

## Appendix C: Survey Instruments

This appendix includes the five residential and nonresidential segment surveys for the CY 2013 evaluation of the Focus on Energy Territory-Wide programs offered in the WPS territory.

Each survey in this appendix includes:

- Table outlining the researchable questions the survey investigates
- Sample of the script surveyors used to interview participants

Special text indicates the following throughout all of the survey scripts:

- **Green text:** Interviewer instructions
- **Red text:** CATI programming instructions

**Focus on Energy/Territory-Wide  
Home Performance with ENERGY STAR® Bonus and  
Assisted Home Performance with ENERGY STAR® Bonus  
Participating Customer Survey**

Key Research topics	Areas of Investigation for Participant Survey	Questions
<b>Program Design</b>		
1. Do the Territory Wide HPwES Bonus and AHP Bonus incentives available to WPS customers increase participation in the Focus on Energy programs in the WPS territory?	<ul style="list-style-type: none"> <li>Effectiveness of the program design at increasing participation in the Focus on Energy HPwES /AHPB programs.</li> </ul>	D1, D2, I7, I8
<b>Marketing and Outreach</b>		
2. How effective are the marketing and outreach efforts for Territory-Wide HPwES Bonus/AHP Bonuses at reaching WPS customers?	<ul style="list-style-type: none"> <li>WPS Customer awareness of the HPwES Bonus and AHP Bonus incentive.</li> <li>How do WPS customers learn about the HPwES Bonus and AHP Bonus incentives?</li> <li>Availability of marketing materials for the Territory-Wide HPwES Bonus and AHP Bonus incentives.</li> <li>Trade Allies' awareness and understanding of the Territory-Wide HPwES Bonus and AHP Bonus incentives available to WPS customers.</li> </ul>	B1, C1, D3, D4, I1, I2, I3, I9,
<b>Program Satisfaction</b>		
3. Are the Territory-Wide HPwES Bonus and AHP Bonus customers and trade allies satisfied with the programs?	<ul style="list-style-type: none"> <li>Customer satisfaction with the incentive, with the contractors' knowledge of the program and with the process for receiving the additional rebates.</li> <li>Why customers are less than satisfied with the incentive, with the contractors' knowledge of the program and with the process for receiving the additional rebates.</li> </ul>	J1, J2, J3, J4, J5, J6, J7
<b>Net-To-Gross and Attribution</b>		
4. Can savings be attributed to WPS Territory-Wide HPwES/AHPB incentives programs	<ul style="list-style-type: none"> <li>Spill over and NTG Battery</li> </ul>	Sections E, & G & H

Sample Elements:

[MEASURE1], [MEASURE2], etc.

[CFL\_QUANTITY]

[FA\_QUANTITY]

[SH\_QUANTITY]

[PIPE\_INS]

[WPS\_BONUS]

[PGM] If HP then Home Performance and if AHP then Assisted Home Performance

## A. Introduction

Hello, my name is [FIRST NAME], and I am calling on behalf of Focus on Energy to follow up with you about the [PGM NAME] program. Are you the best person to talk to about your household's experience with the program?

[IF YES] Thank you. Your answers to these questions are confidential and will only be used for research purposes.

[IF NO] Can I speak to someone in your home who was involved and is familiar with that work?

[If customer does not recall, say: To refresh your memory, this was the program where an energy auditor or contractor came to your home and did a several hour inspection and analysis that identified the best ways to increase your home's energy efficiency. Does this sound familiar?]

[IF TRANSFERRED TO ANOTHER PERSON REPEAT INTRO. IF NO ONE REMEMBERS THE PROGRAM OR IS AVAILABLE THEN THANK AND TERMINATE]

*Tack-up information, not to be programmed*

[If "No – Not a convenient time," ask if Respondent would like to arrange a more convenient time for us to call them back.]

[IF NEEDED:] Data gathered from these surveys help Focus on Energy design programs that help customers save money on their utility bills by saving energy in their homes.

[Only if asked for a Focus on Energy contact to verify the survey authenticity, offer Joe Fontaine with the Public Service Commission of Wisconsin, 608-266-0910]

[TERMINATION SCRIPT: "Those are all the questions we have for you. Thank you very much for your time."]

A1. First, I'd like to verify what energy-saving improvements you made through the program. Can you please confirm that you installed the following equipment: **[READ MEASURE(S) FROM SAMPLE DATA]? [ONLY SHOW MEASURES FROM SAMPLE AND RECORD YES OR NO FOR EACH.]**  
**[1=YES, 2=NO, 98=DON'T KNOW, AND 99=REFUSED] [IF NO TO ALL THEN THANK AND TERMINATE]**

1. Roof or attic insulation
2. Wall insulation
3. Foundation insulation – this is usually foam board insulation placed either inside or outside a foundation wall, often in a basement
4. Sill box insulation – this is usually either fiberglass or spray foam insulation placed where the walls meet the foundation, often in a basement or crawlspace
5. Air sealing – this might be anywhere in your home where the contractor sealed up areas where air was leaking
6. CFLs – these are energy-saving light bulbs usually with a twisty shape
7. Faucet aerators – these are attachments to your faucet that save water
8. Showerheads
9. Insulation for water heater pipe

A2. Did you make any other energy-saving improvements through the program, aside from the ones I just listed? **[DO NOT READ LIST, RECORD ALL THAT APPLY] [DISPLAY ONLY ANSWERS NOT SELECTED ABOVE]**

1. Roof or attic insulation
2. Wall insulation
3. Foundation insulation – this is usually foam board insulation placed either inside or outside a foundation wall, often in a basement
4. Sill box insulation – this is usually either fiberglass or spray foam insulation placed where the walls meet the foundation, often in a basement or crawlspace
5. Air sealing – this might be anywhere in your home where the contractor sealed up areas where air was leaking
6. CFLs – these are energy-saving light bulbs usually with a twisty shape
7. Faucet aerators – these are attachments to your faucet that save water
8. Showerhead
9. Insulation for water heater pipe
10. Other **[SPECIFY: \_\_\_\_\_]**
98. (Don't know)
99. (Refused)

A3. Part of our research is to determine if customers are aware of who sponsors these programs. Can you tell me who sponsors Focus on Energy? [DO NOT READ LIST, RECORD ORDER OF RESPONSES AND ALL THAT APPLY]

1. Third Party Administrator
2. Wisconsin Public Service/ WPS
3. The state/Wisconsin
4. The utilities
5. Other [SPECIFY: \_\_\_\_\_]
98. (Don't know)
99. (Refused)

**Thank you. Because we value your time, we would like to offer you a \$25 gift card for completing this survey. Do you have 20 minutes to continue? [IF YES, "Thank you for agreeing to participate." IF NO: "Thank you for your time. Have a nice day/evening."]**

**B. Assisted Home Performance Program Awareness**

[ASK IF PGM=AHP]

B1. How did you **first learn** about the Assisted Home Performance with ENERGY STAR program, offered by Focus on Energy? [DO NOT PROMPT - ONE ANSWER ONLY]

1. Television
2. Radio
3. Print media (magazine, newspaper article or advertisement)
4. Billboard/outdoor ad
5. Bill insert
6. Direct mail/brochure/postcard
7. Family/friends/word-of-mouth
8. Website [ASK: Which website? [SPECIFY BELOW]]
  - a. Focus on Energy website
  - b. Utility website [SPECIFY: \_\_\_\_\_]
  - c. Other website [SPECIFY: \_\_\_\_\_]
9. OMIT
10. Email
11. Social Media
12. Focus on Energy representative
13. Phone call [ASK: Which company contacted you?[SPECIFY BELOW]]
  - a. From Focus on Energy
  - b. From Utility representative [SPECIFY UTILITY: \_\_\_\_\_]
14. Approached by Contractor
15. Realtor, home builder
16. Retail stores
17. Home/trade shows
18. Sporting or community event
19. Other, [SPECIFY: \_\_\_\_\_]
98. (Don't know)
99. (Refused)

**C. Program Awareness**

[ASK C1 IF PGM=HP]

C1. \*Where did you most recently hear about the Focus on Energy Home Performance with ENERGY STAR program? [DO NOT PROMPT - ONE ANSWER ONLY]

1. Television
2. Radio
3. Print media (magazine, newspaper article or advertisement)
4. Billboard/outdoor ad
5. Bill insert
6. Direct mail/brochure/postcard
7. Family/friends/word-of-mouth
8. Website [ASK: Which website? [SPECIFY BELOW]]
  - a. Focus on Energy website
  - b. Utility website [SPECIFY: \_\_\_\_\_]
  - c. Other website [SPECIFY: \_\_\_\_\_]
9. OMIT
10. Email
11. Social Media
12. Focus on Energy representative
13. Phone call [ASK: Which company contacted you?[SPECIFY BELOW]]
  - a. From Focus on Energy
  - b. From Utility representative [SPECIFY UTILITY: \_\_\_\_\_]
14. Approached by Contractor
15. Realtor, home builder
16. Retail stores
17. Home/trade shows
18. Sporting or community event
19. Other, [SPECIFY: \_\_\_\_\_]
98. (Don't know)
99. (Refused)

## D. *Assessment Process*

- D1. Thinking back to the time when you were deciding to participate in the [PGM] program, what were the most important reasons you decided to have a home energy assessment? [DO NOT READ LIST; INDICATE UP TO THREE]
1. (Save energy
  2. Save money / appliance was expensive to run
  3. Good for the environment / environmentally safe disposal / recycled
  4. Recommended by a friend/relative
  5. Recommended by a retailer/dealer
  6. Recommended by a contractor
  7. Cash/rebate/incentive payment
  8. Additional WPS bonus incentive
  9. Utility sponsorship of the program [SPECIFY THE PROGRAM: \_\_\_\_\_]
  10. Other [SPECIFY: \_\_\_\_\_]
  98. (Don't know) [SKIP TO D3]
  99. (Refused) [SKIP TO D3]

[ASK D2 IF MORE THAN ONE RESPONSE IN D1]

- D2. Of those reasons, which one was the most important reason you decided to have a home energy assessment? [ONLY SHOW ANSWERS FROM D1][READ LIST IF NECESSARY]
1. [INPUT RESPONSE]
  98. (Don't know)
  99. (Refused)
- D3. Did the contractor tell you about discounts or incentives that you could get on upgrades through the [PGM NAME] program?
1. Yes
  2. No
  98. (Don't know)
  99. (Refused)

## E. *Retrofit Process*

- E1. You installed [READ MEASURES LISTED IN A1]. Was this the full list of recommendations from your home energy contractor, or are there some recommended upgrades you have not made?
1. All of the recommendations made by the contractor [SKIP TO E4]
  2. Some of the recommendations made by the contractor
  98. (Don't know) [SKIP TO E4]
  99. (Refused) [SKIP TO E4]



E2. [IF E1 = 2] Are you planning to make any of the remaining recommended improvements by the end of this year?

1. Yes
2. No [SKIP TO E4]
98. (Don't know) [SKIP TO E4]
99. (Refused) [SKIP TO E4]

E3. [IF E2 = 1] Which ones? [DO NOT READ LIST; RECORD ANSWER FOR EACH]

1. (Mentioned) [CODE ITEM MENTIONED]
2. (Not mentioned)
98. (Don't know)
99. (Refused)
  - a. ROOF (ATTIC) INSULATION
  - b. WALL INSULATION
  - c. FOUNDATION INSULATION
  - d. SILL BOX INSULATION (CRAWLSPACE WALL)
  - e. AIR SEALING
  - f. CFLS
  - g. FAUCET AERATORS
  - h. SHOWERHEADS
  - i. INSULATION FOR WATER HEATER PIPE

E4. How did you decide which improvements to make through the [PGM NAME] program?

1. [RECORD RESPONSE]
98. (Don't know)
99. (Refused)

[OMIT F1-F9]

## F. *Direct Install Measures*

Now I would like to ask you about the energy-saving items you received during your energy assessment.

**[ASK THE FOLLOWING MEASURE-SPECIFIC QUESTIONS ONLY FOR THOSE MEASURES THE PARTICIPANT RECEIVED]**

**Possible measures:**

- CFLs (CFL)
- Faucet aerators (F)
- Showerheads (SH)
- Insulation for water heater pipe (P)
- Envelope Insulation (EI)
- Air Sealing (AS)

**CFL.**

**[ASK SECTION IF MEASURE=CFL, ELSE SKIP TO NEXT MEASURE]**

CFL1. Our records show that you received [CFL\_QUANTITY] compact fluorescent light bulbs, also known as CFLs. Is this correct? [IF NEEDED: These are the twisty light bulbs.]

- 1. Yes [SKIP TO CFL3]
- 2. Yes, I received CFLs, but quantity is not correct
- 3. No, I did not receive any CFLs [SKIP TO NEXT MEASURE]
- 98. (Don't Know) [SKIP TO NEXT MEASURE]
- 99. (Refused) [SKIP TO NEXT MEASURE]

CFL2. How many CFLs did you receive?

- 1. [RECORD NUMBER]\_\_\_\_\_]
- 98. (Don't Know) [SKIP TO NEXT MEASURE]
- 99. (Refused) [SKIP TO NEXT MEASURE]

CFL3. Did the contractor install the CFLs directly into your light fixtures or leave them with you to install yourself?

- 1. The CFLs were installed directly in the light fixtures
- 2. All the CFLs were left behind for me to install
- 3. Some were installed directly into the light fixtures and some were left behind to install
- 4. I did not receive CFLs [SKIP TO NEXT MEASURE]
- 98. (Don't Know) [SKIP TO NEXT MEASURE]
- 99. (Refused) [SKIP TO NEXT MEASURE]

**[ASK IF CFL3=2 OR 3]**

CFL4. How many, if any, of the CFLs have you installed yourself?

- 1. [RECORD NUMBER]\_\_\_\_\_]

CFL5. Have you removed any of the CFLs from the original fixture where they were installed?

- 1. Yes
- 2. No [SKIP TO INSTRUCTION BEFORE CFL9]
- 98. (Don't Know) [SKIP TO INSTRUCTION BEFORE CFL9]
- 99. (Refused) [SKIP TO INSTRUCTION BEFORE CFL9]

CFL6. How many of the light bulbs did you remove?

- 1. [RECORD NUMBER]\_\_\_\_\_]
- 98. (Don't Know)
- 99. (Refused)

CFL7. What did you do with these [QUANTITY FROM CFL6] CFLs? [DO NOT READ LIST; RECORD ALL THAT APPLY]

1. Moved them to a different room in the house [ASK: Where were they moved?\_\_]
2. Storing them for future use
3. Threw them away / recycled them
4. Gave them to someone else
5. Other [SPECIFY: \_\_\_\_\_]
98. (Don't Know)
99. (Refused)

CFL8. Why did you remove the CFL(s)? [DO NOT READ. RECORD ALL THAT APPLY.]

1. Burned out
2. Broke/stopped working
3. Bulb was too bright
4. Bulb was not bright enough
5. Delay in light coming on
6. Did not work with dimmer/3-way switch
7. Didn't fit properly
8. Stuck out of fixture
9. Light color
10. Interference with radio, TV, other electronic devices
11. Other [SPECIFY: \_\_\_\_\_]
98. (Don't Know)
99. (Refused)

CFL9. [ASK IF CFL5=1 >0 OR ((CFL\_QUANTITY OR CFL2)> (CFL4))] What did you do with the CFLs that were not installed? [DO NOT READ. RECORD ALL THAT APPLY]

1. Storing them for future use
2. Threw them away / recycled them
3. Gave them to someone else
4. Broken
5. Other [SPECIFY: \_\_\_\_\_]
98. (Don't Know)
99. (Refused)

## F. FAUCET AERATORS

[ASK SECTION IF MEASURE=FAUCET AERATOR, ELSE SKIP TO NEXT MEASURE]

F1. Our records indicate that you received [FA\_QUANTITY] faucet aerators. Is this correct? [IF NEEDED: These go on water faucets to break up the water flow. They may be replacing old ones in your kitchen or bathroom sinks]

1. Yes [SKIP TO F3]
2. Yes, I received faucet aerators, but quantity is not correct
3. No, I did not receive any faucet aerators [SKIP TO NEXT MEASURE]
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

F2. [ASK IF F1=2] How many faucet aerators did you receive?

1. [RECORD NUMBER] \_\_\_\_\_
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

F3. Did the contractor install the faucet aerators directly or leave them with you to install yourself?

1. The faucet aerators were installed directly [SKIP TO F5]
2. The faucet aerators were left behind for me to install
3. Some were installed directly and some were left behind to install
4. I did not receive faucet aerators [SKIP TO NEXT MEASURE]
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

F4. How many faucet aerators did you install yourself?

1. [RECORD NUMBER] \_\_\_\_\_
98. (Don't Know) [SKIP TO NEXT MEASURE IF F3=2]
99. (Refused) [SKIP TO NEXT MEASURE IF F3=2]

F5. [ASK IF F3=1 OR 3] How many faucet aerators did the contractor install during the visit?

1. [RECORD NUMBER] \_\_\_\_\_ [IF F3=1 and QUANTITY=0, SKIP TO F8]
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

F6. Have you removed any of the aerators from the original location where they were installed?

1. Yes [RECORD NUMBER REMOVED: \_\_\_\_\_]
2. No [SKIP TO F9]
98. (Don't Know) [SKIP TO F9]
99. (Refused) [SKIP TO F9]

F7. Why did you remove the aerator(s)? [DO NOT READ. RECORD ALL THAT APPLY.]

1. Didn't like the flow of water
2. Didn't like how it looked
3. Didn't fit properly
4. Broken
5. Other [SPECIFY: \_\_\_\_\_]
98. (Don't Know)
99. (Refused)

F8. [ASK IF FA\_QUANTITY OR F2 IS GREATER THAN F4+F5] What did you do with the faucet aerators that were not installed? [DO NOT READ. RECORD ALL THAT APPLY.]

1. Storing them for future use
2. Threw them away
3. Gave them to someone else
4. Broken)
5. Other [SPECIFY: \_\_\_\_\_]
98. (Don't Know)
99. (Refused)

**SH. WATER-SAVING SHOWERHEADS**

[ASK SECTION IF MEASURE=SHOWERHEAD, ELSE SKIP TO NEXT MEASURE]

SH1. Our records indicate that you received [SH\_QUANTITY] efficient showerheads. Is this correct?

1. Yes [SKIP TO SH3]
2. Yes, I received efficient showerheads, but quantity is not correct
3. No, I did not receive any efficient showerheads [SKIP TO NEXT MEASURE]
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

SH2. [ASK IF SH1=2] How many showerheads did you receive?

1. [RECORD NUMBER]\_\_\_\_\_]
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. Refused [SKIP TO NEXT MEASURE]

SH3. Did the contractor install the showerheads directly or leave them with you to install yourself?  
[RECORD ONE RESPONSE]

1. The showerheads were installed directly [SKIP TO SH5]
2. The showerheads were left behind for me to install
3. Some were installed directly and some were left behind to install
4. I did not receive showerheads [SKIP TO NEXT MEASURE]
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

SH4. Did you install any of the showerheads?

1. Yes [ASK: How many?\_\_\_\_\_]
2. No
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

SH5. [ASK IF SH3=1 OR 3] How many showerheads did the contractor install during the visit?

- 1. [RECORD NUMBER] \_\_\_\_\_ [IF SH3=1 AND QUANTITY=0, SKIP TO SH7b]
- 98. (Don't Know) [SKIP TO NEXT MEASURE]
- 99. (Refused) [SKIP TO NEXT MEASURE]

SH6. Have you removed any of the showerheads from the original location where they were installed?

- 1. Yes [ASK: How many? \_\_\_\_\_]
- 2. No
- 98. (Don't Know)
- 99. (Refused)

[ASK IF SH6=1]

SH7a. Why did you remove the showerhead(s)? [DO NOT READ. RECORD ALL THAT APPLY.]

- 1. Didn't like the flow of water
- 2. Didn't like how it looked
- 3. Didn't fit properly
- 4. Broken
- 5. Other [SPECIFY: \_\_\_\_\_]
- 98. (Don't Know)
- 99. (Refused)

[ASK IF SUM OF SH4a AND SH5 IS LESS THAN SH\_QUANTITY OR SH2]

SH7b. Why didn't you install the showerhead(s)?

- 1. Didn't like the flow of water
- 2. Didn't like how it looked
- 3. Didn't fit properly
- 4. Broken
- 5. Other [SPECIFY: \_\_\_\_\_]
- 98. (Don't Know)
- 99. (Refused)

SH8. [ASK IF SUM OF SH4a AND SH5 IS LESS THAN SH\_QUANTITY OR SH2] What did you do with the showerheads that were not installed? [DO NOT READ. RECORD ALL THAT APPLY.]

- 1. Storing them for future use
- 2. Threw them away
- 3. Gave them to someone else
- 4. Broken
- 5. Other [SPECIFY: \_\_\_\_\_]
- 98. (Don't Know)
- 99. (Refused)

## P. WATER HEATER PIPE INSULATION

[ASK SECTION IF MEASURE=WATER HEATER PIPE INSULATION, ELSE SKIP TO NEXT MEASURE]

P1. Our records indicate that you received water heater pipe insulation. Is this correct?

1. Yes [SKIP TO P2]
2. No, I did not receive any water heater pipe insulation [SKIP TO NEXT MEASURE]
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

P2. Did the contractor install the pipe insulation directly or leave it with you to install yourself?

1. The pipe insulation was installed directly [SKIP TO P4]
2. The pipe insulation was left behind for me to install
3. I did not receive pipe insulation [SKIP TO NEXT MEASURE]
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

P3. Did you install the pipe insulation?

