--	--	1	1	4%
8	1	2	4	--	25%
7	1	6	--	1	18%
6	--	--	2	--	11%
5	--	1	--	--	4%
4	--	--	--	--	--
3	--	--	1	--	4%
2	--	--	--	--	--
1	--	--	1	--	4%
Not at all satisfied (0)	1	--	1	1	11%
Don't know	2	--	--	--	11%

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Table B-54: Satisfaction with Technical Support
(participants who have benchmarked buildings in the past three years using Portfolio Manager and who contacted technical support)

	EB (count)	V (count)	Total Benchmarking Participants
Sample Size	*18*	*12*	*30*
Very satisfied 10	2	1	11%
9	--	2	4%
8	4	3	25%
7	5	3	18%
6	2	--	11%
5	--	1	4%
4	--	--	--
3	1	--	4%
2	--	--	--
1	1	--	4%
Not at all satisfied (0)	2	1	11%
Don't know	1	1	11%

ABS15. (P)/ ABS12. (NP) What was the one most important reason you were <u>not satisfied</u> with technical support? (Table B-55 and Table B-56)

Table B-55: Why Dissatisfied with Technical Support
(participants who were dissatisfied with technical support)

	PG&E (count)	SDG&E (count)	SoCalGas (count)	All Participants
Sample Size	*1*	*2*	*1*	*4*
Technical support did not know the system or could not provide the information needed	--	2	1	3
It took a long time to get an answer	--	--	1	1
The problem was not fixed	1	--	--	1

Table B-56: Why Dissatisfied with Technical Support
(participants who were dissatisfied with technical support)

	EB (count)	V (count)	All Participants
Sample Size	*3*	*1*	*4*
Technical support did not know the system or could not provide the information needed	1	1	2
It took a long time to get an answer	1	--	1
The problem was not fixed	1	--	1

ABS16. (P)/ABS13. (NP) What was the one most important reason you were <u>satisfied</u> with technical support? (Table B-57 and Table B-58)

Table B-57: Reason Satisfied with Technical Support

(participants who have benchmarked buildings in the past three years using Portfolio Manager who contacted and were satisfied with technical support)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants (count)
Sample Size	*2*	*2*	*6*	*2*	*12*
Helped/solved the problem/followed through	1	1	6	2	10
Their knowledge of the system	1	--	--	--	1
Helped but unable to solve the problem	--	1	--	--	1

Table B-58: Reason Satisfied with Technical Support

(participants who have benchmarked buildings in the past three years using Portfolio Manager who contacted and were satisfied with technical support)

	EB (count)	V (count)	Total Benchmarking Participants (count)
Sample Size	*6*	*6*	*12*
Helped/solved the problem/followed through	6	4	10
Their knowledge of the system	--	1	1
Helped but unable to solve the problem	--	1	1

B.6   Benchmarking Experience

BE3. (P/NP) How many buildings does your organization own, occupy or manage in the US? (Table B-59)

Table B-59: Number of Buildings Owned, Occupied or Managed in the US by Organizations that Benchmarked

(participant end users who benchmarked; non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total End Users who Benchmarked	Non-participants who benchmarked (count)
Sample size	*12*	*11*	*12*	*8*	*43*	*4*
1	2	--	2	1	16%	2
2 to 4	2	--	2	1	16%	--
5 to 10	2	1	--	--	8%	1
11 to 25	--	--	2	2	9%	--
Over 25	6	8	6	4	49%	1
Don't know	--	2	--	--	2%	--

BE4. (P/NP) & BE14.[5] (P) How many of the buildings your organization owns, occupies, or manages have been benchmarked to date? (Table B-60, Table B-61, and Table B-62)

Table B-60: Number of Buildings Benchmarked by Buildings Owned, Occupied or Managed in the US

(participant end users who benchmarked)

Buildings Benchmarked	Number of Buildings Owned, Occupied, or Managed in US						
	1 (count)	2 to 4 (count)	5 to 10 (count)	11 to 25 (count)	Over 25	Don't know (count)	Total
Sample size	*4*	*4*	*3*	*4*	*24*	*2*	*41*
1	4	--	--	1	16%	1	25%
2 to 4	--	4	1	--	8%	--	21%
5 to 10	--	--	2	2	24%	1	23%
11 to 25	--	--	--	1	16%	--	11%
Over 25	--	--	--	--	32%	--	18%
Don't know	--	--	--	--	4%	--	2%

Table B-61: Number of Buildings Benchmarked

(participant end users who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total End Users who Benchmarked	Non-participants who benchmarked
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
1	3	2	2	3	25%	3
2 to 4	2	--	3	2	18%	--
5 to 10	2	2	4	1	23%	--
11 to 25	1	1	2	1	13%	--
Over 25	3	4	--	1	19%	--
Don't know	--	2	--	--	2%	1

Table B-62: Number of Buildings Benchmarked

(participant vendors)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Vendors
Sample size	*11*	*10*	*11*	*8*	*40*
1	1	1	1	1	9%
2 to 4	2	1	2	1	18%
5 to 10	1	2	2	2	15%
11 to 25	3	2	3	1	21%
Over 25	2	4	2	3	24%
Don't know	2	--	1	--	12%

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[5] BE14 (Participant vendors) were asked: How many commercial buildings has your organization benchmarked for clients to date?

BE5. (P/NP) & BE22. (P) In what year did your organization first begin to benchmark buildings? (Table B-63, Table B-64, and Table B-65)

Table B-63: Year First Began Benchmarking
(participant end users)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total End Users who Benchmarked
Sample size	*11*	*11*	*11*	*8*	*41*
1985	1	--	--	--	4%
1986	--	--	--	--	--
1990	--	--	--	--	--
1995	1	1	--	--	5%
1997	--	--	--	--	--
2001	--	1	--	--	1%
2002	--	--	--	1	2%
2003	--	1	--	1	2%
2005	--	--	--	2	2%
2006	--	--	--	1	2%
2007	1	--	2	--	10%
2008	--	2	--	1	3%
2009	1	1	2	--	11%
2010	2	--	4	--	21%
2011	2	3	3	1	22%
Don't know/ no indication	3	2	--	1	16%

Table B-64: Year First Began Benchmarking
(participant vendors)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Vendors
Sample size	*11*	*10*	*11*	*8*	*40*
1986	--	--	1	--	2%
1990	--	--	1	--	2%
1997	--	1	--	--	2%
2005	--	1	--	--	2%
2006	--	--	--	2	2%
2007	--	2	--	--	2%
2008	2	1	--	1	12%
2009	2	--	1	3	15%
2010	--	3	7	1	23%
2011	3	3	1	1	22%
Don't know/ no indication	4	--	--	--	17%

Table B-65: Year First Began Benchmarking
(participants and non-participants who benchmarked)

	EB	V	Non-participants (count)
Sample size	*41*	*40*	*4*
1985	4%	--	--
1986	--	2%	--
1990	--	2%	--
1995	5%	--	--
1997	--	2%	--
2001	1%	--	--
2002	1%	--	--
2003	2%	--	--
2005	2%	2%	--
2006	1%	2%	--
2007	10%	2%	1
2008	3%	12%	--
2009	11%	15%	--
2010	21%	23%	1
2011	22%	22%	--
Don't know/ no indication	16%	17%	2

BE6. (P/NP) On a scale of 0 to 10, with 0 meaning "strongly disagree" and 10 meaning "strongly agree," how much would you agree that the following statements represent your organization's use of benchmarking.

BE6A. (P/NP) You or someone else in your organization routinely monitors your buildings' benchmark scores or EUIs. ? (Table B-66)

Table B-66: Routinely Monitor Building Benchmarking Scores or EUIs
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total EB	Non-participants (count)
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Strongly agree (10)	5	1	4	1	34%	--
9	--	--	1	--	2%	--
8	1	1	2	1	14%	1
7	--	--	--	--	--	--
6	--	1	--	1	2%	--
5	2	2	1	1	16%	1
4	1	1	--	--	5%	--
3	--	--	--	3	5%	--
2	--	1	1	--	2%	--
1	1	--	--	1	7%	--
Strongly disagree (0)	--	2	2	--	9%	1
Not applicable	1	1	--	--	5%	
Don't know	--	1	--	--	<1%	1

BE23. (P) On a scale of 0 to 10, with 0 being "not at all common" and 10 being "very common," how common is it for you to continue to monitor a benchmark score or energy use intensity (EUI) for a client after you have benchmarked a building for them? (Table B-67)

Table B-67: Vendors Continue Monitoring Client Benchmarking Scores
(participant vendors)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
(*Sample size*)	*11*	*10*	*11*	*8*	*40*
Very common (10)	3	3	2	1	23%
9	--	1	--	--	3%
8	1	1	--	1	6%
7	--	--	1	--	3%
6	--	1	--	--	3%
5	2	--	1	4	17%
4	--	--	--	--	--
3	--	1	2	--	9%
2	1	1	1	1	9%
1	--	1	--	--	3%
Not at all common (0)	3	1	4	1	23%
Don't know	1	--	--	--	3%

BE6B. (P/NP) When you make a change to a building or to equipment that could affect its energy use, you or someone else in your organization usually checks the benchmark score or re-benchmarks after making the change. (Table B-68)

Table B-68: Someone in the Organization Usually Checks the Benchmark Score or Re-benchmarks After Making a Building or Equipment Change
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking End Users	Non-participants (count)
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Strongly agree (10)	6	1	5	3	44%	--
9	--	--	--	--	--	1
8	--	3	1	--	4%	1
7	1	2	1	--	9%	--
6	1	--	--	1	7%	--
5	--	1	1	1	4%	--
4	2	1	--	1	11%	1
3	--	--	--	--	--	--
2	--	--	1	--	2%	--
1	1	--	--	1	7%	--
Strongly disagree (0)	0	2	2	1	11%	--
Not applicable	--	1	--	--	<1%	--
Refused	--	--	--	--	--	1

BE6C. (P/NP) You re-benchmark or check your buildings' benchmark scores when there is a change in building tenancy. (Table B-69)

Table B-69: Re-benchmark or Check Building Scores when there is a Change in Building Tenancy
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking End Users	Non-participants (count)
Sample size	11	11	11	8	*41*	*4*
Strongly agree (10)	4	1	4	1	30%	--
9	--	--	1	--	2%	--
8	1	--	--	--	5%	1
7	--	--	--	--	--	--
6	--	1	--	--	<1%	--
5	2	--	1	2	14%	1
4	1	--	--	--	5%	--
3	--	--	1	--	2%	--
2	--	1	--	--	<1%	1
1	1	1	2	1	14%	--
Strongly disagree (0)	--	3	2	1	11%	--
Don't know	--	1	--	--	<1%	1
Not applicable	2	3	--	3	20%	--

BE6D. (P/NP) You do not re-benchmark or check your buildings' benchmark scores. (Table B-70)

Table B-70: Do Not Re-benchmark or Check Buildings' Benchmark Scores
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking End Users	Non-participants (count)
Sample size	11	11	11	8	*41*	*4*
Strongly agree (10)	2	2	2	2	20%	2
9	--	--	--	1	2%	--
8	--	2	1	--	8%	1
7	1	--	--	--	4%	--
6	--	--	1	--	2%	--
5	--	1	--	1	2%	1
4	2	--	--	2	11%	--
3	--	1	--	1	2%	--
2	2	--	--	--	9%	--
1	--	--	1	--	2%	--
Strongly disagree (0)	4	3	6	1	38%	--
Not applicable	--	2	--	--	6%	--

BE7. (P/NP) How frequently does your organization usually re-benchmark buildings or check the score? (Table B-71)

Table B-71: Frequency of Re-benchmarking or Checking Scores
(participant end users and non-participants who routinely monitor building benchmarking Scores or EUIs)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking End Users	Non-participants (count)
Sample size	*9*	*6*	*8*	*4*	*27*	*2*
At least 12 times a year	2	1	3	1	29%	--
At least four times a year	4	2	1	--	29%	--
At least twice a year	2	1	1	2	16%	1
At least yearly	1	--	2	--	19%	--
At least every two years	--	1	--	--	<1%	--
Less than every three years	--	--	1	--	3%	1
Don't know	--	1	--	1	3%	--

BE8. (P/NP) & BE19.[6] (P) Now I am going to read you another series of statements. Please tell me if any of these statements describe the way your organization uses benchmarking tools.

BE8A. (P/NP) & BE19A. (P) To compare a building or portfolio of buildings against each other (sometimes called internal benchmarking) (Table B-72 and Table B-73)

Table B-72: Use of Benchmarking Tools
(participant end users who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample size	*11*	*11*	*11*	*8*	*41*
To compare a building or portfolio of buildings against each					
Yes	5	8	4	6	48%
No	5	3	7	2	48%
Don't know	1	--	--	--	5%
To compare a building or portfolio of buildings against a national index					
Yes	7	6	8	5	65%
No	4	5	3	3	35%
To compare a building to itself over time					
Yes	10	10	8	5	81%
No	1	1	3	3	19%

---

[6] BE19. (Participant vendors) were asked: Now I am going to read you a series of statements. Please tell me if any of these statements describe how clients intend to use the benchmarking data you produce .

Table B-73: Use of Benchmarking Tools
(participant end users and vendors who benchmarked; non-participants who benchmarked)

	EB	V	Non-participants (count)
Sample size	*41*	*40*	*4*
To compare a building or portfolio of buildings against each other			
Yes	48%	62%	1
No	48%η	29%	3
Don't know	5%	9%	--
To compare a building or portfolio of buildings against a national index			
Yes	65%	73%	--
No	35%η	18%	4
Don't know	--η	9%	--
To compare a building to itself over time			
Yes	81%	71%	3
No	19%	21%	1
Don't know	--η	9%	--

η Significantly different from Vendors at the 90% confidence level.

BE9. (P/NP) & BE24 (P) What benchmarking tools or resources does your organization use to benchmark facilities? (Table B-74 and Table B-75)

Table B-74: Benchmarking Tools Used
(participant end users who benchmarked; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total (count)	Non-participants (count)
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
ENERGY STAR Portfolio Manager	10	3	9	5	26	--
Internal method/spreadsheets/data (ex. Metering, energy consumption)	1	3	1	2	7	--
Utility benchmarking program/CEUS survey[7]	1	--	--	1	2	--
Utility bills/monthly energy use	--	--	--	1	1	2
Energy accounting software (Metrix, Faser, EnergyCAP, etc.)	--	--	1	--	1	1
ABS	--	1	--	--	1	--
CalArch	1	--	--	--	1	--
BOMA Standards	--	--	--	1	1	--
SchoolDude UtilityDirect	--	1	--	--	1	--
Laboratories for the 21st Century (EPA/DOE tool for labs)	1	--	--	--	1	--
EEM Suite	--	1	--	--	1	--
E Quest	--	1	--	--	1	--
Carrier building manager systems	--	--	--	1	1	--
Had a vendor do it	--	--	--	--	--	1
Nothing	--	--	1	--	1	--
Don't know	1	1	--	--	2	1

---

[7] This was unclear. The evaluation team suspects the tool referenced is either EnergyIQ or CalArch.

Table B-75: Benchmarking Tools Used
(vendors who benchmarked; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total (count)
Sample size	*11*	*10*	*11*	*8*	*40*
ENERGY STAR Portfolio Manager	9	6	6	6	27
Utility bills	1	1	3	--	5
Internal method/spreadsheets/data (ex. Metering, energy consumption)	--	1	3	--	4
Energy accounting software (Metrix, Faser, EnergyCAP, etc.)	1	--	--	1	2
Energy Pro	--	--	--	1	1
Utility benchmarking program/CEUS survey	1	--	--	--	1
Utility Trac	1	--	--	--	1
E Quest	--	1	--	--	1
Professional engineer	--	--	--	1	1
Measurement sensors	--	--	--	1	1
Don't know	1	--	--	--	1

BE10. (P/NP) & BE25. (P) Have you tried any benchmarking tools or resources that you have found to be not useful?

BE11. (P/NP) & BE26. (P) Which tools? (Table B-76 and Table B-77)

Table B-76: Benchmarking Tools Not Useful
(participant end users who benchmarked; end users who found benchmarking tools to not be useful; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total (count)	Non-participants
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Yes	1	--	3	--	4	--
No	9	9	8	8	34	4
Sample size	*1*	*--*	*3*	*--*	*4*	*--*
ENERGY STAR Portfolio Manager	1	--	1	--	2	--
Energy accounting software (Metrix, Faser, EnergyCAP, etc.)	--	--	1	--	1	--
Sustainable Real Estate Manager	--	--	1	--	1	--

Table B-77: Benchmarking Tools Not Useful
(participant vendors who benchmarked; participant vendors who found benchmarking tools to not be useful; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total (count)
Sample size	*11*	*10*	*11*	*8*	*40*
Yes	2	1	1	1	5
No	8	8	10	6	32
Don't know	1	1	--	1	3
Sample size	*2*	*1*	*1*	*1*	*5*
ENERGY STAR Portfolio Manager	--	--	1	--	1
CalArch	1	--	--	--	1
Green Building Studio	--	--	--	1	1
Internal tool	1	--	--	--	1
Natural gas tool	--	1	--	--	1

BE12. (P/NP) & BE27 (P) Why have you found these tools or resources not useful? (Table B-78)

Table B-78: Why Benchmarking Tools Were Not Helpful
(participants who found benchmarking tools to not be useful)

	Portfolio Manager (count)	Energy accounting software (Metrix, Faser, EnergyCAP, etc.) (count)	Sustainable Real Estate Manager (count)	Total (count)
Sample size	*2*	*1*	*1*	*4*
Not useful in general	2	--	--	2
Hard to navigate	--	1	--	1
Exploring is much more efficient than Portfolio Manager [sic]	--	--	1	1

BE13. (P/NP) & BE28. (P) Why did your organization choose to use ENERGY STAR Portfolio Manager to benchmark instead of some other tool? (Table B-79 and Table B-80)

Table B-79: Reasons for Using Portfolio Manager
(participant end users and non-participants who used Portfolio Manager; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total	Non-participants (count)
Sample size	*8*	*3*	*7*	*5*	*23*	*1*
Recommended by utility	3	--	--	--	20%	--
Easy to use/accessible	--	1	3	1	18%	--
Free	1		1	2	15%	--
Required for certification/ mandatory by law or rebate	1	1	1	--	13%	--
Wide recognition	--	--	2	1	11%	--
ENERGY STAR brand	--	--	2	--	10%	--
Because of workshop	1	--	--	--	7%	--
Available support/assistance	1	--	--	--	7%	--
Industry standard	--	--	1	1	7%	--
We do use other tools	1	--	--	--	7%	--
Other	--	--	--	1	2%	--
Don't know	1	1	--	--	8%	1

Table B-80: Reasons for Using Portfolio Manager
(participant vendors who used Portfolio Manager; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample size	*11*	*9*	*10*	*7*	*37*
Recommended by utility	1	2	2	3	17%
ENERGY STAR brand	2	--	1	1	15%
Required for certification/ mandatory by law or rebate	1	1	3	1	15%
Free	1	1	2	--	13%
Don't know of any other tools	2	1	--	--	11%
Because of workshop	2	1	--	--	9%
Available support/assistance	2	--	--	--	9%
Client requested it	1	1	--	--	6%
Trained on this program	--	--	1	--	5%
To diversify abilities	1	--	--	--	5%
Industry standard	--	1	1	--	4%
Wide recognition	--	--	--	1	3%
To start my own data collection	--	1	--	--	2%
To record info with the DOE	--	1	--	--	2%
Other	--	1	--	--	2%
Don't know	1	--	--	1	8%

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B.7 Additional Insights on Vendor Benchmarking Experience

BE15. (P) Which of the following statements best describes the role of benchmarking commercial buildings for your business? (Table B-81)

Table B-81: Role in Benchmarking
(participant vendors)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample size	*11*	*10*	*11*	*8*	*40*
Benchmark commercial buildings only at the request of clients, and do not actively seek this business	5	3	6	3	44%
Actively seek business benchmarking commercial buildings	6	7	5	5	56%

BE16. (P) On a scale of 0 to 10, with 0 being "none at all" and ten being "a great deal," how much of a demand in the [UTILITY NAME] service territory would you say there is for commercial building benchmarking services? (Table B-82)

Table B-82: Demand for Commercial Benchmarking Services
(participant vendors)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample size	*11*	*10*	*11*	*8*	*40*
A great deal (10)	1	3	--	--	9%
9	--	--	--	1	<1%
8	--	1	1	--	6%
7	2	--	1	1	13%
6	1	1	--	2	9%
5	1	--	4	1	13%
4	1	1	--	--	6%
3	1	--	1	--	6%
2	1	1	1	1	9%
1	1	2	--	1	6%
None at all (0)	--	--	1	--	3%
Don't know	2	1	2	1	19%

BE17. (P) Thinking about your experiences with existing and potential clients, which types of clients have expressed the strongest interest in benchmarking? (Table B-83)

Table B-83: Types of Clients with Strongest Interested in Benchmarking
(participant vendors; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample size	*16*	*6*	*9*	*3*	*34*
Large office building owners or managers	12	5	5	3	74%
Small office building owners or managers	7	2	4	2	43%
Hotel owners or managers	3	3	5	1	39%
Data center owners or managers	4	3	3	2	36%
School administrators	3	4	3	1	32%
State government	4	3	1	1	27%
Health care facility owners or managers	1	2	4	1	26%
Municipal government	3	3	2	--	23%
Warehouse owners or managers	3	3	1	1	23%
Shopping mall owners or managers	--	2	2	1	16%
Municipal Wastewater treatment plants	--	2	2	--	10%
Supermarket owners or managers	--	1	2	1	10%
Auto dealers	--	--	1	1	6%
Multi-family buildings	1	--	--	--	4%
Manufacturing	--	--	1	--	3%
Water parks	--	--	1	--	3%
Churches	--	1	--	--	2%
Non-profits	--	1	--	--	2%
Restaurants	--	1	--	--	2%
Other	--	1	--	--	2%

BE18. (P) Once your organization has benchmarked a building, in your experience what does the customer usually do with the score report? (Table B-84)

Table B-84: Clients' Use of Benchmarking Score
(participant vendors)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample size	*11*	*10*	*11*	*8*	*40*
Learn new information about their building's energy performance					
Yes	10	10	7	7	88%
No	1	--	4	1	12%
Confirm or provide proof for management of what they already knew about their building's performance					
Yes	7	9	9	4	71%
No	4	1	1	3	27%
Don't know	--	--	1	1	3%
Fulfill a requirement for utility program participation or certification					
Yes	4	7	9	7	59%
No	6	2	2	1	35%
Don't know	1	1	--	--	6%
Anything else for which they use the score report					
Yes	7	5	1	2	46%
No	3	2	7	4	49%
Don't know	1	--	1	--	6%

BE20. (P) Now I want you to think about the clients for whom you have benchmarked buildings so that a client can qualify for utility program participation. In these cases, do you usually provide benchmarking results only to the client, only to the utility, or both? (Table B-85)

Table B-85: Qualification for Utility Program Participation
(participant vendors who believe customers usually use the score report to fulfill a requirement for utility program participation or certification)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample size	*4*	*5*	*9*	*7*	*25*
Provide results to the client only	2	1	3	6	44%
Provide results to both	2	4	4	1	44%
Don't know	--	--	1	--	6%
Refused	--	--	1	--	6%

BE21. (P) On a scale of 0 to 10, with 0 being "not at all interested" and 10 being "very interested," in general, how interested were these clients in seeing the benchmarking results? (Table B-86)

Table B-86: Client Interest in Benchmarking Results
(participant vendors who provide results to the client only or to both the client and the utility)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total
Sample size	*4*	*5*	*7*	*7*	*23*
Very interested (10)	1	1	2	1	25%
9	1	--	--	1	6%
8	1	1	2	3	31%
7	1	2	--	1	13%
6	--	1	--	--	6%
5	--	--	1	--	6%
4	--	--	1	--	6%
3	--	--	--	1	<1%
2	--	--	--	--	--
1	--	--	--	--	--
Not at all interested (0)	--	--	1	--	6%

B.8   Value of Benchmarking

VB1. (P/NP) Which of the following statements best describes your experience with benchmarking the buildings you own, occupy or manage? (Table B-87)

Table B-87: Value of Benchmarking
(participant end users and non-participants who benchmarked; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Provided new information about buildings' energy						
Yes	11	10	9	5	90%	1
No	0	1	2	3	11%	2
Don't know	--	--	--	--	--	1
Was a requirement for "ENERGY STAR" or "LEED" certification						
Yes	7	10	7	5	66%	1
No	4	1	4	3	34%	3
Don't know	--	--	--	--	--	--
Confirmed or provided proof for management of what already known about buildings' performance						
Yes	6	8	8	6	64%	1
No	4	3	3	2	31%	2
Don't know	1	0	0	0	4%	1
Prepared organization for AB1103						
Yes	4	5	5	5	43%	1
No	5	2	2	2	32%	3
Don't know	2	4	4	1	27%	--
Was a requirement for participation in a utility energy-efficiency program						
Yes	2	5	8	2	40%	2
No	9	5	3	6	59%	2
Don't know	0	1	0	0	1%	--

VB2. (P/NP) Tell me about how you used the information you obtained from benchmarking. (Table B-88)

