

## Appendix U. Survey Instruments by Program

This appendix includes a sample survey/script for the following programs in Focus on Energy's residential and nonresidential sectors as well as a residential marketing awareness survey.

Each survey in this appendix includes:

- Table outlining the researchable questions the survey investigates
- Participant quota
- 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**
- **Asterisk (\*):** Survey questions labeled with an asterisk are core questions that will be asked across all Focus on Energy phone surveys, where appropriate.

This appendix also includes a survey of residential customers' market awareness and understanding.

### ***Residential Programs***

- Multifamily Energy Savings Program and Multifamily Direct Install Program
- Appliance Recycling Program
- Residential Lighting and Appliance Program
- Home Performance with ENERGY STAR and Assisted Home Performance with ENERGY STAR (Participant and Audit-Only Participant)
- New Homes Program (Participant and Nonparticipant, Building Performance Consultant Participant and Nonparticipant, and Builder)
- Residential Rewards Program
- Enhanced Rewards Program
- Express Energy Efficiency

## 2013 Multifamily Energy Savings Program: Building Owner/Manager Survey

Interviewer instructions are in green.

CATI programming instructions are in red.

Answers that should not be read are in parenthesis.

*Audience: This survey is for participating Multifamily Building Managers/Owners.*

*[Variables from sample]*

*[SERVICE ADDRESS]*

*[CONTACT NAME]*

*[MESP MEASURES 1-4]*

*[Quotas: 25]*

Researchable Question	Discussion	Supporting Questions
How can the Program increase its energy and demand savings?	A wide variety of issues can affect the energy savings resulting from the Program. These include customer behaviors and Program influence. The evaluation will investigate these issues to provide the best estimate of gross and net energy savings as well as opportunities to increase energy savings.	B1-B4, D1-D2, D5, E1-F8, G1-G2
What are the barriers to increased customer participation and how effectively is the Program overcoming those barriers? What are other barriers specific to this Program and sector?	The Program is designed to close the price gap between standard and high-efficiency equipment in multifamily buildings as well as the information gap about the benefits of efficient equipment and sources of financial incentives. The evaluation research will characterize the main barriers to high-efficiency equipment and to what extent and how the Program is addressing the identified barriers. This includes an assessment of the current rebate levels.	D6-D9
How is the Program leveraging the current supply chain for Program measures and what changes can increase the supply chain's support of the Program?	One of this Program's objectives is to rely more on trade allies than the Energy Advisors (Implementers) to promote the Program directly to building owners and managers and thus work to transform the market. The evaluation research will assess the effectiveness of Program efforts on the supply chain and how these efforts have affected business practices.	B5-B7, C1-C2
What is customer satisfaction with the Program?	Customer satisfaction with the various components of the Program and the Program overall is an important indicator of Program effectiveness.	D3-D4, H1-H4

## A. Overview

Hello, my name is *[name]* and I am calling on behalf of *Wisconsin's Focus on Energy Multifamily Energy Savings Program*. Focus on Energy wants to learn about your recent experience with the Multifamily Program for the property at *[SERVICE ADDRESS FROM SAMPLE]*. For your time, we are offering a \$25 gift card, which will be mailed following completion of this survey.

*[If respondent expresses concern: I can assure you I am not selling anything, this call is for research purposes only. 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]*



- A1. May I speak with *[INSERT CONTACT NAME]* *[IF NO CONTACT NAME: “the person at the property who was most involved with your company’s participation in Focus on Energy’s Multifamily Program?”]*
1. (Yes, speaking to the contact or the person most involved)
  2. (Yes, call transferred *[Repeat intro]*)
  - 98. (Don’t Know *[Explain Program and say “this would be the person who makes decisions about energy use equipment such as HVAC and lighting”, repeat question]*)
  - 99. (Refused *[THANK AND TERMINATE]*)

*[IF NEEDED: This should take 20-30 minutes of your time.]*

## PROGRAM DESCRIPTION *[READ IF NEEDED]*

*The Focus on Energy Multifamily Energy Savings Program offers both prescriptive and custom incentives for efficiency projects. These incentives are designed to motivate customers to upgrade equipment or implement energy efficiency projects that otherwise would not have been completed.*

- A2. Our records indicate that the facility at *[SERVICE ADDRESS]* received cash-back incentives for *[MESP MEASURES 1-4]* through the Focus on Energy Multifamily Program in 2013. Is this correct?
1. (Yes, all measures are correct)
  2. (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]*
    - d. (MEASURE4 IS INCORRECT *[Correct: \_\_\_\_\_]*) *[CALL THIS VARIABLE C\_MEASURE4]*
  3. (No, I did not install any measures) *[THANK AND TERMINATE]*
  4. No incorrect address *[ASK: What is the address of the facility that received the upgrades?]*
  - 98. Don’t know *[ASK: Is there someone else we could speak with who would know this? RECORD NAME AND CONTACT INFORMATION AND BEGIN AGAIN]*
  - 99. Refused *[THANK AND TERMINATE]*