1. Yes
2. No [SKIP TOP7]
98. (Don't Know) [SKIP TO NEXT MEASURE]
99. (Refused) [SKIP TO NEXT MEASURE]

P4. Have you removed any of the pipe insulation from where it was originally installed?

1. Yes
2. No [SKIP TO E1]
98. (Don't Know) [SKIP TO E1]
99. (Refused) [SKIP TO E1]

P5. Why did you remove the pipe insulation? [DO NOT READ. RECORD ALL THAT APPLY.]

1. Wasn't helping to insulate enough / wasn't seeing any difference
2. Didn't like how it looked
3. Didn't fit properly
4. Damaged/torn
5. Other [SPECIFY: \_\_\_\_\_]
98. (Don't Know)
99. (Refused)

P7. [ASK IF P3=2] What did you do with the pipe insulation that was not installed? [DO NOT READ. RECORD ALL THAT APPLY.]

1. Storing it for future use
2. Threw it away
3. Gave them to someone else
4. Damaged/torn)
5. Other [SPECIFY: \_\_\_\_\_]

- 98. (Don't Know)
- 99. (Refused)

**EI. Wall, Attic, Foundation, and Sillbox Insulation**

**[ASK SECTION IF MEASURE=INSULATION (ATTIC, FOUNDATION, WALL, OR SILLBOX) REPEAT QUESTION FOR ALL TYPES OF INSTALLED INSULATION]**

EI1. Did the contractor install the [MEASURE] or leave it with you to install yourself?

- 1. The insulation was installed by the contractor
- 2. The insulation was left behind for me to install
- 3. Some was installed by the contractor and some was left behind to install
- 4. I did not receive insulation [SKIP TO NEXT MEASURE]
- 98. (Don't Know) [SKIP TO NEXT MEASURE]
- 99. (Refused) [SKIP TO NEXT MEASURE]

**G. Freeridership**

**[ASK SECTION IF PGM=HP]**

Now I have some questions about what your plans were for making energy-efficient improvements **before** you found out about this program.

**ASK G1-G7 IF MEASURE= CFL**

G1. **Before** you heard about the Focus on Energy Home Performance with ENERGY STAR program, had you already been **planning to purchase** CFLs?

- 1. Yes
- 2. No [SKIP TO G4]
- 98. (Don't Know) [SKIP TO G4]
- 99. (Refused) [SKIP TO G4]

G2. Would you have installed [READ LIST] without the Focus on Energy program?

- 1. Fewer CFLs
- 2. More CFLs
- 3. Or the same number of CFLs
- 98. (Don't Know)
- 99. (Refused)

G3. And, thinking about timing, without the Focus on Energy program, would you have installed the CFLs ... [READ LIST]

- 1. At the same time [SKIP TO G5]
- 2. Within the same year [SKIP TO G5]
- 3. One to two years out [SKIP TO G5]



- 4. More than two years out [SKIP TO G5]
- 5. Never
- 98. (Don't Know) [SKIP TO G5]
- 99. (Refused) [SKIP TO G5]

G4. So just to confirm, you would not have replaced your light bulbs with CFLs at all, without the program. Is that correct?

- 1. Yes
- 2. No
- 98. (Don't Know)
- 99. (Refused)

G5. Please tell me how important the Focus on Energy program was in your decision to install the energy-efficient CFLs? Would you say it was ... [READ LIST]

- 1. Very important
- 2. Somewhat important
- 3. Not too important
- 4. Not important at all
- 98. (Don't Know)
- 99. (Refused)

**[ASK G6-G11 IF MEASURE=WALL INSULATION, ATTIC INSULATION, FOUNDATION INSULATION, OR SILLBOX INSULATION. THESE QUESTIONS REFER TO ALL INSTALLED INSULATION, NOT ONE SPECIFIC TYPE.]**

G6. **Before** you heard about the Focus on Energy Home Performance with ENERGY STAR program, had you already been **planning to purchase** insulation?

- 1. Yes
- 2. No [SKIP TO G10]
- 98. (Don't Know) [SKIP TO G10]
- 99. (Refused) [SKIP TO G10]

G7. Would you have installed the same type and amount of insulation without the incentive from Focus on Energy?

- 1. Yes [SKIP TO G9]
- 2. No
- 98. (Don't Know) [SKIP TO G9]
- 99. (Refused) [SKIP TO G9]

G8. When you say you would have installed insulation without the Focus on Energy program, would you have installed insulation that was at the same level of efficiency?

- 1. Yes
- 2. No
- 98. (Don't Know)
- 99. (Refused)

G9. And, thinking about timing, without the Focus on Energy program, would you have installed the insulation... [READ LIST]

1. At the same time [SKIP TO G11]
2. Within the same year [SKIP TO G11]
3. One to two years out[SKIP TO G11]
4. More than two years out[SKIP TO G11]
5. Never
98. (Don't Know) [SKIP TO G11]
99. (Refused) [SKIP TO G11]

G10. So just to confirm, you would not have added insulation at all, without the program. Is that correct?

1. (Yes)
2. (No)
98. (Don't Know)
99. (Refused)

G11. Please tell me how important was the Focus on Energy program was in your decision to install the energy-efficient insulation? Would you say it was ... [READ LIST]

1. Very important
2. Somewhat important
3. Not too important
4. Not important at all
98. (Don't Know)
99. (Refused)

**[ASK G12-G17 IF MEASURE=SHOWERHEAD OR FAUCET AERATOR. IF BOTH, CHECK FOLLOWING CRITERIA TO DETERMINE WHICH ONE TO ASK ABOUT. IF F4>0 OR F5>0 AND SH4=1 OR SH5>0, SELECT RANDOMLY EITHER SHOWERHEAD OR FAUCET AERATOR]**

G12. **Before** you heard about the Focus on Energy Home Performance with ENERGY STAR program, had you already been **planning to purchase** water-saving [SHOWERHEADS/FAUCET AERATORS]?

1. Yes
2. No [SKIP TO G16]
98. (Don't know) [SKIP TO G16]
99. (Refused) [SKIP TO G16]

G13. Would you have installed the same number of [SHOWERHEADS/FAUCET AERATORS] without the incentive from Focus on Energy?

1. Yes [SKIP TO G15]
2. No
98. (Don't know) [SKIP TO G15]
99. (Refused) [SKIP TO G15]

- G14. When you say you would have installed [SHOWERHEADS/FAUCET AERATORS] without the Focus on Energy program, would you have installed [SHOWERHEADS/FAUCET AERATORS] that was at the same level of efficiency?
1. Yes
  2. No
  98. (Don't know)
  99. (Refused)
- G15. And, thinking about timing, without the Focus on Energy program, would you have installed the [SHOWERHEADS/FAUCET AERATORS]... [READ LIST]
1. At the same time [SKIP TO G17]
  2. Within the same year [SKIP TO G17]
  3. One to two years out [SKIP TO G17]
  4. More than two years out [SKIP TO G17]
  5. Never
  98. (Don't know) [SKIP TO G17]
  99. (Refused) [SKIP TO G17]
- G16. So just to confirm, you would not have added [SHOWERHEADS/FAUCET AERATORS] at all, without the program. Is that correct?
1. Yes
  2. No
  98. (Don't know)
  99. (Refused)
- G17. Please tell me how important the Focus on Energy program was in your decision to install the energy-efficient [SHOWERHEADS/FAUCET AERATORS]? Would you say it was ... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not important at all
  98. (Don't know)
  99. (Refused)

## H. *Spillover*

Now I'd like to talk to you about any energy saving improvements you may have made since participating in the Focus on Energy [PGM NAME] program.

- H1. Since participating in the Focus on Energy [PGM NAME] program, have you installed any other energy-efficient products in your home that you did NOT receive an incentive for? [IF NEEDED: By energy-efficient products, I mean appliances such as ENERGY STAR clothes washers; high efficiency water heaters, insulation, or ENERGY STAR lighting such as CFL light bulbs.]
1. Yes
  2. No [SKIP TO I1]

- 98. (Don't know) [SKIP TO I1]
- 99. (Refused) [SKIP TO I1]

A2. What were the products that you installed without getting an incentive? [DO NOT READ LIST; CLARIFY AS NEEDED TO CODE ANSWER CORRECTLY, RECORD ALL THAT APPLY]

- 1. Gas boiler
- 2. Gas furnace
- 3. Gas tank-less water heater
- 4. Gas storage water heater
- 5. Electric tank-less water heater
- 6. Electric storage water heater
- 7. Insulation; attic [ASK: How many square feet?]
- 8. Insulation; floor [ASK: How many square feet?]
- 9. Insulation; ceiling [ASK: How many square feet?]
- 10. Insulation; other [SPECIFY: \_\_\_\_\_] [ASK: How many square feet?]
- 11. Air sealing
- 12. Clothes washer
- 13. Dishwasher
- 14. Windows [ASK: How many square feet?]
- 15. Programmable thermostat
- 16. Efficient lighting; CFLs [ASK: How many did you install?]
- 17. Efficient lighting; LEDs [ASK: How many did you install?]
- 18. Efficient lighting; Fluorescent [ASK: How many did you install?]
- 19. Efficient lighting; Fixtures [ASK: How many did you install?]
- 20. Efficient lighting; other [SPECIFY: \_\_\_\_\_] [ASK: How many did you install?]
- 21. Refrigerator
- 22. Heat pump water heater
- 23. Room AC [ASK: How many did you install?]
- 24. Central AC
- 25. Heat Pump; air source
- 26. Heat pump; ground source
- 27. Heat pump; other [SPECIFY: \_\_\_\_\_]
- 28. Water-saving shower head [ASK: How many did you install?]
- 29. Faucet aerator [ASK: How many did you install?]
- 30. Water heater pipe insulation
- 31. Turning down the water heater temperature) [ASK: How many degrees did you lower the temperature?]
- 32. Other [SPECIFY: \_\_\_\_\_] [ASK: How many did you install?]
- 98. (Don't know)
- 99. (Refused)

H2. Please tell me how important the Focus on Energy program is in your decision to install [INSERT EACH ONE SELECTED IN H2]. Is it very important, somewhat important, not too important, or not at all important in your decision to install these energy-efficient product(s)?

- 1. Very important

- 2. Somewhat important
- 3. Not too important
- 4. Not important at all
- 98. (Don't know)
- 99. (Refused)

[ASK H4 FOR EACH ONE SELECTED IN H2 EXCEPT 12 (clothes washer), 13 (dishwasher), 14 (windows), 16-20 (Efficient lighting), 21 (refrigerator), 22 (heat pump water heater), 23 (room AC), OR 28 (other).]

H3. Why didn't you apply for and receive an incentive for [INSERT EACH ONE SELECTED IN H2] ? [DO NOT READ LIST; RECORD ONE ANSWER FOR EACH]

- 1. Did not know Cash-back Reward was available
- 2. Product did not qualify
- 3. Other [SPECIFY: \_\_\_\_\_]
- 4. I did receive an incentive
- 98. (Don't know)
- 99. (Refused)

H4. Since participating in Focus on Energy's program, have you taken any other actions to reduce energy consumption? [PROBE WITH: "An energy efficiency action could be turning down the temperature on your thermostat or you water heater, or powering down appliances or computers."]

- 1. Yes
- 2. No
- 98. (Don't know)
- 99. (Refused)

[ASK IF H5=1]

H5. Specifically, what actions have you taken? [DON'T READ LIST; RECORD ALL THAT APPLY]

- 1. Turn down temperature on water heater
- 2. Turn down temperature on furnace
- 3. Take shorter or fewer showers
- 4. Wash clothes only in cold water
- 5. Not leave water running
- 6. Turn off appliances
- 7. Turn off computers
- 8. Turn off lights
- 9. Other [SPECIFY: \_\_\_\_\_]
- 98. (Don't know)
- 99. (Refused)

H6. Please tell me how important the Focus on Energy [PGM NAME] program was in your decision to [INSERT EACH ONE SELECTED IN H6]. Was it very important, somewhat important, not too important, or not at all important in your decision to take these action(s)? [IF MORE THAN ONE ACTION/HABIT IN H6, "Was it the same importance for every action?"]

- 1. Very important
- 2. Somewhat important

- 3. Not too important
- 4. Not important at all
- 98. (Don't know)
- 99. (Refused)

H7. And, over time, have you continued to take these actions to save energy? Let's start with ... **[INSERT EACH ANSWER FROM H6]. [IF NEEDED, "Have you continued to take this action to save energy?"]**

- 1. Yes
- 2. No
- 98. (Don't know)
- 99. (Refused)

## I. *WPS Questions*

Now we have some questions about your utility company, WPS.

I1. Are you familiar with the bonus incentive for WPS customers in the **[PGM NAME]** program? This bonus doubles the normal incentive.

- 1. Yes
- 2. No **[SKIP TO J1]**
- 98. (Don't know) **[SKIP TO J1]**
- 99. (Refused) **[SKIP TO J1]**

I2. How did you first hear about the bonus incentive for WPS customers? **[Do not prompt - ONE ANSWER ONLY]**

- 1. Visited Focus on Energy
- 2. Visited WPS website
- 3. Other website **[SPECIFY THE WEBSITE:\_\_\_\_\_]**
- 4. Marketing material/Bill insert/information came in the mail with my bill **[SPECIFY marketing piece or medium:\_\_\_\_\_]**
- 5. Contractor told me **[SPECIFY TYPE OF CONTACTOR:\_\_\_\_\_]**
- 6. Friend, family member, colleague
- 7. Newspaper
- 8. Radio
- 9. Community Event/Fair
- 10. Social Media (Facebook, Twitter)
- 11. Other **[SPECIFY:\_\_\_\_\_]**
- 98. (Don't know)
- 99. (Refused)

13. When did you learn about the WPS bonus incentive, was it: [READ LIST AND SELECT ONE RESPONSE]
1. At the same time you learned about the [PGM NAME] program
  2. After learning about the [PGM NAME] program but before deciding to participate
  3. After deciding to participate but before the work on your home was done
  4. After the work on your home was done
  5. Other [SPECIFY: \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

[IF WPS\_BONUS=0]

14. Did you receive a bonus reward?
1. (Yes) [SKIP TO I6]
  2. (No) [SKIP TO I9]
  98. (Don't know) [SKIP TO I9]
  99. (Refused) [SKIP TO I9]

[IF WPS\_Bonus>0]

15. Our records show that you received a WPS bonus incentive of [WPS\_BONUS]. Is this correct?
1. (Yes) [SKIP TO I7]
  2. (No, didn't receive an extra incentive) [SKIP TO I9]
  3. (Received incentive; amount is incorrect) [SKIP TO I6]
  98. (Don't know) [SKIP TO I9]
  99. (Refused) [SKIP TO I9]

[IF I5=3 or if I4=1]

16. What was the amount of your bonus incentive?
1. [SPECIFY AMOUNT]
  98. (Don't know)
  99. (Refused)
17. How important was the bonus of [WPS\_BONUS], that was paid in addition to the standard Focus on Energy incentive, in your decision to participate in the [PGM]? Was the bonus ... [READ LIST]?
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not important at all
  98. (Don't know)
  99. (Refused)

18. Without the [WPS\_BONUS] WPS bonus, would you have made more, less, or the same amount of energy-saving improvements in your home?
1. More improvements
  2. The same improvements
  3. Less improvements
  98. (Don't know)
  99. (Refused)

[ASK IF WPS\_BONUS=0 or I4=2 or I5=2]

19. Can you tell us why you did not receive the WPS bonus incentive? [DO NOT READ, SELECT ALL THAT APPLY]
1. Not eligible
  2. Didn't know about them in time
  3. Too big a hassle to apply
  4. Applied but have not received the incentive yet
  5. Didn't apply [ASK: Please tell me about why you didn't apply? \_\_\_\_\_]
  6. Other [SPECIFY: \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

## SAT. Satisfaction

Now I have a few questions about your satisfaction with the WPS bonus incentive program.

SAT1 How satisfied were you with your contractor's level of knowledge about the WPS bonus incentives? Would you say you are... [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO SAT3]
2. Somewhat satisfied [SKIP TO SAT3]
3. Not too satisfied
4. Not at all satisfied
98. (Don't know) [SKIP TO SAT3]
99. (Refused) [SKIP TO SAT3]

[ASK IF SAT2=3 OR 4]



**SAT2** What are the reasons you are dissatisfied with your contractor’s level of knowledge about the WPS incentives? [RECORD ANSWER]

**SAT3** Would you say you are [READ LIST] with the amount of the incentive you received, including the WPS bonus incentive?

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied
98. (Don’t know)
99. (Refused)

**SAT4** How satisfied would you say you are with the process for receiving the additional WPS bonus incentive? Would you say you are ... [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO SAT6]
2. Somewhat satisfied [SKIP TO SAT6]
3. Not too satisfied
4. Not at all satisfied
98. (Don’t know) [SKIP TO SAT6]
99. (Refused) [SKIP TO SAT6]

[ASK IF SAT4=3 OR 4]

**SAT5** What are the reasons you are dissatisfied with the incentive process?

1. [RECORD ANSWER]

**SAT6** \*How would you rate your experience with the WPS bonus incentive overall? Would you say you are... [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO J1]
2. Somewhat satisfied [SKIP TO J1]
3. Not too satisfied
4. Not at all satisfied
98. (Don’t know) [SKIP TO J1]
99. (Refused) [SKIP TO J1]

[ASK IF SAT6=3 OR 4]

**SAT7** \*What about your experience were you dissatisfied with?

1. [RECORD ANSWER]:

## J. Customer Demographics

J1. What challenges, if any, make saving energy difficult in your home? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY.]

1. Have an older (leaky/non-efficient) home
2. Can't control energy use by other household members
3. Don't know what to do (information)
4. Don't have money to invest in energy-efficient improvements
5. Have already done what we can and know to do
6. Health or comfort issues require higher energy use
7. Need energy for a home business or hobby
8. Hasn't been a priority
9. Have energy using equipment/appliances in need of repair
10. Other [SPECIFY: \_\_\_\_\_]
11. No challenges/nothing
98. (Don't know)
99. (Refused)

J2. What type of fuel do you use to heat your home?

1. Natural gas
2. Electricity
3. Propane/Bottled gas
4. Wood
5. Other [SPECIFY: \_\_\_\_\_]
98. (Don't know)
99. (Refused)

J3. What type of fuel does your water heater use?

1. Natural gas
2. Electricity
3. Propane/Bottled gas
4. Wood
5. Other [SPECIFY: \_\_\_\_\_]
98. (Don't know)
99. (Refused)

- J4. What type of home do you live in? Is it a: **[READ LIST; RECORD ONE RESPONSE]**
1. Single-family home, detached house
  2. Attached house (townhouse, row house, or duplex)
  3. Multifamily apartment or condo building with 4 or more units
  4. Mobile/manufactured home
  5. Co-op/retirement community
  6. Other **[SPECIFY: \_\_\_\_\_]**
  98. (Don't Know)
  99. (Refused)
- J5. Do you or members of your household own this home or do you rent?
1. Own/buying
  2. Rent/lease
  3. Occupied without payment of rent
  4. Other **[SPECIFY: \_\_\_\_\_]**
  98. (Don't know)
  99. (Refused)
- J6. Approximately how many square feet of living space does your home have? Don't include the basement unless it is a space that you consider lived in.? **[READ CATEGORIES IF NEEDED]**
1. Less than 1,000
  2. 1,000 to less than 1,500
  3. 1,500 to less than 2,000
  4. 2,000 to less than 2,500
  5. 2,500 to less than 3,000
  6. 3,000 to less than 4,000
  7. 4,000 or more
  98. (Don't know)
  99. (Refused)
- J7. How many rooms are in your home, not counting bathrooms?
1. 1
  2. 2
  3. 3
  4. 4
  5. 5
  6. 6
  7. 7
  8. 8
  9. 9
  10. 10 OR MORE
  98. (Don't know)
  99. (Refused)

J8. About when was your home first built? **[READ CATEGORIES IF NEEDED]**

1. Before 1970s
2. 1970s
3. 1980s
4. 1990 – 1994
5. 1995 – 1999
6. 2000s
7. Other **[SPECIFY: \_\_\_\_\_]**
98. (Don't know)
99. (Refused)

**[ASK IF J2=2 OR J3=2 and J5=2 OR 3]**

J9. Do you pay your electric bill directly to your utility company, or is your electricity included in your rent or condo fee?

1. Pay directly to utility company
2. Included in rent/condo fee
3. Other **[SPECIFY: \_\_\_\_\_]**
98. (Don't know)
99. (Refused)

**[ASK IF J2=1 OR J3=1 and J5=2 OR 3]**

J10. Do you pay your gas bill directly to your utility company, or is your gas included in your rent or condo fee?