Table B-88: Use of Information Obtained in Benchmarking
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Set a baseline score or EUI for future comparison						
Yes	10	8	9	6	85%	2
No	1	3	2	2	16%	2
Don't know	--	--	--	--	--	--
Identify energy-efficiency improvement opportunities in the building						
Yes	10	9	8	7	84%	2
No	1	2	3	1	16%	2
Don't know	--	--	--	--	--	--
Identify which buildings needed the most improvement in their energy performance						
Yes	8	9	6	5	67%	1
No	2	2	5	3	29%	3
Don't know	1	--	--	--	4%	--
Set goals for facility performance						
Yes	7	4	8	4	63%	1
No	4	7	3	4	37%	3
Don't know	--	--	--	--	--	--
Used the information in any other ways						
Yes	2	3	5	3	30%	--
No	9	7	6	5	69%	4
Don't know	--	1	--	--	1%	--

Table B-89: Other Uses of Information Obtained in Benchmarking
(participant end users who benchmarked and used the information in another way)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants (count)
Sample size	*2*	*3*	*5*	*3*	*13*
Fulfill a requirement for certification or bill financing	--	--	2	1	3
Inform directors/staff about company energy use	1	--	--	1	2
Provide information to clients	--	1	1	--	2
Public relations	1	--	--	--	1
Train staff to educate the public on topic	--	1	--	--	1
Retrofits	--	1	--	--	1
Provide information to IFMA	--	--	1	--	1
Help in budgeting energy costs	--	--	1	--	1
Help sell energy upgrades to a customer	--	--	--	1	1
Used the information in another way	--	1	1	--	2

VB3. (P/NP) Has your organization changed how it manages building energy use since benchmarking? (Table B-90)

Table B-90: Organization Changed How it Manages Building Energy Use Since Benchmarking
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample Size	*11*	*11*	*11*	*8*	*41*	*4*
Yes	7	6	7	4	62%	1
No	4	4	4	4	38%	3
Don't know	--	1	--	--	<1%	--

VB4. (P/NP) How? (Table B-91)

Table B-91: How Organization's Management of Building Energy Use Changed
(participant end users who changed building energy management since benchmarking; non-participants whose organization changed how it manages building energy use since benchmarking; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample Size	7	6	7	4	24	1
More frequent monitoring (of controls, thermostats, buildings, electrical/steam usage)	2	1	2	--	25%	--
Identify areas or buildings for reducing energy use	2	1	1	1	22%	--
Installing energy-efficient lighting/ lighting upgrades	1	1	2	--	18%	1
Reduce energy use	--	--	1	--	12%	--
HVAC upgrades	1	--	--	--	7%	--
More awareness in managers/organization as a whole	--	--	1	1	7%	--
Benchmarking	1	--	--	--	7%	--
Implemented automated controls	1	--	--	--	7%	--
Participate in energy efficiency programs	1	--	1	--	5%	--
Changes in business practices/energy efficiency policy	--	1	--	1	3%	--
Retrofits/upgrades to maintain Energy Star requirements	--	1	--	1	3%	--
Lack of staff/personnel to continue monitoring	--	1	--	--	2%	--
Other	--	1	1	--	7%	--

VB5. (P/NP) On a scale of 0 to 10, with 0 being "no influence" and 10 being "a very great deal of influence," how much of an influence has benchmarking had on how your organization manages building energy use? (Table B-92)

Table B-92: Influence of Benchmarking on How Organization Manages Building Energy Use
(participant end users who changed building energy management since benchmarking; non-participants who changed building energy management since benchmarking)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	7	6	7	4	24	1
A very great deal of	3	2	2	1	38%	--

influence (10)						
8	2	--	2	--	24%	--
7	--	--	1	--	3%	1
6	--	--	--	2	3%	--
5	1	3	2		21%	--
4	1	1	--	1	10%	--

VB6. (P/NP) Since benchmarking any of your buildings, has your organization planned or implemented any energy efficiency improvements in those buildings? (Table B-93)

Table B-93: Improvements Planned or Implemented Since Benchmarking
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Yes	9	10	10	5	84%	4
No	2	1	1	2	14%	--
Don't know	--	--	--	1	2%	--

VB7. (P/NP) Has your organization planned or made changes to increase the energy efficiency of any of the following equipment in any of these buildings? (Table B-94)

Table B-94: Improvements Planned or Implemented Since Benchmarking
(participant end users and non-participants who benchmarked; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	*9*	*10*	*10*	*5*	*34*	*4*
Lighting upgrades	9	9	10	3	96%	4
HVAC	8	10	7	4	83%	1
Energy management system or controls	7	9	8	5	82%	--
Energy audits or feasibility studies	6	8	10	4	81%	2
Behavior changes, like changing thermostat set points and turning off lights	7	9	8	4	80%	3
Motors	6	5	5	2	57%	2
Refrigeration	6	6	4	1	53%	1
Windows	3	4	5	1	39%	--
Air compression	3	3	3	--	29%	1
Insulation/Sealing	1	3	3	2	22%	--
Heating/hot water upgrades	2	1	--	--	11%	--
Renewable energy technology	--	1	1	--	5%	--
Retro-commissioning	1	--	--	--	5%	--
Roofing Upgrade	--	1	--	1	4%	--
Water conservation/ waterless urinals	--	1	--	1	3%	--
Steam usage	--	--	--	--	--	1

VB8. (P/NP) Are any of these changes associated with energy efficiency programs offered by your utility? (Table B-95)

Table B-95: Changes Were Associated with Energy-Efficiency Programs Offered by Utility
(participant end users who planned or implemented changes; non-participants who planned or implemented changes)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	*9*	*10*	*10*	*5*	*34*	*4*
Yes	6	8	10	4	81%	3
No	3	2	--	1	19%	1

VB9. (P/NP) On a scale of 0 to 10, with 0 being "not at all important" and 10 being "very important," on average how important were the benchmark scores or EUIs to the decisions to make energy efficiency improvements in these buildings? (Table B-96)

Table B-96: Importance of Benchmarking to Energy-efficiency Improvement Decisions
(participant end users who planned or implemented changes; non-participants who planned or implemented changes)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	*9*	*10*	*10*	*5*	*34*	*4*
Very important (10)	3	3	2	1	27%	--
9	--	--	1	--	4%	1
8	1	1	1	1	11%	1
7	--	3	2	1	12%	1
6	1	--	--	--	5%	--
5	2	--	--	1	12%	--
4	1	--	1	--	9%	--
3	--	1	1	1	6%	--
2	1	--	--	--	5%	--
Not at all important (0)	--	1	2	--	8%	1
Don't know	--	1	--	--	1%	--

VB10. (P/NP) On a scale of 0 to 10, with 0 meaning "strongly disagree" and 10 meaning "strongly agree," how much would you agree that the following statements describe your organization's use of benchmarking? (Table B-97, Table B-98, and Table B-99)

Table B-97: Organization's Use of Benchmarking: Part I
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Implement more comprehensive energy efficiency measures in the buildings benchmarked						
Strongly agree (10)	2	2	3	1	21%	--
9	--	1	1	--	4%	--
8	1	2	2	--	12%	--
7	1	1	--	3	9%	1
6	--	--	2	1	7%	2
5	5	2	2	2	30%	--
4	--	--	--	--	--	--
3	--	1	--	--	1%	--
1	1	1	--	1	6%	--
Strongly disagree (0)	--	1	1	1	5%	1
Don't know	1	--	--	--	4%	--

Table B-98: Organization's Use of Benchmarking: Part II
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Organization considers benchmarking scores in the performance assessments of building engineers or property managers						
Strongly agree (10)	4	1	1	1	22%	--
9	--	--	--	--	--	1
8	--	1	2	--	7%	1
7	--	2	2	--	8%	1
6	2	--	--	2	11%	--
5	1	1	1	--	8%	1
4	--	--	--	--	--	--
3	--	--	--	--	--	--
2	1	--	--	--	4%	--
1	1	1	1	2	11%	--
Strongly disagree (0)	1	5	4	3	25%	--
Don't know	1	--	--	--	4%	--
Organization considers benchmarking scores in the bonuses of building engineers or property managers						
Strongly agree (10)	1	1	2	--	11%	--
9	--	--	1	--	3%	--
8	--	2	--	1	3%	--
7	--	--	--	--	--	1
6	--	--	--	1	1%	1
5	3	1	1	1	18%	1
4	1	--	--	--	4%	--
3	--	--	1	--	3%	--
2	--	1	--	--	1%	--
1	2	--	--	2	11%	--
Strongly disagree (0)	4	6	6	3	44%	--
Refused	--	--	--	--	--	1

Table B-99: Organization's Use of Benchmarking: Part III
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Benchmarking has had no effect on management of buildings' energy use						
Strongly agree (10)	--	--	2	1	7%	1
9	--	--	--	1	1%	--
8	1	2	1	--	9%	--
7	--	--	--	--	--	--
6	--	--	--	--	--	--
5	3	1	1	--	17%	--
4	--	2	--	2	4%	--
3	1	--	2	1	12%	--
2	1	1	--	2	8%	2
1	--	--	--	--	--	--
Strongly disagree (0)	5	4	5	1	41%	1
Don't know	--	1	--	--	1%	--
No more likely to make energy efficiency improvements in buildings that have been benchmarked than in other buildings						
Strongly agree (10)	2	1	--	1	11%	--
9	--	--	--	--	--	--
8	2	1	1	1	14%	--
7	--	--	--	--	--	--
6	--	--	--	1	1%	--
5	2	2	1	1	15%	2
4	1	--	1	--	7%	--
3	--	2	1	2	7%	--
2	--	1	2	1	8%	--
1	--	1	1	1	5%	1
Strongly disagree (0)	3	3	4	--	28%	--
Don't know	1	--	--	--	4%	--
Refused	--	--	--	--	--	1

NMR

VB11. (P/NP) Have you ever, or do you ever expect to, use your benchmarking activities to market buildings, or otherwise differentiate your business? (Table B-100)

Table B-100: Use of Benchmarking to Differentiate Business
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample size	*11*	*11*	*11*	*8*	*41*	*4*
Yes	4	7	9	4	53%	1
No	5	4	2	3	34%	2
Not applicable	--	--	--	--	--	1
Don't know	2	--	--	1	11%	--

VB12. (P/NP) Does your organization use benchmarking data to help value buildings for leases? (Table B-101)

Table B-101: Use of Benchmarking Data to Help Value Buildings for Leases
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample Size	*11*	*11*	*11*	*8*	*41*	*4*
Yes	3	--	3	3	26%	--
No	7	9	5	5	59%	4
Not applicable	1	2	2	--	13%	--
Don't know	--	--	1	--	2%	--

VB13. (P/NP) Does your organization use benchmarking data to help market buildings to potential tenants? (Table B-102)

Table B-102: Use of Benchmarking to Help Market Buildings to Potential Tenants
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample Size	*11*	*11*	*11*	*8*	*41*	*4*
Yes	2	--	4	3	24%	--
No	8	9	5	4	62%	4
Not applicable	1	2	1	1	11%	--
Don't know	--	--	1	--	2%	--

VB14. (P/NP) Does benchmarking play a role in the acquisition of new buildings by your organization? (Table B-103)

Table B-103: Use of Benchmarking in Acquisition of New Buildings
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample Size	*11*	*11*	*11*	*8*	*41*	*4*
Yes	3	2	5	3	35%	--
No	6	7	4	5	48%	4
Not applicable	2	2	2	--	17%	--

VB15. (P/NP) Please describe the role it plays. (Table B-104)

Table B-104: Role Benchmarking Plays in Acquisition of New Buildings
(participant end users for whom benchmarking plays a role in the acquisition of new buildings; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants (count)
Sample Size	*3*	*2*	*5*	*2*	*12*
Helps to evaluate cost of operating/upgrading the building	--	--	5	--	5
We tend to buy/build more efficient buildings	1	1	--	--	2
Part of the selection criteria	1	--	--	--	1
To get help from Energy Star	--	--	--	1	1
To compare energy use before and after upgrades	--	1	--	--	1
Low energy use	1	--	--	--	1
Other	--	--	--	1	1

VB16. (P/NP) Do your benchmarking activities play a role in the sale of buildings in your portfolio? (Table B-105)

Table B-105: Use of Benchmarking in the Sale of Buildings in Portfolio
(participant end users and non-participants who benchmarked)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants	Non-participants (count)
Sample Size	*11*	*11*	*11*	*8*	*41*	*4*
Yes	2	--	2	1	17%	--
No	8	9	7	6	67%	1
Not applicable	1	2	2	1	15%	1

VB17. (P/NP) Please describe the role it plays. (Table B-106)

Table B-106: Role Benchmarking Plays in the Sale of Buildings in Portfolio
(participant end users for whom benchmarking plays a role in the sale of buildings in portfolio; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants (count)
Sample Size	*1*	*0*	*3*	*1*	*4*
Benchmarked buildings sell faster/generate more buyer interest	1	--	--	1	2
The building is work more with a higher score	--	--	1	--	1
Can be used for marketing purposes	--	--	1	--	1
Reflects on management quality of the building	1	--	--	--	1

B.9   No Benchmarking Experience

NB3. (P/NP) Has your organization considered benchmarking any of the buildings it owns, occupies or manages? (Table B-107)

Table B-107: Organization Considered Benchmarking
(participant end users who did not benchmark; non-participants who were aware of benchmarking but did not benchmark)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Non-Benchmarking Participants	Non-participants (count)
Sample size	*12*	*12*	*12*	*8*	*44*	*3*
Yes	7	4	4	2	45%	--
No	5	8	5	5	47%	3
Don't know	0	0	3	1	8%	--

NB3. (P/NP) Why hasn't your organization considered benchmarking any of these buildings? (Table B-108)

Table B-108: Why Organization Has Not Considered Benchmarking
(participant end users who did not consider benchmarking; non-participants who did not consider benchmarking; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Non-Benchmarking Participants	Non-participants (count)
Sample size	*5*	*8*	*5*	*5*	*23*	*3*
Cost to collect information and continue monitoring energy performance	1	1	1	--	16%	--
Data gathering is time consuming	1	--	1	1	15%	--
Organization/building is too small to benchmark	--	--	2	--	14%	--
Portfolio Manager software difficult to use	1	--	--	--	9%	--
Don't know how	1	--	--	--	9%	--
Did not qualify	1	--	--	--	9%	--
Don't own any buildings	--	2	--	1	8%	--
Not applicable to our business	--	2	--	1	5%	--
We already have a place to enter utility data	--	--	1	--	4%	--
Lack of information	--	1	--	--	3%	--
Lack of corporate/ organization management approval	--	1	--	--	3%	--
Potential savings not worth the effort required	--	--	--	1	2%	--
No category for our facility	--	--	--	1	2%	--
In good shape now	--	--	--	--	--	1
Other	--	--	--	--	9%	--
Don't know	--	--	--	--	--	2

NB4. (P/NP) On a scale of 0 to 10, with 0 meaning "Not at all likely" and 10 meaning "extremely likely," how likely is it that within the next year your organization will begin benchmarking the buildings it owns, occupies or manages? (Table B-109)

Table B-109: Likelihood of Benchmarking in Future
(participant end users and non-participants who did not benchmark)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Non-Benchmarking Participants	Non-participants
Sample size	*12*	*12*	*12*	*8*	*44*	*44*
Extremely likely (10)	--	--	2	1	6%	4%
9	1	1	--	--	6%	--
8	1	1	2	--	10% ε	--
7	--	1	--	--	2%	7%
6	--	--	1	--	2%	7%
5	--	4	1	1	10%	11%
4	1	2	--	1	8%	8%
3	2	--	--	1	10%	8%
2	1	--	1	2	8%	13%
1	--	--	--	1	2%	--
Not at all likely (0)	5	2	4	1	31%	38%
Don't know	1	1	1	0	8% ε	--

ε Combined answers for categories 8 to 10 are significantly different from non-participants at the 90% confidence level.

NB6. (P/NP) Have any challenges or barriers prevented your organization from benchmarking the buildings it owns, occupies or manages? (Table B-110)

Table B-110: Challenges or Barriers that Prevented Benchmarking
(participant end users who did not benchmark; non-participants aware of benchmarking who did not benchmark)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Non-Benchmarking Participants	Non-participants (count)
Sample size	*12*	*12*	*12*	*8*	*44*	*3*
Yes	7	4	5	3	49%	--
No	4	8	5	4	41%	3
Don't know	1	--	2	1	10%	--

NB7. (P/NP) What challenges or barriers have prevented you from benchmarking the buildings your company owns occupies or manages? (Table B-111)

Table B-111: Challenges or Barriers that Prevented Benchmarking
(participant end users who did not benchmark who indicated challenges or barriers; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Non-Benchmarking Participants
Sample size	*7*	*4*	*5*	*3*	*19*
Lack of resources	3	1	--	1	5
Portfolio Manager software difficult to use	1	--	--	1	2
Lack of information	--	--	1	1	2
No category for our facility	1	--	1	--	2
Cost to collect information and continue monitoring energy performance	--	1	--	--	1
Data needed for benchmarking not readily accessible or known	--	1	--	--	1
Potential savings not worth the effort required	--	--	1	--	1
Don't know how	--	--	1	--	1
Organization/building is too small to benchmark	--	1	--	--	1
Rules for benchmarking don't apply	1	--	--	--	1
Don't know what the benefits are	1	--	--	--	1
Other	1	--	1	--	2

NB5A. (NP) Based on the description of benchmarking that I read to you earlier, what challenges or barriers do you think might prevent your organization from benchmarking the buildings it owns, occupies or manages? (Table B-112)

Table B-112: Challenges or Barriers that Might Prevent Benchmarking
(non-participants who had not heard of benchmarking; multiple response)

	Non-participants
Sample size	*37*
Cost to collect information and continue monitoring energy performance	33%
Don't know how	11%
Lack of resources	6%
Lack of information	5%
Lack of cooperation from tenants / unit owners	2%
Data gathering is time consuming	2%
Aged buildings/units	2%
Lack of confidence that results will be cost-effective	1%
None	12%
Other	7%
Don't know	19%

NB8. (P/NP) What assistance or services would make your organization more likely to benchmark the buildings it owns, occupies or manages? (Table B-113)

Table B-113: Assistance That Would Make Organization More Likely to Benchmark
(participant end users and non-participants who did not benchmark; multiple response)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Non-Benchmarking Participants	Non-participants
Sample size	*12*	*12*	*12*	*8*	*44*	*44*
None	3	4	5	1	29%	12%
Training on using benchmarking tools	2	--	--	3	13%	13%
Facility specific workshops/revise tool to be able to use more specific facility types	--	--	1	--	11%	--
Provide people/guidance /services to help with benchmarking	1	--	1	2	8%	--
Share more data on similar properties	1	--	--	--	4%	--
Lower the cost/make it free	--	--	1	1	3%	--
Nothing because my organization/building is too small to benchmark	--	1	1	--	3%	--
Help persuading management to approve	--	--	--	--	2%	1%
Assistance filling out forms	--	1	--	--	1%	6%
Help persuading tenants / building unit owners to cooperate	--	1	1	--	1%	10%
Make it more streamlined	--	1	--	--	1%	--
Provide more information	--	--	--	--	--	8%
Free/financial assistance	--	--	--	--	--	8%
If it saved money	--	--	--	--	--	17%
Assistance from a professional	--	--	--	--	--	8%
Partner with a local utility	--	--	--	--	--	7%
Other	1	--	--	--	4%	10%
Don't know	2	5	2	1	20%	--

NB9. (P/NP) If in future your organization benchmarks the buildings it owns, occupies or manages with ENERGY STAR Portfolio Manager, how beneficial do you think it will be for your organization? Please give your response on a scale of 0 to 10, where 0 means "not at all beneficial" and 10 means "extremely beneficial." (Table B-114)

Table B-114: How Beneficial Would Benchmarking be for Your Organization
(participant end users who did not benchmark; non-participants aware of benchmarking who did not benchmark)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Non-Benchmarking Participants	Non-participants (count)
Sample size	*12*	*12*	*12*	*8*	*44*	*3*
Extremely beneficial (10)	2	4	3	3	24%	--
9	--	--	1	--	2%	--
8	1	2	1	2	10%	--
7	3	1	1	1	18%	--
6	1	--	1	1	8%	--
5	2	--	1	--	10%	--
3	--	2	--	1	4%	1
2	--	1	1	--	4%	--
Not at all beneficial (0)	2	1	3	--	16%	1
Don't know	1	1	--	--	6%	--
Refused	--	--	--	--	--	1

NB10. (P/NP) How would you rate your organization's interest in benchmarking the buildings it owns, occupies or manages in the future? Please give your response on a scale of 0 to 10, where 0 means "not at all interested" and 10 means "extremely interested." (Table B-115)

Table B-115: Organization's Interest in Benchmarking
(participant end users who did not benchmark; non-participants aware of benchmarking who did not benchmark)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Non-Benchmarking Participants	Non-participants
Sample size	*12*	*12*	*12*	*8*	*44*	*3*
Extremely interested (10)	3	3	3	2	24%	--
9	--	--	2	--	4%	--
8	1	2	--	--	6%	--
7	--	1	1	1	6%	--
6	1	1	--	1	8%	--
5	3	--	1	2	16%	2
4	--	1	--	1	4%	--
3	1	1	--	--	6%	--
2	2	2	2	1	16%	--
1	--	--	1	--	2%	--
Not at all interested (0)	1	1	1	--	8%	1
Don't know	--	--	1	--	2%	--

NB11. (P/NP) What are the reasons that your organization is not that interested in benchmarking the buildings it owns, occupies or manages? (Table B-116)

Table B-116: Reasons Organization is Not That Interested in Benchmarking
(participant end users who did not benchmark who said their organization is not that interested in benchmarking;
non-participants who said their organization is not that interested in benchmarking)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Non-Benchmarking Participants (count)	Non-participants (count)
Sample size	*4*	*4*	*5*	*1*	*13*	*1*
Not applicable/don't own a big building	1	1	1	--	3	--
Already achieved goals/already optimized energy use	1	1	--	--	2	--
Don't care about energy use/have other priorities	--	--	2	--	2	--
Confusing process/don't understand it yet	1	1	--	--	2	--
No category for our company	--	--	--	1	1	--
No benefit	--	--	1	--	1	--
Just another layer of regulations business owners have to deal with	--	1	--	--	1	--
Already regulated by the FDA	--	--	--	1	1	--
It is four our clients to recommend	--	--	1	--	1	--
Experts in congregation give advice	--	--	--	--	--	1
Don't know	1	--	--	--	1	--

B.10 Value of Certification

VC1. (P/NP) How important is it to your organization that its buildings receive ENERGY STAR certification? Please rate the importance of the certification on a scale of 0 to 10, where zero means "not at all important" and 10 means "extremely important." (Table B-117)

Table B-117: Importance of ENERGY STAR Certification
(participants who said that ENERGY STAR certification is one of the most interesting aspects of benchmarking)

	EB (count)	EN (count)	Total Benchmarking Participants (count)
Sample Size	5	2	7
Extremely important (10)	--	1	1
9	1	--	1
6	1	--	1
5	3	--	3
Not at all important (0)	--	1	1

VC2. (P/NP) How important is it to your organization that its buildings receive LEED certification? Please rate the importance of the certification on a scale of 0 to 10, where zero means "not at all important" and 10 means "extremely important."

One participant had mentioned that LEED certification was one of the most interesting aspects to their organization. Using the same scale of as above, this respondent, an end-user who had not benchmarked, said that LEED certification is extremely important (10) for their organization.

B.11 Awareness of Energy-efficiency Programs and Decision Making

EE1. (P/NP) Please help me understand how important energy costs are compared to the total costs of running your business. Would you say that energy costs are very important, somewhat important, not very important, or not at all important, compared to your total costs of doing business? (Table B-118)

Table B-118: Importance of Energy Costs
(participant end users; non-participants)

	EB	EN	Total Benchmarking Participants	Non-participants
Sample Size	43	44	87	48
Very important	63%	57%	60%	50%
Somewhat important	28%	32%	30%	32%
Not very important	2%ε	6%ε	4%ε	17%
Not at all important	7%ε	4%	6%ε	--
Don't know	--	--	--	1%

ε Significantly different from non-participants at the 90% confidence level.