**B. Overview**

I'd like to ask you about your role in relation to the property/properties at *[SERVICE ADDRESS]*

B1. What is the best way to describe your role at *[ADDRESS]*? Are you the...? *[READ LIST]*

1. Property owner
  2. Property manager
  3. Both property owner and manager
  4. Maintenance or facilities supervisor
  5. Other *[Specify: \_\_\_\_\_]*
- 98. (Don't know)  
-99. (Refused)

B2. What is the total number of apartment units in the facility *[IF NEEDED, REPEAT ADDRESS]*?

*[Record response: \_\_\_\_\_]*

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

B3. Does the building owner pay for the electricity bill or do your tenants pay their own electric bill directly to the utility?

1. Building owner pays
  2. Tenant pays
  3. Some combination of both
- 98. (Don't know)  
-99. (Refused)

B4. Does that also apply to the gas bill?

1. Building owner pays
  2. Tenant pays
  3. Some combination of both
- 98. (Don't know)  
-99. (Refused)

B5. What sources of information do you use to help you make a decision on purchasing energy-efficient products for your property? *[Do not read; RECORD ALL THAT APPLY]*

1. (Internal maintenance staff)
2. (Our regular installation contractor)
3. (An outside installation contractor we may hire or consult with occasionally)
4. (Equipment distributors/ wholesalers)
5. (Equipment manufacturers)
6. (Equipment dealers/ retailers/retailer salesperson referral)
7. (Apartment/trade associations (presentations and newsletters))
8. (Our electric or gas utility representative or website)
9. (Focus on Energy representative or website)
10. (Our own research on the Internet)
11. (I don't purchase energy-efficient products for my property)
12. (Other *[Specify: \_\_\_\_\_]*)
- 98. (Don't know)
- 99. (Refused)

B6. Are you aware that Focus on Energy also offers a free Multifamily Direct Install Program for tenant units?

1. Yes
2. No **[SKIP TO SECTION C]**
- 98. Don't know **[SKIP TO SECTION C]**
- 99. Refused **[SKIP TO SECTION C]**

B7. Did the property at **[SERVICE ADDRESS]** participate in the Multifamily Direct Install Program this year?

1. Yes
2. No **[PROBE: What are the reasons this property didn't participate in the program? \_\_\_\_\_]**
- 98. Don't know
- 99. Refused

### **C. Awareness**

I'd like to talk with you about how you became aware of the Multifamily Energy Savings Program.

C1. \*Where did you most recently hear about the Focus on Energy [PROGRAM NAME] program?

*[DO NOT READ; RECORD ALL THAT APPLY][IF RESPONDENT SAYS MAILING, WEBSITE, UTILITY, TV AD CLARIFY THE ANSWER SO THAT YOU CAN CODE CORRECTLY BELOW]*

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. (Focus on Energy or Utility website)
9. (Other website [*SPECIFY: \_\_\_\_\_*] )
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder)
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Through the Multifamily Direct Install Program)
19. (Tenant told me)
20. (Heard through an apartment/ landlord/professional association)
21. (Heard through other property managers/owners)
22. (Other [*Specify: \_\_\_\_\_*] )
- 98. (Don't know)

C2. \*What motivated you to participate in the program? *[DO NOT READ; RECORD ALL THAT APPLY]*

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. (Utility sponsorship of the program)
9. (To reduce owner operating costs)
10. (To reduce tenant utility costs)
11. (To attract tenants to the property)
12. (To retain current tenants and keep them happy)
13. (Needed to replace equipment anyway)
14. (To receive free equipment)
15. (To market the property as energy efficient)
16. (Other *[Specify: \_\_\_\_\_]*)
- 98. (Don't know)
- 99. (Refused)

## D. Participation

D1. Did you receive a free energy assessment of your facility?

1. Yes **[SKIP TO D3]**
2. No **[SKIP TO D2]**
- 98. Don't know **[Skip to D7]**
- 99. Refused **[Skip to D7]**

D2. **[IF D1 = 2]** What are your reasons for not receiving a free assessment?

*[Record Response]*

- 98. Don't know
- 99. Refused

D3. **[IF D1 = 1]** How satisfied were you with the quality of information that you received from the assessment results?