1. Pay directly to utility company
2. Included in rent/condo fee
3. Other **[SPECIFY: \_\_\_\_\_]**
98. (Don't know)
99. (Refused)

J11. Including yourself, how many people currently live in this household on a full time basis? **[IF NEEDED: Please include everyone who lives in your home whether or not they are related to you and exclude anyone who is just visiting or in the military or children who may be away at college.]**

1. **[RECORD ANSWER]**
98. (Don't know)
99. (Refused)

**[ASK IF J11>1]**

- J12. How many people under the age of 18 live in your home year round?
1. 1
  2. 2
  3. 3
  4. 4
  5. 5
  6. 6
  7. 7 OR MORE
  98. (Don't know)
  99. (Refused)
- J13. What is the highest level of school that someone in your home has completed? [\[READ CATEGORIES, IF NECESSARY\]](#)
1. Less than ninth grade
  2. Ninth to twelfth grade; no diploma
  3. High school graduate; includes GED
  4. Some college, no degree
  5. Associates degree
  6. Bachelor's degree
  7. Graduate or professional degree
  98. (Don't know)
  99. (Refused)
- J14. Which of the following categories best represents your age? Please stop me when I get to the appropriate category.
1. 18-24
  2. 25-34
  3. 35-44
  4. 45-54
  5. 55-64
  6. 65-74
  7. 75 or older
  98. (Don't know)
  99. (Refused)

**[ASK J15 IF PGM=HP]**

J15. Which category best describes your total household income in 2012 before taxes? **[IF NEEDED: "Please stop me when I get to the appropriate category."]**

1. Less than \$20,000
2. \$20,000, up to \$50,000
3. \$50,000, up to \$75,000
4. \$75,000, up to \$100,000
5. \$100,000, up to \$150,000
6. \$150,000 up to \$200,000
7. \$200,000 or more
98. (Don't know)
99. (Refused)

J16. If you are currently employed, what industry do you work in? **[READ LIST]**

1. Education
2. Government
3. Agriculture
4. Health care
5. Self-employed
6. Other business
7. (Retired)
8. (Unemployed)
98. (Don't know)
99. (Refused)

J17. **[INTERVIEWER RECORD: DO NOT READ.]**

1. (Male)
2. (Female)

**[INCENTIVE SCRIPT]**

Those are all the questions we have. Focus on Energy appreciates your input. May I get your name and address so that we can send the incentive to you? Let's start with...

1. Your name **[RECORD NAME; FIRST AND LAST. VERIFY SPELLING]**
2. Street address **[ADDRESS WHERE THEY WOULD LIKE THE CHECK MAILED]**
3. City **[CITY]**
4. Wisconsin **[STATE]**
5. 5 digit ZIP code **[ZIP CODE]**
6. Did I reach you at **[INSERT PHONE]**? [Verify phone number in case we have any questions about the address]

**CLOSING SCRIPT:** The gift card will be mailed to the address you provided in the next several months. Thank you for your time.

**Focus on Energy/Territory-Wide  
Residential Nonparticipant  
Customer Survey**

Key Research topics	Areas of Investigation for Participant Survey	Questions
<b>Customer Awareness and Understanding of Focus on Energy</b>		
1. Is Focus on Energy effectively creating customer awareness of their programs?	<ul style="list-style-type: none"> <li>Are customers aware of Focus on Energy?</li> <li>Do they associate the Focus on Energy incentive programs with Focus on Energy?</li> </ul>	A2, A4, A5
2. Do customers understand who runs Focus on Energy and how it is funded?	<ul style="list-style-type: none"> <li>Do customers differentiate Focus on Energy from their utilities?</li> <li>Do customers know who is offering the incentive programs?</li> <li>Do customers know who runs Focus on Energy? Do customers know how Focus on Energy is funded?</li> </ul>	A2, A4, A6, A7
<b>Customer Satisfaction</b>		
3. How satisfied are customers in the WPS territory with the energy efficiency programs available to them?	<ul style="list-style-type: none"> <li>Customer awareness of energy- efficiency programs and incentives available to them.</li> <li>Customer satisfaction with the energy efficiency programs and incentives available to them.</li> </ul>	A1, A2, B1
4. How satisfied are customers in the WPS territory with Focus on Energy?	<ul style="list-style-type: none"> <li>Customer awareness of Focus on Energy.</li> <li>Customer satisfaction with Focus on Energy.</li> </ul>	A2, A4, A5, B2, B3, C11
5. Do energy efficiency programs increase customers' good will towards their utility?	<ul style="list-style-type: none"> <li>Customers' level of satisfaction with WPS.</li> <li>If the availability of energy efficiency programs to WPS customers creates good will towards WPS.</li> </ul>	B4, C3
<b>Information for Future Programs</b>		
6. What are the customers' barriers to participating in energy-efficiency programs?	<ul style="list-style-type: none"> <li>Customers' awareness of the Focus on Energy programs they are eligible for.</li> <li>Why customers eligible to participate in Focus on Energy programs did not.</li> <li>Customer barriers to energy efficiency in general.</li> </ul>	A1, A2, C7,C8, C9, C10, C11, C12, C13, C14, D3

Key Research topics	Areas of Investigation for Participant Survey	Questions
7. What types of energy savings measures or incentives customers might be interested in?	<ul style="list-style-type: none"> <li>The types of changes customers are planning to make to their homes that will affect their energy usage.</li> <li>The kinds of support customers need to incorporate energy efficiency strategies and measures into any changes to their homes that affect their energy usage.</li> </ul>	D1, D2, D4
<b>Territory-Wide Portfolio Marketing and Outreach</b>		
8. How effective are the marketing and outreach efforts for the Territory-Wide programs at reaching WPS customers?	<ul style="list-style-type: none"> <li>Nonparticipants in WPS territory's awareness of the residential Territory-Wide Programs.</li> <li>How would nonparticipants like to be informed about support available to help them improve the energy efficiency of their homes</li> </ul>	A2, D5
<b>General</b>		
9. How interested are nonparticipants in energy efficiency for their homes?	<ul style="list-style-type: none"> <li>Nonparticipants level of interest in energy efficiency for their home.</li> </ul>	C1, C2, C4
10. Nonparticipant demographics	<ul style="list-style-type: none"> <li>The demographics of nonparticipants in the WPS territory.</li> </ul>	Section E

Hello, my name is **[INSERT NAME]**, and I'm calling on behalf of a statewide research initiative. We are conducting an important study among Wisconsin residents to learn what rebates and incentives you are aware of for products or services that help reduce your home's energy use. I'm NOT calling about your utility bill or selling anything.

May I please speak with the person who is primarily responsible for your household's energy-related decisions? This would be the person who is responsible for paying the utility bills or selecting new lighting and appliances. **[IF NO ONE IS AVAILABLE, TRY TO RESCHEDULE AND THEN TERMINATE. IF TRANSFERRED TO ANOTHER PERSON REPEAT INTRO AND THEN CONTINUE, OTHERWISE CONTINUE....]**

Thank you for agreeing to take part in this survey. Your answers are confidential and will be used only for research purposes.

Do you have a few minutes to speak now?



*Tack-up information, not to be programmed*

[If “No – Not a convenient time,” ask if Respondent would like to arrange a more convenient time for us to call them back.]

[IF RESPONDENT ASKS HOW LONG, SAY: “APPROXIMATELY 8 MINUTES.”]

[**Only if asked** for a contact to verify the survey authenticity, offer Joe Fontaine at the Public Service Commission of Wisconsin who can be reached during business hours at 608-266-0910.]

[If interviewee has questions regarding Focus on Energy or the programs available respond] “I can’t answer that until we get to the end as one of the areas we are investigating is what Wisconsin residents know about the offerings, but I would be happy to tell you about that at the end of the survey and give you some resources where you can find out more.”

**S1.** Our information shows that you are a WPS customer. Do you receive electric service, gas service, or both from WPS?

1. (Electric)
2. (Gas)
3. (Both )
4. (Neither. I am not a WPS customer.) **[THANK AND TERMINATE]**
98. (Don’t know) **[THANK AND TERMINATE]**
99. (Refused) **[THANK AND TERMINATE]**

**[IF S1 = 4]** Thank you for your time. We are trying to speak with WPS customers today.

## **A. Customers’ Awareness and Understanding of Focus on Energy**

**A1.** Are you aware of any rebate or incentives available to you for making energy-efficiency upgrades in your home?

1. (Yes)
2. (No) **[SKIP TO A5]**
98. (Don’t know) **[SKIP TO A5]**
99. (Refused) **[SKIP TO A5]**

A2. What programs or incentives have you seen information on or heard about? **[DO NOT READ. SELECT ALL THAT APPLY.]**

1. (Home performance with ENERGY STAR Program; receive incentives for upgrading an existing home to ENERGY STAR standards.)
2. (New Homes Program: receive incentives for building a new home to higher energy efficiency standards.)
3. (Express Energy Efficiency Program; program staff come to people homes and install free energy-saving products.)
4. (Appliance Recycling Program: free pickup and recycling of old appliances)
5. (Lighting and Appliance Program: in store discounts on energy efficient lighting products and appliances. Customer may receive discount at store or have to send in an application to receive a rebate.)
6. (Renewable Energy Program: incentives for installing solar technology or geothermal heat pumps.)
7. (Federal or state government: in general , OR energy office, )
8. (Retailers (ex. Walmart, Home Depot, Sears)
9. (Manufacturers (ex. Lighting companies: GE, Philips))
10. (ENERGY STAR)
11. (Other **[SPECIFY: \_\_\_\_\_]**)
98. (Don't know)
99. (Refused)

**[ASK A2b FOR EVERY MENTION IN A2]**

A2b. Do you remember who sponsors the program or incentive? **[RECORD ONE RESPONSE; IF THEY MENTIONED SPONSOR IN LAST QUESTION JUST ENTER RESPONSE WITHOUT ASKING]**

1. (Focus on Energy Home Performance with ENERGY STAR Program)
2. (Focus on Energy New Homes Program)
3. (Focus on Energy Express Energy Efficiency Program)
4. (Focus on Energy Appliance Recycling Program)
5. (Focus on Energy Lighting and Appliance Program)
6. (Focus on Energy Renewable Energy Program)
7. (Focus on Energy - no specific program named)
8. (Wisconsin Public Service/WPS Home Performance with ENERGY STAR Program)
9. (Wisconsin Public Service/WPS New Homes Program)
10. (Wisconsin Public Service/WPS Express Energy Efficiency Program)
11. (Wisconsin Public Service/WPS Appliance Recycling Program)
12. (Wisconsin Public Service/WPS Lighting and Appliance Program)
13. (Wisconsin Public Service/WPS Renewable Energy Program)
14. (Wisconsin Public Service/WPS - no specific program named)
15. (Utility company; Alliant, WPS, Xcel, We Energies, MG&E)
16. (Other **[SPECIFY: \_\_\_\_\_]**)
98. (Don't know)
99. (Refused)

A3. Have you received a rebate or incentive of any kind for making energy efficient improvements or implementing any energy-efficiency strategies in your home in the past three years?

1. (Yes)
2. (No) **[SKIP TO A5]**
3. (Have applied for one but have not received it yet)
98. (Don't know) **[SKIP TO A5]**
99. (Refused) **[SKIP TO A5]**

Our next set of questions is about people's awareness of who sponsors energy-efficiency programs in the state. There are no right or wrong answers.

- A4. Can you tell me who sponsored the rebate or incentive you received **[IF A3 = 3: READ]** or are waiting to receive? **[DO NOT READ.]**
1. (Focus on Energy)
  2. (**BOTH** WPS /Wisconsin Public Service & Focus on Energy)
  3. (WPS /Wisconsin Public Service)
  4. (Public Service Commission of Wisconsin)
  5. (Utility company; Alliant, WPS, Xcel, We Energies, MG&E)
  6. (Federal or state government: in general , OR energy office)
  7. (Retailers (ex. Walmart, Home Depot, Sears))
  8. (Manufacturers (ex. Lighting companies: GE, Philips))
  9. (ENERGY STAR)
  10. (Other **[SPECIFY: \_\_\_\_\_]**)
  98. (Don't know)
  99. (Refused)

**[IFA3= 1 AND A4 = 1 OR 2]** That is all of our questions. Thank you for your time today. **[THIS DOES NOT COUNT AS A COMPLETED SURVEY.]**

- A5. How familiar are you with Focus on Energy? Would you say ... **[READ LIST]**
1. Very Familiar
  2. Somewhat familiar
  3. Not too familiar
  4. Not familiar at all **[SKIP TO B1]**
  98. (Don't know) **[SKIP TO B1]**
  99. (Refused) **[SKIP TO B1]**

**[ASK IF A5=1-3]** Our next questions are to help us gauge peoples' general awareness and understanding of Focus on Energy. Like the questions in the last section there are no right or wrong answers

- A6. Again, not to put you on the spot, but can you share your impression of who operates or sponsors Focus on Energy? **[RECORD ALL THAT APPLY]**

1. (WPS)
2. (Utilities)
3. (The State)
4. (Taxpayer dollars)
5. (Ratepayers)
6. (Public Service Commission of Wisconsin)
7. (Independent Administrator)
8. (Other [SPECIFY: \_\_\_\_\_])
98. (Don't know)
99. (Refused)

A7. **[ASK IF A5=1-3]** How are Focus on Energy's offerings funded? **[RECORD ALL THAT APPLY]**

1. (WPS)
2. (Utilities)
3. (The State)
4. (Taxpayer dollars)
5. (Ratepayers)
6. (Public Service Commission of Wisconsin)
7. (Independent Administrator)
8. (Other [SPECIFY: \_\_\_\_\_])
98. (Don't know)
99. (Refused)

## B. Satisfaction

My next questions address your level of satisfaction with the rebates and incentives that are available to you.

B1. **[SKIP IF A1=2,98 OR 99]** Using a scale of 1 to 10, with 1 being extremely dissatisfied, 5 being neutral, and 10 being extremely satisfied can you describe how satisfied you are with the rebates, incentives, or other offerings available to you from **any source** for making energy-efficiency improvements to your home? **[REVIEW SCALE IF NEEDED]**

1. (**RECORD 1-10:** \_\_\_\_\_)
98. (Don't know)
99. (Refused)

B2. **[ASK IF A5=1-3]** Using the same scale of 1 to 10, can you describe how satisfied you are with the rebates, incentives, or other offerings **specifically** from Focus on Energy? **[REVIEW SCALE IF NEEDED:]** with 1 being extremely dissatisfied and 10 being extremely satisfied.]

1. (**RECORD 1-10:** \_\_\_\_\_)
98. (Don't know)
99. (Refused)

- B3. **[ASK IF B2= 1-4]** That response indicates that you are less than satisfied with Focus on Energy. What about Focus on Energy are you dissatisfied with?
1. **[RECORD ANSWER: \_\_\_\_\_]**
  98. (Don't know)
  99. (Refused)
- B4. Again, using the same scale of 1 to 10, how would you describe your satisfaction with WPS? **[IF NEEDED, PROMPT WITH:]** with 1 being extremely dissatisfied and 10 being extremely satisfied.
1. **[RECORD 1-10: \_\_\_\_\_]**
  98. (Don't know)
  99. (Refused)

### C. *Energy-Efficiency Attitudes and Barriers*

Now I am going to read a series of statement about energy usage in your household. For each one tell me it you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

- C1. Saving energy in my home is important. Do you **[READ LIST]**
1. (Strongly Agree)
  2. (Somewhat Agree)
  3. (Somewhat Disagree)
  4. (Strongly Disagree)
  98. (Don't know)
  99. (Refused)
- C2. My home is very energy-efficient. Would you say that you: **[READ LIST]**
1. (Strongly Agree)
  2. (Somewhat Agree)
  3. (Somewhat Disagree)
  4. (Strongly Disagree)
  98. (Don't know)
  99. (Refused)
- C3. The availability of incentives and other offerings to help me save energy increases my satisfaction with energy utilities like WPS. **[READ LIST IF NEEDED]**
1. (Strongly Agree)
  2. (Somewhat Agree)
  3. (Somewhat Disagree)
  4. (Strongly Disagree)
  98. (Don't know)
  99. (Refused)

- C4. Have you purchased any compact fluorescent light bulbs or CFLs in the past 12 months? **[IF NEEDED: CFLs often have a spiral shape. Some people say they look like soft-serve ice cream and others call them twisty or swirly light bulbs]**
1. (Yes)
  2. (No) **[SKIP TO C6]**
  98. (Don't know) **[SKIP TO C6]**
  99. (Refused) **[SKIP TO C6]**
- C5. **[IF C4= 1]** How many times in the past 12 months would you estimate that you have purchased CFLs?
1. **[RECORD ANSWER: \_\_\_\_\_]**
  98. (Don't know)
  99. (Refused)
- C6. **[IF 0= 2, 98 or 99]** Have you implemented any other energy savings improvements or strategies in your house in the past three years?
1. (Yes)
  2. (No) **[SKIP TO D1]**
  98. (Don't know) **[SKIP TO D1]**
  99. (Refused) **[SKIP TO D1]**
- C7. **[IF 0= 2, 98 or 99 AND C6=1]** What types of energy saving improvements or strategies have you implemented in the past three years? **[RECORD ALL THAT APPLY; DO NOT READ LIST]**
1. (Install more efficient lights/light bulbs)
  2. (Put on an addition)
  3. (Remodel)
  4. (Buy more efficient appliances/electronics)
  5. (Add insulation to the home)
  6. (Weatherize, caulk, air seal home)
  7. (Get new windows/doors)
  8. (Installed more efficient furnace or AC)
  9. (Unplug electronics and appliances when not in use)
  10. (Adjust the thermostat)
  11. (Turn off lights more consistently)
  12. (Turn off appliances/electronics more consistently)
  13. (Other **[SPECIFY: \_\_\_\_\_]** )
  98. (Don't know) **[SKIP TO D1]**
  99. (Refused) **[SKIP TO D1]**
- C8. **[ASK IF C6=1 and C7 ≠ 98 or 99]** Do you know if you were eligible for any incentives or rebates for these energy-efficient improvements or strategies?
1. (Yes)
  2. (No) **[SKIP TO D1]**

- 98. (Don't know) **[SKIP TO D1]**
- 99. (Refused) **[SKIP TO D1]**

C9. **[ASK if C8=1]** You mentioned earlier that you have not received any incentives for energy efficient measures in the past three years] **[ (READ IF C10= 2 Ok, so)**, what was the reason that you did not pursue an incentive for this energy-efficiency improvement or strategy?]

- 1. (Unaware of incentive)
- 2. (Too complicated)
- 3. (Not a priority)
- 4. (Didn't know how)
- 5. (Found out about incentive after I'd purchased it)
- 6. (Tried but no incentive available or not eligible)
- 7. **[SPECIFY: \_\_\_\_\_]**
- 8. [I did receive an incentive]
- 98. (Don't know)
- 99. (Refused)

C10. **[ASK IF C9 = 8]** I'm sorry. I must have misunderstood. Let me repeat my earlier question. Have you received a rebate or incentive for implementing any energy-efficiency improvements or strategies in your home in the past three years?

- 1. (Yes)
- 2. (No) **[REPEAT C9]**
- 3. (Have applied for one but have not received it yet ]
- 98. (Don't know) **[SKIP TO TERMINATION]**
- 99. (Refused) **[SKIP TO TERMINATION]**

C11. **[ASK IF C10=1]** Can you tell me who sponsored the rebate or incentive you received **[If C10 = 3: READ]** or are waiting to receive?

- 1. (Focus on Energy) **[SKIP TO TERMINATION]**
- 2. (WPS /Wisconsin Public Service )
- 3. (Public Service Commission of Wisconsin)
- 4. (Utility company; Alliant, WPS, Xcel, We Energies, MG&E)
- 5. (Federal or state government: in general , OR energy office)
- 6. (Retailers (ex. Walmart, Home Depot, Sears))
- 7. (Manufacturers (ex. Lighting companies: GE, Philips))
- 8. (ENERGY STAR)
- 9. (Other **[SPECIFY: \_\_\_\_\_]**)
- 98. (Don't know)
- 99. (Refused)

- C12. **[If 0 = 1 or 3, AND A4 > 2 BUT < 88]** You said earlier that you have received an incentive for implementing an energy-efficient improvement or strategy in your home during the past three years, but **not** from Focus on Energy. What types of energy saving improvements or strategies have you implemented in the past three years? **[RECORD ALL THAT APPLY; DO NOT READ LIST]**
1. (Install more efficient lights/light bulbs)
  2. (Put on an addition)
  3. (Remodel)
  4. (Buy more efficient appliances/electronics)
  5. (Add insulation to the home)
  6. (Weatherize, caulk, air seal home)
  7. (Get new windows/doors)
  8. (Installed more efficient furnace or AC)
  9. (Unplug electronics and appliances when not in use)
  10. (Adjust the thermostat)
  11. (Turn off lights more consistently)
  12. (Turn off appliances/electronics more consistently)
  13. (Other [SPECIFY: \_\_\_\_\_] )
  14. (Indicates that incentive **was** from Focus on Energy **[SKIP TO TERMINATION]**)
  98. (Don't know)
  99. (Refused)

TERMINATION: **[IF C10= 1 AND C11 = 1 OR C10= 99 or 88 or C12=14]** That is all of our questions. Thank you for your time today.

- C13. **[If 0 = 1 or 3, AND A4 > 2 BUT < 88]** Do you know if you were eligible for any incentives or rebates for these improvements or strategies?
1. (Yes)
  2. (No) **[SKIP TO D1]**
  98. (Don't know) **[SKIP TO D1]**
  99. (Refused) **[SKIP TO D1]**
- C14. **[ASK if C13=1]** What was the reason that you did not pursue an incentive for this improvement or strategy?
1. (Unaware of incentive)
  2. (Too complicated)
  3. (Not a priority)
  4. (Didn't know how)
  5. (Found out about incentive after I'd purchased it)
  6. (Tried but no incentive available or not eligible)
  7. (Found out about incentive after I'd purchased it)
  8. **[SPECIFY: \_\_\_\_\_]**
  98. (Don't know)
  99. (Refused)



**D. Future programs**

D1. Do you have specific plans within the next year – that is by fall 2014 – to make any changes to your home that will impact your energy use?