EE2. (NP) In your opinion, how consistent are the resources that your organization allocates to managing energy costs with the importance it assigns to energy costs? Would you say that the resources your organization assigns to managing energy costs are very consistent, somewhat consistent, not very consistent, or not at all consistent with the importance it assigns to energy costs? (Table B-119)

Table B-119: Consistency of Energy-efficiency Resources
(non-participants)

	Non-participants
Sample Size	*48*
Very consistent	21%
Somewhat consistent	51%
Not very consistent	10%
Not at all consistent	15%
Don't know	2%

EE3. (NP) Please tell me why you say that the resources your organization assigns to energy costs are [Very consistent/somewhat consistent/not very consistent/not at all consistent] with the importance it assigns to energy costs. (Table B-120)

Table B-120: Reason for Level of Consistency of Energy-efficiency Resources
(non-participants who indicated level of consistency of energy-efficiency resources)

	All	Very consistent (count)	Somewhat consistent	Not very consistent (count)	Not at all consistent (count)
Sample Size	*46*	*12*	*21*	*4*	*9*
Always looking to save money/energy	15%	5	12%	--	--
Lower priority than customer/student needs	13%	1	12%	1	--
Cost/limited budget	11%	--	12%	1	--
Not enough resources/time	11%	--	8%	1	3
Doesn't suit organization/company	9%	--	4%	--	2
Utility provides a lot of service already	4%	1	--	--	--
Old/inefficient buildings	4%	--	8%	--	--
Look at rates each year	4%	--	8%	--	--
Monitor energy use closely	4%	2	4%	--	--
Lack of management consistency	2%	--	--	--	1
Reliable management personnel/consultant	2%	2	--	--	--
Low energy costs	<1%	--	--	--	1
Lack of utility program consistency	<1%	--	<1%	--	--
Other	6%	1	12%	--	--
Don't know	11%	--	12%	1	2
Refused	4%	--	8%	--	--

EE4. (NP) How important is it for you to be able to assess how the energy consumption in your buildings compares to the energy consumption in buildings occupied by other similar companies or competitors? (Table B-121)

Table B-121: Importance of Comparing Building Energy Consumption
(non-participants)

	Non-participants
Sample Size	*48*
Very important	16%
Somewhat important	51%
Not very important	17%
Not at all important	16%

EE5. (NP) Why is it [Very important/somewhat important/not very important/not at all important] for you to be able to assess how the energy consumption in your buildings compares to the energy consumption in buildings occupied by other similar companies or competitors? (Table B-122)

Table B-122: Reason for Importance of Comparing Building Energy Consumption
(non-participants who indicated importance of comparing building energy consumption; multiple response)

	All	Very important (count)	Somewhat important (count)	Not very important (count)	Not at all important (count)
Sample Size	*46*	*11*	*19*	*6*	*10*
Not concerned with others/Don't care	22%	1	--	3	6
Create benchmark/self-assessment	20%	3	4	--	--
Determine where to reduce energy costs/usage	18%	3	4	--	--
To stay competitive/compare costs	10%	1	3	--	--
Want to save energy/save money on energy	9%	2	1	--	--
Energy costs are small/not a priority	4%	--	2	--	2
Special business type	4%	--	--	1	1
Environmental/sustainability concerns	2%	1	--	--	--
To ensure paying appropriate price for energy	2%	--	1	--	--
Already efficient	2%	--	--	1	--
Affects jobs	2%	--	1	--	--
Other	14%	--	4	1	--
Refused	1%	--	--	--	1

B.12 Firmographics

F1A.[8] (P/NP) How many buildings does your organization own, occupy or manage in the US? (Table B-123, Table B-124, and Table B-125)

Table B-123: Number of Buildings Owned, Occupied, Managed in the US
(participant end users who did not benchmark; non-participants)

	PG&E (counts)	SCE (counts)	SDG&E (counts)	SoCalGas (counts)	Total Non-Benchmarking Participants	Non-participants
Sample Size	*12*	*12*	*12*	*8*	*44*	*48*
1	2	3	2	2	18%	20%
2 to 4	1	2	3	--	12%ε	33%
5 to 10	2	1	1	1	14%	12%
11 to 25	1	3	1	--	10%	13%
Over 25	5	1	3	3	33%	22%
Don't know	1	2	2	2	12%ε	--

Table B-124: Number of Buildings Owned, Occupied, or Managed in the US
(participant end users who did not benchmark; non-participants; participant end users who benchmarked; non-participants who benchmarked)

	Participant End Users who Benchmarked (EB)	Non-Benchmarking Participant End Users (EN)	Non-participants	Non-participants who benchmarked (count)
Sample Size	*43*	*44*	*48*	*4*
1 to 4	32% ε	30% ε	53%	2
5 to 10	8%	14%	12%	1
11 to 25	9%	10%	13%	--
Over 25	49%ε	33%	22%	1
Don't know	2%ζ	12%ε	--	--

ε Significantly different from non-participants at the 90% confidence level.
ζ Significantly different from EN at the 90% confidence level.
ε Significantly different from non-participants at the 90% confidence level.

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[8] Participant Vendors were asked: For how many customer buildings does your organization perform benchmarking services in the US?

Table B-125: Number of Buildings Serviced in the US
(participant vendors)

	PG&E (counts)	SCE (counts)	SDG&E (counts)	SoCalGas (counts)	Total Vendors
Sample Size	*11*	*10*	*11*	*8*	*40*
1	2	1	--	--	12%
2 to 4	2	1	2	2	21%
5 to 10	--	2	1	2	9%
11 to 25	2	2	3	1	18%
Over 25	3	4	3	1	24%
Don't know	2	--	2	2	18%

F1B.[9] (P/NP) & F1C.[10] How many of these buildings are in California? (Table B-126)

Table B-126: Number of Buildings Owned, Occupied, or Managed in California
(participant end users who benchmarked; non-participants)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	Total Benchmarking Participants
Sample Size	*12*	*9*	*12*	*8*	*41*
1	3	--	2	1	21%
2 to 4	1	--	2	2	13%
5 to 10	3	1	--	1	15%
11 to 25	1	--	2	2	13%
Over 25	4	8	6	2	40%

F2.[11] (P/NP) Thinking only about your organization's buildings in California, what is the approximate square footage of heated and cooled floor area of these facilities? (Table B-127, Table B-128, Table B-129, and Table B-130)

Table B-127: Total Square Footage of Buildings in California
(participants who indicated total square foot of buildings)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	All Participants
Sample Size	*14*	*10*	*16*	*6*	*46*
1,000-49,999 ft^2	1	4	10	3	31%
50,000-99,999 ft^2	2	1	--	--	9%
100,000-399,999 ft^2	5	1	1	1	22%
400,000-899,999 ft^2	3	3	2	--	18%
900,000 ft^2 or more	3	1	3	2	20%

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[9] Participant vendors were asked: How many of these customer buildings are in California?

[10] Participant end users who had benchmarked were asked: Earlier you said your organization owns, occupies or manages [INSERT RESPONSE TO BE3 HERE] buildings in the US. How many of these are in California?

[11] Participant vendors were asked: Thinking only about the customer buildings your organization has benchmarked in California, what is the approximate square footage of heated and cooled floor area of these facilities?

Table B-128: Total Square Footage of Buildings in California
(participants and non-participants who indicated total square foot of buildings)

	EB	EN	Vendors (count)	All Participants	Non-participants
Sample Size	*16*	*20*	*10*	*46*	*23*
1,000-49,999 ft^2	4	38%	4	31%	31%
50,000-99,999 ft^2	2	3%ε	--	9%ε	35%
100,000-399,999 ft^2	2	24%	3	22%	20%
400,000-899,999 ft^2	3	27%ε	1	18%ε	2%
900,000 ft^2 or more	5	7%	2	20%	12%

ζ Significantly different from EN at the 90% confidence level.
ε Significantly different from non-participants at the 90% confidence level.

Table B-129: Average Square Footage of Buildings in California
(participants who indicated total square foot of buildings)

	PG&E (count)	SCE (count)	SDG&E (count)	SoCalGas (count)	All Participants
Sample Size	*10*	*8*	*4*	*8*	*30*
1,000-9,999 ft^2	1	2	1	1	13%
10,000-49,999 ft^2	2	1	1	3	21%
50,000-99,999 ft^2	2	2	--	--	16%
100,000 ft^2 or more	5	3	2	4	50%

Table B-130: Average Square Footage of Buildings in California*
(participants who indicated average square foot of buildings; non-participants)

	EB	EN	Vendors	All Participants	Non-participants
Sample Size	*9*	*9*	*22*	*30*	*16*
1,000-9,999 ft^2	1	--	17%	13%	8
10,000-49,999 ft^2	1	1	22%	21%	6
50,000-99,999 ft^2	--	2	11%	16%	--
100,000 ft^2 or more	3	4	28%	50%	2

F3.[12] (P/NP) What are the primary activities conducted at these buildings in California? (Table B-131)

Table B-131: Primary Activities in Buildings in California
(participants, non-participants; multiple response)

	EB	EN	V	All Participants	Non-participants
Sample size	*43*	*44*	*40*	*127*	*48*
Office	60%ζδε	25%η	49%ε	44%ε	22%
School/Education/Library	12%η	17%η	--δε	11%	10%
Hotel or Motel	4%ε	11%ηε	9%δε	8%ε	10%
Industrial Process/Manufacturing/Assembly	6%ε	15%ηε	1%δε	8%ε	31%
Retail (non-food)	10%ε	2%	9%ε	7%ε	1%
Hospital	--δ	--	--δ	7%ε	--
Municipal/Local Govt Building	8%ε	2%	5%	5%ε	--
Scientific Research/Laboratory	6%ε	4%	2%	4%ε	--
College/University	--ζδ	9%ηε	--δ	3%ε	--
Warehouse	1%ε	3%ε	4%	3%ε	12%
Community Service/Church/Temple	8%ζ	--	2%	3%	4%
Condo Assoc./Apartment Mgr./Residential	--ζδ	7%ηε	--δ	3%ε	--
Research and Development	3%	4%	--δ	3%ε	--
Restaurant	4%	--ε	3%	2%	7%
Commercial Association	6%ζηε	--	--δ	2%ε	--
Agricultural Facility	--ζδ	9%ηε	--δ	3%ε	--
Bank/Financial Institution	3%	--	2%	1%	--
Construction/Contractor	--	2%	2%	1%	--
Data Analysis	--	2%	--	1%	--
Data Center	1%	--	2%	1%	--
Engineer Consulting	--	2%	--	1%	--
Grocery Store	--	1%	2%	1%	2%
Maintenance	1%	--	2%	1%	--
Museum	--	--	2%	1%	--
Public Facility/Public Assembly	3%	2%	--	1%	--
Senior Care Facility	--	--	2%	1%	--
Tourism	--	2%	--	1%	--
Auto Dealers/rental	1%	--	--	<1%	3%
Energy Services	--	--	2%	<1%	--
Fire Station	1%	--	--	<1%	--
Movie Theater	1%	--	--	<1%	--
Municipal Wastewater Treatment Plant	--	--	2%	<1%	1%

[12] Participant vendors were asked: What are the primary activities conducted at the buildings for which your organization performs benchmarking services in California?

	EB	EN	V	All Participants	Non-participants
(Table B-132: Primary Activities in Buildings in California continued)					
Health Care (other than Hospital)	10%δε	4%	8%δε	7%	--
Greenhouse	--	--	--	--	2%
Laundry/Cleaners	--	--	--	--	4%
Printer	--ε	--ε	--ε	--ε	8%
Nothing	1%	--	--	<1%	--
Other	--δε	--ε	6%	2%	6%
Don't know	--δ	--	--δ	2%ε	--
Refused	--	--	--	--	1%

ζ Significantly different from EN at the 90% confidence level.
η Significantly different from Vendors at the 90% confidence level.
δ Significantly different from all participants at the 90% confidence level.
ε Significantly different from non-participants at the 90% confidence level.

F4.[13] (P/NP) Are all of the buildings your organization owns, occupies or manages served by [UTILITY NAME]? (Table B-133)

Table B-133: All Buildings Served by Same Utility
(participants)

	EB	EN	V	All Participants	Non-participants
Sample Size	*43*	*44*	*40*	*127*	*48*
Yes	72%η	56%ε	50%ε	61%ε	81%
No	26%η	40%ε	44%ε	36%ε	14%
Don't know	2%	4%	6%	4%	5%

η Significantly different from Vendors at the 90% confidence level.
ε Significantly different from non-participants at the 90% confidence level.

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[13] Participant vendors were asked: Are all of the buildings your organization has benchmarked to date served by [UTILITY NAME]?

F5. (P/NP) Besides [UTILITY NAME], what other utilities serve these buildings? (Table B-134)

Table B-134: Other Utilities Serving California Buildings
(participants and non-participants served by other utilities; multiple response)

	EB (count)	EN (count)	V (count)	All Participants	Non-participants (count)
Sample Size	*13*	*18*	*20*	*51*	*7*
Southern California Edison (SCE)	4	4	6	42%	4
San Diego Gas & Electric (SDG&E)	3	3	6	28%	--
Pacific Gas & Electric (PG&E)	2	3	7	17%	4
LA Dept of Water and Power	4	3	4	13%	--
Don't know	1	4	2	12%	--
Southern California Gas (SoCalGas)	1	1	2	6%	--
San Diego Water and Power	--	1	--	5%	--
Multiple Utilities (not specified)	--	1	1	5%	--
Western Area Power Administration	1	--	--	4%	--
Pacific Power & Light (PP&L)	--	--	2	3%	--
SMUD	--	--	1	3%	--
Long Beach Gas	--	2	--	2%	--
Salt River Project	--	--	1	2%	--
Marino Valley Utilities	1	--	--	1%	--
Riverside Public Utilities	--	1	--	1%	--
Sempra	--	1	--	1%	--
EWP Renewable Corp	--	1	--	1%	--
Southwest Gas (SG)	--	--	--	--	1
Imperial Irrigation District	--	--	--	--	1
Anaheim Utilities	--	--	--	--	1

B.13 Survey Instruments

B.13.1 Participant Survey Instrument

Study 5461p

Sample Quota (Quota Cell Number is in Parentheses)

Utility	Sample	Sample Type	End-user Benchmarked (EB)	End user Not Benchmarked (EN)	Vendor (V)	Total by Utility
PG&E	340	Sample	12 (1)	12 (2)	11 (3)	35
SCE	216	Census	12 (4)	12 (5)	11 (6)	35
SDG&E	326	Sample	12 (7)	12 (8)	12 (9)	36
SCG	120	Census	12 (10)	12 (11)	11 (12)	35
Total			48	48	45	141

[NOTES FOR CATI PROGRAMMING]

The sample is comprised of participants in IOU benchmarking workshops on or before mid-August 2011. The screening questions will be used to group respondents into the following categories:

a. End-use customers (E). These are (1) customers who whose primary interest in benchmarking is for facilities that are owned by their employer, and (2) customers whose primary interest is in benchmarking facilities that are leased or managed, but not owned, by their employer.

b. Vendors (V). The vendors' primary interest is in benchmarking facilities owned and managed by other organizations (i.e. by end-user customers).

Both End-use customers and Vendors are further subdivided by whether they have benchmarked their own or clients' buildings:

- **EB** – End-users who have benchmarked buildings **IF 0 = 01 OR 02 OR 03 AND 0=01**
- **EN** – End-users who have not yet benchmarked buildings **IF 0 = 01 OR 02 OR 03 AND 0=03**
- **VB** – Vendors who have benchmarked buildings using EPSM in connection with benchmarking offerings **IF 0 = 04 AND 0=01**

Vendors who have not benchmarked a building are excluded from the survey.

		Owner/Lessee	Vendor
Benchmarked with ESPM	Yes	**EB**	**VB**
	No	**EN**	(exclude)

The survey firm should reserve a variable to contain these flags as they are assigned during the screening portion of the survey.

Sample Elements: Contact Name
Utility Name
Workshop Month Year
Organization Name

1   INTRODUCTION

Hello, my name is _____ and I am calling from _____ on behalf of California Public Utilities Commission. May I please speak with **[Contact Name]**?

[IF NECESSARY: I would like to speak with the person who is most knowledgeable about your organization's experiences benchmarking your buildings.**]**

I am calling today as part of an evaluation of the benchmarking support offered by California utilities. You were selected for this study because you registered for a **[UTILITY NAME]** benchmarking workshop in **[month year]**. We'd like to ask you a few questions about the workshop and the use of benchmarking in your operations.

[IF RESPONDENT ASKS WHAT BENCHMARKING IS: Benchmarking is measuring a building's energy usage with energy management software that allows customers to track and assess energy consumption. Typically benchmarking provides metrics that assess the energy use per square foot and energy performance of the whole building by comparing it to the energy usage of similar buildings.]

[WHY THIS STUDY MATTERS: This study will be used to improve **[UTILITY NAME]** programs that help customers benchmark their buildings using ENERGY STAR Portfolio Manager.**]**

[IF RESPONDENT ASKS HOW TO GET HELP WITH BENCHMARKING: [UTILITY NAME] can help you with ENERGY STAR Portfolio Manager. Just send them an email with your questions and someone from **[UTILITY NAME]** will get back to you. The email address is . . .

[PG&E: benchmarking@pge.com]

[SCE: If you need assistance, contact your account representative or call (800) 736-4777]

[SDG&E: If you need assistance, contact SDG&E's Energy Savings Center at (800) 644-6133 or by email at benchmarking@semprautilities.com]

[**SoCalGas:** If you need assistance, please go to our benchmarking website at: socalgas.com and search "benchmarking."]

2   SCREENING

S1.   I understand that you registered for a **[UTILITY NAME]** workshop on benchmarking buildings with ENERGY STAR Portfolio Manager in **[month year]**. Do you remember attending this workshop?

01   YES **[SKIP TOS3]**
02   NO
88   REFUSED
99   DON'T KNOW

S2.   Is there someone else who would know about your organization's participation in a utility-sponsored benchmarking workshop?

    01   YES **[ASK FOR NAME: _____ AND TELEPHONE #: _____]** **[THANK AND TERMINATE. SCHEDULE INTERVIEW WITH BEST CONTACT.]**
02   NO **[THANK AND TERMINATE]**

S3.   Are you still an employee of **[organization name]**?

    01   YES
02   NO **[THANK AND TERMINATE]**
    88   REFUSED **[THANK AND TERMINATE]**
    99   DON'T KNOW **[THANK AND TERMINATE]**

S4.   Which of the following statements best describes your interest in benchmarking? Would you say your interest is primarily in …**[READ]**

    01   Benchmarking facilities owned by the organization that employs you **[END USER--OWNER]**
    02   Benchmarking facilities occupied and leased or managed, but not owned, by the organization that employs you **[END USER—NOT OWNER, NOT PROPERTY MANAGER]**
    03   Benchmarking facilities that are managed by the organization that employs you but which are occupied and owned by other organizations **[END USER— PROPERTY MANAGER ONLY]**
    04   Benchmarking facilities that are occupied, owned, **and** managed by other organizations? **[VENDOR]**
    77   Other (SPECIFY :_____). **[THANK AND TERMINATE]**
88   REFUSED **[THANK AND TERMINATE]**
99   DON'T KNOW **[THANK AND TERMINATE]**

S5.   Which of the following statements best describes your organization's experience with benchmarking *in the past three years*… **[READ IN ORDER. STOP READING WHEN RESPONDENT AGREES WITH A STATEMENT. TRACK DISPOSITION OF 02 SEPARATELY FROM 88 & 99]**

01   We have *completed* benchmarking at least one building
      02   We are *in the process* of benchmarking a building *for the first time* **[THANK AND TERMINATE]**
03   We have *not* benchmarked a building in the past three years
88   REFUSED **[THANK AND TERMINATE]**
99   DON'T KNOW **[THANK AND TERMINATE]**

IF 0=02, 88 OR 99 THANK AND TERMINATE

IF 0=04 AND 0=03 THANK AND TERMINATE

S6.   **[IF 0=01]** Does your organization use ENERGY STAR Portfolio Manager to benchmark buildings?

01   YES
02   NO
88   REFUSED
99   DON'T KNOW

S7.   **[IF (0=01, 02 OR 03) AND S5=01]** Which of the following best describes your role in benchmarking buildings for your organization? **[READ]**

      01   *You* benchmark buildings for your organization, OR
      02   Another employee benchmarks buildings for your organization, OR
      03   Another company benchmarks buildings for your organization
      04   Other: _____ **[THANK AND TERMINATE]**
88   REFUSED **[THANK AND TERMINATE]**
99   DON'T KNOW **[THANK AND TERMINATE]**

S8.   **[IF 0=04 AND S5=01]** Which best describes your role in benchmarking buildings for your organization? **[READ]**

      01   *You* benchmark buildings for customers
      02   Another employee benchmarks buildings for customers
      03   Other: _____ **[THANK AND TERMINATE]**
88   REFUSED **[THANK AND TERMINATE]**
99   DON'T KNOW **[THANK AND TERMINATE]**

S9.   **[IF S7=02 or S8=02]** This survey asks about the value of benchmarking to your organization and how you use the results as well as about feedback on ENERGY STAR Portfolio Manager or other benchmarking tools your organization may have used. Are you the best person in your organization to talk with about this, or is there someone else we should talk with?

    01   No, someone else **[ASK FOR NAME: _____ AND TELEPHONE #: _____] [THANK AND TERMINATE. SCHEDULE INTERVIEW WITH BEST CONTACT. THE BEST CONTACT MAY NOT HAVE ATTENDED A WORKSHOP]**
    02   I am best person **[CONTINUE]**
88   REFUSED **[THANK AND TERMINATE]**
99   DON'T KNOW **[THANK AND TERMINATE]**

   [CODING: IF 0 = 01 OR 02 OR 03 AND (S5 = 01) Code as: EB
                   IF 0 = 01 OR 02 OR 03 AND (S5 = 03) Code as: EN
                   IF 0 = 04AND (S5 = 01) Code as: VB
                   IF 0 = 04 AND S5=03) THANK AND TERMINATE
                   If S4=01/02/03/04 AND (S5=DK/REF) THANK AND TERMINATE]

QUOTAS: EB   = 47
                   EN   = 47
                   VB   = 47

3   Workshop Experience

First I'd like to ask you a few questions about the workshop you took.

WS1.   What was your primary reason for attending the workshop about ENERGY STAR Portfolio Manager? **[DO NOT READ.]**

01   To benchmark my organization's buildings
02   To benchmark other organizations' buildings
03   To better understand benchmarking performed by others
04   To learn to use Automated Benchmarking Services (electronic meter data upload)
05   Did not attend workshop **[SKIP TO 0]**
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

WS2. Were there any other reasons? **[ACCEPT MULTIPLE RESPONSES. PROBE. SAME LIST AS 0**, **EXCLUDING THE REASON GIVEN IN WS1. PUNCH 5 FOR WS2 SHOULD BE: 5. No other reasons DO NOT READ.]**

WS3. Was the training provided in the workshop sufficient to allow you to benchmark buildings on your own? **[DO NOT READ]**

    01   YES

02   NO

77   Other (SPECIFY :_____)

    88   REFUSED

    99   DON'T KNOW

WS4. **[IF WS3=02**] In what ways did the training <u>not</u> prepare you to benchmark buildings on your own? **[DO NOT READ; ACCEPT MULTIPLE RESPONSES.]**

01   Workshop didn't train us on how to obtain utility bills/energy usage data

02   Workshop didn't provide enough hands-on experience with ESPM

    77   Other (SPECIFY :_____)

    88   REFUSED

    99   DON'T KNOW

4   ESPM & ABS Experience

[IF S5 = 01 AND ((S7=01 OR 02) OR (S8=01 OR 02))]

Now I'd like to ask you a few questions about your experience using the Automated Benchmarking Service with ENERGY STAR Portfolio Manager. **[If needed:** Automated Benchmarking Services makes it possible obtain energy use data for each meter electronically and updates the benchmarking score automatically on a monthly basis with updated energy usage values.]

ABS1. Has your organization been able to successfully benchmark buildings using ENERGY STAR Portfolio Manager?

    01   YES **[SKIP TO 0]**

    02   NO

    77   Other (SPECIFY :_____)

    88   REFUSED

    99   DON'T KNOW

ABS2. **[IF 0=02]** Why was your organization unable to benchmark with ESPM? **[MULTIPLE RESPONSE. DO NOT READ]**

    01   Confusing or difficult to use

02   Problems deleting a meter

03   Problems getting authorizations from tenants or others
04   Could not identify all meters
05   Could not get a score because building was too small
06   Could not get a score for some other reason [RECORD DESCRIPTION]
07   Could not get a score & don't know why
08   Type of building I wanted to rate is not included in Portfolio Manager
09   Problems due to having multiple addresses for a building
10   Technical problems setting up account
11   Difficulty getting approval from utility to set up account to benchmark customer's building
12   Received confusing error codes
77   Other (SPECIFY :_____)
88   REFUSED
98   DON'T KNOW Respondent did not do the benchmarking themselves
99   DON'T KNOW Other

ABS3. Have you had any difficulties using ENERGY STAR Portfolio Manager?

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
        98   DON'T KNOW Respondent did not do the benchmarking themselves
99   DON'T KNOW Other

ABS4. Which of the following best describes how your organization currently transfers energy use data into ENERGY STAR Portfolio Manager? **[READ 01 AND 02 IN ORDER, THEN READ 03 AND 04 IN RANDOM ORDER. BE SURE TO READ ALL OPTIONS, AS THE RESPONDENT MAY CHANGE THEIR MIND ABOUT THEIR ANSWER AFTER HEARING ALL FOUR.]**

01   We enter building and energy consumption information into Portfolio Manager by hand, one building at a time
02   We upload building and energy consumption data for 10 or more buildings from an Excel spreadsheet using a template from ENERGY STAR Portfolio Manager
03   We use the Automated Benchmarking System, or ABS, to automatically transfer energy consumption data only from the *utility* into Portfolio Manager
04   We use the Automated Benchmarking System, or ABS, to automatically transfer building and/or energy consumption data from *a service or product provider that is not the utility* into Portfolio Manager
77   Other (SPECIFY :_____)
88   REFUSED
98   DON'T KNOW— Respondent did not do the benchmarking themselves

NMR

99   DON'T KNOW—Other

ABS5. **[IF ABS4=03]** For which utilities do you transfer data with the utility's Automated Benchmarking Service? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES. PROBE.]**
01   Pacific Gas and Electric
02   Southern California Edison
03   Southern California Gas
04   San Diego Gas and Electric
77   Other (SPECIFY :_____)
88   REFUSED
98   DON'T KNOW—Respondent did not do the benchmarking themselves
99   DON'T KNOW—Other

ABS6. **[IF ABS4=01 OR 02]** IN THE LAST THREE YEARS, has your organization TRIED to use the Automated Benchmarking Service to automatically transfer building energy use data from the utility to Energy Star Portfolio Manager?