1. Very satisfied **[SKIP TO D5]**
2. Somewhat satisfied **[SKIP TO D5]**
3. Not too satisfied
4. Not at all satisfied
- 98. (Don't know) **[SKIP TO D5]**
- 99. (Refused) **[SKIP TO D5]**

D4. **[If D3 = 3,4] What are the reasons you are not satisfied with the quality of information you received?**

*[Record Response]*

- 98. Don't know
- 99. Refused

D5. How satisfied were you with the professionalism of the energy advisor who conducted your energy assessment?

- 1. Very satisfied **[SKIP TO D7]**
- 2. Somewhat satisfied **[SKIP TO D7]**
- 3. Not too satisfied
- 4. Not at all satisfied
- 98. (Don't know) **[SKIP TO D7]**
- 99. (Refused) **[SKIP TO D7]**

D6. **[If D5 = 3,4] What are the reasons you are not satisfied with the quality of information you received?**

*[Record Response]*

- 98. Don't know

D7. Focus on Energy offers a benchmarking incentive through the Multifamily Energy Savings Program. To receive this incentive, after making the energy efficiency upgrades through the program, the participant must track the energy savings at the multifamily complex for 12 months. If the energy savings exceed the projected savings at the end of 12 months, an additional incentive is issued. Did you participate in the benchmarking option of the Multifamily Energy Savings Program?

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

D8. When you were deciding whether to take part in the Multifamily Energy Savings Program, did you encounter any problems or challenges?

- 1. Yes
- 2. No **[SKIP TO D10]**
- 98. Don't know **[SKIP TO D10]**
- 99. Refused **[SKIP TO D10]**

D9. What problems or challenges did you encounter? *[DO NOT READ LIST; RECORD all that APPLY]*

1. (Financial constraints)
2. (Lack of easy access to tenant apartments)
3. (Time constraints in figuring out what to install)
4. (Tenants pay their own energy use)
5. (Approval by board or member)
6. (Uncertainty regarding return on investment)
7. (Tenant security/privacy)
8. (Did not face any problems or barriers )
9. (Other *[Specify: \_\_\_\_\_]* )
- 98. (Don't know)
- 99. (Refused)

D10. What are the barriers to implementing multiple energy efficiency projects through the Multifamily Energy Savings Program?

1. (Financial constraints)
2. (Lack of easy access to tenant apartments)
3. (Time constraints in figuring out what to install)
4. (Tenants pay their own energy use)
5. (Approval by board or member)
6. (Uncertainty regarding return on investment) *[Probe: What payback period would you prefer for your projects? \_\_\_\_\_]*
7. (Understanding the anticipated energy-savings)
8. (Understanding the return on investment) *[Probe: What payback period would you prefer for your projects? \_\_\_\_\_]*
9. (Tenant security/privacy)
10. (Did not face any problems or barriers )
11. (Other *[Specify: \_\_\_\_\_]* )
- 98. (Don't know)
- 99. (Refused)

D11. Have you or your staff had to repair or prematurely replace any of the equipment you received through the Program?

1. Yes
2. No *[SKIP TO SECTION E]*
- 98. Don't know *[SKIP TO SECTION E]*
- 99. Refused *[SKIP TO SECTION E]*

D12. Which equipment did you have to repair or prematurely replace?

*[Record response]*

-98. Don't know

-99. Refused

## E. Freeridership

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

E1. 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 "E1KEEP"=MEASURES 1-4]**

2. I would not have installed any of the energy efficient equipment that Focus on Energy installed. **[CREATE NEW VARIABLE "E1DROP"= MEASURES 1-4] [SKIP TO E7]**

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 "E1KEEP"]**

b. What would you not have installed? **[CREATE NEW VARIABLE "E1DROP"]**

-98. Don't know **[SKIP TO E7]**

-99. Refused **[SKIP TO E7]**

**[IF E1=2,-98,-99, SKIP TO E7, OTHERWISE CONTINUE]**

E2. Let me make sure I understand. When you say you would have installed the **[E1KEEP]** 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 "E2KEEP"=E1KEEP]**

2. I would **not** have installed **any** of the equipment to the same level of efficiency. **[CREATE NEW VARIABLE "E2DROP"=E1KEEP]**

3. I would have installed **only some** of the equipment to the same level of efficiency. **[ASK A AND BE BELOW]**

a. Which equipment would you have installed? **[CREATE NEW VARIABLE "E2KEEP"]**

b. **Which equipment would you not have installed?****[CREATE NEW VARIABLE "E2DROP"]**