1. (Yes)
2. (No) **[SKIP TO D4]**
98. (Don't know) **[SKIP TO D4]**
99. (Refused) **[SKIP TO D4]**

D2. What type of changes are you planning to make? **[RECORD ALL THAT APPLY; DO NOT READ LIST]**

1. (Install more efficient lights/light bulbs)
2. (Put on an addition)
3. (Remodel)
4. (Buy more efficient appliances/electronics)
5. (Add insulation to the home)
6. (Weatherize, caulk, air seal home)
7. (Get new windows/doors)
8. (Unplug electronics and appliances when not in use)
9. (Adjust the thermostat)
10. (Turn off lights more consistently)
11. (Turn off appliances/electronics more consistently)
12. (Other **[SPECIFY: \_\_\_\_\_]** )
98. (Don't know)
99. (Refused)

D3. What factors might affect whether you make these changes to your home? **[RECORD ALL THAT APPLY; DO NOT READ LIST]**

1. (Cost)
2. (Can't control energy use by other household members)
3. (Don't know what to do (information))
4. (Don't have money to invest in energy-efficient improvements)
5. (Not a priority)
6. (Have energy using equipment/appliances in need of repair)
7. (Other **[SPECIFY: \_\_\_\_\_]** )
98. (Don't know)
99. (Refused)

D4. What kinds of support would help you implement more energy efficient options when making these changes to your home? **[RECORD ALL THAT APPLY; DO NOT READ LIST]**

1. (Incentives or rebates)
2. (Information about energy efficient technologies)
3. (Information about where to buy energy efficient equipment)
4. (Referrals to contractors who understand energy efficiency /building science))
5. (Help understanding the possibilities)
6. (Other **[SPECIFY: \_\_\_\_\_]**)
98. (Don't know)
99. (Refused)

D5. What is the best way to inform you about support available to help you increase the energy efficiency in your home? **[ALLOW ANSWER AND THEN PROBE ON THE FOLLOWING, CHOOSE ALL THAT APPLY]**

1. (Utility website)
2. (Utility bill insert)
3. (Utility phone call)
4. (Utility; unspecified)
5. (Media (newspaper, radio, tv)
6. (Magazines, periodicals)
7. (Energy-efficiency programs like Focus on Energy)
8. (Government agency; local, state, or federal)
9. (Retailer, contractor, hardware store)
10. (Word of mouth (family, friend, colleague))
11. (General internet search; Google)
12. (Social media like Facebook and Twitter)
13. (Other, **[SPECIFY: \_\_\_\_\_]**)
14. (Do not want to receive information)
98. (Don't know)
99. (Refused)

## **E. Customer Demographics**

Finally, I have a few questions about your home and household.

E1. What type of home do you live in? **[READ RESPONSES 1-5, then 6; SELECT ONE RESPONSE]**

1. (Single-family home, detached house)
2. (Attached house (townhouse, row house, or duplex))
3. (Multifamily apartment or condo building with 4 or more units)
4. (Mobile/manufactured home)
5. (Co-op/retirement community)
6. (Other **[SPECIFY: \_\_\_\_\_]**)
98. (Don't Know)
99. (Refused)

E2. Do you or members of your household own this home or do you rent?

1. (Own/buying)
2. (Rent/lease)
3. (Occupied without payment of rent)
4. (Other [SPECIFY: \_\_\_\_\_])
98. (Don't know)
99. (Refused)

E3. Is your home occupied...[READ RESPONSE]

1. (Year round or)
2. (On a seasonal basis/vacation home)
98. (Don't know) [DO NOT READ]
99. (Refused) [DO NOT READ]

E4. How many people live in your home on a full-time basis [including yourself] ? [IF NEEDED:] Please include everyone who lives in your home whether or not they are related to you and exclude anyone who is just visiting or in the military or children who may be away at college.

1. \_\_\_\_\_ Range = 1 to 10, 10 = 10 or more [RECORD RESPONSE]
98. (Don't know) [DO NOT READ]
99. (Refused) [DO NOT READ]

E5. Which of the following categories best describes your age? Is it... [READ LIST]

1. (18-24)
2. (25-34)
3. (35-44)
4. (45-54)
5. (55-64)
6. (65-74)
7. (75 or older)
98. (Don't know)
99. (Refused)

That is all of our questions. Thank you for your time today. We truly appreciate it.

**IF INTERVIEWEE WOULD LIKE ADDITIONAL INFORMATION READ:** You had mentioned during the survey that you would like more information. Focus on Energy is the Wisconsin utilities' statewide energy-efficiency and renewable resource program. Since 2001, the program has provided information, resources, and financial incentives to eligible Wisconsin residents and businesses to install cost-effective energy efficient and renewable energy projects. Focus is funded by the state's investor-owned energy utilities.

If you would like additional information on Focus on Energy, or the programs available, I have several resources I can share with you. Would you like a web address, or a phone number you can call? "

1. **(WEB ADDRESS) [READ:]** The website for Focus on Energy is: [www.focusonenergy.com](http://www.focusonenergy.com)
2. **[Phone numbers] [READ:]** The phone number for Focus on Energy is: 1-800-762-7077

**Focus on Energy/Territory-Wide  
Energy Bundle Bonus  
Participating Customer Survey**

Key Research topics	Areas of Investigation for Participant Survey	Questions
<b>Program Design</b>		
1. Does the Territory Wide Energy Bundle Bonus increase participation in the Focus on Energy programs in the WPS territory?	<ul style="list-style-type: none"> <li>Effectiveness of the program design at increasing participation in the associated Focus on Energy programs.</li> <li>Energy Bundle Bonus participants; awareness of the other Focus on Energy programs.</li> </ul>	Section J, K1
<b>Marketing and Outreach</b>		
2. How effective are the marketing and outreach efforts for Territory-Wide Energy Bundle Bonus at reaching WPS agricultural customers?	<ul style="list-style-type: none"> <li>How do WPS customers learn about the Territory-Wide Energy Bundle Bonus?</li> <li>Who do customers associate with the Focus on Energy incentive payments they have received?</li> </ul>	J2, K2-K4
<b>Program Satisfaction</b>		
3. Are the Energy Bundle Bonus customers satisfied with the program?	<ul style="list-style-type: none"> <li>Customer satisfaction with the incentive, and with the process for receiving the additional rebates.</li> </ul>	Section SAT
<b>Net-To-Gross and Attribution</b>		
4. Can savings be attributed to the WPS Territory-Wide Energy Bundle Bonus incentives?	<ul style="list-style-type: none"> <li>Spill over and NTG Battery</li> </ul>	Section G, Section H, Section I, Section M, and Section N

Interviewer instructions are in green.

CATI programming instructions are in red.

Words in parenthesis should not be read to respondent.

**SAMPLE Requirements:**

- [PHONE] Start with first column of phone numbers and move across.
- [COMPANY] Customer Name

- [CONTACT] First Name 1 and Last Name 1
- [ADDRESS]
- [MEASURE1]
- [MEASURE2]
- [MEASURE3]
- [MEASURE 1 OR C\_MEASURE1 INCENTIVE TOTAL]
- [EBB INCENTIVE AMOUNT] Total value of all Bonus Energy Bundles.
- [# OF MEASURES] – Total number of measure categories in EBB
- [FOCUS PROGRAM] – Name of Focus Program received base incentive from SAMPLE INCLUDES Business Incentive Participants (BIP), AND Chains Stores and Franchises customers [CSF]– MARKED IN DATABASE MESP=Multifamily Energy Savings Program

## A. Introduction

### INFORMATION FOR INTERVIEWER

*This survey is to gather participant feedback on the Energy Bundle Bonus incentive. Although this incentive is offered through Focus on Energy, it is not available to all Focus on Energy customers. To be eligible customers must:*

1. *Be a customer of the Wisconsin Public Service/WPS.*
2. *Have received an incentive through one of the following Focus on Energy programs: Business Incentive Program, Multifamily Energy Savings or Chains Stores and Franchises.*
3. *The first part of this survey addresses the Focus on Energy Program the customer participated in, and the second part addresses the Energy Bundle Bonus incentive they received.*
4. *Do not mention WPS until it is mentioned in the survey.*

- A1. Hello, may I speak with [CONTACT?] OR [IF NO NAME] May I speak with the person who handles energy decisions for your company? [IF NOT AT THIS LOCATION, ASK FOR PHONE NUMBER AND NAME AT CORRECT LOCATION AND CALL RESPONDENT]
1. (Yes) [CONTINUE WITH RESPONDENT ON PHONE]
  99. (REFUSED) [THANK AND TERMINATE]
- A2. Hello, I am [INSERT NAME] calling with a short survey on behalf of Wisconsin's Focus on Energy program. Are you the person responsible for making equipment decisions regarding energy efficiency at your company? [IF NEEDED: Focus on Energy is a statewide program overseen by the Public Service Commission of Wisconsin to encourage energy efficiency.]

1. (Yes)
2. (No, but person can come to phone) [START OVER AT A2 WITH NEW RESPONDENT]
3. (No, not available) [SCHEDULE CALLBACK]
4. (I have already been surveyed)
98. (DON'T KNOW) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START AGAIN]
99. (REFUSED) [THANK AND TERMINATE]

[IF A2 = 4 Read:] I see that you participated in several Focus on Energy programs, so were probably contacted about one of the other, state wide programs. This survey is to collect feedback on a program that is only available to customers like you. Because we have a limited number of participants, your opinions are very important to us.

Back-up information, not to be programmed:

[If “No – Not available,” ask if Respondent would like to arrange a more convenient time for us to call them back or if you can leave a message for that person.]

[IF RESPONDENT ASKS HOW LONG, SAY: “APPROXIMATELY 20 MINUTES.”]

[IF NEEDED:] This survey is for research purposes only and this is not a marketing call. Your participation in this study is important so that Focus on Energy can improve the energy-efficiency programs it offers to businesses and other organizations.

[Only if asked for a Focus on Energy contact to verify the survey authenticity, offer Joe Fontaine with the Public Service Commission of Wisconsin, 608-266-0910.]

- A3. Our records show that you installed energy efficient equipment including [MEASURE1], [MEASURE2], and [MEASURE3]. To ensure our records are correct, can you confirm that you installed these upgrades during 2013?
1. Yes
  2. No, wrong year [Record correct year, if possible]
  3. No, wrong measure [CORRECT BELOW]
    - a. [MEASURE1] IS INCORRECT [Correct:\_\_\_\_\_] [CALL THIS VARIABLE C\_MEASURE1]
    - b. [MEASURE2] IS INCORRECT [Correct:\_\_\_\_\_] [CALL THIS VARIABLE C\_MEASURE2]
    - c. [MEASURE3] IS INCORRECT [Correct:\_\_\_\_\_] [CALL THIS VARIABLE C\_MEASURE3]
  4. No, I did not install any measures [THANK AND TERMINATE]
  98. (DON'T KNOW) [Is there someone we could speak with that would know this? Record name and contact information:\_\_\_\_\_]
  99. (REFUSED) [THANK AND TERMINATE]

[DO NOT ASK A4 IF [FOCUS PROGRAM] = CSF AND INSTALLATION IS DIRECT INSTALL]

- A4. [ASK IF [FOCUS PROGRAM] = BIP or CSF] I'm going to read you a short list. Please tell me if a contractor, vendor, or Focus on Energy staff person was involved in any of the following steps: [READ LIST AND SELECT ALL THAT APPLY: 1=CONTRACTOR OR VENDOR INVOLVED, 2= FOCUS ON ENERGY STAFF INVOLVED; 3=NEITHER INVOLVED; 98=DON'T KNOW; 99 REFUSED]
1. Project initiation [IF =1 THEN SKIP SECTION G AND ASK SECTION H]
  2. Decisions about project design [IF=1 THEN SKIP SECTION G AND ASK SECTION H]
  3. Equipment selection [IF=1 THEN SKIP SECTION G AND ASK SECTION H]
  4. Equipment installation
  98. (DON'T KNOW)
  99. (REFUSED)
- A5. Our records also show that your business received an incentive or discount through the [FOCUS PROGRAM] of [FOCUS PROGRAM INCENTIVE AMOUNT]. [IF NEEDED READ: This may have been in addition to other incentives you received]. Is that correct?
1. Yes
  2. I received an incentive but a different amount [SPECIFY \_\_\_\_\_]
  3. I received an incentive, but I do not know if that is the correct amount
  4. No [THANK AND TERMINATE]
  98. (DON'T KNOW) [THANK AND TERMINATE]
  99. (REFUSED) [THANK AND TERMINATE]
- B. Section removed; Section heading kept to maintain lettering.**
- C. Section removed; Section heading kept to maintain lettering.**
- D. Section removed; Section heading kept to maintain lettering.**
- E. Section removed; Section heading kept to maintain lettering.**
- F. Section removed; Section heading kept to maintain lettering.**



ASK SECTION G IF [FOCUS PROGRAM] = BIP OR CSF AND IF A4.1≠1 OR A4.2≠1 OR A4.3≠1. IF PROGRAM= MESP SKIP TO SECTION M]

**G. +Freeridership**

[ASK THIS SECTION IF:

[[FOCUS PROGRAM] = BIP] and [IF A4.1≠1 OR A4.2≠1 OR A4.3≠1] CONTRACTOR DID NOT HELP IN THE DECISION MAKING OF DID NOT KNOW OR REFUSED] [IF A4.1=1 OR A4.2=1 OR A4.3=1 SKIP TO SECTION H]

OR

[[FOCUS PROGRAM] = CS&F]

Now I'd like to talk with you a bit more about your decisions to purchase the new [MEASURE1 OR C\_MEASURE1]. Even though you may have received incentives for other energy-saving equipment from other programs these questions are just about the [MEASURE1 OR C\_MEASURE1] that was purchased and the incentive you received from the [FOCUS PROGRAM].

[INTERVIEWER NOTE ABOUT THIS SECTION (don't read to respondent): This section is based on hypothetical behavior so we are asking similar questions to verify that we are gathering the correct responses.]

- G1. At the time that you first heard about the financial incentive, had you...? [READ LIST AND RECORD ONE FOR EACH: 1=YES OR 2=NO OR 98=DON'T KNOW OR 99=REFUSED]
  - 1. Already been thinking about purchasing [MEASURE1 OR C\_MEASURE1]?
  - 2. Already begun collecting information about [MEASURE1 OR C\_MEASURE1]?
  - 3. Already selected the particular [MEASURE1 OR C\_MEASURE1] and were going to purchase it?
  - 4. Already purchased the [MEASURE1 OR C\_MEASURE1]?
  - 5. Already installed the [MEASURE1 OR C\_MEASURE1]?
  
- G2. Just to make sure I understand, did your organization have specific plans to install the [MEASURE1 OR C\_MEASURE1][s] before learning about the incentive?
  - 1. Yes [ASK G3]
  - 2. No [SKIP TO G4]
  - 98. (DON'T KNOW) [SKIP TO G4]
  - 99. (REFUSED) [SKIP TO G4]
  
- G3. Prior to learning about the incentive, was the purchase of the [MEASURE1 OR C\_MEASURE1][s] included in your organization's capital budget?
  - 1. Yes [ASK G4]
  - 2. No [ASK G4]
  - 98. (DON'T KNOW) [ASK G4]
  - 99. (REFUSED) [ASK G4]

- G4. Would you have purchased and installed the same [MEASURE1 OR C\_MEASURE1][s] without the incentive?
1. Yes [SKIP TO G7]
  2. No [SKIP TO G9]
  98. (DON'T KNOW) [ASK G5]
  99. (REFUSED) [ASK G5]
- G5. Would you have installed **something** without the incentive? [DO NOT READ LIST UNLESS NECESSARY]
1. Yes, would have installed something [ASK G6]
  2. No, would NOT have installed anything [SKIP TO G9]
  98. (DON'T KNOW) [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
  99. (REFUSED) [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
- G6. When you say you **would have installed** something, would you have installed something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?
1. Yes [ASK G7]
  2. No [ASK G7]
  98. (DON'T KNOW) [ASK G7]
  99. (REFUSED) [ASK G7]
- G7. [ASK FOR MEASURE WITH ACTUAL UNIT GREATER THAN 1] And without the incentive, would you have installed the same number of [MEASURE1 OR C\_MEASURE1][s]?
1. Yes [ASK G8]
  2. No [ASK G7.2a]
    - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1](s)? [ASK G8]
  98. (DON'T KNOW) [ASK G8]
  99. (REFUSED) [ASK G8]
- G8. Without the [INCENTIVE FOR MEASURE1 OR C\_MEASURE1], would you have installed the [MEASURE1 OR C\_MEASURE1][s]...[READ LIST AND RECORD ONE RESPONSE]
1. Within the same year? [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
  2. Within one to two years? [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
  3. Within three to five years? [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
  4. In more than five years? [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
  98. (DON'T KNOW) [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
  99. (REFUSED) [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
- [ASK G9 TO G12 IF G4 = 2 OR G5 = 2]
- G9. When you say **you would not have installed** the same [MEASURE1 OR C\_MEASURE1][s] without the incentive, would you have installed anything at all?

1. Yes, would have installed something [ASK G10]
2. No, would not have installed anything at all [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
98. (DON'T KNOW) [ASK G10]
99. (REFUSED) [ASK G10]

G10. Without the incentive, would you have installed something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?

1. Yes [ASK G11]
2. No [ASK G11]
98. (DON'T KNOW) [ASK G11]
99. (REFUSED) [ASK G11]

G11. [ASK FOR MEASURE WITH ACTUAL UNITS GREATER THAN 1] Without the incentive, would you have installed the same [MEASURE1 OR C\_MEASURE1][s]?

1. Yes [ASK G12]
2. No [ASK G11.2A]
  - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1] (s)? [ASK G12]
98. (DON'T KNOW) [ASK G12]
99. (REFUSED) [ASK G12]

G12. And, would you have installed the same [MEASURE1 OR C\_MEASURE1][s]. . . [READ LIST AND RECORD ONE RESPONSE]

1. In the same year? [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
2. In one to two years? [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
3. In three to five years? [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
4. More than five years out? [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
98. (DON'T KNOW) [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]
99. (REFUSED) [IF [FOCUS PROGRAM] = BIP OR CSF SKIP TO SECTION I]

[DO NOT ASK H IF [[FOCUS PROGRAM] ≠ BIP] and [IF A4.1≠1 OR A4.2≠1 OR A4.3≠1] OR [[FOCUS PROGRAM] = CSF OR MESP] [IF [FOCUS PROGRAM] = CSF GO TO SECTION I ]

## H. +Freeridership

[ASK SECTION H IF [[FOCUS PROGRAM] = BIP] AND A4.1 OR A4.2 OR A4.3=1 – CONTRACTOR HELPED IN THE DECISION MAKING]

Now I'd like to talk with you about the new [MEASURE1 OR C\_MEASURE1]. Even though your contractor may have installed other energy-efficient equipment, these questions are just about the [MEASURE1 OR C\_MEASURE1].

[INTERVIEWER NOTE ABOUT THIS SECTION (don't read to respondent): This section is based on hypothetical behavior so we are asking similar questions to verify that we are gathering the correct responses.]

- H1. At the time that you first started working with your contractor on this project, had you...? [READ LIST AND RECORD ONE FOR EACH: 1=YES OR 2=NO OR 98=DON'T KNOW OR 99=REFUSED]
1. Already been thinking about purchasing [MEASURE1 OR C\_MEASURE1]?
  2. Already begun collecting information about [MEASURE1 OR C\_MEASURE1]?
  3. Already selected the particular [MEASURE1 OR C\_MEASURE1] and were going to purchase it?
  4. Already purchased the [MEASURE1 OR C\_MEASURE1]?
  5. Already installed the [MEASURE1 OR C\_MEASURE1]?
- H2. Just to make sure I understand, did your organization have specific plans to install the [MEASURE1 OR C\_MEASURE1][s] before you began working with your contractor or vendor?
1. Yes [ASK H3]
  2. No [SKIP TO H4]
  98. (DON'T KNOW) [SKIP TO H4]
  99. (REFUSED) [SKIP TO H4]
- H3. Before you began working with your contractor, was the purchase of the [MEASURE1 OR C\_MEASURE1][s] included in your organization's capital budget?
1. Yes [ASK:]
    - a. Did your contractor help your organization make the decision to include the purchase of [MEASURE1 OR C\_MEASURE1][s] in your organization's capital budget? [ASK H4]
  2. No [ASK H4]
  98. (DON'T KNOW) [ASK H4]
  99. (REFUSED) [ASK H4]
- H4. Would you have purchased and installed the same [MEASURE1 OR C\_MEASURE1][s] without the assistance from your contractor?
1. Yes [SKIP TO H7]
  2. No [SKIP TO H9]
  98. (DON'T KNOW) [ASK H5]
  99. (REFUSED) [ASK H5]
- H5. Would you have installed **something** without the involvement of your contractor? [DO NOT READ LIST UNLESS NECESSARY]
1. Yes, would have installed something [ASK H6]
  2. No, would NOT have installed anything [SKIP TO H9]
  98. (DON'T KNOW) [SKIP TO SECTION I]
  99. (REFUSED) [SKIP TO SECTION I]

- H6. When you say you **would have installed** something, would you have installed something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?
1. Yes [ASK H7]
  2. No [ASK H7]
  98. (DON'T KNOW) [ASK H7]
  99. (REFUSED) [ASK H7]
- H7. [ASK FOR MEASURE WITH ACTUAL UNIT GREATER THAN 1] And without the involvement of your contractor would you have installed the same number of [MEASURE1 OR C\_MEASURE1][s]?
1. Yes [ASK H8]
  2. No [ASKH7.2a]
    - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1](S)? [ASK H8]
  98. (DON'T KNOW) [ASK H8]
  99. (REFUSED) [ASK H8]
- H8. Without the assistance from your contractor, would you have installed the [MEASURE1 OR C\_MEASURE1][s]...[READ LIST AND RECORD ONE RESPONSE]
1. Within the same year? [SKIP TO SECTION I]
  2. Within one to two years? [SKIP TO SECTION I]
  3. Within three to five years? [SKIP TO SECTION I]
  4. In more than five years? [SKIP TO SECTION I]
  98. (DON'T KNOW) [SKIP TO SECTION I]
  99. (REFUSED) [SKIP TO SECTION I]
- [ASK H9 TO H13 IF H4=2 OR H5= 2]
- H9. When you say **you would not have installed** the same [MEASURE1 OR C\_MEASURE1][s] without the assistance from your contractor, would you have installed anything at all?
1. Yes [ASK H10]
  2. No [SKIP TO SECTION I]
  98. (DON'T KNOW) [ASK H10]
  99. (REFUSED) [ASK H10]
- H10. Without the assistance from your contractor, **would you have installed** something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?
1. Yes [ASK H11]
  2. No [ASK H11]
  98. (DON'T KNOW) [ASK H11]
  99. (REFUSED) [ASK H11]
- H11. [ASK FOR MEASURE WITH ACTUAL UNITS GREATER THAN 1] Without the assistance from your contractor, would you have installed the same [MEASURE1 OR C\_MEASURE1][s]?