01   Yes
02   No
77   Other (SPECIFY :_____)
88   Refused
98   Don't Know

ABS7. **[IF ABS6=01]**   Why did your organization stop using the Automated Benchmarking Service? **[DO NOT READ. MARK ALL THAT APPLY]**

01   Confusing or difficult to use
02   Problems deleting a meter
03   Problems getting authorizations from tenants or others
04   Could not identify all meters
05   Pin code not available
06   Address mismatch
07   ABS data not available for specific meter(s)
08   Building ID number changed in ESPM
09   Problems due to having multiple addresses for a building
10   Technical problems setting up account
        11   Difficulty getting approval from utility to set up account to benchmark customer's building
12   Received confusing error codes
77   Other [RECORD DESCRIPTION]
88   REFUSED
98   [VOL] DON'T KNOW Respondent did not do the benchmarking themselves
99   [VOL] DON'T KNOW Other

ABS8. **[IF ABS4=03]** Have you had any difficulties using the Automated Benchmarking Service to import the buildings energy use data electronically into ENERGY STAR Portfolio Manager?

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
98   DON'T KNOW -- Respondent did not do the benchmarking themselves
99   DON'T KNOW—Other

ABS9. **[IF ABS8=01]** Tell me what kinds of difficulties you experienced with the Automated Benchmarking Service. **[DO NOT READ. MARK ALL THAT APPLY]**

01   Confusing or difficult to use
02   Problems deleting a meter
03   Problems getting authorizations from tenants or others
04   Could not identify all meters
05   Pin code not available
06   Address mismatch
07   ABS data not available for specific meter(s)
08   Building ID number changed in ESPM
09   Problems due to having multiple addresses for a building
10   Technical problems setting up account
        11   Difficulty getting approval from utility to set up account to benchmark customer's building
12   Received confusing error codes
77   Other [RECORD DESCRIPTION]
88   REFUSED
98   [VOL] DON'T KNOW Respondent did not do the benchmarking themselves
99   [VOL] DON'T KNOW Other

ABS10.   **[IF ABS3=01]** Tell me what kinds of difficulties you experienced with ENERGY STAR Portfolio Manager. **[DO NOT READ. MARK ALL THAT APPLY]**

01   Confusing or difficult to use
02   Problems deleting a meter
03   Problems getting authorizations from tenants or others
04   Could not identify all meters
05   Could not get a score because building was too small
06   Could not get a score for some other reason [RECORD DESCRIPTION]
07   Could not get a score & don't know why
08   Type of building I wanted to rate is not included in Portfolio Manager
09   Problems due to having multiple addresses for a building
10   Technical problems setting up account
11   Difficulty getting approval from utility to set up account to benchmark customer's building
12   Received confusing error codes
77   Other [RECORD DESCRIPTION]
88   REFUSED
98   [VOL] DON'T KNOW Respondent did not do the benchmarking themselves
99   [VOL] DON'T KNOW Other

ABS11.   For buildings that meet certain qualifications, Portfolio Manager should produce a benchmark score from 0 to 100. For all other buildings, Portfolio Manager should produce EUI, which is Energy Use Intensity or energy use per square foot. Has your organization been able to obtain a benchmark score from Portfolio Manager for buildings that should qualify for a score?

01   YES
02   NO
77   Other (SPECIFY :_____)
98   DON'T KNOW Respondent did not do the benchmarking themselves
99   DON'T KNOW Other

ABS12.   Did you contact technical support at **[UTILITY NAME]** for help with Portfolio Manager or the Automated Benchmarking Service?

01   YES
02   NO **[GO TO BE1]**
88   REFUSED **[GO TO BE1]**
99   DON'T KNOW **[GO TO BE1]**

NMR

ABS13.   Was technical support able to resolve your problem?

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

ABS14.   Using a scale of 0 to 10, where 0 = "not at all satisfied" and 10 = "very satisfied," how satisfied would you say you were with technical support overall? [**RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.**]?

ABS15.   [**IF ABS14<3**] What was the one most important reason you were **not satisfied** with technical support? [**PROBE FOR A SPECIFIC REASON. ACCEPT ONE RESPONSE.**]

01   [RECORD VERBATIM]
88   REFUSED
99   DON'T KNOW

ABS16.   [**IF ABS14>7**] What was the one most important reason you were **satisfied** with technical support? [**PROBE FOR A SPECIFIC REASON. ACCEPT ONE RESPONSE.**]

01   [RECORD VERBATIM]
88   REFUSED
99   DON'T KNOW

5   Benchmarking Experience [END USERS ONLY]

[EB ONLY]

BE1.   How did you first learn about benchmarking? [**DO NOT READ. ACCEPT MULTIPLE RESPONSES**]

    01   Utility workshop
    02   Utility account manager or other utility representative
    03   Utility website
    04   Utility energy efficiency program
    05   Industry or trade journal, newspaper, or website
    06   Industry association, such as BOMA
    07   Legislation (AB1103 or other)
    08   This survey
    77   Other (SPECIFY :_____)
    88   REFUSED
    99   DON'T KNOW

BE2. What aspects of benchmarking most interest your organization? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   Rating performance of buildings
02   Identifying poor performing buildings
03   Saving energy
04   Helping the environment
05   ENERGY STAR certification
06   LEED certification
07   Complying with corporate sustainability or environmental initiative
08   Required by AB1103
09   Improving profitability
10   Possibility of increasing building's value/ marketability
11   Possibility of advertising score/marketing opportunity for organization
12   Taking a whole building approach to assessing energy usage
13   Identifying efficiency measures
14   To get a baseline before an installation
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

BE3. How many buildings does your organization own, occupy or manage in the US? **[RECORD A NUMBER; IF THEY CANNOT GIVE A NUMBER, READ ANSWER CATEGORIES AND ASK WHICH ONE IT FITS INTO]**

01   1
02   2 to 4
03   5 to 10
04   11 to 25
05   Over 25
88   REFUSED
99   DON'T KNOW

BE4. How many of the buildings your organization owns, occupies, or manages have been benchmarked to date? **[RECORD A SINGLE NUMBER 0-999, NOT A RANGE. IF THEY ARE NOT SURE OF NUMBER, ASK THEM TO PROVIDE AN EDUCATED GUESS. REFUSED=8888, DON'T KNOW=9999.]**

BE5. In what year did your organization first begin to benchmark buildings? **[RECORD YEAR. REFUSED=88, DON'T KNOW=99.]**

BE6.   On a scale of 0 to 10, with 0 meaning "strongly disagree" and 10 meaning "strongly agree," how much would you agree with the following statements about your organization's use of benchmarking? **[RANDOMIZE ORDER]**

A. You or someone else in your organization routinely monitors your buildings' benchmark scores or EUIs. **[RECORD NUMBER 0-10, REFUSED=88, NOT APPLICABLE=98, DON'T KNOW=99.]**

B. When you make a change to a building or to equipment that could affect its energy use, you or someone else in your organization usually checks the benchmark score or re-benchmarks after making the change. **[RECORD NUMBER 0-10, REFUSED=88, NOT APPLICABLE=98, DON'T KNOW=99.]**

C. You re-benchmark or check your buildings' benchmark scores when there is a change in building tenancy. **[RECORD NUMBER 0-10, REFUSED=88, NOT APPLICABLE=98, DON'T KNOW=99.]**

D. You **do not** re-benchmark or check your buildings' benchmark scores. **[RECORD NUMBER 0-10, REFUSED=88, NOT APPLICABLE=98, DON'T KNOW=99.]**

BE7.   **[IF BE6A>3]** How frequently does your organization usually re-benchmark buildings or check the score? **[READ]**

01   At least 12 times a year
02   At least four times a year
03   At least twice a year
04   At least yearly
05   At least every two years
06   At least every three years
07   Less than every three years
88   REFUSED
99   DON'T KNOW

BE8.   Now I am going to read you another series of statements. Please tell me if any of these statements describe the way your organization uses benchmarking tools. **[READ]**

A. To compare a building or portfolio of buildings against each other (sometimes called internal benchmarking)
B. To compare a building or portfolio of buildings against a national index
C. To compare a building to itself over time

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

BE9.   What benchmarking tools or resources does your organization use to benchmark facilities? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   ENERGY STAR Portfolio Manager
02   Utility bills
03   Energy accounting software (Metrix, Faser, EnergyCAP, etc.)
04   ABS
05   CalArch
06   EnergyIQ
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

BE10.   Have you tried any benchmarking tools or resources that you have found to not be useful?

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

BE11.   **[IF 0=01]** Which tools? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   ENERGY STAR Portfolio Manager
02   Utility bills
03   Energy accounting software (Metrix, Faser, EnergyCAP, etc.)
04   ABS
05   CalArch
06   EnergyIQ
77   Other (SPECIFY :_____)
95   Did not know of any other tool
88   REFUSED
99   DON'T KNOW

BE12.   **[IF 0=01]** Why have you found these tools or resources to not be useful?

01   [RECORD VERBATIM]
88   REFUSED
99   DON'T KNOW

BE13. **[IF BE9=01 OR S6=01]** Why did your organization choose to use ENERGY STAR Portfolio Manager to benchmark instead of some other tool? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES]**

01   Recommended by utility
02   Because of workshop
03   ENERGY STAR brand
04   Available support/assistance
05   Don't know of any other tools
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

6   Benchmarking Experience [VENDORS ONLY]

[VB ONLY]

BE14. How many commercial buildings has your organization benchmarked for clients to date? **[RECORD SINGLE NUMBER 0-999, NOT A RANGE. IF THEY ARE NOT SURE OF NUMBER, ASK THEM TO PROVIDE AN EDUCATED GUESS. REFUSED=8888, DON'T KNOW=9999.]**

BE15. Which of the following statements best describes the role of benchmarking commercial buildings for your business? **[READ]**

01   You benchmark commercial buildings only at the request of your clients, and do not actively seek this business
02   You actively seek business benchmarking commercial buildings
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

BE16. On a scale of 0 to 10, with 0 being "none at all" and ten being "a great deal," how much of a demand in the **[UTILITY NAME]** service territory would you say there is for commercial building benchmarking services? **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

BE17. Now I am going to read you a list of some types of clients that might be interested in benchmarking. Thinking about your experiences with existing and potential clients, which types of clients have expressed the strongest interest in benchmarking? **[READ LIST. MARK ALL THAT APPLY]**

A. State government
B. Municipal government

    C. Municipal Wastewater treatment plants

    D. Large office building owners or managers

    E. Small office building owners or managers

    F. Shopping mall owners or managers

    G. Warehouse owners or managers

    H. Health care facility owners or managers

    I. Supermarket owners or managers

    J. Data center owners or managers

    K. School administrators

    L. Hotel owners or managers

    M. Auto dealers

    N. Other (SPECIFY :_____)

01   YES
02   NO
88   REFUSED
99   DON'T KNOW

BE18. Once your organization has benchmarked a building, in your experience what does the customer usually do with the score report? Would you say the customer usually uses the score report to… **[READ; RANDOMIZE ORDER OF A THROUGH C, THEN READ.]**

    A. Learn new information about their building's energy performance?

    B. Confirm or provide proof for management of what they already knew about their building's performance?

    C. Fulfill a requirement for utility program participation or certification?

    D. Is there anything else for which they use the score report? [RECORD DESCRIPTION]

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

BE19. Now I am going to read you a series of statements. Please tell me if any of these statements describe how clients intend to use the benchmarking data you produce … **[RANDOMIZE ORDER]**

     A. To compare a building or portfolio of buildings against each other (sometimes called internal benchmarking)
     B. To compare a building or portfolio of buildings against a national index
     C. To compare a building to itself over time

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

BE20. **[IF BE18C=01]** Now I want you to think about the clients for whom you have benchmarked buildings so that a client can qualify for utility program participation. In these cases, do you usually provide benchmarking results only to the client, only to the utility, or both?

01   Provide results to the client only
02   Provide results to the utility only
03   Provide results to both
77   Other [RECORD DESCRIPTION]
88   REFUSED
99   DON'T KNOW

BE21. **[IF BE20=01 OR 03]** On a scale of 0 to 10, with 0 being "not at all interested" and 10 being "very interested," in general, how interested were these clients in seeing the benchmarking results? **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

BE22. In what year did your organization first begin to benchmark buildings? **[RECORD YEAR. REFUSED=88, DON'T KNOW=99.]**

BE23. On a scale of 0 to 10, with 0 being "not at all common" and 10 being "very common," how common is it for you to continue to monitor a benchmark score or energy use intensity (EUI) for a client after you have benchmarked a building for them?**[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.][IF ASKED FOR MORE ABOUT EUI: ENERGY USE PER SQUARE FOOT.]**

BE24. What benchmarking tools or resources does your organization use to benchmark facilities for clients? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   ENERGY STAR Portfolio Manager
02   Utility bills
03   Energy accounting software (Metrix, Faser, EnergyCAP, etc.)
04   ABS
05   CalArch
06   EnergyIQ
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

BE25. Have you tried any benchmarking tools or resources that you have found to not be useful?

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

BE26. **[IF BE25=01]** Which tools? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   ENERGY STAR Portfolio Manager
02   Utility bills
03   Energy accounting software (Metrix, Faser, EnergyCAP, etc.)
04   ABS
06   CalArch
07   EnergyIQ
77   Other (SPECIFY :_____).
95   Did not know of any other tool
88   REFUSED
99   DON'T KNOW

BE27. **[IF BE25=01]** Why have you found these tools or resources to not be useful?

01   [RECORD VERBATIM]
88   REFUSED
99   DON'T KNOW

BE28. **[IF BE24=01 OR S6=01]** Why did your organization choose to use ENERGY STAR Portfolio Manager to benchmark instead of some other tool? **[MULTIPLE RESPONSE. DO NOT READ.]**

01	Recommended by utility
02	Because of workshop
03	ENERGY STAR brand
04	Available support/assistance
05	Don't know of any other tools
77	Other (SPECIFY :_____)
88	REFUSED
99	DON'T KNOW

7   Value of Benchmarking [END USERS ONLY]

[EB ONLY]

Now I'd like to ask you a few questions about what you did with the benchmarking information.

VB1.   Which of the following statements best describes your experience with benchmarking the buildings you own, occupy or manage? Would you say benchmarking…**[READ; RANDOMIZE ORDER.]**

A. Provided you with new information about your buildings' energy performance?

B. Confirmed or provided proof for management of what you already knew about your buildings' performance?

C. Was a requirement for participation in a utility energy efficiency program?

D. Was a requirement for "ENERGY STAR" or "LEED" certification?

E. Prepared your organization for AB1103?

01	YES
02	NO
77	Other (SPECIFY :_____)88 REFUSED
99	DON'T KNOW

VB2.   Tell me about how you used the information you obtained from benchmarking? Did you use it to …**[READ; RANDOMIZE ORDER.]**

A. Identify energy efficiency improvement opportunities in the building?

B. Identify which buildings needed the most improvement in their energy performance?

C. Set goals for facility performance?

D. Set a baseline score or EUI for future comparison?

E. Did you use the information in any other ways?

F. **[IF VB2E=01]** How? [RECORD DESCRIPTION]

01   YES
02   NO
88   REFUSED
99   DON'T KNOW

VB3. Has your organization changed how it manages building energy use since benchmarking?

01   YES
02   NO **[GO TO 0]**
88   REFUSED **[GO TO 0]**
99   DON'T KNOW **[GO TO 0]**

VB4. **[IF 0=01]** How? **[RECORD VERBATIM]**

VB5. **[IF 0=01]** On a scale of 0 to 10, with 0 being "no influence" and 10 being "a very great deal of influence," how much of an influence has benchmarking had on how your organization manages building energy use?**[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

VB6. Since benchmarking any of your buildings, has your organization planned or implemented any energy efficiency improvements in those buildings?

01   YES
02   NO **[GO TO VB10]**
88   REFUSED **[GO TO VB10]**
99   DON'T KNOW **[GO TO VB10]**

VB7. **[IF 0=01]** Now I am going to read you a list of energy efficiency improvements. Has your organization planned or made changes to increase the energy efficiency of any of the following equipment in any of these buildings? **[READ. ACCEPT MULTIPLE RESPONSE]**

   A. Energy audits or feasibility studies
   B. Motors
   C. HVAC
   D. Insulation
   E. Windows
   F. Energy management system or controls
   G. Behavior changes, like changing thermostat set points and turning off lights
   H. Air compression
   I. Refrigeration
   J. Lighting upgrades

K. Have any other kinds of changes been made to increase energy efficiency in these buildings?

L. **[IF VB7K=01]** What else? **[RECORD]**

01   YES
02   NO
88   REFUSED
99   DON'T KNOW

VB8.   **[IF 0=01]** Are any of these changes associated with energy efficiency programs offered by your utility?

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

VB9.   **[IF 0=01]** On a scale of 0 to 10, with 0 being "not at all important" and 10 being "very important," on average how important were the benchmark scores or EUIs to the decisions to make energy efficiency improvements in these buildings? **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

VB10. On a scale of 0 to 10, with 0 meaning "strongly disagree" and 10 meaning "strongly agree," how much would you agree that the following statements describe your organization's use of benchmarking? **[RANDOMIZE ORDER]**

A. Benchmarking has had no effect on how you manage our buildings' energy use. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

B. You implement more comprehensive energy efficiency measures in the buildings you benchmark. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

C. You are no more likely to make energy efficiency improvements in buildings that have been benchmarked than in other buildings. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

D. Your organization considers benchmarking scores in the performance assessments of building engineers or property managers. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

E. Your organization considers benchmarking scores in the bonuses of building engineers or property managers. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

VB11. Have you ever, or do you ever expect to, use your benchmarking activities to market buildings, or otherwise differentiate your business?

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

VB12. Does your organization use benchmarking data to help value buildings for leases?

01   YES
02   NO
03   NOT APPLICABLE
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

VB13. Does your organization use benchmarking data to help market buildings to potential tenants?

01   YES
02   NO
03   NOT APPLICABLE
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

VB14. Does benchmarking play a role in the acquisition of new buildings by your organization?

01   YES
02   NO
03   NOT APPLICABLE
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

VB15. **[IF 0=01]** Please describe the role it plays. [RECORD VERBATIM]

VB16. Do your benchmarking activities play a role in the sale of buildings in your portfolio?

01   YES
02   NO
03   NOT APPLICABLE
77   Other (SPECIFY :_____)

88   REFUSED
99   DON'TKNOW

VB17. **[IF 0=01]** Please describe the role it plays. [RECORD VERBATIM]

8   No Experience Benchmarking

 [EN ONLY]

NB1.   How did you first learn about benchmarking? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES]**

        01   Utility workshop
        02   Utility account manager or other utility representative
        03   Utility website
        04   Utility energy efficiency program
        05   Industry or trade journal, newspaper, or website
        06   Industry association, such as BOMA
        07   Legislation (AB1103 or other)
        08   This survey
        77   Other (SPECIFY :_____)
        88   REFUSED
        99   DON'T KNOW

NB2.   Has your organization considered benchmarking any of the buildings it owns, occupies or manages?

01   YES
02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

NB3.   **[IF NB2=02]** Why hasn't your organization considered benchmarking any of these buildings? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES]**

01   Data gathering is time consuming
02   Cost to collect information and continue monitoring energy performance
03   Lack of confidence that results will be cost-effective
04   ESPM software difficult to use
05   Data needed for benchmarking not readily accessible or known
06   Lack of resources
07   Lack of information
08   Lack of cooperation from tenants / unit owners
09   Lack of corporate/organization management approval
10   Potential savings not worth the effort required
11   Don't know how
12   Was not aware of benchmarking
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

NB4.   On a scale of 0 to 10, with 0 meaning "Not at all likely" and 10 meaning "extremely likely," how likely is it that within the next year your organization will begin benchmarking the buildings it owns, occupies or manages? **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

NB5.   What aspects of benchmarking most interest your organization? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   Rating performance of buildings
02   Identifying poor performing buildings
03   Saving energy
04   Helping the environment
05   ENERGY STAR certification
06   LEED certification
07   Complying with corporate sustainability or environmental initiative
08   Required by AB1103
09   Improving profitability
10   Possibility of increasing building's value/ marketability
11   Possibility of advertising score/marketing opportunity for organization
12   Taking a whole building approach to assessing energy usage
13   Identifying efficiency measures
14   To get a baseline before an installation
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

NB6.   Have any challenges or barriers prevented your organization from benchmarking the buildings it owns, occupies or manages?

01   YES

02   NO
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

NB7.   **[IF 0=01]**   What challenges or barriers have prevented you from benchmarking the buildings it owns occupies or manages? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   Data gathering is time consuming
02   Cost to collect information and continue monitoring energy performance
03   Lack of confidence that results will be cost-effective
04   ESPM software difficult to use
05   Data needed for benchmarking not readily accessible or known
06   Lack of resources
07   Lack of information
08   Lack of cooperation from tenants / unit owners
09   Lack of corporate/organization management approval
10   Potential savings not worth the effort required
11   Don't know how
12   None
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

NB8.   What assistance or services would make your organization more likely to benchmark the buildings it owns, occupies or manages? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   Assistance filling out forms
02   Training on using benchmarking tools
03   Help persuading tenants / building unit owners to cooperate
04   Help persuading management to approve
05   None
77   Other (RECORD)
88   REFUSED
99   DON'T KNOW

NB9.   If in future your organization benchmarks the buildings it owns, occupies or manages with ENERGY STAR Portfolio Manager, how beneficial do you think it will be for your organization? Please give your response on a scale of 0 to 10, where 0 means "not at all beneficial" and 10 means "extremely beneficial." **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

NB10. How would you rate your organization's interest in benchmarking the buildings it owns, occupies or manages in the future? Please give your response on a scale of 0 to 10, where 0 means "not at all interested" and 10 means "extremely interested." **[RECORD NUMBER0-10, REFUSED=88, DON'T KNOW=99.]**

NB11. **[IF NB10<4]** What are the reasons that your organization is not that interested in benchmarking the buildings it owns, occupies or manages? **[RECORD]**

9   Value of Certification

VC1. **[IF BE2=05 OR NB5=05**] How important is it to your organization that its buildings receive ENERGY STAR certification? Please rate the importance of the certification on a scale of 0 to 10, where zero means "not at all important" and 10 means "extremely important." **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

VC2. **[IF BE2=06 OR NB5=06]** How important is it to your organization that its buildings receive LEED certification? Please rate the importance of the certification on a scale of 0 to 10, where zero means "not at all important" and 10 means "extremely important." **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

10   Awareness of Energy Efficiency Programs and Decision Making

[EN AND EB ONLY]

EE1. Please help me understand how important energy costs are compared to the total costs of running your business. Would you say that energy costs are very important, somewhat important, not very important, or not at all important, compared to your total costs of doing business?

01   Very important
02   Somewhat important
03   Not very important
04   Not at all important
88   REFUSED
99   DON'T KNOW

11   Firmographics

I have just a few more questions to ask you.