-98. Don't know

-99. Refused



- E3. **[ASK IF E2=1 OR 3]** And would you have installed the same quantity of **[E2KEEP]** 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 “E3DROP”=E2KEEP]**
  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 “E3PARTIAL”]**
    - b. Which equipment would you have installed?**[CREATE NEW VARIABLE“E3SAME]**
- 98. Don't know  
 -99. Refused
- E4. Without the program, would you have installed the **[E2KEEP]** on your own... **(READ LIST)**
1. Within the same year? **[ASK/RECORD WHICH MEASURES = E4A]**
  2. Within one to two years? **[ASK/RECORD WHICH MEASURES = E4B]**
  3. Within three to five years? **[ASK/RECORD WHICH MEASURES = E4C]**
  4. In more than five years? **[ASK/RECORD WHICH MEASURES = E4D]**
  5. When the equipment failed? **[ASK/RECORD WHICH MEASURES = E4E]**
- 98. (Don't know) **[ASK/RECORD WHICH MEASURES = E4F]**  
 -99. (Refused) **[ASK/RECORD WHICH MEASURES = E4G]**
- E5. Before you heard about the program, had you already purchased and installed the **[E2KEEP]**?
1. Yes, I purchased and installed **all** **[E2KEEP]** before learning about the program.
  2. No, I purchased and installed **only some** of the **[E2KEEP]** before learning about the program.  
 [ASK B BELOW]
    - b. **Which equipment did you purchase before you learned about the program?**  
**[CREATE VARIABLE= E5B]**
  3. No, I had **not** purchased and installed **any** of the **[E2KEEP]** before learning about the program.
- 98. Don't know  
 -99. Refused

E6. 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 [E2KEEP]?

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

E7. [ASK ONLY IF E1= 2, 3, -98 OR -99, ELSE SKIP TO G1] [IF E1=3, READ: "Going back to the [E1DROP] you originally said you would not have installed without the program, do you mean you would not have installed the [E1DROP] at all?" IF E1=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 [E1DROP] at all?" IF E1=-98 or -99, READ "Would you not have installed the [E1DROP] at all?"] (DO NOT READ LIST)

1. YES, I would **not** have installed the measures **at all**. [SKIP TO SECTION F]
  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 E7DROP]
    - b. Which equipment would you have installed? [CREATE VARIABLE = E7KEEP]
- 98. Don't know  
-99. Refused

E8. Would you have installed the same types of [E7KEEP] but they would have been at a lower level of efficiency? (DO NOT READ LIST)

1. YES, I would **not** have installed **any** [E7KEEP] to the same level of efficiency. [E7KEEP = E8DROP] [SKIP TO SECTION F]
  2. NO – I would have installed **all** of the [E7KEEP] to the same level of efficiency. [E7KEEP = E8KEEP]
  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 E8DROP]
    - b. Which equipment would you have installed? [CREATE VARIABLE= E8KEEP]
- 98. Don't know  
-99. Refused

- E9. Would it have been the same [E8KEEP] but fewer of them? (DO NOT READ LIST)
1. YES, you would have installed fewer of **all** of the [E8KEEP].
  2. NO, I would **not** have installed fewer of the [E8KEEP].
  3. NO, I would have **only** installed fewer for **some** of the [E8KEEP] but would have installed the same for others. [ASK A AND BE BELOW]
    - a. Which equipment would you not have installed? [CREATE VARIABLE= E9PARTIAL]
    - b. Which equipment would you have installed? [CREATE VARIABLE = E9SAME]
- 98. Don't know
- 99. Refused

E10. And finally, would you have installed the [E8KEEP]... (READ LIST)

1. In the same year? [ASK/RECORD WHICH MEASURES = E10A]
  2. In one to two years? [ASK/RECORD WHICH MEASURES = E10B]
  3. In three to five years? [ASK/RECORD WHICH MEASURES = E10C]
  4. More than five years out? [ASK/RECORD WHICH MEASURES = E10D]
  5. Upon equipment failure? [ASK/RECORD WHICH MEASURES = E10e]
- 98. Don't know [ASK/RECORD WHICH MEASURES = E10F]
- 99. Refused [ASK/RECORD WHICH MEASURES = E10G]

E11. Before you heard about the program, had you already purchased and installed the [E8KEEP]?

1. Yes, had purchased and installed **all** [E8KEEP] before learning about the program.
  2. No, had **only** purchased and installed **some** of the [E8KEEP] before learning about the program. [ASK B BELOW]
    - b. Which equipment did you purchase before you learned about the program? [CREATE VARIABLE= E11B]
  3. NO, had **not** purchased and installed **any** of the [E8KEEP].
- 98. Don't know
- 99. Refused

E12. 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 [E8KEEP] measures?

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

**F. Other Properties**

F1. Do you oversee any other properties that participated in the Multifamily Energy Savings Program in 2013

- 1. YES
- 2. NO [SKIP TO SECTION G]
- 98. Don't know [SKIP TO SECTION G]
- 99. Refused [SKIP TO SECTION G]

F2. Would your answer about the program's influence on conducting energy efficient upgrades have been different for those properties or would you give the same answer?