1. Yes [ASK H12]
2. No [ASK H11.2A]
  - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1][S]? [ASK H12]
98. (DON'T KNOW) [ASK H12]
99. (REFUSED) [ASK H12]

H12. And, would you have installed the same [MEASURE1 OR C\_MEASURE1][s]. . . [READ LIST AND RECORD ONE RESPONSE]

1. In the same year? [ASK H13]
2. In one to two years? [ASK H13]
3. In three to five years? [ASK H13]
4. More than five years out? [ASK H13]
98. (DON'T KNOW) [ASK H13]
99. (REFUSED) [ASK H13]

H13. If the assistance or information from your contractor had not been available, would you have done anything differently on this project?

1. Yes [ASK H14]
2. No [SKIP TO SECTION I]
98. (DON'T KNOW)[[SKIP TO SECTION I]
99. (REFUSED) [SKIP TO SECTION I]

H14. What would you have done differently?  
[RECORD OPEN ENDED RESPONSE]

## I. +Spillover

[ASK THIS SECTION IF [FOCUS PROGRAM] = BIP OR CSF]

I1. Since making these energy-efficiency upgrades has your company installed any other energy-efficient products in your facility that you did **NOT** receive an incentive for? By energy-efficient products, I mean high-efficiency lighting such as T5s; high efficiency motors and variable speed drives; high efficiency air conditioners and heat pumps, efficient heating or water heating equipment, etcetera.

1. Yes [ASK I2]
2. No [SKIP TO SECTION J]
98. (DON'T KNOW) [SKIP TO SECTION J]
99. (REFUSED) [SKIP TO SECTION J]

I2. [IF [FOCUS PROGRAM] = BIP THEN READ TEXT] Are these products also installed at [ADDRESS] or at a different location? [IF [FOCUS PROGRAM] = CSF THEN READ TEXT] Are these products also installed at the same location as the upgrades we have been talking about or at a different location?

1. Same location
2. Different location
98. (DON'T KNOW)
99. (REFUSED)

13. What were the other energy-efficient products that you installed without getting an incentive? [DO NOT READ LIST; MARK ALL THAT APPLY; 98=DON'T KNOW, 99=REFUSED, 96=N/A] [If the customer says they bought something but have not installed it, the equipment has to be installed and operating for us to count it toward spillover.]

1. CFLs
2. LEDs
3. Fluorescent tubes (T5s, T8s, etc.)
4. Efficient lighting controls (occupancy sensors, daylighting, timers)
5. High efficiency motors
6. Air source heat pumps
7. Ground source heat pumps
8. Central AC
9. VSD (variable speed drive)
10. Boiler
11. Compressed air regulator
12. Gas furnaces
13. Exit signs
14. Refrigeration equipment (refrigerators, freezers)
15. Other [SPECIFY: \_\_\_\_\_]
98. (DON'T KNOW)
99. (REFUSED)

14. [REPEAT FOR EACH ITEM MENTIONED IN I3] How many [INSERT ITEM FROM I3] did you install? [RECORD NUMBER \_\_\_\_\_, 98 FOR DON'T KNOW, 99 FOR REFUSED, AND 96 FOR N/A]

15. [REPEAT FOR EACH ITEM MENTIONED IN I3] Please tell me how important the incentive for [INSERT MEASURE1] was in your decision to install [INSERT ITEM FROM I3]. Was it very important, somewhat important, not too important, or not at all important?

[EMPHASIZE EACH ANSWER OPTION AND PAUSE IN BETWEEN EACH OPTION. AFTER THE 2<sup>ND</sup> ITEM, YOU CAN SAY, "And using the same scale, please rate how important the incentive was in your decision to install [ANSWER FROM I3]"]

1. Very important
2. Somewhat important
3. Not too important or
4. Not at all important
98. (DON'T KNOW)
99. (REFUSED)

16. **[ASK FOR ALL MENTIONED IN I3]** Did you receive an incentive for installing **[INSERT ANSWER FROM I3]**? **[DO NOT READ ANSWER LIST]**
1. Yes
  2. No
  3. Item did not qualify
  4. Contractor or vendor received the incentive
  98. (DON'T KNOW)
  99. (REFUSED)
17. **[ASK IF I2=2]** What is the address of the location where you installed **[INSERT EACH ITEM FROM I3]**? **[98 FOR DON'T KNOW AND 99 FOR REFUSED]**  
**ENTER STREET ADDRESS:**  
**ENTER CITY:**  
**ENTER STATE:**  
**ENTER ZIP CODE:**

**[ASK ALL SURVEY RESPONDENTS SECTION J]**

## **J. Program Questions**

Now we have a few questions about other programs.

- J1. Are you aware of the Energy Bundle Bonus program?
1. Yes
  2. No
  98. (DON'T KNOW)
  99. (REFUSED)

**[ASK IF J1=1]**

- J2. Can you tell me who sponsored the Energy Bundle Bonus Program? **[DO NOT READ LIST; RECORD ALL THAT APPLY]**
1. WPS/Wisconsin Public Service
  2. Focus on Energy
  3. Other **[Specify: \_\_\_\_\_]**
  98. (DON'T KNOW)
  99. (REFUSED)

**[ASK IF J1=2, 98, OR 99]**

- J3. The Energy Bundle Bonus is an additional incentive you would have received for being a WPS customer and implementing multiple energy-efficiency improvements with the **[FOCUS PROGRAM]**. It may have been in a separate check. Are you aware of this bonus incentive? **[DO NOT READ LIST]**  
**[If they say they say they don't remember the name, but they think that sounds familiar, or they recall getting separate check, mark as YES]**



- 1. Yes
- 2. No [Skip to Section L Firmographics]
- 98. (DON'T KNOW) [Skip to Section L Firmographics]
- 99. (REFUSED) [Skip to L Firmographics]

J4. Our records show that your company received additional incentives of [EBB INCENTIVE] dollars from the WPS Energy Bundle Bonus program for installing equipment including the [MEASURE1], [MEASURE2], and [MEASURE3]. Does this sound correct?

- 1. Yes
- 2. No, didn't receive an extra incentive
- 3. Received incentive; amount is incorrect [Record amount: \_\_\_\_\_]
- 98. (DON'T KNOW)
- 99. (REFUSED)

[SKIP IF J1=2 OR 98 OR 99 AND J4=2 OR 98 OR 99]

J5. When did your organization learn about the WPS Energy Bundle Bonus program? Was it ... [READ LIST AND SELECT ONE RESPONSE]

- 1. Before making the decision to purchase any of the equipment.
- 2. While making the decision to purchase the first type of equipment.
- 3. While making the decision to purchase the first type of equipment, but before deciding to purchase the additional equipment.
- 4. After making the decision to purchase the additional equipment.
- 5. Other [SPECIFY: \_\_\_\_\_]
- 98. (DON'T KNOW)
- 99. (REFUSED)

[ASK IF J4=1 OR 3]

J6. The Energy Bundle Bonus offered increased incentives with each additional type of equipment installed. Was this increase in the incentive a factor in your decision to install more types of equipment?

- 1. (Yes)
- 2. (No)
- 98. (DON'T KNOW)
- 99. (REFUSED)

[ASK IF J4=1 OR 3]

J7. How important was the increasing incentive from the Energy Bundle Bonus program in your decision to install [INSERT # OF MEASURE GROUPS] types of equipment? Was it ... [READ LIST]

- 1. Very important
- 2. Somewhat important
- 3. Not too important
- 4. Not important at all
- 98. (DON'T KNOW)
- 99. (REFUSED)

[ASK IF J4=1 OR 3]

J8. If you had not received the Energy Bundle Bonus incentive for [EBB] for the [INSERT # OF MEASURE GROUPS] types of equipment, would you have still purchased the [MEASURE1, MEASURE 2], and [MEASURE3]?

1. Yes
2. No
3. Other [SPECIFY/RECORD COMMENTS: \_\_\_\_\_]
98. (DON'T KNOW)
99. (REFUSED)

## K. Program Awareness

[ASK EVERYONE]

K1. Please tell me which of the following Focus on Energy programs you have heard of. Have you heard of ... [READ EACH AND RECORD YES OR NO]

1. Business Incentive Program
2. Small Business Program
3. Large Energy Users
4. Renewable Energy Program
5. Other: [SPECIFY \_\_\_\_\_]
98. (DON'T KNOW)
99. (REFUSED)

[ASK K2-K4 IF J4=1 OR 3]

K2. How did you first hear about the Energy Bundle Bonus Program incentive? [DO NOT READ, PROMPT IF NECESSARY]

1. Visited Focus on Energy website
2. Visited WPS website
3. Other website [SPECIFY THE WEBSITE: \_\_\_\_\_]
4. Marketing material/Bill insert/information came in the mail with my bill [SPECIFY marketing piece or medium: \_\_\_\_\_]
5. Contractor told me [SPECIFY TYPE OF CONTACTOR: \_\_\_\_\_] [SKIP TO K4]
6. WPS Account Representative told me
7. Focus on Energy Representative told me
8. Friend, family member, colleague
9. Newspaper
10. Radio
11. Community Event/Fair
12. Social Media (Facebook, Twitter)
13. Other [SPECIFY: \_\_\_\_\_]
98. (DON'T KNOW)
99. (REFUSED)

- K3. Did your contractor tell you about the Energy Bundle Bonus Program incentive?
1. Yes
  2. No [SKIP TO SAT1]
  98. (DON'T KNOW) [SKIP TO SAT1]
  99. (REFUSED) [SKIP TO SAT1]
- K4. The Energy Bundle Bonus Program increases the incentives with each additional improvement or upgrade. Did your contractor encourage you to look at additional energy efficiency improvements or upgrades so you could take advantage of the additional incentives available to you for being a WPS customer?
1. Yes
  2. No
  98. (DON'T KNOW)
  99. (REFUSED)

### **SAT. Satisfaction**

[ASK SAT1-SAT8 IF J4=1 OR 3]

Now I have a few questions about your satisfaction with the Energy Bundle Bonus Program.

- SAT1 How satisfied are you with your contractor's level of knowledge about the Energy Bundle Bonus Program. Would you say you are... [READ LIST, REPEAT AS NEEDED]
1. Very satisfied [SKIP TO SAT3]
  2. Somewhat satisfied [SKIP TO SAT3]
  3. Not too satisfied
  4. Not at all satisfied
  98. (DON'T KNOW) [SKIP TO SAT3]
  99. (REFUSED) [SKIP TO SAT3]

[ASK IF SAT1=3 OR 4]

SAT2 What are the reasons you are dissatisfied with your contractor's level of knowledge about the Energy Bundle Bonus Program? [RECORD ANSWER]

SAT3 Would you say you are [READ LIST] with the amount of the incentive you received, including the incentive from the Energy Bundle Bonus Program?

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied
98. (DON'T KNOW)
99. (REFUSED)

[ASK IF SAT3=3 OR 4]

SAT4 What are the reasons you are dissatisfied with the amount of the incentive?

[RECORD ANSWER]

SAT5 How satisfied would you say you are with the process for receiving the additional Energy Bundle Bonus Program incentive only available to WPS customers? Would you say you are ... [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO SAT7]
2. Somewhat satisfied [SKIP TO SAT7]
3. Not too satisfied
4. Not at all satisfied
98. (DON'T KNOW) [SKIP TO SAT7]
99. (REFUSED) [SKIP TO SAT7]

[ASK IF SAT5=3 OR 4]

SAT6 What are the reasons you are dissatisfied with the incentive process?

[RECORD ANSWER]

SAT7 How would you rate your experience with the Energy Bundle Bonus Program overall? Would you say you are... [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO NEXT SECTION]
2. Somewhat satisfied [SKIP TO NEXT SECTION]
3. Not too satisfied
4. Not at all satisfied
98. (DON'T KNOW) [SKIP TO NEXT SECTION]
99. (REFUSED) [SKIP TO NEXT SECTION]

[ASK IF SAT7=3 OR 4]

SAT8 What about your experience were you dissatisfied with [RECORD ANSWER]:

## L. Firmographics

Finally, I would like to ask you some questions about your company.

[ASK IF PROGRAM=BIP]

L1. \*What industry is your company in? [CODE ONE RESPONSE BELOW; DON'T READ UNLESS NECESSARY]

1. Agriculture, Mining
2. Communications
3. Construction
4. Education
5. Finance, Insurance, Real Estate
6. Food Service (restaurants)
7. Government
8. Health Care
9. Manufacturing
10. Nonprofit / churches / schools
11. Retail, Wholesale
12. Transportation
13. Hotel/motels
14. Other [SPECIFY: \_\_\_\_\_]
98. (DON'T KNOW)
99. (REFUSED)

[ASK IF PROGRAM=CSF]

L2. \*What industry is your company in?

1. Food Service (restaurants)
2. Food sales (grocery stores, convenience stores)
3. Retail
4. Other [SPECIFY: \_\_\_\_\_]
98. (DON'T KNOW )
99. (REFUSED)

[ASK L3-0 IF PROGRAM=CSF OR BIP]

L3. \*Does your organization lease or own the facility?

1. Lease
2. Own
3. Other [SPECIFY: \_\_\_\_\_]
98. (DON'T KNOW)
99. (REFUSED)

[ASK L3-0 IF PROGRAM=CSF OR BIP]

L4. What is the square footage of the heated and cooled space in this facility? [NUMERIC OPEN END UP TO 1,000,000]

1. [RECORD NUMBER: \_\_\_\_\_]
98. (DON'T KNOW)
99. (REFUSED)

[ASK L3-0 IF PROGRAM=CSF OR BIP]

L5. \*How many people are employed at this location?

1. [RECORD NUMBER: \_\_\_\_\_]
98. (DON'T KNOW)
99. (REFUSED)

[RECORD FOR ALL PROGRAMS]

L6. \*[INTERVIEWER RECORD GENDER. DO NOT ASK]

1. Female
2. Male

*Thank you. We appreciate your help with this survey. Have a nice day.*

## M. Freeridership – MESP [ASK IF PROGRAM =MESP]

I'd like to ask you some questions about the [MEASURES 1-4] that were installed at [service address]

M1. If you had not had the items installed through the Focus on Energy program, would you have installed all, some, or none of the same energy efficiency equipment on your own? [DO NOT READ LIST]

1. I would have installed all of the energy efficient equipment on my own. [create new TEXT variable "M1keep"=MEASURES 1-4]
2. I would not have installed any of the energy efficient equipment that Focus on Energy installed. [create new variable "M1drop"= MEASURES 1-4] [SKIP TO N7]
3. I would have only installed some of the equipment on my own that Focus on Energy installed. [ASK A AND B BELOW]
  - a. What would you have installed? [CREATE NEW VARIABLE "M1KEEP"]
  - b. What would you not have installed? [CREATE NEW VARIABLE "M1DROP"]
98. (DON'T KNOW) [SKIP TO N7]
99. (REFUSED) [SKIP TO N7]

[IF M1=2,98,99, SKIP TO N7, OTHERWISE CONTINUE]

- M2. Let me make sure I understand. When you say you would have installed the [M1KEEP] on your own, would you have installed equipment that was just as energy efficient, or would you have installed equipment that was somewhat less efficient than what Focus on Energy installed for you? (DO NOT READ LIST)[IF NEEDED: "On your own" means without the Focus on Energy program]
1. I would have installed all equipment to same level of efficiency. [create new variable "M2KEEP"=M1KEEP]
  2. I would not have installed any of the equipment to the same level of efficiency. [create new variable "M2DROP"=M1KEEP]
  3. I would have installed only some of the equipment to the same level of efficiency. [ASK A AND B BELOW]
    - a. Which equipment would you have installed? [CREATE NEW VARIABLE "M2KEEP"]
    - b. Which equipment would you not have installed?[CREATE NEW VARIABLE "M2DROP"]
  98. (DON'T KNOW)
  99. (REFUSED)
- M3. [ASK IF M2=1 OR 3] And would you have installed the same quantity of [M2KEEP] on your own? [DO NOT READ LIST]
1. YES, I would have installed the same quantity of all equipment.
  2. NO – I would not have installed the same quantity for any of the equipment. [create new variable "M3DROP"=M2KEEP]
  3. NO – I would have installed the same quantity for only some of the equipment. [ASK A AND B BELOW]
    - a. Which equipment would you have not installed? [CREATE NEW VARIABLE "M3PARTIAL"]
    - b. Which equipment would you have installed? [CREATE NEW VARIABLE "M3SAME"]
  98. (DON'T KNOW)
  99. (REFUSED)
- M4. Without the program, would you have installed the [M2KEEP] on your own... [READ LIST]
1. Within the same year? [ASK/RECORD WHICH MEASURES = M4A]
  2. Within one to two years? [ASK/RECORD WHICH MEASURES = M4B]
  3. Within three to five years? [ASK/RECORD WHICH MEASURES = M4C]
  4. In more than five years? [ASK/RECORD WHICH MEASURES = M4D]
  5. When the equipment failed? [ASK/RECORD WHICH MEASURES = M4D]
  98. (DON'T KNOW) [ASK/RECORD WHICH MEASURES = M4F]
  99. (REFUSED) [ASK/RECORD WHICH MEASURES = M4G]
- M5. Before you heard about the program, had you already purchased and installed the [M2KEEP]?

1. Yes, I purchased and installed all [M2KEEP] before learning about the program.
  2. No, I purchased and installed only some of the [M2KEEP] before learning about the program. [ASK B BELOW]
    - b. Which equipment did you purchase before you learned about the program? [CREATE VARIABLE= M5B]
  3. No, I had not purchased and installed any of the [M2KEEP] before learning about the program.
  98. (DON'T KNOW)
  99. (REFUSED)
- M6. Overall, would you say the Focus on Energy Multifamily Energy Savings Program was very important, somewhat important, not too important or not important at all in your decision to install the energy efficient [M2KEEP]?
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  98. (DON'T KNOW)
  99. (REFUSED)
- M7. [ASK ONLY IF M1= 2, 3, 98 or 99, else skip to N1] [IF M1=3, READ: "Going back to the [M1DROP] you originally said you would not have installed without the program, do you mean you would not have installed the [M1DROP] at all?" [IF M1=2, READ:] "Let me make sure I understand. When you say you would not have installed the same equipment, do you mean you would not have installed the [M1DROP] at all?" [IF M1=98 or 99, READ ]"Would you not have installed the [M1DROP] at all?"] [DO NOT READ LIST]
1. YES, I would not have installed the measures at all. [SKIP TO SECTION N]
  2. NO, I would have installed some of the measures. [ASK A AND B BELOW]
    - a. Which equipment would you not have installed? [CREATE VARIABLE M7DROP]
    - b. Which equipment would you have installed? [CREATE VARIABLE = M7KEEP]
  98. (DON'T KNOW)
  99. (REFUSED)
- M8. Would you have installed the same types of [M7KEEP] but they would have been at a lower level of efficiency? [DO NOT READ LIST]



1. YES, I would not have installed any [M7KEEP] to the same level of efficiency. [M7KEEP = M8DROP] [SKIP TO SECTION N]
  2. NO – I would have installed all of the [M7KEEP] to the same level of efficiency. [M7KEEP = N8KEEP]
  3. NO – I would have installed only some of the measures to the same level of efficiency. [ASK A AND B BELOW]
    - a. Which equipment would you not have installed? [CREATE VARIABLE M8DROP]
    - b. Which equipment would you have installed? [CREATE VARIABLE= M8KEEP]
  98. (DON'T KNOW)
  99. (REFUSED)
- M9. Would it have been the same [M8KEEP] but fewer of them? [DO NOT READ LIST]
1. YES, you would have installed fewer of all of the [M8KEEP]
  2. NO, I would not have installed fewer of the [M8KEEP]
  3. NO, I would have only installed fewer for some of the [N8KEEP] but would have installed the same for others. [ASK A AND BE BELOW]
    - a. Which equipment would you not have installed? [CREATE VARIABLE= M9PARTIAL]
    - b. Which equipment would you have installed? [CREATE VARIABLE = M9SAME]
  98. (DON'T KNOW)
  99. (REFUSED)
- M10. And finally, would you have installed the [M8KEEP]... [READ LIST]
1. In the same year? [ASK/RECORD WHICH MEASURES = M10A]
  2. In one to two years? [ASK/RECORD WHICH MEASURES = M10B]
  3. In three to five years? [ASK/RECORD WHICH MEASURES = M10C]
  4. More than five years out? [ASK/RECORD WHICH MEASURES = M10D]
  5. Upon equipment failure? [ASK/RECORD WHICH MEASURES = M10E]
  98. (DON'T KNOW) [ASK/RECORD WHICH MEASURES = M10F]
  99. (REFUSED) [ASK/RECORD WHICH MEASURES = M10G]
- M11. Before you heard about the program, had you already purchased and installed the [M8KEEP]?
1. Yes, had purchased and installed all [M8KEEP] before learning about the program.
  2. No, had only purchased and installed some of the [M8KEEP] before learning about the program. [ASK A BELOW]
    - a. Which equipment did you purchase before you learned about the program? [CREATE VARIABLE= M11A]
  3. NO, had not purchased and installed any of the [M8KEEP].
  98. (DON'T KNOW)
  99. (REFUSED)
- M12. Overall, would you say the Focus on Energy Multifamily Energy Savings Program was very important, somewhat important, not too important or not important at all in your decision to install the [M8KEEP] measures?