F1A.   **[IF EN:]** How many buildings does your organization own, occupy or manage in the US? **[RECORD A NUMBER; IF THEY CANNOT GIVE A NUMBER, READ ANSWER CATEGORIES AND ASK WHICH ONE IT FITS INTO]**

[IF VB:] For how many customer buildings does your organization perform benchmarking services in the US? **[RECORD A NUMBER; IF THEY CANNOT GIVE A NUMBER, READ ANSWER CATEGORIES AND ASK WHICH ONE IT FITS INTO]**

01   1
02   2 to 4
03   5 to 10
04   11 to 25
05   Over 25
88   REFUSED
99   DON'T KNOW

F1B.   **[IF EN:]** How many of these buildings are in California?**[RECORD A NUMBER; IF THEY CANNOT GIVE A NUMBER, READ ANSWER CATEGORIES AND ASK WHICH ONE IT FITS INTO]**

[IF VB:] How many of these customer buildings are in California? **[RECORD A NUMBER; IF THEY CANNOT GIVE A NUMBER, READ ANSWER CATEGORIES AND ASK WHICH ONE IT FITS INTO]**

01   1
02   2 to 4
03   5 to 10
04   11 to 25
05   Over 25
88   REFUSED
99   DON'T KNOW

F1C.   **[IF EB AND BE3=1, 2, 3, 4, OR 5]** Earlier you said your organization owns, occupies or manages **[INSERT RESPONSE TO BE3 HERE]** buildings in the US. How many of these are in California? **[RECORD A NUMBER; IF THEY CANNOT GIVE A NUMBER, READ ANSWER CATEGORIES AND ASK WHICH ONE IT FITS INTO]**

01   1
02   2 to 4
03   5 to 10
04   11 to 25
05   Over 25
88   REFUSED
99   DON'T KNOW

F2.   **[IF EB or EN, READ:]** Thinking only about your organization's buildings in California, what is the approximate square footage of heated and cooled floor area of these facilities? You can give me either the total square footage for all buildings or an average square footage per building. Your best guess is fine. **[RECORD VERBATIM; IF 99, PROBE FOR OR AVERAGE FACILITY SIZE]**

[IF VB, READ:] Thinking only about the customer buildings your organization has benchmarked in California, what is the approximate square footage of heated and cooled floor area of these facilities? You can give me either the total square footage for all buildings or an average square footage per building. Your best guess is fine. **[RECORD VERBATIM; IF 99, PROBE FOR AVERAGE FACILITY SIZE]**

Total amount _____ square feet

OR

Average per facility _____square feet

77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

F3.   **[IF EB or EN, READ:]** What are the primary activities conducted at these buildings in California? **[DO NOT READ; ACCEPT MULTIPLE RESPONSES]**

[IF VB, READ:] What are the primary activities conducted at the buildings for which your organization performs benchmarking services in California? **[DO NOT READ; ACCEPT MULTIPLE RESPONSES]**

01   Office
02   Retail (non-food)
03   College/University
04   School
05   Grocery Store
06   Restaurant

07	Health Care (other than Hospital)
08	Hospital
09	Hotel or Motel
10	Warehouse
11	Construction
12	Community Service/Church/Temple
13	Industrial Process/Manufacturing/Assembly
14	Condo Assoc./Apartment Mgr.
15	Greenhouse
16	Laundry/Cleaners
17	Data Center
18	Municipal Wastewater Treatment Plant
19	Municipal Building
20	Auto Dealers
21	Senior Care Facility
77	Open/Other (SPECIFY :_____)
88	REFUSED
99	DON'T KNOW

F4.   **[IF EN OR EB, READ]** Are all of the buildings your organization owns, occupies or manages served by **[UTILITY NAME]?**

[IF VB, READ] Are all of the buildings your organization has benchmarked to date served by **[UTILITY NAME]?**

01   YES
02   NO
88   REFUSED
99   DON'T KNOW

F5.   **[IF F4=02]** Besides **[UTILITY NAME],** what other utilities serve these buildings? **[MULTIPLE RESPONSE. DO NOT READ]**

01   Southwest Gas (SG)
02   Pacific Gas & Electric (PG&E)
03   San Diego Gas & Electric (SDG&E)
04   Pacific Power & Light (PP&L)
05   Sierra Pacific Power (SPP)
06   Southern California Edison (SCE)
07   Southern California Gas (SCG)
77   Other (SPECIFY :_____)
88   REFUSED
99   DON'T KNOW

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

B.13.2 Non-Participant Survey Instrument

Study 5461n

[NOTES FOR CATI PROGRAMMING]

Non-participants are medium or large commercial customers who are sole tenants of a building (whether they are owner-occupiers or renters), or own a building with just one tenant (so that this group would actually be in a position to benchmark). While they may have benchmarked with ESPM or another benchmarking tool, they should have not taken a utility benchmarking workshop nor have used ABS with EPSM.

- **EO -** End users who own the building(s) their organization occupies, **IF 0=01**

- **EL -** End users who rent or lease the building(s) their organization occupies, **IF 0=03**

- **PM –** Property manager, **IF 0=04**

Quotas=48

Sample Elements: Contact Name

Utility Name

1   INTRODUCTION

Hello, my name is _____ and I am calling from _____on behalf of California Public Utilities Commission.

[IF NECESSARY: I would like to speak with the person who is most knowledgeable about your organization's experiences benchmarking your buildings.**]**

I am calling today as part of an evaluation of the benchmarking support offered by **[their UTILITY NAME]** and other California utilities. The reason we are calling is to gather information that will help **[UTILITY NAME]** improve its support of businesses such as yours. We would appreciate a few minutes of your time to ask you some questions.

 [IF RESPONDENT ASKS WHAT BENCHMARKING IS: Buildings are benchmarked using energy management software that allows customers to track and assess energy consumption. Typically benchmarking provides metrics that assess the energy use intensity (EUI) (e.g., energy use per square foot) and energy performance of the whole building by comparing it to the energy usage of similar buildings.]

[WHY THIS STUDY MATTERS: This study will be used to improve **[UTILITY NAME]** programs that help customers benchmark their buildings using ENERGY STAR Portfolio Manager.**]**

[IF RESPONDENT ASKS HOW TO GET HELP WITH BENCHMARKING: [UTILITY NAME] can help you with ENERGY STAR Portfolio Manager. Just send them an email with your questions and someone from **[UTILITY NAME]** will get back to you. The email address is . . .

[PG&E: benchmarking@pge.com]

[SCE: If you need assistance, contact your account representative or call (800) 736-4777]

[SDG&E: If you need assistance, contact SDG&E's Energy Savings Center at (800) 644-6133 or by email at benchmarking@semprautilities.com]

[SoCalGas: If you need assistance, please go to our benchmarking website at: socalgas.com and search "benchmarking."]

2   SCREENING

S10.   Are you the person at your organization who is most familiar with the energy management of your organization's facilities? [**Probes:** This might be your facility manager, or energy manager]

01   YES **[GO TO 0]**

02   NO

88   REFUSED

99   DON'T KNOW

S11.   Is there someone else who would know about the energy management of your organization's facilities?

01   YES **[ASK FOR NAME: _____ AND TELEPHONE #: _____]** **[THANK AND TERMINATE. SCHEDULE INTERVIEW WITH BEST CONTACT.]**

02   NO **[THANK AND TERMINATE]**

S12.   Before this call, had you heard of the term "Building Benchmarking"?

01   YES **[GO TO 0]**

02   NO

88   REFUSED **[THANK AND TERMINATE]**

99   DON'T KNOW

S13.   **[IF 0=02 OR 99]** Buildings are benchmarked using energy management software that allows customers to track and assess energy consumption. Typically benchmarking provides metrics that assess the energy use intensity and energy performance of the whole building by comparing it to the energy usage of similar buildings. Have you heard of this practice of "Building Benchmarking"?

01   YES

02   NO **[GO TO 0]**

88   REFUSED **[THANK AND TERMINATE]**

99   DON'T KNOW **[THANK AND TERMINATE]**

S14.   What does the term "Building Benchmarking" mean to you?

01   [RECORD VERBATIM]

88   REFUSED

99   DON'T KNOW

S15.   Which of the following statements best describes your organization's experience with benchmarking *in the past three years*… **[READ IN ORDER. STOP READING WHEN RESPONDENT AGREES WITH A STATEMENT. TRACK DISPOSITION OF 02 SEPARATELY FROM 88 & 99]**

01   We have *completed* benchmarking at least one building

02   We are *in the process* of benchmarking a building *for the first time* **[THANK AND TERMINATE]**

03   We have *not* benchmarked a building in the past three years **[GO TO 0]**

88   REFUSED **[THANK AND TERMINATE]**

99   DON'T KNOW **[THANK AND TERMINATE]**

S6A.   Which of the following best describes your role in benchmarking buildings for your organization? **[READ]**

01   *You* benchmark buildings for your organization, OR

02   Another employee benchmark buildings for your organization, OR **[GO TO S6B]**

03   Another company benchmarks buildings for your organization **[GO TO S6C]**

04   Other: _____ **[THANK AND TERMINATE]**

88   REFUSED **[THANK AND TERMINATE]**

99   DON'T KNOW **[THANK AND TERMINATE]**

S6B.   **[IF S3=02]** This survey asks about the value of benchmarking to your organization and how you use the results as well as about feedback on ENERGY STAR Portfolio Manager or other benchmarking tools your organization may have used. Are you the best person in your organization to talk with about this, or is there someone else we should talk with?

01   No, someone else **[ASK FOR NAME: _____ AND TELEPHONE #: _____] [THANK AND TERMINATE. SCHEDULE INTERVIEW WITH BEST CONTACT. THE BEST CONTACT MAY NOT HAVE ATTENDED A WORKSHOP]**

02   I am the best person **[CONTINUE]**

88   REFUSED **[THANK AND TERMINATE]**

99   DON'T KNOW **[THANK AND TERMINATE]**

S6C.   **[IF S3=03]** This survey asks about the value of benchmarking to your organization and how you use the results. Are you the best person in your organization to talk with about this, or is there someone else we should talk with?

01   No, someone else **[ASK FOR NAME: _____ AND TELEPHONE #: _____] [THANK AND TERMINATE. SCHEDULE INTERVIEW WITH BEST CONTACT. THE BEST CONTACT MAY NOT HAVE ATTENDED A WORKSHOP]**

02   I am the best person **[GO TO 0]**

88   REFUSED **[THANK AND TERMINATE]**

99   DON'T KNOW **[GO TO 0]**

S16.   Has your organization used ENERGY STAR Portfolio Manager to benchmark buildings? **[IF RESPONDENT ASKS WHAT ENERGY STAR PORTFOLIO MANAGER IS:** Portfolio Manager is an interactive energy management tool that allows you to track and assess energy and water consumption across your entire portfolio of buildings in a secure online environment.]

01   YES

02   NO **[GO TO 0]**

88   REFUSED **[THANK AND TERMINATE]**

99   DON'T KNOW **[GO TO 0]**

S17.   Which of the following best describes how your organization *currently* transfers energy use data into ENERGY STAR Portfolio Manager? **[READ 01 AND 02 IN ORDER, THEN READ 03 AND 04 IN RANDOM ORDER. BE SURE TO READ ALL OPTIONS, AS THE RESPONDENT MAY CHANGE THEIR MIND ABOUT THEIR ANSWER AFTER HEARING ALL FOUR.]**

01   We enter building and energy consumption data into Portfolio Manager by hand, one building at a time

02   We upload building and energy consumption data for 10 or more buildings from an Excel spreadsheet using a template from Portfolio Manager

03   We use the Automated Benchmarking System, or ABS, to automatically transfer energy consumption data only from the *utility* into Portfolio Manager **[THANK AND TERMINATE]**

04   We use the Automated Benchmarking System, or ABS, to automatically transfer building and/or energy consumption data from *a service or product provider that is not the utility* into Portfolio Manager **[THANK AND TERMINATE]**

05   OTHER **[THANK AND TERMINATE]**

88   REFUSED **[THANK AND TERMINATE]**

99   DON'T KNOW

S18.   Which of the following statements best describes your organization?

01   You own and manage facilities that you either lease to others or occupy yourselves **[END USER—OWNER (EO)]**

02   You own facilities that you lease to others and do not manage **[OWNER-NOT END-USER--THANK AND TERMINATE]**

03   You occupy and manage facilities that you lease from an owner or property management firm **[END USER—NOT OWNER (EL)]**

04   You manage facilities owned and occupied by others **[PROPERTY MANAGER – (PM)]**

77   Other (SPECIFY :_____). **[THANK AND TERMINATE]**

88   REFUSED **[THANK AND TERMINATE]**

99   DON'T KNOW **[THANK AND TERMINATE]**

[**Confirmation of non-participants:**

        IF 0=01, THEY ARE A NON-PARTICIPANT END-USER OWNER [EO] AND CAN CONTINUE THROUGH THE SURVEY.

IF 0=03, THEY ARE A NON-PARTICIPANT END-USER NON-OWNER [EL] AND CAN CONTINUE THROUGH THE SURVEY.

        IF 0=04, THEY ARE A NON-PARTICIPANT PROPERTY MANAGER [PM] AND CAN CONTINUE THROUGH THE SURVEY.]

3   ESPM & ABS Experience

[ASK IF 0=01 AND S16= 01]

First, I'd like to ask you a few questions about your experience using ENERGY STAR Portfolio Manager.

ABS17.   Has your organization been able to successfully benchmark buildings using ENERGY STAR Portfolio Manager?

01   YES **[SKIP TO 0]**

02   NO

77   Other: _____ **[SKIP TO 0**]

88   REFUSED **[SKIP TO 0**]

99   DON'T KNOW **[SKIP TO 0**]

ABS18.   **[IF 0=02]** Why was your organization unable to benchmark with ESPM? **[MULTIPLE RESPONSE. DO NOT READ]**

01   Confusing or difficult to use

02   Problems deleting a meter

03   Problems getting authorizations from tenants or others

04   Could not identify all meters

05   Could not get a score because building was too small

06   Could not get a score for some other reason [RECORD DESCRIPTION]

07   Could not get a score & don't know why

08   Type of building I wanted to rate is not included in Portfolio Manager

09   Problems due to having multiple addresses for a building

10   Technical problems setting up account

11   Difficulty getting approval from utility to set up account to benchmark customer's building

12   Received confusing error codes

77   Other [RECORD DESCRIPTION]

88   REFUSED

98   DON'T KNOW Respondent did not do the benchmarking themselves

99   DON'T KNOW Other

ABS19.   Have you had any difficulties using ENERGY STAR Portfolio Manager?

01   YES

02   NO

77   Other (SPECIFY :_____)

88   REFUSED

98   DON'T KNOW Respondent did not do the benchmarking themselves

99   DON'T KNOW Other

ABS20.   **[IF 0=01**] Tell me what kinds of difficulties you experienced with ENERGY STAR Portfolio Manager. **[DO NOT READ. MARK ALL THAT APPLY]**

01   Confusing or difficult to use

02   Problems deleting a meter

03   Problems getting authorizations from tenants or others

04   Could not identify all meters

05   Could not get a score because building was too small

06   Could not get a score for some other reason [RECORD DESCRIPTION]

07   Could not get a score & don't know why

08   Type of building I wanted to rate is not included in Portfolio Manager

09   Problems due to having multiple addresses for a building

10   Technical problems setting up account

11   Difficulty getting approval from utility to set up account to benchmark customer's building

12   Received confusing error codes

77   Other [RECORD DESCRIPTION]

88   REFUSED

98   DON'T KNOW Respondent did not do the benchmarking themselves

99   DON'T KNOW Other

ABS8. For buildings that meet certain qualifications, Portfolio Manager should produce a benchmark score from 0 to 100. For all other buildings, Portfolio Manager should produce EUI, which is Energy Use Intensity or energy use per square foot. Has your organization been able to obtain a benchmark score from Portfolio Manager for buildings that should qualify for a score?

01   YES

02   NO

77   Other (SPECIFY :_____)

98   DON'T KNOW Respondent did not do the benchmarking themselves

99   DON'T KNOW Other

ABS21.   IN THE LAST THREE YEARS, has your organization TRIED to use the Automated Benchmarking Service to automatically transfer building energy use data from the utility to ENERGY STAR Portfolio Manager?

01   YES

02   NO

77   Other (SPECIFY :_____)

88   REFUSED

98   DON'T KNOW

ABS22.   **[IF ABS21=01]** For which utilities have you tried to transfer data with the utility's Automated Benchmarking Service? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES. PROBE.]**

01   Pacific Gas and Electric

02   Southern California Edison

03   Southern California Gas

04   San Diego Gas and Electric

88   REFUSED

98   DON'T KNOW—Respondent did not do the benchmarking themselves

99   DON'T KNOW—Other

ABS23.   **[IF ABS21=01]** Why did your organization stop using the Automated Benchmarking Service? **[DO NOT READ. MARK ALL THAT APPLY.] [IF THEY SAY THEY ARE STILL USING THE AUTOMATED BENCHMARKING SERVICE, THANK AND TERMINATE. CURRENT ABS USERS SHOULD BE WEEDED OUT THROUGH QUESTION S17]**

01   Confusing or difficult to use

02   Problems deleting a meter

03   Problems getting authorizations from tenants or others

04   Could not identify all meters

05   PIN code not available

06   Address mismatch

07   ABS data not available for specific meter(s)

08   Building ID number changed in ESPM

09   Problems due to having multiple addresses for a building

10   Technical problems setting up account

11   Difficulty getting approval from utility to set up account to benchmark customer's building

12   Received confusing error codes

13   Still using Automated Benchmarking Service [THANK AND TERMINATE]

77   Other [RECORD DESCRIPTION]

88   REFUSED

98   DON'T KNOW Respondent did not do the benchmarking themselves

99   DON'T KNOW Other

ABS9. Did you contact technical support at **[UTILITY NAME]** for help with Portfolio Manager or the Automated Benchmarking Service?

01   YES

02   NO [**GO TO BE29**]

88   REFUSED **[GO TO BE29]**

99   DON'T KNOW **[GO TO BE29]**

ABS10.   Was technical support able to resolve your problem?

01   YES

02   NO

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

ABS11.   Using a scale of 0 to 10, where 0 = "not at all satisfied" and 10 = "very satisfied," how satisfied would you say you were with technical support overall? [**RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.**]?

ABS12.   [**IF ABS11< 3**] What was the one most important reason you were **<u>not satisfied</u>** with technical support? [**PROBE FOR A SPECIFIC REASON. ACCEPT ONE RESPONSE.**]

01   [RECORD VERBATIM]

88   REFUSED

99   DON'T KNOW

ABS13.   [**IF ABS11>7**] What was the one most important reason you were **<u>satisfied</u>** with technical support? [**PROBE FOR A SPECIFIC REASON. ACCEPT ONE RESPONSE.**]

01   [RECORD VERBATIM]

88   REFUSED

99   DON'T KNOW

4   Benchmarking Experience

[ASK IF S15=01]

BE29. How did you first learn about benchmarking? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES]**

01   Utility workshop

02   Utility account manager or other utility representative

03   Utility website

04   Utility energy efficiency program

05   Industry or trade journal, newspaper, or website

06   Industry association, such as BOMA

07   Legislation (AB1103 or other)

08   This survey

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

BE30. What aspects of benchmarking most interest your organization? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   Rating performance of buildings

02   Identifying poor performing buildings

03   Saving energy

04   Helping the environment

05   ENERGY STAR certification

06   LEED certification

07   Complying with corporate sustainability or environmental initiative

08   Required by AB1103

09   Improving profitability

10   Possibility of increasing building's value/ marketability

11   Possibility of advertising score/marketing opportunity for organization

12   Taking a whole building approach to assessing energy usage

13   Identifying efficiency measures

14   To get a baseline before an installation

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

BE31. How many buildings does your organization own, occupy or manage in the US? **[RECORD A NUMBER; IF THEY CANNOT GIVE A NUMBER, READ ANSWER CATEGORIES AND ASK WHICH ONE IT FITS INTO]**

01   1

02   2 to 4
03   5 to 10
04   11 to 25
05   Over 25
88   REFUSED
99   DON'T KNOW

BE32. How many of the buildings your organization owns, occupies, or manages have been benchmarked to date? **[RECORD A SINGLE NUMBER 0-999, NOT A RANGE. IF THEY ARE NOT SURE OF NUMBER, ASK THEM TO PROVIDE AN EDUCATED GUESS. REFUSED=8888, DON'T KNOW=9999.]**

BE33. In what year did your organization first begin to benchmark buildings? **[RECORD YEAR. REFUSED=88, DON'T KNOW=99.]**

BE34. On a scale of 0 to 10, with 0 meaning "strongly disagree" and 10 meaning "strongly agree," how much would you agree that the following statements represent your organization's use of benchmarking? **[RANDOMIZE ORDER]**

E.   You or someone else in your organization routinely monitors your buildings' benchmark scores or EUIs. **[RECORD NUMBER 0-10; REFUSED=88, NOT APPLICABLE=98, DON'T KNOW=99]**

F.   When you make a change to a building or to equipment that could affect its energy use, you or someone else in your organization usually checks the benchmark score or

re-benchmarks after making the change. **[RECORD NUMBER 0-10; REFUSED=88, NOT APPLICABLE=98, DON'T KNOW=99]**

G. You re-benchmark or check our buildings' benchmark scores when there is a change in building tenancy. **[RECORD NUMBER 0-10; REFUSED=88, NOT APPLICABLE=98, DON'T KNOW=99]**

H. You **do not** re-benchmark or check your buildings' benchmark scores. **[REFUSED=88, NOT APPLICABLE=98, DON'T KNOW=99]**

BE35. **[IF BE34A>3]** How frequently does your organization usually re-benchmark buildings or check the score?

01   At least 12 times a year

02   At least four times a year

03   At least twice a year

04   At least yearly

05   At least every two years

06   At least every three years

07   Less than every three years

88   REFUSED

99   DON'T KNOW

BE36. Now I am going to read you another series of statements. Please tell me if any of these statements describe the way your organization uses benchmarking tools…? **[READ; RECORD ALL THAT APPLY]**

D. To compare a building or portfolio of buildings against each other (sometimes called internal benchmarking)

E. To compare a building or portfolio of buildings against a national index

F. To compare a building to itself over time

01   YES

02   NO

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

BE37. What benchmarking tools or resources does your organization use to benchmark facilities? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   ENERGY STAR Portfolio Manager

02   Utility bills

03   Energy accounting software (Metrix, Faser, EnergyCAP, etc.)

04   ABS

05   None

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

BE38. Have you tried any benchmarking tools or resources that you have found to be not useful?

01   YES

02   NO

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

BE39. **[IF 0=01]** Which tools or resources? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

01   ENERGY STAR Portfolio Manager

02   Utility bills

03   Energy accounting software (Metrix, Faser, EnergyCAP, etc.)

04   ABS

05   CalArch

06   EnergyIQ

77   Other (SPECIFY :_____)

95   Did not know of any other tool

88   REFUSED

99   DON'T KNOW

BE40. **[IF 0=01]** Why have you found these tools or resources not useful?

01   [RECORD VERBATIM]

88   REFUSED

99   DON'T KNOW

BE41. **[IF BE6=01 OR S16= 01]** Why did your organization choose to use ENERGY STAR Portfolio Manager to benchmark instead of some other tool? **[DO NOT READ]**

01   Recommended by utility

02   Because of workshop

03   ENERGY STAR brand

04   Available support/assistance

05   Don't know of any other tools

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

5   Value of Benchmarking

[ASK IF 0=01 ONLY]

Now I'd like to ask you a few questions about what you did with the benchmarking information.

VB18. Which of the following statements best describes your experience with benchmarking the buildings you own, occupy or manage? Please select all that apply. Would you say benchmarking… **[READ; RANDOMIZE ORDER.]**

> F. Provided you with new information about your buildings' energy performance?
>
> G. Confirmed or provided proof for management of what you already knew about your building's performance?
>
> H. Was a requirement for participation in a utility energy efficiency program?
>
> I.   Was a requirement for "ENERGY STAR" or "LEED" certification?
>
> J.   Prepared your organization for AB1103?

01   YES

02   NO

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

VB19. Tell me about how you used the information you obtained from benchmarking? Did you use it to …**[READ; RANDOMIZE ORDER]**

> G. Identify energy efficiency improvement opportunities in the building?
>
> H. Identify which buildings needed the most improvement in their energy performance?
>
> I.   Set goals for facility performance?
>
> J.   Set a baseline score or EUI for future comparison?
>
> K. Did you use the information in any other ways?
>
> L. **[IF VB19K=01]** How? [RECORD DESCRIPTION]

01   YES

02   NO

88   REFUSED

99   DON'T KNOW

VB20. Has your organization changed how it manages building energy use since benchmarking?

01   YES

02   NO **[GO TO 0]**

88   REFUSED **[GO TO 0]**

99   DON'T KNOW **[GO TO 0]**

VB21. **[IF VB20=01]** How? **[RECORD VERBATIM]**

VB22. **[IF VB20=01]** On a scale of 0 to 10, with 0 being "no influence" and 10 being "a very great deal of influence," how much of an influence has benchmarking had on how your organization manages building energy use? **[RECORD NUMBER0-10, REFUSED=88, DON'T KNOW=99]**

VB23. Since benchmarking any of your buildings, has your organization planned or implemented any energy efficiency improvements in those buildings?

01   YES

02   NO **[GO TO VB10]**

88   REFUSED **[GO TO VB10]**

99   DON'T KNOW **[GO TO VB10]**

VB24. **[IF 0=01]** Now I am going to read you a list of energy efficiency improvements. Has your organization planned or made changes to increase the energy efficiency of any of the following equipment in any of these buildings? **[READ. ACCEPT MULTIPLE RESPONSE]**

      M. Energy audits or feasibility studies

      N. Motors

      O. HVAC

     P.   Insulation

     Q.   Windows

     R.   Energy management system or controls

     S.   Behavior changes, like changing thermostat set points and turning off lights

     T.   Air compression

     U.   Refrigeration

     V.   Lighting upgrades

     W.   Have any other kinds of changes been made to increase energy efficiency in these buildings?

     X.   **[VB7W=01]** What else? **[RECORD]**

01   YES

02   NO

88   REFUSED

99   DON'T KNOW

VB25. **[IF 0=01]** Are any of these changes associated with energy efficiency programs offered by your utility?

01   YES

02   NO

88   REFUSED

99   DON'T KNOW

VB26. **[IF 0=01]** On a scale of 0 to 10, with 0 being "not at all important" and 10 being "very important," on average how important were the benchmark scores or EUIs to the decisions to make energy efficiency improvements in these buildings? **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

VB27. On a scale of 0 to 10, with 0 meaning "strongly disagree" and 10 meaning "strongly agree," how much would you agree that the following statements describe your organization's use of benchmarking? **[RANDOMIZE ORDER]**

F. Benchmarking has had no effect on how you manage your buildings' energy use. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

G. You implement more comprehensive energy efficiency measures in the buildings you benchmark. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

H. You are no more likely to make energy efficiency improvements in buildings that have been benchmarked than in other buildings. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

I. Your organization considers benchmarking scores in the performance assessments of building engineers or property managers. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

J. Your organization considers benchmarking scores in the bonuses of building engineers or property managers. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

VB28. Have you ever, or do you ever expect to, use your benchmarking activities to market buildings, or otherwise differentiate your business?