- 3. Yes, would have answered differently [SPECIFY HOW RESPONSES WOULD BE DIFFERENT: \_\_\_\_\_]
- 4. No, would have answered the same
- 5. No, do not own/manage other participating properties
- 98. (Don't know)
- 99. (Refused)

**G. Spillover**

G1. 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 H]
- 98. Don't know [SKIP TO SECTION H]
- 99. Refused [SKIP TO SECTION H]

G2. What equipment/activities were they?

Type 1: \_\_\_\_\_

Type 2: \_\_\_\_\_

Type 3: \_\_\_\_\_

-98. Don't know **[SKIP TO SECTION H]**

-99. Refused **[SKIP TO SECTION H]**

G3. 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]**

Location 1

Location 2

Location 3

G4. **[ASK IF ANY RESPONSES IN G3=1, ELSE SKIP TO G6]** In what percent of your tenant units did you install the **[INSERT TYPE 1-3 THAT HAD A LOCATION OF "IN TENANT UNIT"]**?

Percent 1: \_\_\_\_\_

Percent 2: \_\_\_\_\_

Percent 3: \_\_\_\_\_

G5. **[ASK IF ANY RESPONSES IN G3=1]** And how many **[IF ANY OF TYPE 1-3 = INSULATION, READ "SQURE FEET"]** of the **[INSERT TYPE 1-3 THAT HAD A LOCATION OF "IN TENANT UNIT"]** did you install/conduct in each tenant unit?

Quantity 1: \_\_\_\_\_

Quantity 2: \_\_\_\_\_

Quantity 3: \_\_\_\_\_

G6. **[ASK IF ANY RESPONSES IN G3=2]** And how many **[IF ANY OF TYPE 1-3 = INSULATION, READ "SQURE FEET"]** of the **[INSERT TYPE 1-3 THAT HAD A LOCATION OF "COMMON AREA"]** did you install/conduct?

Quantity 1: \_\_\_\_\_

Quantity 2: \_\_\_\_\_

Quantity 3: \_\_\_\_\_

G7. If applicable, do you recall the efficiency level of the equipment or activity? Such as energy star qualified, for example? **[INSERT TYPE 1-3]**?

Efficiency 1: \_\_\_\_\_

Efficiency 2: \_\_\_\_\_

Efficiency 3: \_\_\_\_\_

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

G8. Please tell me how important the Focus on Energy program is in your decision to install [INSERT EACH ONE SELECTED IN G2]. 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
- 98. Not important at all (Don't know)
- 99. (Refused)

**H. Satisfaction**

H1. How satisfied have you been with the Multifamily Energy Savings Program as a whole? **(READ LIST IF NECESSARY)**

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

H2. **[IF H1= 3 OR 4]** Why were you less than satisfied with this program?

*[Record Response: \_\_\_\_\_]*

- 98. Don't know
- 99. Refused

H3. How likely are you to recommend this program to another property manager or owner of other multifamily properties?

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

H4. Do you have any suggestions for ways the program could be improved? *[DO NOT READ; RECORD ALL THAT APPLY]*

1. (No/ None/ Wouldn't change anything/ Keep program as is)
2. (Include additional types of equipment)
3. (Simplify the installation process )
4. (Provide more information)
5. (Use better contractors)
6. (Improve quality/accountability)
7. (Get a message to my owners)
8. (Other *[SPECIFY: \_\_\_\_\_]*)
- 98. (Don't know)
- 99. (Refused)

H5. What is the name and mailing address where you would like your \$25 gift card sent to?

*[RECORD FIRST AND LAST NAME, STREET ADDRESS, CITY, STATE, AND ZIP]*

*[Record Response: \_\_\_\_\_]*

[INTERVIEWER RECORD: DO NOT READ.]

1. (Female)
2. (Male)

**CLOSING SCRIPT:** Those are all the questions we have. **Focus on Energy** appreciates your input. Thank you for your time.

## 2013 Multifamily Direct Install Program: Building Owner/Manager Survey

Interviewer instructions are in green.

CATI programming instructions are in red.

Answers that should not be read are in parenthesis.