1. Very important
2. Somewhat important
3. Not too important
4. Not at all important
98. (DON'T KNOW)
99. (REFUSED)

## **N. Spillover (MESP) [ASK IF PROGRAM=MESP]**

- N1. Since participating in the program, have you installed any energy efficient equipment or conducted any activity that improves the energy efficiency of your building(s) for which you did not receive a program incentive? By energy-efficient products, I mean appliances such as ENERGY STAR clothes washers; high efficiency water heaters, insulation or windows, or ENERGY STAR lighting such as CFL light bulbs?
1. (Yes)
  2. (No) **[SKIP TO SECTION J]**
  98. (DON'T KNOW) **[SKIP TO SECTION J]**
  99. (REFUSED) **[SKIP TO SECTION J]**
- N2. What equipment/activities were they?
1. **[RECORD TYPE 1]**
  2. **[RECORD TYPE 2]**
  3. **[RECORD TYPE 3]**
  98. (DON'T KNOW)
  99. (REFUSED)
- N3. Were the **[INSERT TYPE 1-3]** installed/conducted in tenant units or in common areas? **[1= Tenant units, 2= Common areas, 98=Don't know, 99=Refused]**
1. Location 1
  2. Location 2
  3. Location 3
- N4. **[ASK IF ANY RESPONSES IN N3=1, ELSE SKIP TO N6]** In what percent of your tenant units did you install the **[INSERT TYPE 1-3 THAT HAD A LOCATION OF "IN TENANT UNIT"]**?
1. Percent 1
  2. Percent 2
  3. Percent 3
- N5. **[ASK IF ANY RESPONSES IN N3=1]** And how many **[IF ANY OF TYPE 1-3 = INSULATION, READ "SQUARE FEET"]** of the **[INSERT TYPE 1-3 THAT HAD A LOCATION OF "IN TENANT UNIT"]** did you install/conduct in each tenant unit?

1. Quantity 1
2. Quantity 2
3. Quantity 3

N6. [ASK IF ANY RESPONSES IN N3=2] And how many [IF ANY OF TYPE 1-3 = INSULATION, READ "SQUARE FEET"] of the [INSERT TYPE 1-3 THAT HAD A LOCATION OF "COMMON AREA"] did you install/conduct?

1. Quantity 1
2. Quantity 2
3. Quantity 3

N7. If applicable, do you recall the efficiency level of the equipment or activity? Such as energy star qualified, for example? [INSERT TYPE 1-3]?

1. Efficiency 1
2. Efficiency 2
3. Efficiency3

Now, I'm going to read a statement about this equipment we've been discussing:

N8. Please tell me how important the Focus on Energy program is in your decision to install [INSERT EACH ONE SELECTED IN N2]. Is it very important, somewhat important, not too important, or not at all important in your decision to install these energy-efficient product(s)?

1. Very important
2. Somewhat important
3. Not too important
4. Not at all important
98. (DON'T KNOW)
99. (REFUSED)

**[SKIP TO SECTION J]**

**Focus on Energy/Territory-Wide  
Smart Farms Program  
Participating Customer Survey**

Key Research topics	Areas of Investigation for Participant Survey	Questions
<b>Program Design</b>		
1. Does the Territory Wide Smart Farms Program available to WPS agricultural customers increase participation in the Focus on Energy programs in the WPS territory?	<ul style="list-style-type: none"> <li>Effectiveness of the program design at increasing participation in the Focus on Energy BIP program.</li> <li>Smart Farms participants; awareness of the other Focus on Energy programs.</li> </ul>	Section J, K1
<b>Marketing and Outreach</b>		
2. How effective are the marketing and outreach efforts for Territory-Wide Smart Farms at reaching WPS agricultural customers?	<ul style="list-style-type: none"> <li>How do WPS customers learn about the Territory-Wide Smart Farms Program?</li> <li>Who do customers associate with the Focus on Energy incentive payments they have received?</li> </ul>	J2, K2
<b>Program Delivery</b>		
3. How effectively are the Territory-Wide programs being delivered?	<ul style="list-style-type: none"> <li>How effective is having an Energy Advisor work directly with the business.</li> <li>Did the program coordinate effectively with business' stakeholders (WPS Rewire program staff, the Trade Allies, .)</li> </ul>	Section L
<b>Program Satisfaction</b>		
4. Are the Territory-Smart Farms customers satisfied with the program?	<ul style="list-style-type: none"> <li>Customer satisfaction with the incentive, and with the process for receiving the additional rebates.</li> </ul>	Section M
<b>Lessons Learned</b>		

5. Are there lessons learned from the Smart Farms Program that can be applied to other Focus on Energy programs?	<ul style="list-style-type: none"> <li>• What aspects of the Smart Farms Program did the participants feel were effective for helping them save energy?</li> </ul>	J8, Section L
<b>Net-To-Gross and Attribution</b>		
6. Can savings be attributed to the WPS Territory-Wide Smart Farms incentives?	<ul style="list-style-type: none"> <li>• Spill over and NTG Battery</li> </ul>	Section G and Section I

INTERVIEWER INSTRUCTIONS ARE IN GREEN.

CATI PROGRAMMING INSTRUCTIONS ARE IN RED.

Words in parenthesis should not be read to respondent

**Sample Requirements:**

- [PHONE] Phone 1 Area Code and Phone 1
- [COMPANY] Customer Name
- [CONTACT] First Name 1 and Last Name 1
- [ADDRESS]
- [MEASURE1] Measure 1 Category
- [MEASURE2]
- [MEASURE3]
- [MEASURE 1 OR C\_MEASURE1 INCENTIVE TOTAL]
- [Smart Farms INCENTIVE AMOUNT]
- [FOCUS PROGRAM] – Name of Focus Program received base incentive from (Business Incentive Participants (BIP), MULTIFAMILY ENERGY SAVINGS PROGRAM (MESP) AND CHAINS STORES AND FRANCHISES (CS&F)
- [FOCUS PROGRAM INCENTIVE AMOUNT]

**INFORMATION FOR INTERVIEWER**

*This survey is to gather participant feedback on the Smart Farms Program.*

- 1. Although this incentive is offered through Focus on Energy, it is not available to all Focus on Energy customers.*
- 2. To be eligible customers must be a customer of the Wisconsin Public Service/WPS and have participated in the Business Incentive Program or Chain Stores and Franchises Program.*
- 3. The first part of this survey addresses the Business Incentive Program or Small Business Incentive Program, and the second part addresses the Smart Farms Program.*
- 4. Customers may have also participated in the Energy Bundle Bonus Program, but we are not addressing that Program in this survey.*

## A. Introduction

- A1. Hello, my name is \_\_\_\_\_ and I'm calling with a short survey on behalf of Focus on Energy. Could I please speak with [CONTACT] or the person who is most familiar with the energy-efficiency decisions for your business?
1. (Yes)
  2. (No, but person can come to phone) [START OVER AT A1 WITH NEW RESPONDENT]
  3. (No, not available) [SCHEDULE CALLBACK]
  98. (Don't know) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START AGAIN]
  99. (Refused) [THANK AND TERMINATE]

Back-up information, not to be programmed:

[If "No – Not available," ask if Respondent would like to arrange a more convenient time for us to call them back or if you can leave a message for that person.]

[IF RESPONDENT ASKS HOW LONG, SAY: "APPROXIMATELY 20 MINUTES."]

[IF NEEDED: This survey is for research purposes only and this is not a marketing call. Your participation in this study is important so that Focus on Energy can improve the energy-efficiency programs it offers to agricultural businesses and other organizations.]

[Only if asked for a Focus on Energy contact to verify the survey authenticity, offer Joe Fontaine at 608-266-0910, with the Public Service Commission of Wisconsin.]

First, I need to confirm our records.

- A2. Our records show that you installed energy-efficient equipment including [MEASURE1], [MEASURE2], and [MEASURE3]. To ensure our records are correct, can you confirm that you installed these upgrades in the past two years?
1. (Yes)
  2. (No, wrong year) [RECORD CORRECT YEAR, IF POSSIBLE]
  3. (No, wrong measure) [CORRECT BELOW]
    - a. (MEASURE1 is incorrect [CORRECT: \_\_\_\_\_]) [CALL THIS VARIABLE C\_MEASURE1]
    - b. (MEASURE2 is incorrect [CORRECT: \_\_\_\_\_])
    - c. (MEASURE3 is incorrect [CORRECT: \_\_\_\_\_])
  4. (No, I did not install any measures) [THANK AND TERMINATE]
  98. (Don't know) [IS THERE SOMEONE WE COULD SPEAK WITH THAT WOULD KNOW THIS? RECORD NAME AND CONTACT INFORMATION: \_\_\_\_\_]
  99. (Refused) [THANK AND TERMINATE]

A3. Our records also show that your business received an incentive or discount through the [FOCUS PROGRAM] of [FOCUS PROGRAM INCENTIVE AMOUNT]. [IF NEEDED READ: THIS MAY HAVE BEEN IN ADDITION TO OTHER INCENTIVES YOU RECEIVED]. Is that correct?

1. (Yes)
2. (No) [THANK AND TERMINATE]
98. (Don't know) [THANK AND TERMINATE]
99. (Refused) [THANK AND TERMINATE]

A4. [IF [FOCUS PROGRAM] =BUSINESS INCENTIVE PROGRAM ASK] I'm going to read you a short list. Please tell me if a contractor, vendor, or Focus on Energy staff person was involved in any of the following steps: [READ LIST AND SELECT ALL THAT APPLY: 1=CONTRACTOR OR VENDOR INVOLVED, 2= FOCUS ON ENERGY STAFF INVOLVED; 3=NEITHER INVOLVED; 98=DON'T KNOW; 99=REFUSED]

1. Project initiation
2. Decisions about project design
3. Equipment selection
4. Equipment installation
98. (Don't know)
99. (Refused)

**B. Section removed; Section heading kept to maintain lettering.**

**C. Section removed; Section heading kept to maintain lettering.**

**D. Section removed; Section heading kept to maintain lettering.**

**E. Section removed; Section heading kept to maintain lettering.**

**F. Section removed; Section heading kept to maintain lettering.**

**G. Freeridership**

Now I'd like to talk with you a bit about your decisions to purchase the new [MEASURE1 OR C\_MEASURE1]. Even though you may have received incentives on other energy saving equipment and from other programs, these questions are just about the [MEASURE1 OR C\_MEASURE1] that was purchased and the incentive you received from the [FOCUS PROGRAM].

[NOTE: THIS SECTION IS BASED ON HYPOTHETICAL BEHAVIOR SO WE ARE ASKING SIMILAR QUESTIONS TO VERIFY THAT WE ARE GATHERING THE CORRECT RESPONSES.]

G1. At the time that you first heard about the financial incentive, had you...? [READ LIST AND RECORD ONE FOR EACH: 1=YES OR 2=NO OR 98=DON'T KNOW OR 99=REFUSED]

1. Already been thinking about purchasing [MEASURE1 OR C\_MEASURE1]?
2. Already begun collecting information about [MEASURE1 OR C\_MEASURE1]?
3. Already selected the particular [MEASURE1 OR C\_MEASURE1] and were going to purchase it?
4. Already purchased the [MEASURE1 OR C\_MEASURE1]?
5. Already installed the [MEASURE1 OR C\_MEASURE1]?
98. (Don't know)
99. (Refused)

G2. Just to make sure I understand, did your organization have specific plans to install the [MEASURE1 OR C\_MEASURE1][s] before learning about the incentive?

1. (Yes) [ASK G3]
2. (No) [SKIP TO G4]
98. (Don't know) [SKIP TO G4]
99. (Refused) [SKIP TO G4]

G3. Prior to learning about the incentive, was the purchase of the [MEASURE1 OR C\_MEASURE1][s] included in your organization's capital budget?

1. (Yes) [ASK G4]
2. (No) [ASK G4]
98. (Don't know) [ASK G4]
99. (Refused) [ASK G4]

G4. Would you have purchased and installed the same [MEASURE1 OR C\_MEASURE1][s] without the incentive?

1. (Yes) [SKIP TO G7]
2. (No) [SKIP TO G9]
98. (Don't know) [ASK G5]
99. (Refused) [ASK G5]

G5. Would you have installed something without the incentive? [DO NOT READ LIST UNLESS NECESSARY]

1. (Yes, would have installed something) [ASK G6]
2. (No, would NOT have installed anything) [SKIP TO G10]
98. (Don't know) [SKIP TO I1]
99. (Refused) [SKIP TO I1]



G6. When you say you would have installed something, would you have installed something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?

1. (Yes) [ASK G7]
2. (No) [ASK G7]
98. (Don't know) [ASK G7]
99. (Refused) [ASK G7]

G7. [ASK FOR MEASURE WITH ACTUAL UNIT GREATER THAN 1] And without the incentive, would you have installed the same number of [MEASURE1 OR C\_MEASURE1][s]?

1. (Yes) [ASK G8]
2. (No) [ASK G8G7.2a]
  - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1][s]? [ASK G8]
98. (Don't know) [ASK G8]
99. (Refused) [ASK G8]

G8. Without the [INCENTIVE FOR MEASURE1 OR C\_MEASURE1], would you have installed the [MEASURE1 OR C\_MEASURE1][S]...[READ LIST AND RECORD ONE RESPONSE]

1. Within the same year? [SKIP TO I1]
2. Within one to two years? [SKIP TO I1]
3. Within three to five years? [SKIP TO I1]
4. In more than five years? [SKIP TO I1]
98. (Don't know) [SKIP TO I1]
99. (Refused) [SKIP TO I1]

[ASK G9 TO G12 IF G4 =2 OR G5 = 2]

G9. When you say you would not have installed the same [MEASURE1 OR C\_MEASURE1][s] without the incentive, would you have installed anything at all?

1. (Yes, would have installed something) [ASK G10]
2. (No, would not have installed anything at all) [SKIP TO I1]
98. (Don't know) [ASK G10]
99. (Refused) [ASK G10]

G10. Without the incentive, would you have installed something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?

1. (Yes) [ASK G11]
2. (No) [ASK G11]
98. (Don't know) [ASK G11]
99. (Refused) [ASK G11]

G11. [ASK FOR MEASURE WITH ACTUAL UNITS GREATER THAN 1] Without the incentive, would you have installed the same [MEASURE1 OR C\_MEASURE1][s]?

1. (Yes) [ASK G12]
2. (No) [ASK G11.2A]
  - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1][s]? [ASK G12]
98. (Don't know) [ASK G12]
99. (Refused) [ASK G12]

G12. And, would you have installed the same [MEASURE1 OR C\_MEASURE1][S]...[READ LIST AND RECORD ONE RESPONSE]

1. In the same year? [SKIP TO I1]
2. In one to two years? [SKIP TO I1]
3. In three to five years? [SKIP TO I1]
4. More than five years out? [SKIP TO I1]
98. (Don't know) [SKIP TO I1]
99. (Refused) [SKIP TO I1]

**H. Section removed; Section heading kept to maintain lettering.**

**I. Spillover**

I1. Since making these energy-efficiency upgrades has your company installed any other energy-efficient products in your facility that you did *NOT* receive an incentive for? By energy-efficient products, I mean high-efficiency lighting such as T5s; high efficiency motors and variable speed drives; high efficiency air conditioners and heat pumps, efficient heating or water heating equipment, etcetera.

1. (Yes) [ASK SECTION I2]
2. (No) [SKIP TO SECTION J]
98. (Don't know) [SKIP TO SECTION J]
99. (Refused) [SKIP TO SECTION J]

I2. Are these products also installed at [ADDRESS] or at a different location?

1. (Same location)
2. (Different location)
98. (Don't know)
99. (Refused)

13. What were the other energy-efficient products that you installed without getting an incentive? [DO NOT READ LIST; MARK ALL THAT APPLY; 98=DON'T KNOW, 99=REFUSED] [IF THE CUSTOMER SAYS THEY BOUGHT SOMETHING BUT HAVE NOT INSTALLED IT, THE EQUIPMENT HAS TO BE INSTALLED AND OPERATING FOR US TO COUNT IT TOWARDS SPILLOVER.]

1. (CFLs)
2. (LEDs)
3. (Fluorescent tubes; T5s, T8s, etc.)
4. (Efficient lighting controls: occupancy sensors, daylighting, timers)
5. (High efficiency motors)
6. (Air source heat pumps)
7. (Ground source heat pumps)
8. (Central AC)
9. (VSD: variable speed drive)
10. (Boiler)
11. (Compressed air regulator)
12. (Gas furnaces)
13. (Exit signs)
14. (Refrigeration equipment: refrigerators, freezers)
15. (Other) [SPECIFY: \_\_\_\_\_]
98. (Don't know)
99. (Refused)

14. [REPEAT FOR EACH ITEM MENTIONED IN I3] How many [INSERT ITEM FROM I3] did you install?

1. [RECORD NUMBER \_\_\_\_\_]
98. (Don't know)
99. (Refused)

15. [REPEAT FOR EACH ITEM MENTIONED IN I3] Please tell me how important the incentive for [INSERT MEASURE1] was in your decision to install [INSERT ITEM FROM I3]. Was it very important, somewhat important, not too important, or not at all important [INSERT ITEM FROM I3]?

1. Very important
2. Somewhat important
3. Not too important or
4. Not at all important
98. (Don't know)
99. (Refused)

16. [EMPHASIZE EACH ANSWER OPTION AND PAUSE IN BETWEEN EACH OPTION. AFTER THE SECOND ITEM, READ:] And using the same scale, please rate how important the incentive was in your decision to install [ANSWER FROM I3].
1. Very important
  2. Somewhat important
  3. Not too important or
  4. Not at all important
  98. (Don't know)
  99. (Refused)
17. [ASK FOR ALL MENTIONED IN I3] Did you receive an incentive for installing [INSERT ANSWER FROM I3]? [DO NOT READ ANSWER LIST]
1. (Yes)
  2. (No)
  3. (Item did not qualify)
  4. (Contractor or vendor received the incentive)
  98. (Don't know)
  99. (Refused)
18. [ASK IF I2=2] What is the address of the location where you installed [INSERT EACH ITEM FROM I3]?
1. [RECORD STREET ADDRESS\_\_\_\_\_]
  2. [RECORD CITY\_\_\_\_\_]
  3. [RECORD STATE\_\_\_\_\_]
  4. [RECORD ZIP CODE\_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

## J. Smart Farms Questions

Now we have a few questions about other programs.

- J1. Are you aware of the Smart Farms Program?
1. (Yes)
  2. (No)
  98. (Don't know)
  99. (Refused)

- J2. [ASK IF J1=1] Can you tell me who sponsored the Smart Farms Program? [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (WPS/Wisconsin Public Service)
  2. (Focus on Energy)
  3. (Other [SPECIFY: \_\_\_\_\_])
  98. (Don't know)
  99. (Refused)
- J3. [ASK IF J1=2, 98, OR 99] This program offers WPS agricultural customers the opportunity to receive up to 60% of their project costs for implementing energy-efficiency measures, have an energy audit, and work with an Energy Advisor. Are you aware of this program?
1. (Yes)
  2. (No)
  98. (Don't know)
  99. (Refused)
- J4. [ASK EVERYONE] Our records show that your company received an additional incentive of [SMART FARMS INCENTIVE] dollars from the WPS Smart Farms program for installing the [MEASURE1], [MEASURE2], and [MEASURE3] is that correct?
1. (Yes)
  2. (No, didn't receive an extra incentive)
  3. (Received incentive; amount is incorrect) [RECORD CORRECT AMOUNT]
  98. (Don't know)
  99. (Refused) [SKIP TO K1 BUT DON'T COUNT TOWARD QUOTA]
- J5. [ASK IF J4=2 OR 98] Just to confirm, [IF J4=2: YOUR COMPANY DID NOT RECEIVE] [IF J4= 99: YOU DO NOT KNOW IF YOUR COMPANY RECEIVED] an additional financial incentive from the WPS Smart Farms Program in addition to the incentive provided by the business program, is that correct?
1. (No , they did not receive an incentive from WPS) [SKIP TO K1 BUT DON'T COUNT TOWARD QUOTA]
  2. (Yes, they did receive an incentive from WPS)
  98. (Don't know) [SKIP TO K1 BUT DON'T COUNT TOWARD QUOTA]
  99. (Refused) [SKIP TO K1 UT DON'T COUNT TOWARD QUOTA]

J6. [ASK IF J4=1 OR 3 OR J5=2] When did your organization learn about the WPS Smart Farms program?