01   YES

02   NO

03   NOT APPLICABLE

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

VB29. Does your organization use benchmarking data to help value buildings for leases?

01   YES

02   NO

03   NOT APPLICABLE

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

VB30. Does your organization use benchmarking data to help market buildings to potential tenants?

01   YES

02   NO

03   NOT APPLICABLE

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

VB31. Does benchmarking play a role in the acquisition of new buildings by your organization?

01   YES

02   NO

03   NOT APPLICABLE

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

VB32. **[IF VB31=01]** Please describe the role it plays. [RECORD VERBATIM]

VB33. Do your benchmarking activities play a role in the sale of buildings in your portfolio?

01   YES

02   NO

03   NOT APPLICABLE

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'TKNOW

VB34. **[IFVB33=01]** Please describe the role it plays. [RECORD VERBATIM]

6   No Experience Benchmarking

[ASK IF S13=02 OR 0=03]

[IF S13=02 ASK ONLY NB15, NB16, NB5A and NB19—no other NB questions]

NB12. **[IF S13 =01]** How did you first learn about benchmarking? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES]**

01   Utility workshop

02   Utility account manager or other utility representative

03   Utility website

04   Utility energy efficiency program

05   Industry or trade journal, newspaper, or website

06   Industry association, such as BOMA

07   Legislation (AB1103 or other)

08   This survey

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

NB13. **[IF S13=01]** Has your organization considered benchmarking any of the buildings it owns, occupies or manages?

01   YES

02   NO

88   REFUSED

99   DON'T KNOW

NB14. **[IF NB2=02 AND S13=01]** Why hasn't your organization considered benchmarking any of these buildings? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES]**

01   Data gathering is time consuming

02   Cost to collect information and continue monitoring energy performance

03   Lack of confidence that results will be cost-effective

04   ESPM software difficult to use

05   Data needed for benchmarking not readily accessible or known

06   Lack of resources

07   Lack of information

08   Lack of cooperation from tenants / unit owners

09   Lack of corporate/organization management approval

10   Potential savings not worth the effort required

11   Don't know how

12   Was not aware of benchmarking

     77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

NB15. **[ASK FOR ALL IN THIS SERIES INCLUDING IF S13=01]** On a scale of 0 to 10, with 0 meaning "Not at all likely" and 10 meaning "extremely likely," how likely is it that within the next year your organization will begin benchmarking the buildings it owns, occupies or manages? **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

NB16. **[IF NB2=01 READ:]** What aspects of benchmarking most interest your organization? **[DO NOT READ. ACCEPT MULTIPLE RESPONSES.]**

[IF NB2=02, 88 OR 99 READ:] What aspects of benchmarking would most likely interest your organization?

[IF S13=02 READ:] Based on the description of benchmarking that I read to you earlier, what aspects of benchmarking would most likely interest your organization?

01   Rating performance of buildings

02   Identifying poor performing buildings

03   Saving energy

04   Helping the environment

05   ENERGY STAR certification

06   LEED certification

07   Complying with corporate sustainability or environmental initiative

08   Required by AB1103

09   Improving profitability

10   Possibility of increasing building's value/ marketability

11   Possibility of advertising score/marketing opportunity for organization

12   Taking a whole building approach to assessing energy usage

13   Identifying efficiency measures

14   To get a baseline before an installation

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

NB5A. **[IF S13=02]** Based on the description of benchmarking that I read to you earlier, what challenges or barriers do you think might prevent your organization from benchmarking the buildings it owns, occupies or manages?

01   Data gathering is time consuming

02   Cost to collect information and continue monitoring energy performance

03   Lack of confidence that results will be cost-effective

04   ESPM software difficult to use

05   Data needed for benchmarking not readily accessible or known

06   Lack of resources

07   Lack of information

08   Lack of cooperation from tenants / unit owners

09   Lack of corporate/organization management approval

10   Potential savings not worth the effort required

11   Don't know how

12   None

77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

NB17. **[IF S13=01]** Have any challenges or barriers prevented your organization from benchmarking the buildings it owns, occupies or manages?

01   YES

02   NO

88   REFUSED

99   DON'T KNOW

NB18. **[IF NB17=01]** What challenges or barriers have prevented you from benchmarking? **[DO NOT READ; ACCEPT MULTIPLE RESPONSES.]**

01   Data gathering is time consuming

02   Cost to collect information and continue monitoring energy performance

03   Lack of confidence that results will be cost-effective

04   ESPM software difficult to use

05   Data needed for benchmarking not readily accessible or known

06   Lack of resources

07   Lack of information

08   Lack of cooperation from tenants / unit owners

09   Lack of corporate/organization management approval

10   Potential savings not worth the effort required

11   Don't know how

12   None

       77   Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

NB19. **[ASK OF ALL IN THIS SERIES, INCLUDING S13=02]** What assistance or services would make your organization more likely to benchmark the buildings it owns, occupies or manages? **[DO NOT READ; ACCEPT MULTIPLE RESPONSES.]**

01   Assistance filling out forms

02   Training on using benchmarking tools

03   Help persuading tenants / building unit owners to cooperate

04   Help persuading management to approve

05   None

77   Other (RECORD)

88   REFUSED

99   DON'T KNOW

NB20.   **[IF S13=01]** If in future your organization were to benchmark the buildings it owns, occupies or manages, how beneficial do you think it would be for your organization? Please give your response on a scale of 0 to 10, where 0 means not at all beneficial and 10 means extremely beneficial. **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

NB21.   **[IF S13=01]** How would you rate your organization's interest in benchmarking the buildings it owns, occupies or manages in the future? Please give your response on a scale of 0 to 10, where 0 means "not at all interested" and 10 means "extremely interested." **[RECORD NUMBER0-10, REFUSED=88, DON'T KNOW=99.]**

NB22.   **[IF NB10<4]** What are the reasons that your organization is not that interested in benchmarking the buildings it owns, occupies or manages?**[RECORD]**

7   Value of Certification

[ASK OF ALL]

VC3.   **[IF BE30=05 OR NB16=05**] How important is it to your organization that its buildings receive ENERGY STAR certification? Please rate the importance of the certification on a scale of 0 to 10, where zero means "not at all important" and 10 means "extremely important." **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

VC4.   **[IF BE30=06 OR NB16=06]** How important is it to your organization that its buildings receive LEED certification? Please rate the importance of the certification on a scale of 0 to 10, where zero means "not at all important" and 10 means "extremely important." **[RECORD NUMBER 0-10, REFUSED=88, DON'T KNOW=99.]**

8   Awareness of Energy Efficiency Programs and Decision Making

[ASK OF ALL]

EE2.   Please help me understand how important energy costs are compared to the total costs of running your business. Would you say that energy costs are very important, somewhat important, not very important, or not at all important, compared to your total costs of doing business?

01   Very important

02   Somewhat important

03   Not very important

04   Not at all important

88   REFUSED

99   DON'T KNOW

EE3.   In your opinion, how consistent are the resources that your organization allocates to managing energy costs with the importance it assigns to energy costs? Would you say that the resources your organization assigns to managing energy costs are very consistent, somewhat consistent, not very consistent, or not at all consistent with the importance it assigns to energy costs?

01   Very consistent

02   Somewhat consistent

03   Not very consistent

04   Not at all consistent

88   REFUSED

99   DON'T KNOW

EE4.   **[IF 0=01, 02, 03 OR 04]** Please tell me why you say that the resources your organization assigns to energy costs are **[READ ANSWER FROM 0 HERE]** with the importance it assigns to energy costs. **[RECORD]**

EE5.   How important is it for you to be able to assess how the energy consumption in your buildings compares to the energy consumption in buildings occupied by other similar companies or competitors? Would you say that it is very important, somewhat important,

not very important, or not at all important for you to be able to assess how the energy consumption in your buildings compares to the energy consumption in buildings occupied by other similar companies or competitors?

01   Very important

02   Somewhat important

03   Not very important

04   Not at all important

88   REFUSED

99   DON'T KNOW

EE6.   **[IF EE5=01, 02, 03, OR 04]** Why is it **[READ ANSWER FROM EE5 HERE]** for you to be able to assess how the energy consumption in your buildings compares to the energy consumption in buildings occupied by other similar companies or competitors? **[RECORD]**

9   Firmographics

[ASK OF ALL]

I have just a few more questions to ask you.

F1D.   How many buildings does your organization own, occupy or manage in the US? **[RECORD A NUMBER; IF THEY CANNOT GIVE A NUMBER, READ ANSWER CATEGORIES AND ASK WHICH ONE IT FITS INTO]**

01   1

02   2 to 4
03   5 to 10
04   11 to 25
05   Over 25
88   REFUSED
99   DON'T KNOW

F1E.   How many of these buildings are in California? **[RECORD A NUMBER; IF THEY CANNOT GIVE A NUMBER, READ ANSWER CATEGORIES AND ASK WHICH ONE IT FITS INTO]**

01   1

02   2 to 4
03   5 to 10
04   11 to 25
05   Over 25
88   REFUSED
99   DON'T KNOW

F6.   Thinking only about your organization's buildings in California, what is the approximate square footage of heated and cooled floor area of these facilities? You can give me either the total square footage for all buildings or an average square footage per building. Your best guess is fine. **[RECORD VERBATIM; IF 99, PROBE FOR OR AVERAGE FACILITY SIZE]**

Total amount _____ square feet

OR

Average per facility _____square feet

88   REFUSED

99   DON'T KNOW

F7.   What are the primary activities conducted at these buildings in California? **[DO NOT READ; ACCEPT MULTIPLE RESPONSES]**

01   Office

02   Retail (non-food)

03   College/University

04   School

05   Grocery Store

06   Restaurant

07   Health Care (other than Hospital)

08   Hospital

09   Hotel or Motel

10   Warehouse

11   Construction

12	Community Service/Church/Temple
13	Industrial Process/Manufacturing/Assembly
14	Condo Assoc./Apartment Mgr.
15	Greenhouse
16	Laundry/Cleaners
17	Data Center
18	Municipal Wastewater Treatment Plant
19	Municipal Building
20	Auto Dealers
21	Senior Care Facility
77	Open/Other (SPECIFY :_____)
88	REFUSED
99	DON'T KNOW

F8.   Are all of your organization's buildings in California served by **[UTILITY NAME]**?

01	YES
02	NO
88	REFUSED
99	DON'T KNOW

F9.   **[IF F4=02]** Besides **[UTILITY NAME]**, what other utilities serve these buildings? **[DO NOT READ]**

01	Southwest Gas (SG)
02	Pacific Gas & Electric (PG&E)
03	San Diego Gas & Electric (SDG&E)
04	Pacific Power & Light (PP&L)
05	Sierra Pacific Power (SPP)
06	Southern California Edison (SCE)
07	Southern California Gas (SCG)
77	Other (SPECIFY :_____)

88   REFUSED

99   DON'T KNOW

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

B.14 In-Depth Interview Guides

B.14.1 Initiative Management Staff Interview Guide

CPUC Benchmarking Process Evaluation

DRAFT Interview Guide: Program Staff Interview Guide: Program Management

Interviewer: _____

Date of Interview: _____

Time Begun_____ Time Ended _____

Respondent Name: _____

Respondent Title: _____

Contact Information:

  Phone Number(s): _____

  Fax Number: _____

  E-mail Address: _____

Interview was: _____ By phone
                   _____ In person

[NOTE: THE QUESTIONS IN THIS INTERVIEW GUIDE WILL NOT NECESSARILY BE READ VERBATIM BUT MAY BE MODIFIED TO SUIT THE INTERVIEW. IN ADDITION, THE INTERVIEWERS MAY SKIP QUESTIONS THAT ARE LESS RELEVANT TO A PARTICULAR INTERVIEW]

I am ____ from NMR Group, and I am calling to talk with you about [IOU name]'s support for customer benchmarking with EPSM. As you may know, I am part of the evaluation team for [IOU name]'s benchmarking program. Part of our job is to determine how people involved in the program think it is operating, what is working well, and what needs to be improved. The information you provide will be combined with observations from program participants and other stakeholders, including utility customers, and secondary research such as program descriptions and collateral material. We will make every effort to keep your responses confidential. No comments will be attributed to any individual without their express permission.

With your permission, I would like to record the interview. We will use the recording for transcription purposes only; in order to make sure we accurately represent your responses. No one but NMR staff members will have access to the recording. Do I have your permission to record the interview?

_____ Yes _____ No

Respondent Background

First of all, I'd like to get some background on your involvement with [IOU name]'s benchmarking program.

1) How long have your worked for [IOU name] and how long have you been involved with [IOU name]'s benchmarking support?

2) What is your current job title? Briefly, please describe your roles and responsibilities as they relate to the benchmarking program? [PROBE: on workshop, ABS, technical support, marketing]

3) About what percentage of your time is spent on benchmarking support?

4) Tell me about any training you've received, or how your background helped to prepare you for managing the benchmarking program? Is there any additional training that you feel would be useful?

Program Description & Logic

5) What are the major components and activities of the benchmarking program? What are these activities intended to accomplish?
   a) In the short term
   b) In the intermediate term
   c) In the long term
   What are the key outputs from each activity?

   Is there any sequence to these activities, outputs, or outcomes? Are there any of these that need to happen before another takes place? Are there any casual relationships between these activities, outputs, and outcomes?
   [PROBE: Are there any organizations other than the IOU involved in the programs?
   Who on staff should we talk to for more details in each area.]

6) Outside of what you have just described, are there any ways that [IOU name] helps customers to benchmark their buildings? [PROBE for description. Note that we are not looking for proxy benchmarking here—that's addressed in another section]

7) Are there particular customer segments that are targeted for *customer-driven benchmarking*? Describe. [Probe: e.g. industry/building type, size of building, size of customer, large private building owner versus small private building owner, government versus private building, owner/renter, urban/rural, previous energy efficiency program participants, other market segments]

8) Are there particular customer segments that are targeted for the benchmarking *program*? Describe. [PROBE: Are they different from the target for customer-driven benchmarking?]

9) In what ways do customers come to participate in the program?
   a) How do they learn about:
      i)   benchmarking with ENERGY STAR™ Portfolio Manager (ESPM),
      ii) workshops,
      iii) ABS, and
      iv) technical support?
   b) What percent of customers who participate in each of the following have never participated in another [IOU name] commercial program? What percent of customers who participate each of the following are or have been participants in another [IOU name] program? Which programs?
      i)   Workshops
      ii) ABS use
      iii) Technical support

10) In your experience, what is the value to customers of benchmarking? (Probe for:

      i)   Understand current energy consumption patterns

      ii) Identify near term and long term EE project opportunities/projects

      iii) increase the market value of building/leased space

      iv) enhance green image

      v)   reduce O&M expenses

      vi) anything else)

11) In your experience, what is the value to customers of the benchmarking *workshops*?

12) In your experience, what is the value to customers of ABS? (Probe for specific reasons)

Program Goals & Objectives
13) What would you say are the primary short (less than 2 years), mid-term (3-5 years), and long-term (5+ years) goals and objectives of the program??

14) How do you arrive at or set these goals? Who is involved in the decision making? [Probe to think beyond their first response]

15) What are the market barriers to achieving these goals and objectives? What facilitates overcoming them?

16) How have you been measuring progress towards these goals over the past several years? How will you be measuring them into the short, mid, and long-term future?
   a) How do you measure or quantify success for this program?

17) Decision 09-09-047 directs the IOUs to follow a strategy in benchmarking buildings that starts with the biggest buildings first, and leverages the non-residential audit, RCx, government partnerships and other programs. The decision also directs the IOUs to collaborate to create statewide consistency in their benchmarking programs.

a) What is your organization doing to ensure that the benchmarking strategy outlined in this Decision is being implemented? (The strategy being to start with the biggest buildings first, and leverage the non-residential audit, RCx, government partnerships and other programs.)

b) How is your organization collaborating with other IOUs and any other organizations to create statewide consistency in benchmarking programs?

The Customer Experience

18) Why do you think customers decide to benchmark their buildings? What drives them to it?
   1. Which drivers are most important? (Ask for listing—e.g. energy savings, financial savings, non-energy benefits, etc.–and rank.)
   2. What non-energy benefits are customers most interested in? [Probe: learning how their benchmark score for their building compares to similar buildings, improved working environment, Energy Star designation, environmental benefits, reduced carbon footprint, marketing/public relations benefits, education & training, etc.]

19) Are customers more likely to benchmark if they have previously participated in a program with [IOU name]? Are customers more likely to participate in a program with [IOU name] if they have taken the workshop? If they have benchmarked one or more buildings?

20) How do different types of customers use the benchmarking scores?
   a) For those who are not participating in a utility program: In what way is the information useful to customers? What are they likely to do with it? What, if any, additional information do they need in order to determine how to manage their energy use or take action to reduce their score?

21) Do you believe customers experience changes in attitudes regarding the management of energy usage in their facilities after . . .
   a) Taking a workshop? Why or why not
   b) Benchmarking a building using ABS? Why or why not
   [Probe of possible changes in attitude: increased awareness of energy efficiency, surprised by how low/high facility rates against other similar facilities, discouraged/encouraged by ranking, motivated to improve or upgrade energy efficiency in their facilities]

22) What does [IOU name] do to help customers who have benchmarked a property to improve their scores? Is there more that [IOU name] could conceivably do? What are the barriers to [IOU name] doing these things?

23) What situations or factors do you think might keep some customers from
   a) Taking the workshop, even if they are eligible?
   b) Benchmarking their building with ESPM after taking the workshop?
   c) Using ABS to facilitate benchmarking?
   d) Benchmarking on a regular basis?
   e) Reducing their energy use with the help of ESPM?
        [Probe for prioritized list of situations, e.g. data privacy constraints, metering configurations, budgeting, facility staff cooperativeness, availability of metering

> readings, lack of perceived value to customer, time required, lost interest or momentum, etc.]

24) Is benchmarking with ESPM a requirement for participation in other utility programs? In which programs is it a requirement? To your knowledge, is the requirement too high a barrier for some customers? For which types of customers, and why?

25) Describe the relationship between the customer-driven benchmarking support offered by [IOU name] and [IOU name]'s other commercial programs.

26) What actions do you take to bring other programs to the attention of customers utilizing [IOU name]'s benchmarking support? Do you offset the cost of benchmarking? Provide free of charge? Do you increase financial incentives for measures installed as a result of benchmarking?

27) Does [IOU name] conduct any follow up with customers in the workshop to determine if they benchmarked after the workshop?
   a) Does [IOU name] conduct any follow up with customers using ABS? If so, for what purpose? [Probe: ABS QA, program marketing]

28) Do you believe the benchmarking program delivers value to [IOU name]? To customers? In what way do you believe it delivers value? [PROBE: program's benefits exceed the program's expenses?]

Program Implementation

29) What is the division of labor between utility staff and contractors for . . .
   a) Marketing of workshop
   b) Development of workshop marketing materials
   c) Workshop contents
   d) Workshop delivery
   e) Marketing of ABS
   f) Development of ABS marketing materials
   g) ABS technical support (and any other technical support if offered)

30) Who on staff should we talk to for more in-depth information about marketing of the benchmarking offerings?

Note: Questions 19-22 may be moved to program implementation staff interview guide.

31) Are there any limitations or barriers that keep you from meeting goals for:

   a) training customers,

   b) providing ABS services or any other benchmarking support offered through the program,

   c) or meeting goals for number of buildings benchmarked?

   Describe the limitations. Which are most severe? [Probe for budget, staff, in-house expertise, contractor expertise and capacity, lack of customer awareness or engagement, customer resistance to participation, any other factors. Sempra utilities: Probe for prospect of meeting goals for number of buildings benchmarked without proxy benchmarking.]

32) For SDG&E: How does SDG&E expect to meet its target of 20,000 commercial buildings benchmarked? [PROBE: How will it do this without using a proxy score?]

33) How does [IOU name] define a "building" for purposes of tracking progress on customer benchmarking with EPSM? Does that definition differ with definitions for other purposes, or of other organizations, such as IOUs or other stakeholders? Describe.

34) How does [IOU name] define a "benchmark" for purposes of tracking progress on customer benchmarking with EPSM? Does that definition differ with definitions for other purposes, or of other organizations, such as IOUs or other stakeholders?

35) Describe the interaction and communication between yourself and
   a) Staff responsible for workshop
   b) ABS technical staff and tech support staff
   c) staff of other programs for which customer-driven benchmarking with ESPM is relevant.
   [Probe: How closely do you work with these staff? Are current interactions adequate? Why or why not? How can interactions/communication be improved? Have there been any breakdowns in communications? If so, how were they resolved and what steps have been taken to avoid future breakdowns?]

36) Other than ensuring that ABS works with ESPM, are there any ways that [IOU name]'s benchmarking support coordinates with federal programs? Are there any ways in which the support coordinates with state or local programs? Are there any ways not already discussed in which the support coordinates with other utility programs? [Describe. How are resources shared or leveraged among these programs?]
   a) If no coordination: would coordination with other programs benefit program participants or [IOU name]?
   b) If coordination: How would you enhance this coordination to improve benefits?

ESPM

Now I have some questions about [IOU] experiences with ENERGY STAR Portfolio Manager and [IOU name]'s work with EPSM staff at EPA. [PROBE to determine who should be asked these questions—program management staff or implementation staff]

37) To what extent do program staff work with EPA ESPM staff?
   a) Describe the interaction and communication between [IOU name] and ESPM staff. How frequently are you in communication? How closely do you work with ESPM staff members? Are current interactions adequate? Why or why not? How can interactions/communication be improved? Have there been any breakdowns in communications? If so, how were they resolved and what steps have been taken to avoid future breakdowns?

38) Do you and EPA ESPM staff engage in any joint problem solving regarding ABS or any other [IOU name] program offerings?

39) What are the benefits of working with ESPM? What are the drawbacks of working with ESPM?

40) In what other [IOU name] programs is ESPM used? How is ESPM used in these programs?

Tracking of Program Data

41) Describe how you track program data. What data are currently being tracked and by whom?
   a) Workshop participation
   b) ABS use
   c) Technical support
   d) Participation in other [IOU name] programs
   e) Energy saving actions undertaken by participants
   f) Building characteristics data used to generate ESPM score, and changes to building characteristics data over time
   g) ESPM scores, and changes to ESPM scores over time
   h) Other information related to AB1103
   i) Anything else?

42) To what extent do benchmarking program staff coordinate tracking of participant data with other utility programs? What procedures are in place to facilitate this coordination? How well are they adhered to? Describe.

43) What data would you like to see tracked that are not? What data are currently tracked that could be excluded from the database? [Is it all tracked in one database? Probe on tracking coordination/integration with other programs of same utility.]

44) NMR will be conducting a telephone survey in the fall with customer-driven benchmarking program participants and non-participants. We are looking for some feedback on the viability of identifying participants and non-participants. We plan to survey two groups of Participants:
   (1) Workshop participants, defined as commercial customers who have participated in utility benchmarking workshops at least three months prior to the survey, but who had yet not benchmarked their building(s).
   (2) ABS participants, defined as commercial customers who have benchmarked their buildings using ABS and EPSM.
   (3) We will also survey non-participants, defined as commercial customers who are not registered users of ABS. All samples would be drawn randomly from utility customer records, including data collected on workshop participants and ABS users.
   To the extent possible, all the groups will be stratified by type of industry, number and type of buildings per customer. Is this information available for all customers, whether or not they have used ABS? If not, what other customer information is available that might help us in stratifying the sample? [PROBE based on customer data we have already received, asking about availability of any key data that are missing]

Proxy Benchmarking

[Note that some or all of these proxy benchmarking questions may be asked of the implementation staff instead of or in addition to the program management staff. Also, some of these questions may need to wait to be asked until proxy benchmarking plans are further developed.]

45) Who at [IOU name] is the best person to talk to about your plans for delivering proxy benchmarking scores to customers? Is this the same person as we should talk to about how the proxy benchmarking score is determined for each building type?

NMR

46) Has [PG&E, SCE] developed the parameters and inputs for the proxy benchmarking system, and the method for producing the benchmarking score? If so, please provide the list of parameters and the scoring algorithm.

47) Do you believe the proxy building parameters are reliable measures? In what specific ways are the proxy building parameters a fair approximation of the actual customer parameters? How will the proxy building parameters reflect changes in customer –specific operations such as hours of use, workforce reductions etc.?

48) [PG&E, SCE ONLY] Tell me about [PG&E's, SCE's] plans for the delivery of proxy benchmarking scores to customers. [Probe to understand program logic. If planning is not yet far enough along for this question, find out when would be an appropriate time to interview for this information]

   a) What changes do they expect from customers in response to the proxy benchmarking score? [Probe: attitudes? Knowledge? Behavior?] Why?

   b) What specific actions do they expect customers to take because of the scores? Why?

   c) If the proxy benchmarking score is meant to result in customers receiving the score to undertake a more thorough benchmarking with ESPM, how is that expected to happen? What are the specific steps, and what is [IOU name] planning to do to facilitate customers taking these steps?

   d) Is the proxy benchmarking system intended to provide the same score as ESPM when driven by the same input data? If not, how will the issue of comparability be addressed?

   e) Are there any plans to re-rate ESPM participants with proxy system or vice versa? [Describe]

49) How does [IOU name] envision the proxy benchmarking efforts connecting with its current benchmarking offerings (workshop, ABS, tech support), and with customer-driven benchmarking? With the existing marketing efforts? With other programs?