*Audience: This survey is for Participating Multifamily Building Managers/Owners.*

*[Variables from sample]*

*[SERVICE ADDRESS]*

*[CONTACT NAME]*

*[MESP MEASURES 1-4]*

*[Quotas: 25]*



Researchable Question	Discussion	Supporting Questions
How can the Program increase its energy and demand savings?	A wide variety of issues can affect the energy savings resulting from the Program. These include customer behaviors and Program influence. The evaluation will investigate these issues to provide the best estimate of gross and net energy savings as well as opportunities to increase energy savings.	B1-B4, E1-G2
What are the barriers to increased customer participation and how effectively is the Program overcoming those barriers? What are other barriers specific to this Program and sector?	The Program is designed to close the price gap between standard and high-efficiency equipment in multifamily buildings as well as the information gap about the benefits of efficient equipment and sources of financial incentives. The evaluation research will characterize the main barriers to high-efficiency equipment and to what extent and how the Program is addressing the identified barriers. This includes an assessment of the current rebate levels.	D1-D2
How is the Program leveraging the current supply chain for Program measures and what changes can increase the supply chain's support of the Program?	One of this Program's objectives is to rely more on trade allies than the Energy Advisors (Implementers) to promote the Program directly to building owners and managers and thus work to transform the market. The evaluation research will assess the effectiveness of Program efforts on the supply chain and how these efforts have affected business practices.	B5-B7, C1-C2
What is customer satisfaction with the Program?	Customer satisfaction with the various components of the Program and the Program overall is an important indicator of Program effectiveness.	D3-D6, H1-H5

## A. Overview

Hello, my name is *[name]* and I am calling on behalf of *Wisconsin's Focus on Energy Multifamily Direct Install Program*. Focus on Energy wants to learn about your recent experience with the Multifamily Program for the property at *[SERVICE ADDRESS FROM SAMPLE]*. For your time, we are offering a \$25 gift card, which will be mailed following completion of this survey.

*[If respondent expresses concern: I can assure you I am not selling anything, this call is for research purposes only. 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]*

- A1. May I speak with *[INSERT CONTACT NAME]* *[IF NO CONTACT NAME: “the person at the property who was most involved with your company’s participation in Focus on Energy’s Multifamily Direct Install Program?”]*
1. (Yes, speaking to the contact or the person most involved)
  2. (Yes, call transferred *[Repeat intro]*)
- 98. (Don’t Know *[Explain Program and say “this would be the person who makes decisions about energy use equipment such as HVAC and lighting”, repeat question]*)
- 99. (Refused *[THANK AND TERMINATE]*)

*[IF NEEDED: This should take 20-30 minutes of your time.]*

**PROGRAM DESCRIPTION: [READ IF NECESSARY]**

*The Multifamily Direct Install Program provides free direct installation in tenant units of water-saving showerheads and faucet aerators, pipe insulation, and compact fluorescent light bulbs (CFLs).*

- A2. Our records indicate that the facility at *[SERVICE ADDRESS]* received free installations of *[DI MEASURES 1-4]* in *[HOUSING UNITS]* apartments through the Focus on Energy Multifamily Direct Install Program in 2013. Is this correct?
1. (Yes)
  2. (No)
- 98. (Don’t know)
- 99. (Refused)

- A3. **[IF A2 = 2, -98, -99]** Can you please clarify which items were installed and in how many apartments?
1. (Yes, all measures and housing unit quantities are correct)
  2. (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]**
    - d. (MEASURE4 IS INCORRECT [Correct: \_\_\_\_\_] ) **[CALL THIS VARIABLE C\_MEASURE4]**
  3. (No, housing unit quantity is incorrect) **[CORRECT BELOW]**
    - a. (MEASURE1 QUANTITY IS INCORRECT [Correct: \_\_\_\_\_] ) **[CALL THIS VARIABLE C\_MEASURE1Q]**
    - b. (MEASURE2 QUANTITY IS INCORRECT [Correct: \_\_\_\_\_] ) **[CALL THIS VARIABLE C\_MEASURE2Q]**
    - c. (MEASURE3 QUANTITY IS INCORRECT [Correct: \_\_\_\_\_] ) **[CALL THIS VARIABLE C\_MEASURE3Q]**
    - d. (MEASURE4 QUANTITY IS INCORRECT [Correct: \_\_\_\_\_] ) **[CALL THIS VARIABLE C\_MEASURE4Q]**
  4. (No, I did not install any measures) **[THANK AND TERMINATE]**
  5. No incorrect address **[ASK: What is the address of the facility that received the upgrades?]**
  - 98. Don't know **[ASK: Is there someone else we could speak with who would know this? RECORD NAME AND CONTACT INFORMATION AND BEGIN AGAIN]**
  - 99. Refused **[THANK AND TERMINATE]**

## B. Overview

I'd like to ask you about your role in relation to the property/properties at **[SERVICE ADDRESS]**

- B1. What is the best way to describe your role at **[ADDRESS]**? Are you the . . .? **[READ LIST]**
1. Property owner
  2. Property manager
  3. Both property owner and manager
  4. Maintenance or facilities supervisor
  5. Other **[Specify: \_\_\_\_\_]**
- 98. (Don't know)
- 99. (Refused)

B2. What is the total number of apartment units in the facility *[IF NEEDED, REPEAT ADDRESS]*?