Was it ... [READ LIST AND SELECT ONE RESPONSE]

1. Before making the decision to purchase any of the equipment.
2. While making the decision to purchase the first type of equipment.
3. While making the decision to purchase the first type of equipment, but before deciding to purchase the additional equipment.
4. After making the decision to purchase the additional equipment.
5. (Other [SPECIFY: \_\_\_\_\_])
98. (Don't know)
99. (Refused)

J7. The Smart Farms Program paid the difference between the incentives you received through the [FOCUS PROGRAM] and 60% of your approved costs for installing the measures we've been discussing. Was this increase in the incentive a factor in your decision to install more measures?

1. (Yes)
2. (No)
98. (Don't know)
99. (Refused)

J8. How important was the increasing incentive from the Smart Farms program in your decision to install [INSERT # OF MEASURE GROUPS] types of equipment? Was it ... [READ LIST]

1. Very important
2. Somewhat important
3. Not too important
4. Not important at all
98. (Don't know)
99. (Refused)

J9. If you had not received the Smart Farms incentive for [SMART FARMS INCENTIVE AMOUNT] for the [INSERT # OF MEASURE GROUPS] types of equipment, would you have still purchased the [MEASURE1], [MEASURE 2], and [MEASURE3]?

1. (Yes)
2. (No)
3. (Other [SPECIFY/RECORD COMMENTS: \_\_\_\_\_])
98. (Don't know)
99. (Refused)

### K. Program Awareness

The next few questions are about what you have heard about these programs.

K1. **[ASK EVERYONE]** Please tell me which of the following Focus on Energy programs you have heard of?

**[READ EACH AND RECORD YES OR NO]**

1. Business Incentive Program
2. Small Business Incentive Program
3. Large Energy Users
4. Renewable Energy Program
5. Energy Bundle Bonus
6. Another program **[SPECIFY \_\_\_\_\_]**
98. (Don't know)
99. (Refused)

**[ASK K2-M6 IF J4=1 OR 3 OR J5=2]**

K2. How did you first hear about the Smart Farms Program? **[DO NOT READ, PROMPT IF NECESSARY;RECORD ONE RESPONSE] [IF MORE THAN ONE: FROM WHICH SOURCE DID YOU FIRST LEARN ABOUT THE PROGRAM?] [IF THEY SAY WPS, ASK: DO YOU KNOW IF THEY WERE WORKING WITH THE SMART FARMS PROGRAM OR THE WPS REWIRE PROGRAM? IF SMART FARMS RECORD UNDER "ENERGY ADVISOR TOLD ME"]**

1. (Received letter promoting Program)
 

K2-1. (Do you know what organization the letter was from? **[PROMPT IF NECESSARY]**)

  - a. (Smart Farms)
  - b. (WPS)
  - c. (Focus On Energy)
  - d. (Other **[SPECIFY: \_\_\_\_\_]** )

98. (Don't know)

99. (Refused)
  
2. (Received phone call)
 

K2-2. (Do you know what organization the person who contacted you was with? **[PROMPT IF NECESSARY]**)

  - a. (Smart Farms)
  - b. (WPS)
  - c. (Focus On Energy)
  - d. (Other **[SPECIFY: \_\_\_\_\_]** )

98. (Don't know)

99. (Refused)
  
3. (Energy Advisor told me)
 

K2-3. (What organization is the Energy Advisor who contacted you with? **[PROMPT IF NECESSARY]**)

- a. (Smart Farms)
  - b. (WPS)
  - c. (Focus On Energy)
  - d. (Other [SPECIFY: \_\_\_\_\_] )
  - 98. (Don't know)
  - 99. (Refused)
4. (Program staff told me)  
K2-4. (What organization is the program staff who contacted you with?)[PROMPT IF NECESSARY]
- a. (Smart Farms)
  - b. (WPS)
  - c. (Focus On Energy)
  - d. (Other [SPECIFY: \_\_\_\_\_] )
  - 98. (Don't know)
  - 99. (Refused)
5. (Contractor told me [SPECIFY TYPE OF CONTACTOR: \_\_\_\_\_])
6. (WPS Rewire Program Staff told me)
7. (Friend, family member, colleague)
8. (Community Event/Fair)
9. (Other [SPECIFY: \_\_\_\_\_])
98. (Don't know)
99. (Refused)

## L. Program Delivery

- L1. How important were the results of the Smart Farms Program's walk-through audit to your decision to implement the energy-saving measures we've been discussing? Would you say they were [READ LIST, REPEAT AS NEEDED]
- 1. Very important [SKIP TO L3]
  - 2. Somewhat important [SKIP TO L3]
  - 3. Not too important
  - 4. Not at all important
  - 98. (Don't know) [SKIP TO L3]
  - 99. (Refused) [SKIP TO L3]
- L2. [ASK IF L1=3 OR 4] How could the Smart Farms Program walk-through audit have been more effective?
- 1. [RECORD \_\_\_\_\_]
  - 98. (Don't know)
  - 99. (Refused)



L3. How important was working with the Energy Advisor to your decision to implement the energy-saving measures we've been discussing? Would you say they were... [READ LIST, REPEAT AS NEEDED]

1. Very important [SKIP TO Section 0]
2. Somewhat important [SKIP TO Section 0]
3. Not too important
4. Not at all important
98. (Don't know) [SKIP TO Section 0]
99. (Refused) [SKIP TO Section 0]

L4. How could the Energy Advisor have been more effective?

1. [RECORD \_\_\_\_\_]
98. (Don't know)
99. (Refused)

## M. Satisfaction

M1. Would you say you are [READ LIST] with the amount of the incentive you received from the Smart Farms Program?

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied
98. (Don't know)
99. (Refused)

M2. [ASK IF M1 =3 OR 4] What are the reasons you are dissatisfied with the incentive amount?

1. [RECORD \_\_\_\_\_]
98. (Don't know)
99. (Refused)

M3. How satisfied would you say you are with the process for receiving the Smart Farms Program incentive? Would you say you are ... [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO M1.A4.1]
2. Somewhat satisfied [SKIP TO M1.A4.1]
3. Not too satisfied
4. Not at all satisfied
98. (Don't know) [SKIP TO M1.A4.1]
99. (Refused) [SKIP TO M1.A4.1]

M4. [ASK IF M3=3 OR 4] What are the reasons you are dissatisfied with the incentive process?

1. [RECORD \_\_\_\_\_]
98. (Don't know)
99. (Refused)

M5. How would you rate your experience with the Smart Farms Program overall? Would you say you are [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO SECTION M1.A4.1]
2. Somewhat satisfied [SKIP TO SECTION M1.A4.1]
3. Not too satisfied
4. Not at all satisfied
98. (Don't know) [SKIP TO SECTION M1.A4.1]
99. (Refused) [SKIP TO SECTION M1.A4.1]

M6. [ASK IF 1=3 OR 4] What about your experience were you dissatisfied with?

1. [RECORD \_\_\_\_\_]
98. (Don't know)
99. (Refused)

## N. Company Demographics

N1. Finally, I would like to ask you some questions about your company.

N2. Does your organization lease or own the facility?

1. (Lease)
2. (Own)
3. (Other [SPECIFY: \_\_\_\_\_])
98. (Don't know)
99. (Refused)

N3. What is the square footage of the heated and cooled space in this facility? [NUMERIC OPEN END UP TO 1,000,000]

1. [RECORD NUMBER: \_\_\_\_\_]
98. (Don't know)
99. (Refused)

N4. How many people are employed at this location?

1. [RECORD NUMBER: \_\_\_\_\_]
98. (Don't know)
99. (Refused)

N5. [INTERVIEWER: RECORD GENDER]

1. Female
2. Male

## ***O. Closing***

Thank you. We appreciate your help with this survey. Have a nice day.

**Focus on Energy/Territory-Wide  
Schools and Government Program  
Participating Customer Survey**

Key Research topics	Areas of Investigation for Participant Survey	Questions
<b>Program Design</b>		
1. Does the Territory-Wide Schools and Government Program available to schools and governments in WPS territory increase participation in the Focus on Energy programs in the WPS territory?	<ul style="list-style-type: none"> <li>Effectiveness of the Program at increasing participation in the Focus on Energy programs.</li> <li>Schools and Government Program participants' awareness of the other Focus on Energy programs</li> </ul>	K1, O, J7, J8, J9
<b>Marketing and Outreach</b>		
2. How effective are the marketing and outreach efforts for the Territory-Wide Schools and Government Program at reaching schools and governments in the WPS territory?	<ul style="list-style-type: none"> <li>How do schools and governments in WPS territory learn about the Territory-Wide Schools and Government Program?</li> <li>Who do customers associate with the Focus on Energy support and incentive payments they have received?</li> </ul>	J1, J2, K2, K2, O
<b>Program Delivery</b>		
3. How effectively are the Territory-Wide programs being delivered?	<ul style="list-style-type: none"> <li>How effectively were the Schools and Government Program components delivered to the participating jurisdictions?</li> </ul>	Section M
<b>Program Satisfaction</b>		
4. Are the Territory-Wide Schools and Government Program customers satisfied with the Program?	<ul style="list-style-type: none"> <li>Customer satisfaction with the incentive, and with the process for receiving the additional rebates.</li> </ul>	Section N
<b>Lessons Learned</b>		
5. Are there lessons learned from the Schools and Government Program that can be applied to other Focus on Energy programs?	<ul style="list-style-type: none"> <li>What aspects of the Schools and Government Program did the participants feel were effective for helping them save energy in both the short and long term?</li> </ul>	Section M
<b>Net-To-Gross and Attribution</b>		
6. Can savings be attributed to the WPS Territory-Wide Schools and Government Program incentives?	<ul style="list-style-type: none"> <li>Spill over and NTG battery</li> <li>Attribution battery</li> </ul>	Sections G, H, I, and J

Interviewer instructions are in green.

CATI programming instructions are in red.

Words in parentheses should not be read to respondent

**SAMPLE Requirements:**

- [PHONE] Phone 1 Area Code and Phone 1
- [JURISDICTION] Customer Name
- [CONTACT] First Name 1 and Last Name 1
- [ADDRESS]
- [MEASURE1] Measure 1 Category
- [MEASURE2]
- [MEASURE3]
- [MEASURE 1 OR C\_MEASURE1 INCENTIVE TOTAL]
- [MEASURE 1 >1] Yes or No.
- [TOTAL SCHOOLS AND GOVERNMENT BONUS INCENTIVE AMOUNT]
- [PILOT WINNER] Yes or No
- [FOCUS PROGRAM] – Name of Focus Program received base incentive from (Business Incentive Participants (BIP)
- [FOCUS PROGRAM INCENTIVE AMOUNT]

## **A. Introduction**

### *INFORMATION FOR INTERVIEWER*

*This survey is to gather participant feedback on the Schools and Government Program. Although the incentives for this program are offered through Focus on Energy, it is not available to all Focus on Energy customers.*

- 1. To be eligible customers must be a customer of the Wisconsin Public Service/WPS and have participated in the Business Incentive Program or Small Business Incentive Program.*
- 2. The first part of this survey addresses the Business Incentive Program or Small Business Incentive Program, and the second part addresses the Schools and Government Program.*
- 3. Customers may have also participated in the Energy Bundle Bonus Program, but we are not addressing that Program in this survey.*
- 4. Do not mention WPS until it is mentioned in the survey.*

- A1. Hello, my name is \_\_\_\_\_ and I'm calling with a short survey on behalf of Focus on Energy. We are conducting a study regarding energy savings programs available to schools and government facilities. [SKIP IF 2<sup>ND</sup> RESPONDENT] Could I please speak with [CONTACT] or the person who is most familiar with the energy-efficiency decisions for your jurisdiction?
1. Yes
  2. No, but person can come to phone [START OVER AT A1 WITH NEW RESPONDENT]
  3. No, not available [SCHEDULE CALLBACK]
  98. (DON'T KNOW) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START AGAIN]
  99. (REFUSED) [THANK AND TERMINATE]

Back-up information, not to be programmed:

[If "No – Not available," ask if you can arrange a time for us to call them back or if you can leave a message for that person.]

[IF RESPONDENT ASKS HOW LONG, SAY: "APPROXIMATELY 15 to 20 MINUTES."]

[IF NEEDED:] This survey is for research purposes only and this is not a marketing call. Your participation in this study is important so that Focus on Energy can improve the energy-efficiency programs it offers to schools and government facilities in the future.

[Only if asked for a Focus on Energy contact to verify the survey authenticity, offer Joe Fontaine at 608-266-0910 with the Public Service Commission of Wisconsin.]

**First, I would like to confirm our records.**

- A2. Our records show that you installed energy-efficient equipment including [MEASURE1], [MEASURE2], and [MEASURE3]. To ensure our records are correct, can you confirm that you installed these upgrades between the fall of 2012 and the end of 2013?
1. Yes
  2. No, wrong year [Record correct year, if possible]
  3. No, wrong measure [CORRECT BELOW]
    - a. MEASURE1 IS INCORRECT [Correct: \_\_\_\_\_] [CALL THIS VARIABLE C\_MEASURE1]
    - b. MEASURE2 IS INCORRECT [Correct: \_\_\_\_\_]
    - c. MEASURE3 IS INCORRECT [Correct: \_\_\_\_\_]
  4. No, I did not install any measures [THANK AND TERMINATE]
  98. (DON'T KNOW) [Is there someone we could speak with that would know this? Record name and contact information: \_\_\_\_\_]
  99. (Refused) [THANK AND TERMINATE]
- A3. Our records also show that your business received an incentive or discount through the [FOCUS PROGRAM] of [FOCUS PROGRAM INCENTIVE AMOUNT]. This would have been for your entire jurisdiction, not just one site that you worked on. [IF NEEDED READ: This may have been in addition to other incentives you received]. Is that correct?

1. Yes
2. Yes, but program name is incorrect
  - a. [ENTER CORRECT PROGRAM NAME]
3. Yes, but incentive amount is incorrect
  - b. [ENTER CORRECT INCENTIVE AMOUNT]
4. No, we did not receive an incentive [THANK AND TERMINATE]
98. (DON'T KNOW) [THANK AND TERMINATE]
99. (REFUSED) [THANK AND TERMINATE]

[IF [FOCUS PROGRAM] =BUSINESS INCENTIVE PROGRAM ASK]

A4. I'm going to read you a short list. Please tell me if a contractor, vendor, or Focus on Energy staff person was involved in any of the following steps: [READ LIST AND SELECT ALL THAT APPLY: 1=CONTRACTOR OR VENDOR INVOLVED, 2= FOCUS ON ENERGY STAFF INVOLVED; 3=NEITHER INVOLVED; 98=DON'T KNOW; 99 REFUSED]

1. Project initiation [IF =1 THEN SKIP SECTION G AND ASK SECTION H]
2. Decisions about project design [IF=1 THEN SKIP SECTION G AND ASK SECTION H]
3. Equipment selection [IF=1 THEN SKIP SECTION G AND ASK SECTION H]
4. Equipment installation
98. (DON'T KNOW)
99. (REFUSED)

B. *Section removed; Section heading kept to maintain lettering.*

C. *Section removed; Section heading kept to maintain lettering.*

D. *Section removed; Section heading kept to maintain lettering.*

E. *Section removed; Section heading kept to maintain lettering.*

F. *Section removed; Section heading kept to maintain lettering.*

G. **+Freeridership**

[IF [FOCUS PROGRAM = BUSINESSESS INCENTIVE PROGRAM, ASK EITHER SECTION G OR SECTION H]

[IF A4.1=1 OR A4.2=1 OR A4.3=1 SKIP TO SECTION H OTHERWISE ASK THIS SECTION - CONTRACTOR DID NOT HELP IN THE DECISION MAKING OF DID NOT KNOW OR REFUSED]

Now I'd like to talk with you a bit about your decisions to purchase the new [MEASURE1 OR C\_MEASURE1]. Even though you may have received incentives on other energy saving equipment and from other programs, these questions are just about the [MEASURE1 OR C\_MEASURE1] that was purchased and the incentive you received from the [FOCUS PROGRAM].

[INTERVIEWER NOTE ABOUT THIS SECTION (don't read to respondent): This section is based on hypothetical behavior so we are asking similar questions to verify that we are gathering the correct responses.]

- G1. At the time that you first heard about the financial incentive, had you...? [READ LIST AND RECORD ONE FOR EACH: 1=YES OR 2=NO OR 98=DON'T KNOW OR 99=REFUSED]
1. Already been thinking about purchasing [MEASURE1 OR C\_MEASURE1]?
  2. Already begun collecting information about [MEASURE1 OR C\_MEASURE1]?
  3. Already selected the particular [MEASURE1 OR C\_MEASURE1] and were going to purchase it?
  4. Already purchased the [MEASURE1 OR C\_MEASURE1]?
  5. Already installed the [MEASURE1 OR C\_MEASURE1]?
- G2. Just to make sure I understand, did your jurisdiction have specific plans to install the [MEASURE1 OR C\_MEASURE1][s] before learning about the incentive?
1. Yes [ASK G3]
  2. No [SKIP TO G4]
  98. (DON'T KNOW) [SKIP TO G4]
  99. (REFUSED) [SKIP TO G4]
- G3. Prior to learning about the incentive, was the purchase of the [MEASURE1 OR C\_MEASURE1][s] included in your organization's capital budget?
1. Yes [ASK G4]
  2. No [ASK G4]
  98. (DON'T KNOW) [ASK G4]
  99. (REFUSED) [ASK G4]
- G4. Would you have purchased and installed the same [MEASURE1 OR C\_MEASURE1][s] without the incentive?
1. Yes [SKIP TO G7]
  2. No [SKIP TO G9]
  98. (DON'T KNOW) [ASK G5]
  99. (REFUSED) [ASK G5]
- G5. Would you have installed **something** without the incentive? [DO NOT READ LIST UNLESS NECESSARY]
1. Yes, would have installed something [ASK G6]
  2. No, would NOT have installed anything [SKIP TO G10]
  98. (DON'T KNOW) [SKIP TO I1]
  99. (REFUSED) [SKIP TO I1]
- G6. When you say you **would have installed** something, would you have installed something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?
1. Yes [ASK G7]
  2. No [ASK G7]



- 98. (DON'T KNOW) [ASK G7]
- 99. (REFUSED) [ASK G7]

G7. [ASK FOR MEASURE WITH ACTUAL UNIT GREATER THAN 1] And without the incentive, would you have installed the same number of [MEASURE1 OR C\_MEASURE1][s]?

- 1. Yes [ASK G8]
- 2. No [ASK G7.2a]
  - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1](s)? [ASK G8]
- 98. (DON'T KNOW) [ASK G8]
- 99. (REFUSED) [ASK G8]

G8. Without the [INCENTIVE FOR MEASURE1 OR C\_MEASURE1], would you have installed the [MEASURE1 OR C\_MEASURE1][s]...[READ LIST AND RECORD ONE RESPONSE]

- 1. Within the same year? [SKIP TO I1]
- 2. Within one to two years? [SKIP TO I1]
- 3. Within three to five years? [SKIP TO I1]
- 4. In more than five years? [SKIP TO I1]
- 98. (DON'T KNOW) [SKIP TO I1]
- 99. (REFUSED) [SKIP TO I1]

[ASK G9TO G12 IF G4 =2 OR G5 = 2]

G9. When you say **you would not have installed** the same [MEASURE1 OR C\_MEASURE1][s] without the incentive, would you have installed anything at all?

- 1. Yes, would have installed something [ASK G10]
- 2. No, would not have installed anything at all [SKIP TO I1]
- 98. (DON'T KNOW) [ASK G10]
- 99. (REFUSED) [ASK G10]

G10. Without the incentive, would you have installed something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?

- 1. Yes [ASK G11]
- 2. No [ASK G11]
- 98. (DON'T KNOW) [ASK G11]
- 99. (REFUSED) [ASK G11]

G11. [ASK FOR MEASURE WITH ACTUAL UNITS GREATER THAN 1] Without the incentive, would you have installed the same [MEASURE1 OR C\_MEASURE1][s]?

- 1. Yes [ASK G12]
- 2. No [ASK G11.2A]
  - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1](s)? [ASK G12]
- 98. (DON'T KNOW) [ASK G12]
- 99. (REFUSED) [ASK G12]

G12. And, would you have installed the same [MEASURE1 OR C\_MEASURE1][s] . . . [READ LIST AND RECORD ONE RESPONSE]

1. In the same year? [SKIP TO I1]
2. In one to two years? [SKIP TO I1]
3. In three to five years? [SKIP TO I1]
4. More than five years out? [SKIP TO I1]
98. (DON'T KNOW) [SKIP TO I1]
99. (REFUSED) [SKIP TO I1]

## H. *+Freeridership*

[ASK EITHER SECTION G OR SECTION H]

[ASK SECTION H IF ANY A4.1 OR A4.2 OR A4.3=1 – CONTRACTOR HELPED IN THE DECISION MAKING]

Now I'd like to talk with you about the new [MEASURE1 OR C\_MEASURE1]. Even though your contractor may have installed other energy-efficient equipment, these questions are just about the [MEASURE1 OR C\_MEASURE1].

[INTERVIEWER NOTE ABOUT THIS SECTION (don't read to respondent): This section is based on hypothetical behavior so we are asking similar questions to verify that we are gathering the correct responses.]