50) What plans are there to track utility progress on proxy benchmarking?

51) What plans are there to track impact on customers of proxy benchmarking score receipt?

52) [PG&E, SCE ONLY] Describe how [PG&E, SCE] currently plans to identify customers to receive proxy benchmark scores, and the context in which the scores will be delivered. [E.g. as a standalone piece, a bill stuffer, with program marketing materials, et.]

   a) What, if any, follow up does [IOU name] plan to conduct with customers receiving proxy scores?

53) [PG&E, SCE ONLY] What is the current schedule for implementation of the pilot study? How many buildings of what type will receive scores, by when? What data will be available from the proxy benchmarking for use in program evaluation? [Describe.] When will the data be available?

54) Has [IOU name] considered working with any of the other IOUs to develop a proxy benchmarking methodology together? Is working together on a proxy benchmarking methodology for customer buildings technically feasible or desirable? Why or why not?

55) [SDG&E & SC GAS ONLY] How does [SDG&E, SCGas] plan to meet its 2010-2012 benchmarking goals?

   a) Is proxy benchmarking likely to play a role? [If yes, describe the role. If not, why not.]

    b) When do you expect [SDG&E, SCGas] to make a decision regarding whether or not to pursue proxy benchmarking?

    c) To what extent might any proxy benchmarking effort by [SDG&E, SCGas] resemble that of SCE or PG&E? [How familiar are you with the proxy benchmarking being developed at SCE and PGE?]

General Observations

56) On a scale of 1 to 10, with 1 being ineffective and 10 being extremely effective, how would you rate the program in achieving its goals?

    a) Why do you give it is rating? list areas for improvement, possible synergies, lessons learned etc.

57) What are the major strengths of the program? Major weaknesses?

58) What lessons would you say [IOU} has learned from the program so far?

In what areas could the program be improved? [PROBE for their ideas on how these improvements could be made] Is there anything else you would like to tell me about the program, including additional suggestions to make the program work better or more effectively in th

B.14.2 Initiative Implementation Staff Interview Guide

CPUC Benchmarking Process Evaluation

DRAFT Program Staff Interview Guide: Program Implementation Staff

Interviewer: _____

Date of Interview: _____

Time Begun_____ Time Ended _____

Respondent Name: _____

Respondent Title: _____

Contact Information:

   Phone Number(s): _____

   Fax Number: _____

   E-mail Address: _____

Interview was: _____ By phone
                    _____ In person

[NOTE: THE QUESTIONS IN THIS INTERVIEW GUIDE WILL NOT NECESSARILY BE READ VERBATIM BUT MAY BE MODIFIED TO SUIT THE INTERVIEW. IN ADDITION, THE INTERVIEWERS MAY SKIP QUESTIONS THAT ARE LESS RELEVANT TO A PARTICULAR INTERVIEW]

I am ____ from NMR Group, and I am calling to talk with you about [IOU name]'s support for customer benchmarking with EPSM. As you may know, I am part of the evaluation team for [IOU name]'s benchmarking program. Part of our job is to determine how people involved in the program think it is operating, what is working well, and what needs to be improved. The information you provide will be combined with observations from program participants and other stakeholders, including utility customers, and secondary research such as program descriptions and collateral material. We will make every effort to keep your responses confidential. No comments will be attributed to any individual without their express permission.

With your permission, I would like to record the interview. We will use the recording for transcription purposes only; in order to make sure we accurately represent your responses. No

one but NMR staff members will have access to the recording. Do I have your permission to record the interview?

_____ Yes _____ No

Respondent Background

First of all, I'd like to get some background on your involvement with [IOU name]'s benchmarking program.

59) How long have your worked for [IOU name] and how long have you been involved with [IOU name]'s benchmarking support?

60) What is your current job title? Briefly, please describe your roles and responsibilities as they relate to the benchmarking program? [PROBE on workshop, ABS, technical support, marketing]

61) About what percentage of your time is spent on benchmarking support?

62) Tell me about any training you've had that helped prepare you to work for benchmarking support. Do you believe that you have received sufficient training on using ENERGY STAR™ Portfolio Manager (ESPM)? Is there any additional training that you feel would be useful?

Benchmarking Workshops

63) Who is eligible to participate in the benchmarking workshops?
   a. What is the process for determining who is eligible?
   3. Does the program target any specific groups within the eligible population [Probe: industry/building type, size of building, size of customer, large private building owner versus small private building owner, government versus private building, owner/renter, urban/rural, previous energy efficiency program participants, other market segments]? Do most workshop participants fall into a targeted group? Is anyone discouraged from attending the workshop? If so, why?
      [Watch out—there is some overlap here with marketing]

   Please describe the overall Workshop process: [*Probe if necessary using questions below]*
   a) How many different workshops are offered? What are the different levels and the focus of each.
   b) Who is involved in developing the workshop(s)? Who is responsible for content? For presentation? For logistics?
   c) How long do they last?
   d) Where are they offered? How frequently??
   e) Is there a fee for taking any of the workshops? What is the fee?
   f) If workshops are in person, are refreshments provided?

64) What changes have been made to the workshop offering(s) over time (e.g. content, location, length, marketing)? Why were changes made? Have they had the intended effect?

65) In your opinion, do the workshops provide adequate customer training on use of ESPM and ABS? To what extent do customers request additional training to continue benchmarking activities after attending their first workshop?

66) [BEARING IN MIND THAT WE KNOW FROM THE DATA REQUEST WHAT INFO IS COLLECTED ABOUT WORKSHOP PARTICIPANTS . . .] How is the information collected from workshop participants typically used after each workshop? Is any follow up conducted with participants? If so, describe.

67) How are other [IOU] program offerings presented during the workshop? [INFORM THIS QUESTION WITH A LISTING FROM THE WORKSHOP SLIDES, WHICH WE ARE OBTAINING] Are any materials for these programs provided during the workshop? [Describe how]

68) Do customers who attend workshops ask for any other types of help or services? What do they ask for? What do you tell them?

69) Do you think that participation in the workshops is now at optimal levels, or is it higher or lower than it should or could be? Please explain your answer.
   a) If lower, what should be done to get more people to participate? [PROBE: Are enough workshops offered to meet the need?]
   b) If higher, what should be done to limit participation?
   c) Are there untapped customer segments? If so how can they be reached?

70) What changes to the workshop are planned, or being planned, for the future? Why are the changes being made and what do you hope to accomplish with them?

ABS

71) What kind of feedback, if any, do you typically receive from customers who have used [IOU name]'s ABS? Please think both about what they like and don't like, the things they praise, and the things they complain about.

72) How do you handle complaints about ABS? How do you attempt to resolve them?

73) Do you have suggestions for improving the ABS? [PROBE for details of suggested improvements]

Tech Support

74) Describe the technical support offered. ? How is it offered—on-line, by phone, in person? How is this support staffed? What kinds of questions are typical?

75) For how long has the tech support been offered? Has it changed over time? If so, how and why?

76) What kind of feedback, if any, do you typically receive from customers who have used [IOU name]'s technical support? Please think both about what they like and don't like, the things they praise, and the things they complain about.

77) How do you handle complaints about the tech support? How do you attempt to resolve them?

78) How could the tech support be improved?

ESPM

79) To what extent do program staff work with EPA ESPM staff?
   a) Describe the interaction and communication between [IOU name] and EPA ESPM staff. How frequently are you in communication? How closely do you work with EPA ESPM staff members? Are current interactions adequate? Why or why not? How can interactions/communication be improved? Have there been any breakdowns in communications? If so, how were they resolved and what steps have been taken to avoid future breakdowns?

80) Do you and EPA ESPM staff engage in any joint problem solving regarding ABS or any other [IOU name] program offerings?

81) What are the specific and quantifiable benefits of working with ESPM? What are the drawbacks of working with ESPM?

82) In what other [IOU name] programs is ESPM used? How is ESPM used in these programs?

ESPM Technical Questions

83) For customers with multiple buildings at a contiguous location with one master meter, is the customer required to manually input data into ESPM for each building?
   a) [IF DATA MUST BE ENTERED MANUALLY] What type of data? [PROBE for submetered energy usage data, building characteristics data, other]
   b) When a customer has their own energy management software or works with a third party billing contractor, is the customer able to upload available data into the ESPM or ABS or any other format that can be used for the purpose of benchmarking buildings? If not, why? Are there software development tools that can be used to collect this type of information and store in a central database such as a [IOU name] tracking system for subsequent reporting?

84) For customers with multiple buildings at non-contiguous locations, is the customer required to manually input data into ESPM for each building?
   a) When a customer has their own energy management software or works with a third party billing contractor, is the customer able to upload available data into the ESPM or ABS or any other format that can be used for the purpose of benchmarking buildings? If not, why? Are there software development tools that can be used to collect this type of information for storage in a central database for subsequent reporting?

Proxy Benchmarking
Note that some or all of the proxy benchmarking questions that appear in the program management interview guide may be asked of the implementation staff instead of or in addition to the program management staff.

85) Do you plan to cover proxy benchmarking in your workshops? IF YES: How? Do you have any plans to address proxy benchmark scores with customers who come into the workshop after having received the score?

General Observations

86) On a scale of 1 to 10, with 1 being ineffective and 10 being extremely effective, how would you rate the program in achieving its goals?

    a) Why do you give it is rating? list areas for improvement, possible synergies, lessons learned etc.

87) What are the major strengths of the program? Major weaknesses?

88) What lessons would you say [IOU} has learned from the program so far?

89) In what areas could the program be improved? [PROBE for their ideas on how these improvements could be made] Is there anything else you would like to tell me about the program, including additional suggestions to make the program work better or more effectively in the future?

B.14.3 Initiative Marketing Staff Interview Guide

CPUC Benchmarking Process Evaluation

DRAFT Program Staff Interview Guide: Marketing & Outreach

Interviewer: _____

Date of Interview: _____

Time Begun_____ Time Ended _____

Respondent Name: _____

Respondent Title: _____

Contact Information:

    Phone Number(s): _____

    Fax Number: _____

    E-mail Address: _____

Interview was: _____ By phone
                _____ In person

[NOTE: THE QUESTIONS IN THIS INTERVIEW GUIDE WILL NOT NECESSARILY BE READ VERBATIM BUT MAY BE MODIFIED TO SUIT THE INTERVIEW. IN ADDITION, THE INTERVIEWERS MAY SKIP QUESTIONS THAT ARE LESS RELEVANT TO A PARTICULAR INTERVIEW]

I am ____ from NMR Group, and I am calling to talk with you about [IOU name]'s support for customer benchmarking with EPSM. As you may know, I am part of the evaluation team for [IOU name]'s benchmarking program. Part of our job is to determine how people involved in the program think it is operating, what is working well, and what needs to be improved. The information you provide will be combined with observations from program participants and other stakeholders, including utility customers, and secondary research such as program descriptions and collateral material. We will make every effort to keep your responses confidential. No comments will be attributed to any individual without their express permission. With your permission, I would like to record the interview. We will use the recording for transcription purposes only; in order to make sure we accurately represent your responses. No one but NMR staff members will have access to the recording. Do I have your permission to record the interview?

_____ Yes _____ No

Respondent Background

First of all, I'd like to get some background on your involvement with [IOU name]'s benchmarking program.

90) How long have your worked for [IOU name] and how long have you been involved with [IOU name]'s benchmarking support?

91) What is your current job title? Briefly, please describe your roles and responsibilities as they relate to the benchmarking program? [PROBE: on workshop, ABS, technical support, marketing]

92) About what percentage of your time is spent on benchmarking support?

93) Tell me about any training you've received, or how your background helped to prepare you for your role in benchmarking support. Do you believe that you have received sufficient training on using ENERGY STAR™ Portfolio Manager (ESPM)? Is there any additional training that you feel would be useful?

Marketing & Outreach

94) Tell me about the market for customer driven benchmarking, proxy benchmarking, and for the program offerings (workshop, ABS, and technical support).
   a) Has [IOU name] segmented the market for each of these?
       i) If yes, describe the segments [Probe: e.g. industry/building type, size of building, size of customer, large private building owner versus small private building owner, government versus private building, owner/renter, urban/rural, previous energy efficiency program participants, other market segments]
       ii) If not ,why not
   b) Has [IOU name] targeted specific market segments as being particularly important for each of these?
       i) If so, which segments? Why did you pick these segments to target?

95) Tell me about how the workshop, ABS, and technical support are marketed. [AFTER DESCRIPTION, PROBE a-d below]
   a) How do you market to the targeted segments?
       i) Communication channels
       ii) What are [IOU name]'s core messages around benchmarking? Do the messages vary by segment? How?
   b) Are a variety of customer types approached? Which types? Are there any eligible groups which have shown little/no interest? Which have not been approached?
   c) How are prospective participants identified?
   d) Are the offerings marketed in conjunction with other [IOU name] programs? Which ones?

       i)   What tracking is associated with this? [PROBE for description]

96) Are there specific times of year that marketing is done and why?

97) How much money is allocated/spent on marketing (2010/2011/2012)?

98) What methods of marketing have been most effective? Have the methods and their effectiveness changed over time?

99) Are there any eligible groups which are not being reached? How could these groups be reached? Are there other communication channels that are not currently being used to market the workshop, ABS and technical support? Why are these channels not being utilized?

100)   Will the addition of proxy benchmarking affect your marketing activities in any way? IF YES: How?

101)   Are you adapting your marketing plans to facilitate channeling customers who receive proxy benchmark scores into the workshop and/or ABS? IF YES: In what way? IF NO: Why not?

102)   Do you have any plans to market proxy benchmarking?
   a) IF NO: Why not?
   b) IF YES: What are your plans to market proxy benchmarking?
   c) Are you targeting specific customer segments? What segments are those?
   d) IF DIFFERENT FROM TARGETED SEGMENTS FOR WORKSHOPS, ETC.: Why are they different?
   e) Has there been any change in your available budget to allow for marketing associated with proxy benchmarking? IF NO: Why not? How will this affect your efforts for marketing the workshops, etc.?

General Observations

103)   On a scale of 1 to 10, with 1 being ineffective and 10 being extremely effective, how would you rate the program in achieving its goals?

   a) Why do you give it is rating? list areas for improvement, possible synergies, lessons learned etc.

104)   What are the major strengths of the program? Major weaknesses?

105)   What lessons would you say [IOU} has learned from the program so far?

106)   In what areas could the program be improved? [PROBE for their ideas on how these improvements could be made] Is there anything else you would like to tell me about the program, including additional suggestions to make the program work better or more effectively in the future?

B.14.4 Stakeholder Interview Guide

CPUC Benchmarking Process Evaluation

DRAFT Interview Guide: Stakeholder Interview Guide

Interviewer: _____

Date of Interview: _____

Time Begun_____ Time Ended _____

Respondent Name: _____

Respondent Title: _____

Contact Information:

   Phone Number(s): _____

   Fax Number: _____

   E-mail Address: _____

Interview was: _____ By phone

[NOTE: THE QUESTIONS IN THIS INTERVIEW GUIDE WILL NOT NECESSARILY BE READ VERBATIM BUT MAY BE MODIFIED TO SUIT THE INTERVIEW. IN ADDITION, THE INTERVIEWERS MAY SKIP QUESTIONS THAT ARE LESS RELEVANT TO A PARTICULAR INTERVIEW]

I am ____ from NMR Group (a recognized energy research organization), and I am calling to talk with you about the IOU sponsored benchmarking support currently taking place in California. I am part of a team working on a process evaluation of this support, and part of our evaluation is to understand how the support interacts with the benchmarking tools developed by other organizations, what is working well, and what needs to be improved. The information you provide will be combined with observations from others and reported in aggregate. Your responses will be kept confidential, and no comments will be attributed to any individual or organization without their express permission.

With your permission, I would like to record the interview. We will use the recording for transcription purposes only; in order to make sure we accurately represent your responses. No

one but evaluation team members will have access to the recording. Do I have your permission to record the interview?

_____ Yes _____ No

Roles and Responsibilities – 10 minutes

First of all, I'd like to get some background about you and your involvement with benchmarking for commercial buildings in California.

107)   What is your role at [organization] with respect to commercial building benchmarking and tools to support it? How familiar are you with ESPM and its use by commercial building owners/operators in California? What other benchmarking tools are you familiar with? [PROBE for (1) level of familiarity/expertise in each tool and (2) use of tool in the field by building owners/operators]

108)   Is [organization] developing benchmarking tools for commercial building use in CA? What tool(s) and why? For what audiences? How, if at all, will the tool relate to ESPM?

109)   Describe the interaction and communication between the California IOU and [organization]. How frequently are you in communication? How closely do you work with California IOU staff members? Are current interactions adequate? Why or why not? How can interactions or communication be improved? Have there been any breakdowns in communications? If so, how were they resolved and what steps have been taken to avoid future breakdowns?

110)   Do you engage in any joint problem solving regarding the California IOU benchmarking programs?

Program Description & Logic – 10 minutes

111)   We are trying to better understand how benchmarking tools for commercial buildings, including but not limited to ESPM, result in or contribute to saving energy in commercial buildings. Please describe your understanding of the role that benchmarking with ESPM is meant to play in getting the target audience to manage their building's energy use or getting them to install energy saving measures.
   a)   Describe the target audience for ESPM and any other benchmarking tools. What can/should benchmarking by itself be expected to accomplish with the target audience(s)? Does this vary by tool?
   b)   What other activities or support, if any, need to be in place for benchmarking tools to have the desired effect on the target audience(s)? (In other words, how much of what it is supposed to accomplished would you expect to be due to the tool itself, and how much to other things?)
      i)   Does this vary by tool? If so, how? [PROBE for differences between the logic for ESPM versus other tools]
   c)   Do any of the effects due to the tool itself vary by building or business type? Describe.
   d)   Do any of the effects due to the tool itself vary by whether or not the benchmarking takes place within the context of a utility energy efficiency program? Describe.

112)   To your knowledge, how do most members of the target audience(s) learn about benchmarking? About the various benchmarking tools?

113)   What potential do you see for benchmarking activities to track progress towards realizing energy efficiency potential in commercial buildings market wide in California? If there is potential, what might be good leading progress indicators, and which could realistically be tracked? What are the limitations on tracking leading indicators?

114)   What role do the IOUs play in the improving ESPM or other benchmarking tools used in California? What role do users of ESPM or other tools play?

   a) If the IOUS or other user play a role: How is feedback solicited for each? What mechanism is there for taking it into account?

   b) If the IOUs or other users don't play a role; Are there opportunities for the IOUs or other users to provide feedback?

Customers – 10 minutes

115)   What is the general awareness level of benchmarking among potential users of ESPM?

116)   What is the general perception of the usefulness and applicability of benchmarking among potential users? Of ESPM? Why? Does this vary by target audience?

117)   The four CA IOUs are all offering support to encourage their customers to benchmark their buildings using ESPM. The support consists of providing in-person workshops to train customers how to use ESPM, providing automated upload of customer utility data to ESPM (via ABS or "Automated Benchmarking System," and providing tech support for using ABS.

   a) Are you familiar with any of this support?

      i) IF FAMILIAR: Tell us about it. [PROBE for their opinions of the appropriateness and quality of the support, being specific in their comments. Does the support offered make a difference to the likelihood of a customer benchmarking a building? If so, how? If not, why not?]

      ii) IF FAMILIAR: To your knowledge, do customers who benchmark typically find out about benchmarking first from the IOUs, or do they typically encounter benchmarking tools or establish the need to benchmark first and then go to the IOUs for help?

      iii) IF FAMILIAR: What do you see as the major strengths and weaknesses of the benchmarking support provided by the California IOUs?

      iv) IF FAMILIAR: How could the support be improved?

   b) What else, if anything, could or should the IOUs do to make it more likely that customers will benchmark their buildings? [PROBE specifically for benchmarking on a regular basis with the goal of managing energy use, rather than on a one-time basis as part of the mandate to benchmark in conjunction with the lease or sale of a building.]

c) What else, if anything, could or should the IOUs do to attract or inform potential users/target audience of ESPM? [Probe: Do the IOUs engage in any joint program marketing with other stakeholders? Which ones, and how?]

118) What value, if any, do you think customers gain by benchmarking their facilities? [Probe: How do customers use the benchmarking score provided? How much do customers value the benchmarking score?]

119) Who in an organization typically makes the decision to benchmark a building or buildings? [PROBE: What is their role in an organization and how would we best identify them to talk to them?]

a) Why do you think they make the decision to benchmark? What drives them to it?

b) Which drivers are most important? (Ask for listing—e.g. energy savings, financial savings, non-energy benefits, etc.–and rank.)

c) What non-energy benefits are they typically most interested in? [Probe: learning how their benchmark score for their building compares to similar buildings, improved working environment, Energy Star designation, environmental benefits, reduced carbon footprint, marketing/public relations benefits, education & training, etc.]

120) What situations or factors do you think might keep some utility customers from benchmarking their commercial facilities? [Probe for prioritized list of situations, e.g. data privacy constraints, metering configurations, budgeting, facility staff cooperativeness, availability of metering readings, lack of perceived value to customer, time required, lost interest or momentum, etc.]

ESPM & Other Benchmarking Tools 10- minutes

121) Are there any aspects of ESPM that you consider to be especially good for motivating customers to use ESPM?

122) Are there aspects of ESPM that create barriers to customers using the tool?

123) Have you or [organization] worked directly with the EPA regarding the functionality or use of ESPM? If so, please explain.

a) Have you asked EPA for specific enhancements or improvements to ESPM, and if so, what have you asked for?

b) Has the EPA been responsive to your requests?

124) Do you know of any efforts to quantify and claim energy savings for the benchmarking components of CA's efficiency programs, or if that's being considered? If so, please explain what's being considered and the timeframe.

125) The IOU program emphasis is on ESPM but other tools can be used, such as the BEARS asset rating tool [Building Energy Asset Rating System] that CA is developing. Are you familiar with the BEARS tool?

a) IF NOT FAMILIAR: Is there someone else in their organization familiar with the BEARS effort that we should talk to?

b) IF FAMILIAR: What are the key functional differences of the BEARS tool relative to ESPM that will be important to CA's benchmarking efforts? How will BEARS complement ESPM?

c) What do you see as the advantages or disadvantages of the BEARS compared to ESPM?

d) How will use of the BEARS tool be marketed as part of the benchmarking efforts? What customers will it be targeted to?

126)   Are there any other benchmarking tools that you think will become part of CA's benchmarking efforts? [If so, answer the previous question for the other tool(s).]

Proxy Benchmarking –10 minutes

127)   Are you aware of the SCE and PG&E's efforts to introduce proxy benchmarking to help meet their benchmarking targets?

I'd like to read you a description of the Proxy Benchmarking process currently being considered. Afterwards, I'd like to get your feedback on Proxy Benchmarking and any suggestions you may have for its successful implementation.

[Proxy Benchmarking Description]

Proxy benchmarking is essentially a "utility-driven" version of benchmarking. Once their proxy benchmarking tools are developed, SCE and PG&E will be able to calculate scores for their customers' buildings based on customer billing data and secondary information gleaned from various outside sources. It is our understanding that SCE and PG&E will provide the scores to customers for which the utilities have no evidence that any buildings have been benchmarked. The expectation is that the provision of the proxy score (presumably with other encouraging information, such as information about opportunities to participate in other utility programs) will increase customers' interest in undertaking benchmarking themselves, driving customers to the support services that utilities provide to help customers benchmark their buildings themselves using EPSM.

128)   Do you have any experience with similar efforts performed elsewhere? If yes, where? How did those efforts perform?

129)   As described, do you believe that secondary information coupled with utility energy use data can make for reliable inputs for benchmarking?

130)   What value, if any, do you see in providing utility customers with a proxy benchmark?

131)   Are there any specific pitfalls to the proxy benchmarking approach? If so, how could these be addressed?

132)   How do you see proxy benchmarking functioning in the overall context of a successful benchmarking program? [Probe: What happens after customers receive the proxy information? How should the information be marketed? Who should be targeted for proxy benchmarking? How should proxy benchmarking data be presented to customers?]

Wrap Up – 5 minutes

133)   Is there anything else you would like to tell me about the IOU benchmarking support or ESPM, including additional suggestions to make the benchmarking support or ESPM work more effectively in the future?

B.14.5EPA Interview Guide

CPUC Benchmarking Process Evaluation

DRAFT Interview Guide: EPA Interview Guide

Interviewer: _____

Date of Interview: _____

Time Begun_____ Time Ended _____

Respondent Name: _____

Respondent Title: _____

Contact Information:

Phone Number(s): _____

Fax Number: _____

E-mail Address: _____

Interview was: _____ By phone

[NOTE: THE QUESTIONS IN THIS INTERVIEW GUIDE WILL NOT NECESSARILY BE READ VERBATIM BUT MAY BE MODIFIED TO SUIT THE INTERVIEW. IN ADDITION, THE INTERVIEWERS MAY SKIP QUESTIONS THAT ARE LESS RELEVANT TO A PARTICULAR INTERVIEW]

I am ____ from NMR Group (a recognized energy research organization), and I am calling to talk with you about the IOU sponsored benchmarking initiatives currently taking place in California. I am part of a team working on a process evaluation of these programs, and part of our evaluation is to understand how these programs interact with the ENERGY STAR Portfolio Manager program, what is working well, and what needs to be improved. The information you provide will be combined with observations from others and reported in aggregate. Your responses will be kept confidential, and no comments will be attributed to any individual or organization without their express permission.