*[Record response: \_\_\_\_\_]*

- 98. Don't know
- 99. Refused

B3. Does the building owner pay for the electricity bill or do your tenants pay their own electric bill directly to the utility? *[DON'T READ LIST UNLESS NECESSARY]*

- 1. (Building owner pays)
- 2. (Tenant pays)
- 3. (Some combination of both)
- 98. (Don't know)
- 99. (Refused)

B4. Does that also apply to the gas bill? *[DON'T READ LIST UNLESS NECESSARY]*

- 1. (Building owner pays)
- 2. (Tenant pays)
- 3. (Some combination of both)
- 98. (Don't know)
- 99. (Refused)

B5. What sources of information do you use to help you make a decision on purchasing energy-efficient products for your property? *[Do not read; RECORD ALL THAT APPLY]*

- 1. (Internal maintenance staff)
- 2. (Our regular installation contractor)
- 3. (An outside installation contractor we may hire or consult with occasionally)
- 4. (Equipment distributors/ wholesalers)
- 5. (Equipment manufacturers)
- 6. (Equipment dealers/ retailers/retailer salesperson referral)
- 7. (Apartment/trade associations (presentations and newsletters))
- 8. (Our electric or gas utility representative or website)
- 9. (Focus on Energy representative or website)
- 10. (Our own research on the Internet)
- 11. (I don't purchase energy-efficient products for my property)
- 12. (Other *[Specify: \_\_\_\_\_]*)
- 98. (Don't know)
- 99. (Refused)

B6. Are you aware of the Focus on Energy Multifamily Energy Saving Program that offers prescriptive and custom incentives for energy-efficient equipment and services for common areas and tenant units?

1. Yes
2. No **[SKIP TO SECTION C]**
- 98. Don't know **[SKIP TO SECTION C]**
- 99. Refused **[SKIP TO SECTION C]**

B7. Did the property at **[SERVICE ADDRESS]** receive incentives for prescriptive or custom equipment through the Multifamily Energy Savings Program this year?

1. Yes
2. No **[PROBE: What are the reasons this property didn't participate in the program? \_\_\_\_\_]**
- 98. Don't know
- 99. Refused

### C. Awareness

I'd like to talk with you about how you became aware of the Multifamily Direct Install Program.

C1. \*Where did you most recently hear about the program? *[DO NOT READ; RECORD ALL THAT APPLY][IF RESPONDENT SAYS MAILING, WEBSITE, UTILITY, TV AD CLARIFY THE ANSWER SO THAT YOU CAN CODE CORRECTLY BELOW]*

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. (Focus on Energy or Utility website)
9. (Other website [SPECIFY: \_\_\_\_\_] )
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder)
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Through the Multifamily Energy Savings Program)
19. (Tenant told me)
20. (Heard through an apartment/ landlord/professional association)
21. (Heard through other property managers/owners)
22. (Other *[Specify: \_\_\_\_\_]* )
- 98. (Don't know)
- 99. (Refused)

C2. \*What motivated you to participate in the program? *[DO NOT READ; RECORD ALL THAT APPLY]*

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. (Utility sponsorship of the program)
9. (To reduce owner operating costs)
10. (To reduce tenant utility costs)
11. (To attract tenants to the property)
12. (To retain current tenants and keep them happy)
13. (Needed to replace equipment anyway)
14. (To receive free equipment)
15. (To market the property as energy efficient)
16. (Other *[Specify: \_\_\_\_\_]*)
- 98. (Don't know)
- 99. (Refused)

## **D. Participation**

D1. When you were deciding whether to take part in the Multifamily Direct Install Program, did you encounter any problems or barriers?

1. Yes
2. No ***[SKIP TO D3]***
- 98. Don't know ***[SKIP TO D3]***
- 99. Refused ***[SKIP TO D3]***

D2. What problems or challenges did you encounter? *[DO NOT READ LIST; RECORD all that APPLY]*

1. (Financial constraints)
2. (Lack of easy access to tenant apartments)
3. (Time constraints in figuring out what to install)
4. (Tenants pay their own energy use)
5. (Approval by board or member)
6. (Uncertainty regarding return on investment)
7. (Tenant security/privacy)
8. (Did not face any problems or barriers)
9. (Other *[Specify: \_\_\_\_\_]*)
- 98. (Don't know)
- 99. (Refused)

D3. Did you receive any feedback from your tenants about the new equipment installed in their units?

1. (Yes [*What feedback did you receive?*\_\_\_\_\_])
2. (No)
- 98. (Don't know)
- 99. (Refused)

D4. Do you know of any tenants who have removed the equipment that was installed through the program?