H1. At the time that you first started working with your contractor on this project, had you...? [READ LIST AND RECORD ONE FOR EACH: 1=YES OR 2=NO OR 98=DON'T KNOW OR 99=REFUSED]

1. Already been thinking about purchasing [MEASURE1 OR C\_MEASURE1]?
2. Already begun collecting information about [MEASURE1 OR C\_MEASURE1]?
3. Already selected the particular [MEASURE1 OR C\_MEASURE1] and were going to purchase it?
4. Already purchased the [MEASURE1 OR C\_MEASURE1]?
5. Already installed the [MEASURE1 OR C\_MEASURE1]?

H2. Just to make sure I understand, did your organization have specific plans to install the [MEASURE1 OR C\_MEASURE1][s] before you began working with your contractor?

1. Yes [ASK H3]
2. No [SKIP TO H4]
98. (DON'T KNOW) [SKIP TO H4]
99. (REFUSED) [SKIP TO H4]

H3. Before you began working with your contractor, was the purchase of the [MEASURE1 OR C\_MEASURE1][s] included in your organization's capital budget?

1. Yes [ASK:]
  - a. Did your contractor help your organization make the decision to include the purchase of [MEASURE1 OR C\_MEASURE1][s] in your organization's capital budget? [ASK H4]
2. No [ASK H4]

- 98. (DON'T KNOW) [ASK H4]
- 99. (REFUSED) [ASK H4]

H4. Would you have purchased and installed the same [MEASURE1 OR C\_MEASURE1][s] without the assistance from your contractor?

- 1. Yes [SKIP TO H7]
- 2. No [SKIP TO H9]
- 98. (DON'T KNOW) [ASK H5]
- 99. (REFUSED) [ASK H5]

H5. Would you have installed **something** without the involvement of your contractor? [DO NOT READ LIST UNLESS NECESSARY]

- 1. Yes, would have installed something [ASK H6]
- 2. No, would NOT have installed anything [SKIP TO H9]
- 98. (DON'T KNOW) [SKIP TO I1]
- 99. (REFUSED) [SKIP TO I1]

H6. When you say you **would have installed** something, would you have installed something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?

- 1. Yes [ASK H7]
- 2. No [ASK H7]
- 98. (DON'T KNOW) [ASK H7]
- 99. (REFUSED) [ASK H7]

H7. [ASK FOR MEASURE WITH ACTUAL UNIT GREATER THAN 1] And without the involvement of your contractor would you have installed the same number of [MEASURE1 OR C\_MEASURE1][s]?

- 1. Yes [ASK H8]
- 2. No [ASKH7.2a]
  - b. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1](s)? [ASK H8]
- 98. (DON'T KNOW) [ASK H8]
- 99. (REFUSED) [ASK H8]

H8. Without the assistance from your contractor, would you have installed the [MEASURE1 OR C\_MEASURE1][s]...[READ LIST AND RECORD ONE RESPONSE]

- 1. Within the same year? [SKIP TO I1]
- 2. Within one to two years? [SKIP TO I1]
- 3. Within three to five years? [SKIP TO I1]
- 4. In more than five years? [SKIP TO I1]
- 98. (DON'T KNOW) [SKIP TO I1]
- 99. (REFUSED) [SKIP TO I1]

[ASK H9 TO H13 IF H4=2 OR H5= 2]

H9. When you say **you would not have installed** the same [MEASURE1 OR C\_MEASURE1][s] without the assistance from your contractor, would you have installed anything at all?

- 1. Yes [ASK H10]

- 2. No [SKIP TO I1]
- 98. (DON'T KNOW) [ASK H10]
- 99. (REFUSED) [ASK H10]

H10. Without the assistance from your contractor, **would you have installed** something that was just as energy efficient as the [MEASURE1 OR C\_MEASURE1][s] you installed?

- 1. Yes [ASK H11]
- 2. No [ASK H11]
- 98. (DON'T KNOW) [ASK H11]
- 99. (REFUSED) [ASK H11]

H11. [ASK FOR MEASURE WITH ACTUAL UNITS GREATER THAN 1] Without the assistance from your contractor, would you have installed the same [MEASURE1 OR C\_MEASURE1][s]?

- 1. Yes [ASK H12]
- 2. No [ASKH11.2A]
  - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1][S]? [ASK H12]
- 98. (DON'T KNOW) [ASK H12]
- 99. (REFUSED) [ASK H12]

H12. And, would you have installed the same [MEASURE1 OR C\_MEASURE1][s]. . . [READ LIST AND RECORD ONE RESPONSE]

- 1. In the same year? [ASK H13]
- 2. In one to two years? [ASK H13]
- 3. In three to five years? [ASK H13]
- 4. More than five years out? [ASK H13]
- 98. (DON'T KNOW) [ASK H13]
- 99. (REFUSED) [ASK H13]

H13. If the assistance or information from your contractor had not been available, would you have done anything differently on this project?

- 1. Yes [ASK H14]
- 2. No [SKIP TO I1]
- 98. (DON'T KNOW) [SKIP TO I1]
- 99. (REFUSED) [SKIP TO I1]

H14. What would you have done differently?

[RECORD OPEN ENDED RESPONSE]

## I. *+Spillover*

- I1. Since making these energy-efficiency upgrades has your jurisdiction installed any other energy-efficient products in your facilities that you did **NOT** receive an incentive for? By energy-efficient products, I mean high-efficiency lighting such as T5s; high efficiency motors and variable speed drives; high efficiency air conditioners and heat pumps, efficient heating or water heating equipment, etcetera.

1. Yes [ASK I2]
  2. No [SKIP TO SECTION J]
  98. (DON'T KNOW) [SKIP TO SECTION J]
  99. (REFUSED) [SKIP TO SECTION J]
12. Are these products also installed at [ADDRESS] or at a different location?
1. Same location
  2. Different location
  98. (DON'T KNOW)
  99. (REFUSED)
13. What were the other energy-efficient products that you installed without getting an incentive? [DO NOT READ LIST; MARK ALL THAT APPLY; 98=DON'T KNOW, 99=REFUSED, -96=N/A] [If the customer says they bought something but have not installed it, the equipment has to be installed and operating for us to count it towards spillover.]
1. CFLs
  2. LEDs
  3. Fluorescent tubes (T5s, T8s, etc.)
  4. Efficient lighting controls (occupancy sensors, daylighting, timers)
  5. High efficiency motors
  6. Air source heat pumps
  7. Ground source heat pumps
  8. Central AC
  9. VSD (variable speed drive)
  10. Boiler
  11. Compressed air regulator
  12. Gas furnaces
  13. Exit signs
  14. Refrigeration equipment (refrigerators, freezers)
  15. Other [SPECIFY: \_\_\_\_\_]
  98. (DON'T KNOW)
  99. (REFUSED)
14. [REPEAT FOR EACH ITEM MENTIONED IN I3] How many [INSERT ITEM FROM I3] did you install? [RECORD NUMBER \_\_\_\_\_, 98 FOR DON'T KNOW, 99 FOR REFUSED, AND 96 FOR N/A]
15. [REPEAT FOR EACH ITEM MENTIONED IN I3] Please tell me how important the incentive for [INSERT MEASURE1] was in your decision to install [INSERT ITEM FROM I3]. Was it very important, somewhat important, not too important, or not at all important?
16. [EMPHASIZE EACH ANSWER OPTION AND PAUSE IN BETWEEN EACH OPTION. AFTER THE 2<sup>ND</sup> ITEM, YOU CAN SAY:] "And using the same scale, please rate how important the incentive was in your decision to install [ANSWER FROM I3]"
1. Very important
  2. Somewhat important
  3. Not too important or
  4. Not at all important

98. [DO NOT READ] (DON'T KNOW)  
 99. [DO NOT READ] (REFUSED)
17. [ASK FOR ALL MENTIONED IN I3] Did you receive an incentive for installing [INSERT ANSWER FROM I3]? [DO NOT READ ANSWER LIST]
1. Yes
  2. No
  3. Item did not qualify
  4. Contractor or vendor received the incentive
98. (DON'T KNOW)  
 99. (REFUSED)
18. [ASK IF 0=2] What is the address of the location where you installed [INSERT EACH ITEM FROM I3]? [98 FOR DON'T KNOW AND 99 FOR REFUSED]
- ENTER STREET ADDRESS:  
 ENTER CITY:  
 ENTER STATE:  
 ENTER ZIP CODE:

## J. *Other Program Questions*

Now we have a few questions about other programs.

- J1. Are you aware of the Schools and Government Program?
1. Yes
  2. No
98. (DON'T KNOW)  
 99. (REFUSED)

[ASK IF J1=1]

- J2. Can you tell me who sponsored the Schools and Government Program? [DO NOT READ LIST; RECORD ALL APPLY]
1. WPS/Wisconsin Public Service
  2. Focus on Energy
  3. Other [Specify: \_\_\_\_\_]
98. (DON'T KNOW)  
 99. (REFUSED)

[ASK IF J1=2, 98, OR 99]

- J3. This program offers schools and governments in the WPS territory the opportunity to work with an Energy Advisor, and to either receive up to 60% of their energy-efficiency project costs or a \$25,000 grant for those purposes. Are you aware of this program?
1. Yes
  2. No

- 98. (Don't know)
- 99. (Refused)

- J4. [ASK EVERYONE] Our records show that your jurisdiction received an additional [[IF PILOT WINNER= YES READ] grant [IF PILOT WINNER= NO READ] incentive] of [SCHOOLS AND GOVERNMENT INCENTIVE] dollars from the WPS Schools and Government Program for installing equipment including the [MEASURE1], [MEASURE2], and [MEASURE3]. This incentive would have been in addition to the [FOCUS PROGRAM INCENTIVE AMOUNT] your jurisdiction received through the [FOCUS PROGRAM], for a combined incentive of [TOTAL INCENTIVE AMOUNT]. Is that correct?
- 1. Yes [SKIP TO J6]
  - 2. No, didn't receive an extra incentive
  - 3. Received incentive; amount is incorrect [RECORD CORRECT AMOUNT][SKIP TO J6]
  - 98. (Don't know)
  - 99. (Refused) [SKIP TO K1 BUT DO NOT COUNT TOWARD TARGET]K1]

- J5. Just to confirm, [[IF J4= 2] your jurisdiction did **not** receive] [IF J4= 98] you do not know if your jurisdiction received]] an additional financial incentive from the WPS Schools and Government Program in addition to the incentive provided by the [FOCUS PROGRAM] is that correct? [DO NOT READ LIST]
- 1. No , they did **not** receive an incentive from WPS [SKIP TO K1 BUT DO NOT COUNT TOWARD TARGET]
  - 2. Yes, they **did** receive an incentive from WPS
  - 98. (Don't know) [SKIP TO K1 BUT DO NOT COUNT TOWARD TARGET]
  - 99. (Refused) [SKIP TO K1 BUT DO NOT COUNT TOWARD TARGET]

[ASK IF J4=1 OR 3 OR J5=2]

- J6. When did your jurisdiction learn about the WPS Schools and Government Program? Was it ... [READ LIST AND SELECT ONE RESPONSE]
- 1. Before making the decision to purchase any of the equipment.
  - 2. While making the decision to purchase the first type of equipment.
  - 3. While making the decision to purchase the first type of equipment, but before deciding to purchase the additional equipment.
  - 4. After making the decision to purchase the additional equipment.
  - 5. Other [SPECIFY: \_\_\_\_\_]
  - 98. (Don't know)
  - 99. (Refused)
- J7. The Schools and Government Program paid the difference between the incentives you received through the [FOCUS PROGRAM] and [IF PILOT WINNER= YES READ] 100% [IF PILOT WINNER= NO READ] 60%] of your approved costs for installing the types of equipment we have been discussing. Was this increase in the incentive a factor in your decision to install more types of equipment?
- 1. Yes
  - 2. No
  - 98. (Don't know)
  - 99. (Refused)

- J8. How important [[IF PILOT WINNER= YES READ] was the grant] [IF PILOT WINNER= NO READ] were the incentives]] from the Schools and Government Program in your decision to install [INSERT # OF MEASURE GROUPS] types of equipment? Was it ... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not important at all
  98. (Don't know)
  99. (Refused)
- J9. If you had not received the Schools and Government Program [IF PILOT WINNER= YES READ] grant [IF PILOT WINNER= NO READ] incentive] of [SCHOOLS AND GOVERNMENT INCENTIVE AMOUNT] for the [INSERT # OF MEASURE GROUPS] types of equipment, would you have still purchased the [MEASURE1, MEASURE 2], and [MEASURE3]?
1. Yes
  2. No
  3. Other [SPECIFY/RECORD COMMENTS: \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

## K. *Program Awareness*

The next few questions are about what you have heard about these programs.

- K1. [ASK EVERYONE] Please tell me which of the following Focus on Energy programs you have heard of. [READ EACH AND RECORD YES OR NO]
1. Business Incentive Program
  2. Small Business Program
  3. Large Energy Users Program
  4. Renewable Energy Program
  5. Energy Bundle Bonus
  6. Other: [SPECIFY \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

[SKIP TO SECTION O IF J4=99 OR J5=1 OR 98 OR 99]

- K2. How did you first hear about the Schools and Government Program? [DO NOT READ, PROMPT IF NECESSARY; RECORD ONE RESPONSE] [IF MORE THAN ONE: From which source did you first learn about the Program?]
1. Received letter promoting Program or grant
    - B3-1. Do you know what organization the letter was from? [PROMPT IF NECESSARY]
      - a. Schools and Government
      - b. WPS



- c. Focus On Energy
  - d. Other [SPECIFY:\_\_\_\_\_]
  - 98. (Don't Know)
  - 99. (Refused)
2. (Received phone call)
- B3-2. (Do you know what organization the person who contacted you was with? )  
[PROMPT IF NECESSARY]
- a. Schools and Government
  - b. WPS
  - c. Focus On Energy
  - d. Other [SPECIFY:\_\_\_\_\_]
  - 98. (Don't Know)
  - 99. (Refused)
3. (Energy Advisor told me)
- B3-3. (What organization is the Energy Advisor with who contacted you?) [PROMPT IF NECESSARY]
- a. Schools and Government
  - b. WPS
  - c. Focus On Energy
  - d. Other [SPECIFY:\_\_\_\_\_]
  - 98. (Don't Know)
  - 99. (Refused)
4. (Program staff told me)
- B3-4. (What organization is the program staff with who contacted you?)[PROMPT IF NECESSARY]
- a. Schools and Government
  - b. WPS
  - c. Focus On Energy
  - d. Other [SPECIFY:\_\_\_\_\_]
  - 98. (Don't Know)
  - 99. (Refused)
- 5. Contractor told me [SPECIFY TYPE OF CONTACTOR:\_\_\_\_\_]
  - 6. Friend, family member, colleague
  - 7. Other [SPECIFY:\_\_\_\_\_]
  - 98. (Don't know)
  - 99. (Refused)

## L. *Pilot Competition*

[ASK IF [PILOT WINNER] =NO ]

L1. Were you aware of the pilot competition through the Schools and Government Program? **[IF NEEDED: It was the Schools and Government Program competition for grants of \$25,000 to pay for energy efficiency projects.]**

1. Yes
2. No **[SKIP TO M1]**
98. (Don't know) **[SKIP TO M1]**
99. (Refused) **[SKIP TO M1]**

**[IF 0 = 1 AND [JURISDICTION] ≠ St Mark's Lutheran In Green Bay OR St Adelbert Catholic School, in Roshol]**

L2. Why did your jurisdiction not apply for the \$25,000 grant offered through the pilot competition? **[IF NEEDED: The Program staff selected twelve schools and twelve government jurisdictions from eligible applicants to receive the grant.] [DO NOT READ LIST; RECORD ALL THAT APPLY]**

1. Did not know about the competition in time to apply
2. Did not have the staff or time to complete the application
3. Could not get approval in time
4. Would not have been able to implement the projects within the time frame
5. Other **[SPECIFY: \_\_\_\_\_]**
98. (Don't know)
99. (Refused)

## M. *Program Delivery*

I would like to ask you some questions about the impact of the different components of the Program on your jurisdiction's efforts to save energy.

M1. Did you receive a walkthrough audit from Schools and Government Program staff?

1. Yes
2. No **[Skip to M3]**
98. (Don't know) **[Skip to M3]**
99. (Refused) **[Skip to M3]**

M2. How important were the results of the Schools and Government Program's walkthrough audit to your decision to implement the energy-saving equipments we've been discussing? Would you say it was **[READ LIST]**

1. Very important
2. Somewhat important
3. Not too Important
4. Not at all important
98. (Don't know)
99. (Refused)

**[If M1= 3 or 4 Ask]**

M3. How could the Schools and Government Program walkthrough audit have been more effective? **[RECORD ANSWER]**

**[Ask everyone]**

- M4. How important was working with the Energy Advisor to your decision to implement the energy-saving equipment we've been discussing? Would you say they were...
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  5. (Didn't work with an Energy Advisor)
  98. (Don't know)
  99. (Refused)

**[If M3= 3 or 4]**

- M5. How could the Energy Advisor have been more effective? **[RECORD ANSWER]**
1. **[RECORD ANSWER]:**

**[IF [PILOT WINNER] = YES]**

- M6. How important was forming an energy team to your decision to implement the energy-saving equipment we've been discussing? Would you say they were **[READ LIST]**
1. Very important
  2. Somewhat important
  3. Not too Important
  4. Not at all important
  98. (Don't know)
  99. (Refused)

**[IF [PILOT WINNER] = YES]**

- M7. What are your reasons for saying that that?
1. **[RECORD ANSWER]:**

**[Ask everyone]**

- M8. How important was having benchmarked your facilities to your decision to implement the energy-saving equipment we've been discussing? Would you say they were **[READ LIST]**
1. Very important
  2. Somewhat important
  3. Not too Important
  4. Not at all important
  98. (Don't know)
  99. (Refused)

- M9. What are your reasons for saying that?
1. **[RECORD ANSWER]:**

- M10. Will having worked with the Schools and Government Program affect how your jurisdiction makes energy-savings decisions in the future?
1. Yes
  2. No
  3. Other **[SPECIFY/RECORD COMMENTS:\_\_\_\_\_]**

- 98. (Don't know)
- 99. (Refused)

[If M9=1 Ask]

M9.a. How will having participated in the Program affect your jurisdiction's energy-savings decisions?

[RECORD ANSWER]

## N. *Satisfaction*

- N1. How would you rate your level of satisfaction with the Energy Advisor you worked with for the Schools and Government Program? Would you say you were [READ LIST]:
- 1. Very satisfied
  - 2. Somewhat satisfied
  - 3. Not too satisfied
  - 4. Not at all satisfied
  - 5. (Did not work with an energy advisor)
  - 98. (Don't know) [SKIP TO 0]
  - 99. (Refused) [SKIP TO 0]

[IF N1 = 3 OR 4 ASK]

- N2. What are the reasons you were [INSERT ANSWER TO N1] with the Energy Advisor?
- 1. [RECORD ANSWER]

[IF M1=1 ASK]

- N3. How would you rate your level of satisfaction with the walk through assessment provided by the Schools and Government Program? Would you say you were [READ LIST]
- 1. Very satisfied
  - 2. Somewhat satisfied
  - 3. Not too satisfied
  - 4. Not at all satisfied
  - 98. (Don't know) [SKIP TO N5]
  - 99. (Refused) [SKIP TO N5]

[IF N3= 3 OR 4 ASK]

- N4. What were the reasons you were [INSERT ANSWER TO N3] with the walkthrough assessment?
- 1. [RECORD ANSWER]

- N5. Would you say you are [READ LIST] with the amount of the incentive you received from the Schools and Government Program?
- 1. Very satisfied
  - 2. Somewhat satisfied
  - 3. Not too satisfied
  - 4. Not at all satisfied
  - 98. (Don't know)
  - 99. (Refused)

[ASK IF N5=3 OR 4]

N6. What are the reasons you are dissatisfied with the incentive amount?

1. [RECORD ANSWER]

N7. How satisfied would you say you are with the process for receiving the Schools and Government Program incentives? Would you say you are ... [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO N9]
2. Somewhat satisfied [SKIP TO N9]
3. Not too satisfied
4. Not at all satisfied
98. (Don't know) [SKIP TO N9]
99. (Refused) [SKIP TO N9]

[ASK IF N7=3 OR 4]

N8. What are the reasons you are dissatisfied with the incentive process?

1. [RECORD ANSWER]

N9. How would you rate your experience with the Schools and Government Program overall? Would you say you are [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO SECTION O]
2. Somewhat satisfied [SKIP TO SECTION O]
3. Not too satisfied
4. Not at all satisfied
98. (Don't know) [SKIP TO SECTION O]
99. (Refused) [SKIP TO SECTION O]

[ASK IF N9=3 OR 4]

N10. What about your experience were you dissatisfied with?

1. [RECORD ANSWER]:

## O. *Jurisdiction Statistics*

Finally, I would like to ask you some questions about the location at [ADDRESS].

O1. OMIT QUESTION BUT KEEP NUMBER.

O2. \*Does your organization lease or own the facility?

1. (Lease)
2. (Own)
3. (Other [SPECIFY: \_\_\_\_\_])
98. (DON'T KNOW)
99. (REFUSED)

O3. What is the square footage of the heated and cooled space in this facility? [NUMERIC OPEN END UP TO 1,000,000]

- 1. [RECORD NUMBER: \_\_\_\_\_]
- 98. (DON'T KNOW)
- 99. (REFUSED)

O4. \*How many people are employed at this location?

- 1. [RECORD NUMBER: \_\_\_\_\_]
- 98. (DON'T KNOW)
- 99. (REFUSED)

O5. Interviewer: Record Gender

- 1. Female
- 2. Male

## P. *Closing*

Thank you. We appreciate your help with this survey. Have a nice day.