With your permission, I would like to record the interview. We will use the recording for transcription purposes only; in order to make sure we accurately represent your responses. No one but evaluation team members will have access to the recording. NMR will keep all recordings secure and confidential. Do I have your permission to record the interview?

_____ Yes _____ No

Roles and Responsibilities – 10 minutes

First of all, I'd like to get some background about you and your involvement with the IOU benchmarking programs.

134)   How long have you worked for ENERGY STAR™ Portfolio Manager (ESPM)?

135)   Are you currently involved with the California Benchmarking Programs? If yes, how long have you been involved with these programs?

136)   What is your current job title? Briefly, please describe your roles and responsibilities as they relate to ESPM?

137)   As part of their program offerings, the California IOUs offer support for customer use of ESPM. This <u>includes automated uploading of customer data to ESPM (also known as ABS, or Automated</u> Benchmarking System), ESPM and ABS technical support, and training workshops on EPSM for customers. What, if any, are your roles and responsibilities as they relate to the California IOU benchmarking programs?

   a)   About what percentage of your time is spent on ESPM? About what percentage of your time is spent working with the California IOU benchmarking programs?

138)   Who do you consider to be your customers? Do you consider the California IOU benchmarking programs to be your customers? Why do you feel this way?

139)   Describe the interaction and communication between the California IOU and EPA staff. How frequently are you in communication? How closely do you work with California IOU staff members? Are current interactions adequate? Why or why not? How can interactions or communication be improved? Have there been any breakdowns in communications? If so, how were they resolved and what steps have been taken to avoid future breakdowns?

140)   Do you engage in any joint problem solving regarding the California IOU benchmarking programs?

Program Description & Logic – 10 minutes

141)   Briefly, please describe how ESPM works. [PROBE: What is the role of ESPM in getting utility customers to take actions that could lead to energy savings in their buildings? How is this supposed to work and what is assumed to be provided by other parties, such as utility programs, in support of this. How is ESPM supposed to fit in with utility programs?]

142)   What would you say are the primary short, mid, and long-term goals and objectives of ESPM? How do you arrive at or set these goals? Who is involved in the decision making regarding goals and objectives? [Probe to think beyond their first response]

143)   How do the target audiences for ESPM usually learn about benchmarking with ESPM?

144)   What potential is there for ESPM to track market progress in the commercial sector? That is, what role do you think ESPM could play in developing indicators of benchmarking activities and outcomes in the different commercial subsectors? [Probe for specific metrics or indicators that could be tracked]What changes have been made to ESPM over time? Why were these changes made? Did they have the intended effect?

145)   What changes are currently planned for the future, or at least in the process of being planned? Why are the changes being made and what do you hope to accomplish with them? When are these changes planned to be implemented?

146)   What role do customers, like the California IOUs, play in future versions of the ESPM tool? Are there opportunities for the IOUs to provide feedback? Do you monitor the performance of benchmarking programs in California and other parts of the country? What value do you place on user feedback when evaluating the performance of ESPM?

Customers – 10 minutes

147)   What is the general awareness level of ESPM among potential end-users?

148)   What does the EPA do to attract or inform potential users? [Probe: Does the EPA engage in any joint program marketing with California IOUs? What components of marketing is each entity responsible for?]

149)   Do participants typically find out about the ESPM first or are they more likely to first encounter local initiatives promoting the use of ESPM, like the California IOU benchmarking programs?

150)   What, if any, technical assistance is available to users through ESPM? Are participants more likely to use ESPM if technical assistance is available from local utilities or other organizations?

151)   What value, if any, do you think customers gain by benchmarking their facilities using ESPM? [Probe: How do customers use the benchmarking score provided? How much do customers value the benchmarking score?]

152)   Why do you think customers decide to benchmark their buildings? What drives them to it?

  a) Which drivers are most important? (Ask for listing—e.g. energy savings, financial savings, non-energy benefits, etc.–and rank.)

  b) What non-energy benefits are customers most interested in? [Probe: learning how their benchmark score for their building compares to similar buildings, improved working environment, Energy Star designation, environmental benefits, reduced carbon footprint, marketing/public relations benefits, education & training, etc.]

153)   Are there any efforts in EPA to estimate the actual energy savings that could be attributed to the use of ESPM, or to support such efforts by others? If so, please explain.

154)   What situations or factors do you think might keep some customers from benchmarking their facilities using ESPM? [Probe for prioritized list of situations, e.g. data privacy constraints, metering configurations, budgeting, facility staff cooperativeness, availability of

metering readings, lack of perceived value to customer, time required, lost interest or momentum, etc.]

Proxy Benchmarking – 5 minutes

155)   Are you aware of the SCE and PG&E's efforts to introduce proxy benchmarking to help meet their benchmarking targets?

I'd like to read you a description of the Proxy Benchmarking process currently being considered. Afterwards, I'd like to get your feedback on the plans for Proxy Benchmarking and any suggestions you may have for its successful implementation.

[Proxy Benchmarking Description]

Proxy benchmarking is essentially the "utility-driven" version of benchmarking. Once their proxy benchmarking tools are developed, SCE and PG&E will be able to calculate scores for their customers' buildings based on customer billing data and secondary information gleaned from various outside sources. It is our understanding that SCE and PG&E will provide the scores to customers for which the utilities have no evidence that building(s) have been benchmarked. The expectation is that the provision of the proxy score (presumably with other encouraging information, such as information about opportunities to participate in other utility programs) will increase customers' interest in undertaking benchmarking themselves, increasing the likelihood that customers will benchmark their buildings using EPSM.

156)   Does the EPA have any experience with similar efforts performed elsewhere? If yes, where? How did those efforts perform?

157)   Based on this description, do you think the proxy benchmark would be of value to customers? Why or why not?

158)   In your opinion, how could proxy benchmarking be improved?

Tracking Data & Wrap Up – 7 minutes

159)   What are the major strengths and weaknesses of the California IOU benchmarking programs?

160)   How could the California IOU benchmarking programs be improved?

161)   Is there anything else you would like to tell me about the IOU benchmarking programs or ESPM, including additional suggestions to make the programs work better or more effectively in the future?

Tracking of Data – 2 minutes

162)   NMR will be conducting a telephone survey in the fall with customer-driven benchmarking program participants and non-participants. We are looking for some feedback on the viability of identifying non-participants. Non-participants include customers who have benchmarked their facilities using ESPM but did so outside of the programs available through the California IOUs. Is any information publically available for these types of customers?

B.14.6 Large Portfolio Customers Interview Guide

CPUC Benchmarking Process Evaluation

DRAFT Interview Guide: Key Holders of Large Portfolios of Commercial Buildings Interview Guide

Interviewer: _____

Date of Interview: _____

Time Begun_____ Time Ended _____

Respondent Name: _____

Respondent Title: _____

Contact Information:

Phone Number(s): _____

Fax Number: _____

E-mail Address: _____

Interview was: _____ By phone

[NOTE: THE QUESTIONS IN THIS INTERVIEW GUIDE WILL NOT NECESSARILY BE READ VERBATIM BUT MAY BE MODIFIED TO SUIT THE INTERVIEW. IN ADDITION, THE INTERVIEWERS MAY SKIP QUESTIONS THAT ARE LESS RELEVANT TO A PARTICULAR INTERVIEW]

I am _____ from NMR Group (a recognized energy research organization), and I am calling to talk with you about your organization's experiences benchmarking your buildings. I understand from [name of their local utility] that [organization name] has benchmarked at least one building using ENERGY STAR Portfolio Manager. I am part of a team working on an evaluation of the benchmarking support offered by [their IOU name] and other utilities around California. As part of our evaluation we'd like to understand the perspective of organizations like yours on benchmarking and the role it plays in your operations.

163)   [Screening] Are you the person at [organization] who is most knowledgeable about [org name]'s experience with energy benchmarking, including benchmarking tools or the benchmarking support provided by your local utility? [IF ASKED: by energy benchmarking I mean . . .]

    a) If no: Probe: Who at [organization] would be most knowledgeable about [org name]'s experience with energy benchmarking tools or the benchmarking support provided by your local utility?

    b) We would like to talk to the person who is the most knowledgeable about [org name]'s experience with energy benchmarking tools or the benchmarking support provided by your local utility. Could you give me the name and telephone number of this person? [Thank and terminate. Schedule interview with best contact.]

The information you provide will be combined with observations from others and reported in aggregate. Your responses will be kept confidential, and no comments will be attributed to any individual or organization without their express permission.

With your permission, I would like to record the interview. We will use the recording for transcription purposes only; in order to make sure we accurately represent your responses. No one but evaluation team members will have access to the recording. Do I have your permission to record the interview?

_____ Yes _____ No

Roles and Responsibilities – 2 minutes

First of all, I'd like to get some background about you and your organization.

164) Briefly, please describe [business name]'s primary business.

165) What is your current job title?

    a) What are your roles and responsibilities at [organization]? [If necessary probe for more specific information about benchmarking roles and responsibilities.]

Benchmarking tools – 7 minutes

166) When did [organization] first begin to benchmark facilities?

167) How many of [organization]'s buildings have been benchmarked?

168) What tools do you use to benchmark your facilities?

    a) [If not mentioned above] Do you use or have you ever used EPA's ENERGY STAR™ Portfolio Manager to benchmark any of your facilities?

       i) If yes, why did you choose to use ESPM and not some other tool?

       ii) If no, do you have any experience using ESPM? Why have you decided not to use ESPM to benchmark your facilities?

    b) Have you heard about or used any support for benchmarking offered by California utilities? [PROBE for ABS, workshops, tech support for ESPM]

169) Of the benchmarking tools and resources you mentioned, which did you use?

a) ABS,

b) workshops,

c) tech support for ESPM

d) For each: what have you found to be most useful about them? Why? How could they be improved? [PROBE for each of the tools they mention]

170)   [If contacted technical support] Did you contact technical support at [IOU name] for help with Automated Benchmarking Service or ESPM?

a) Tell us about your experience with tech support. [PROBE: Were they able to resolve your problem? Ease of access? Timeliness of response?]

171)   Are there any benchmarking tools or resources you have tried that you have found to not be useful? Why? [Note to interviewer: Do not limit to benchmarking with ESPM]

Benchmarking Process – 15 minutes

Now I'd like to ask you a few questions to help me better understand the benchmarking process and how it affects your portfolio of facilities.

172)   Briefly, please describe for me the typical benchmarking process for a single facility in your portfolio.

a) Do you perform benchmarking only once for each facility or is it an iterative process? How often do you benchmark a given facility? [Probe: is benchmarking done monthly, annually, etc. Are facilities only benchmarked again if changes are made?]

b) Is benchmarking data provided to facility managers at individual facilities? How is benchmarking data presented to facility managers?

173)   Do you benchmark your facilities internally to each other? That is do you compare properties within your portfolio to other properties in your portfolio?

  i)   What are the advantages of comparing properties within your portfolio to each other? What are the disadvantages?

174)   Do you compare individual properties in your portfolio to all ESPM buildings across the US?

  i)   What are the advantages of comparing properties within your portfolio to other properties throughout the US? What are the disadvantages?

175)   Once a facility has been benchmarked what are the next steps? [Probe: If the facility scores relatively low?] What role does benchmarking play in decisions that are made affecting that facilities energy use?

a) Can you give any specific examples of steps you've taken as a result of the benchmarking process?

176)   Do you proactively identify facilities through benchmarking that are "poor performers"? If so, do you then target these facilities for energy efficiency improvements, additional study (audits), or other activities?

177)   Are there specific standards, requirements or protocols in place to respond to benchmarking data? [PROBE: For example, do you require that all of your facilities meet a certain standard? If facilities do not meet this standard, is there a protocol in place to bring the facility into compliance with your standard?]

178)   Does [organization] have any incentives in place that reward employees who identify or implement changes to increase efficiency and improve benchmarking scores? [Probe: Salaries / bonuses tied to energy efficiency scores or improvements over time.]

    a) What tools do you find are best suited for providing information to set these incentives?

179)   What would you say are the primary short, mid, and long-term goals and objectives of [organization]'s benchmarking activities? How do you arrive at or set these goals? Who is involved in the decision making? [Probe to think beyond their first response]

Now I'd like to ask you a few questions about what you think is necessary for benchmarking to be effective for a large portfolio of buildings.

180)   What key support activities do you need benchmarking tools to perform in order to meet the needs of your portfolio? Does your current benchmarking tool meet these needs?

181)   What roles or support can your local utilities play to help you get the most out of your benchmarking activities? [Probe: technical support, ABS, incentive programs, audit programs, etc.]

182)   How would you describe the commitment level of [organization] to the benchmarking process?

183)   What advice would you give to another organization just starting down the path to benchmarking to ensure that they reap the full benefits of the benchmarking process?

Value of Benchmarking – 10 minutes

184)   What motivated [organization] to benchmark its facilities?

185)   What value, if any, does [organization] gain by benchmarking facilities?

186)   How important is it to [organization] that your facilities are benchmarked? Why or why not?

187)   How important is it to [organization] that your facilities be ENERGY STAR™ certified? Why or why not?

188)   How do benchmarking activities influence the overall operations of your portfolio of buildings? What influence do benchmarking activities have on the operation of individual buildings?

189)   Now I'd like to ask about how your benchmarking activities affect the acquisition of new facilities, your marketing to new tenants, and sales of facilities—or how you expect them to in the future.

    a) Do your benchmarking activities play a role in the acquisition of new facilities? If not, are they likely to in the future? How? [Probe: Do you perform any benchmarking

activities before acquisitions? Do you examine energy usage of facilities before purchasing new facilities?]

b) Do your benchmarking activities play a role in the marketing of your facilities to customers? If not, are they likely to in the future? How? [Probe: Do you use benchmarking data to help value facilities for leases? Do you use energy usage of facilities to help market facilities to potential tenants?]

c) Do your benchmarking activities play a role in the sale of facilities in your portfolio? If not, are they likely to in the future? How? [Probe: Do you use benchmarking data to help value facilities? Do you use energy usage of facilities as a selling feature?]

190)   Does [organization] participate in energy efficiency programs offered by IOUs in California? [Note to interviewer if interviewing SDG&E customer: Benchmarking with ESPM, or proof that building does not qualify for benchmarking with EPSM, is a requirement for SDG&E program participation.]

191)   Without your benchmarking activities do you think you would have participated in fewer IOU energy efficiency programs? Why or why not?

192)   Which programs have you signed up for as a result of your benchmarking activities?

Firmographics – 2 minutes (ASK THESE WHEN WE SET UP THE INTERVIEW)

I have just a few more questions to ask you.

193)   How many facility locations are you responsible for overseeing in California? [Probe for a specific number]
194)   What is the square footage of these facilities in California? [Probe for total amount, or average facility size]
195)   What are the primary activities conducted at these facilities in California? [Accept multiple responses]
   a) Retail sales & service
   b) Restaurant/food service
   c) Hotel/Motel
   d) Medical
   e) Grocery Store/food sales
   f) Warehouse & storage
   g) Office
   h) Industrial
   i) Recreation
   j) Other [SPECIFY]:
196)   Are all of your facilities in the same one utility's service territory?
   a) If not, in what other service territories?

Wrap Up – 1 minute

197)   Is there anything else you would like to tell me about your experience benchmarking your facilities, including lessons learned and any suggestions to that would be helpful in designing utility administered benchmarking programs?

B.14.7 Initiative Participants Interview Guide

CPUC Benchmarking Process Evaluation

DRAFT Interview Guide: Participant Interview Guide

Interviewer: _____

Date of Interview: _____

Time Begun_____ Time Ended _____

Respondent Name: _____

Respondent Title: _____

Contact Information:

   Phone Number(s): _____

   Fax Number: _____

   E-mail Address: _____

Interview was: _____ By phone

[NOTE: THE QUESTIONS IN THIS INTERVIEW GUIDE WILL NOT NECESSARILY BE READ VERBATIM BUT MAY BE MODIFIED TO SUIT THE INTERVIEW. IN ADDITION, THE INTERVIEWERS MAY SKIP QUESTIONS THAT ARE LESS RELEVANT TO A PARTICULAR INTERVIEW]

I am ____ from NMR Group, and I am calling to talk with you about your organization's experiences benchmarking your buildings. I am part of a team working on an evaluation of the benchmarking support offered by [their IOU name] and other utilities around California. As part of our evaluation we'd like to understand your experiences with benchmarking support from [IOU name] and your perspectives on benchmarking and the role it plays in your operations.

198)   [Screening] Are you the person at [organization] who is most knowledgeable about [org name]'s experience with [ABS, benchmarking workshop, and/or benchmarking tech support] provided by your local utility? [IF ASKED: by energy benchmarking I mean . . . .]

   a)   If no: Probe: Who at [organization] would be most knowledgeable about [org name]'s experience with [ABS, benchmarking workshop, and/or benchmarking tech support] provided by your local utility?

b) We would like to talk to the person who is the most knowledgeable about [org name]'s experience with [ABS, benchmarking workshop, and/or benchmarking tech support] provided by your local utility. Could you give me the name and telephone number of this person? [Thank and terminate. Schedule interview with best contact.]

The information you provide will be combined with observations from others and reported in aggregate. We will make every effort to keep your responses confidential. No comments will be attributed to any individual without their express permission.

With your permission, I would like to record the interview. We will use the recording for transcription purposes only; in order to make sure we accurately represent your responses. No one but evaluation team members will have access to the recording. Do I have your permission to record the interview?

_____ Yes _____ No

Roles and Responsibilities – 3 minutes

First of all, I'd like to get some background about you and your organization.

199) Briefly, please describe [business name]'s primary business.

200) What is your job title?

201) What are your roles and responsibilities at [organization]? [If necessary probe for more specific information about benchmarking roles and responsibilities.]

202) How do you use ENERGY STAR™ Portfolio Manager? [PROBE: To benchmark own facilities? To benchmark customers' facilities? How many facilities have you benchmarking using EPSM?]

Benchmarking "Program" Experience – 10 minutes

203) I understand you recently attended a workshop on Benchmarking your building with ENERGY STAR Portfolio manager and [IOU name's] Automated Benchmarking Service. Is this correct?

a) If YES: Tell me about the workshop you attended.

  i) Why did you take the workshop?

  ii) Did the workshop meet your needs? PROBE: why or why not?

   (1) What was [organization]'s primary reason for attending the workshop? [Probe: What did you hope to accomplish, what benefits did you hope would result, etc. Probe: To learn how to use ESPM, to learn more about benchmarking in general, to determine which facilities to benchmark first, to update understanding of benchmarking, etc.]

   (2) Had you used ESPM before attending the workshop? [IF YES: why did they attend the workshop?]

      (3) During the workshop, did you learn about any other utility services or programs that could be relevant to your business/buildings?

          (a) IF YES: Have you followed up with the utility on any of these? Has someone from the utility reached out to you about them?

      (4) Do you have buildings to benchmark?

          (a) IF YES: Did you complete benchmarking one of your actual buildings at the workshop, or did you benchmark using a sample profile?

          (b) IF SAMPLE: After the workshop, did you benchmark an actual building?

204) Did you have any problems downloading your utility data using ABS? Did you have any problems using ESPM? {PROBE: Ease of use, technical difficulties, frustrations?]

205) Did you contact technical support at [IOU name} for help with Automated Benchmarking Service or ESPM?

a) IF YES: What aspects or functions of ABS did [organization] need assistance with? [Probe: General setup and use of ABS, defining which facilities were included in ABS, understanding data that looked wrong in ABS, matching data with our utility bills from ABS, etc.]

b) Tell us about your experience with tech support. [PROBE: Were they able to resolve your problem? Ease of access? Timeliness of response?]

206) Would you have benchmarked with ESPM if you could not automatically download your utility data using ABS? Probe: Why or why not.

207) How did you come up with the square footage for the building(s) you benchmarked? [probe for quality of this info]

Organization's Previous Benchmarking Experience – 5 minutes

208) Before [attending workshop, using ABS, contacting ABS technical support], did [organization] engage in any benchmarking activities?
a) [If yes] When did [organization] first begin to benchmark facilities?
b) How many of [organization]'s buildings have been benchmarked?
c) What tools do you use to benchmark your facilities?

    i) [If not mentioned above] Do you use or have you ever used EPA's ENERGY STAR™ Portfolio Manager to benchmark any of your facilities?

    ii) If yes, why did you choose to use ESPM and not some other tool?

    iii) If no, do you have any experience using ESPM? Why have you decided not to use ESPM to benchmark your facilities?

209) Of the benchmarking tools and resources you mentioned, what have you found to be most useful about them? Why? [PROBE for each of the tools they mention] Less useful? Why? [PROBE for each of the tools they mention]

210)   Are there any benchmarking tools or resources you have tried that you have found to not be useful? Why?

Value & Role of Benchmarking – 10 minutes

211)   How many buildings has your organization benchmarked with EPSM and ABS? What percent of your buildings [or your customers' buildings] does this represent?

   a) Are there any you benchmarked using ESPM but not ABS? If YES: How many? Why did you not use ABS?

   b) If no buildings benchmarked: What challenges or barriers have prevented you from benchmarking facilities with EPSM/ABS?

212)   Have you used any tools other than ESPM to benchmark any buildings that could be benchmarked using ESPM? IF YES: How recently? Why did you use this tool and not ESPM?[If yes] How useful did you find the benchmark? Why do you feel this way? [Probe: what value were you able to derive from benchmarking?]

213)   Did benchmarking provide you with new information? [PROBE: Did the benchmarking just confirm something you already knew? ask for additional details and specifics. Example, Confirmed high energy usage but provided proof for management? Etc.]

214)   How often have you re-benchmarked the same buildings?

   a) How often do you expect to re-benchmark facilities in future? Why? [Probe: Do you plan to benchmark the same facility periodically to monitor progress?]

215)   Did the ESPM score motivate you to take actions to improve your score?

   a) IF YES: What actions? [PROBE for improved operations & maintenance versus capital improvements, list of measures implemented or actions taken].

   b) Did you implement any of these measures through energy efficiency programs offered by your utility? [identify which measures were through programs and name of programs]

   c) If actions: Did you re-benchmark after you took the actions?

   d) [if no actions] Why not? What challenges or barriers have prevented you from taking actions as a result of benchmarking activities?

   e) How did the score motivate you to take the actions? [PROBE: Did it help you sell these to management, get buy in for investment?]

   f) Would you have done these anyway without the score? [If yes: Why do you say that?]

216)   Did you benchmark any facilities that qualified for ENERGY STAR certification?

   a) If yes, did you apply for certification?

   b) If yes, did you receive certification and display it?

217)   Do you share your benchmarking scores with anyone outside [organization]? [Probe: tenants, clients, customers, utilities, peers, etc.]

   a) If yes: How do you share this information?

218)   Have you used your benchmarking scores to market facilities, or otherwise differentiate your business? [Probe: with clients and customers, improve "green image" of company, etc.]

219)   Are there any other ways you used the score that you haven't already mentioned? Describe.

220)   What value, if any, does [organization] gain by benchmarking facilities?

221)   How important is it to [organization] that your facilities be ENERGY STAR™ certified? Why or why not?

222)   How do benchmarking activities influence the operations of individual buildings in [organization's] portfolio?

223)   How do benchmarking activities influence the overall operations of your portfolio of buildings?

224)   Do your benchmarking activities play a role in the acquisition of new facilities? [Probe: Do you perform any benchmarking activities before acquisitions? Do you examine energy usage of facilities before purchasing new facilities?]

225)   Do your benchmarking activities play a role in the marketing of your facilities to customers? [Probe: Do you use benchmarking data to help value facilities for leases? Do you use energy usage of facilities to help market facilities to potential tenants?]

226)   Do your benchmarking activities play a role in the sale of facilities in your portfolio? [Probe: Do you use benchmarking data to help value facilities? Do you use energy usage of facilities as a selling feature?]

Firmographics – 3 minutes

I have just a few more questions to ask you.

227)   How many facility locations are you responsible for overseeing in California? [Probe for a specific number]

228)   What is the square footage of these facilities in California? [Probe for total amount, or average facility size]

229)   What are the primary activities conducted at these facilities in California? [Accept multiple responses]
   a) Retail sales & service
   b) Restaurant/food service
   c) Hotel/Motel
   d) Medical
   e) Grocery Store/food sales
   f) Warehouse & storage
   g) Office
   h) Industrial
   i) Recreation
   j) Other [SPECIFY]:

230)   Are all of your facilities in the same one utility's service territory?
   a) If not, in what other service territories?

Wrap Up – 3 minutes

231)   How could… be improved?

   a) The workshop you attended

   b) ABS

   c) ABS technical support

Is there anything else you would like to tell me about your experience with benchmarking your facilities, including any suggestions to improve [workshops, ABS, technical support]?