1. (Yes [*Record detail if offered:*\_\_\_\_\_])
2. (No)
- 98. (Don't know)
- 99. (Refused)

D5. Have you or your staff had to repair or prematurely replace any of the equipment you received through the Multifamily Direct Install Program?

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

D6. Which equipment did you have to repair or prematurely replace? [*Mark all that apply; don't read list*]

1. (Water-saving showerheads [or handheld showerheads] )
2. (Bathroom faucet aerators)
3. (Kitchen faucet aerators)
4. (Energy-efficient light bulbs known as CFLs [*Clarify: spiral, globe, candelabra*])
5. (Pipe wrap for common area water heaters)
6. (LED exit sign light bulbs)
- 98. (Don't know)
- 99. (Refused)



**E. Freeridership**

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

E1. 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 "E1KEEP"=MEASURES THEY WOULD HAVE INSTALLED])
2. (I would not have installed any of the energy efficient equipment that Focus on Energy installed. [CREATE NEW VARIABLE "E1DROP"=RECORD RESPONDENTS MEASURES])
3. (I would have only installed some of the equipment on my own that Focus on Energy installed. [ASK A AND BE BELOW]
  - a. Which equipment would you have installed? [CREATE NEW VARIABLE "E2KEEP"]
  - b. Which equipment would you not have installed ? [CREATE VARIABLE E1DROP]
- 98. (Don't know)
- 99. (Refused)

**[IF E1=2,-98,-99, SKIP TO E8, OTHERWISE CONTINUE]**

E2. Let me make sure I understand. When you say you would have installed the [E1KEEP] 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)**[INTERVIEWER NOTES: "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 "E2KEEP"=E1KEEP] )
2. (I would **not** have installed **any** of the equipment to the same level of efficiency. [CREATE NEW VARIABLE "E2DROP"=E1KEEP])
3. (I would have installed **only some** of the equipment to the same level of efficiency. [ASK A AND BE BELOW])
  - a. Which equipment would you have installed? [CREATE NEW VARIABLE "E2KEEP"]
  - b. **Which equipment would you not have installed?**[CREATE NEW VARIABLE "E2DROP"]
- 98. (Don't know)
- 99. (Refused)

- E3. **[ASK IF E2=1 OR 3]** And would you have installed the same quantity of **[E2KEEP]** in a given housing unit 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 “E3DROP”=E2KEEP]**)
  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 the same quantity? **[CREATE NEW VARIABLE “E3PARTIAL”]**
    - b. Which equipment would you have installed the same quantity?**[CREATE NEW VARIABLE“E3SAME]**
- 98. (Don't know)
- 99. (Refused)
- E4. And would you have installed the **[E2KEEP]** in the same quantity of housing units on your own? **(DO NOT READ LIST)**
1. (YES, I would have installed measures in the same quantity of **housing units** on my own)
  2. (NO, I would **not** have installed measures in the same quantity of units on my own. **[ASK A AND B BELOW]**)
    - a. Which equipment would you not have installed in the same quantity of housing units? **[CREATE NEW VARIABLE “E4PARTIAL”]**
    - b. Which equipment would you have installed in the same quantity of housing units?**[CREATE NEW VARIABLE “E4SAME”]**
- 98. (Don't know)
- 99. (Refused)
- E5. Without the program, would you have installed the **[E2KEEP]** on your own... **(READ LIST)**
1. Within the same year? **[ASK/RECORD WHICH MEASURES = E5A]**
  2. Within one to two years? **[ASK/RECORD WHICH MEASURES = E5B]**
  3. Within three to five years? **[ASK/RECORD WHICH MEASURES = E5C]**
  4. In more than five years? **[ASK/RECORD WHICH MEASURES = E5D]**
  5. Upon equipment failure? **[ASK/RECORD WHICH MEASURES = E5E]**
- 98. (Don't know) **[ASK/RECORD WHICH MEASURES = E5F]**
- 99. (Refused) **[ASK/RECORD WHICH MEASURES = E5G]**

E6. Before you heard about the program were you planning to purchase and install the [E2KEEP]?

1. (Yes, planned to purchase **all** [E2KEEP] measures before learning about the program.)

2. (No, I purchased and installed **only some** of the [E2KEEP] before learning about the program. [ASK B BELOW])

b. **Which equipment did you purchase before you learned about the program?**  
[CREATE VARIABLE= E6B]

3. (No, had **not** planned to purchase/install **any** of the [E2KEEP] measures before learning about the program.)

-98. (Don't know)

-99. (Refused)

E7. Overall, would you say the Multifamily Direct Install Program was very important, somewhat important, not too important or not important at all in your decision to install the energy efficient [E2KEEP]?

1. Very important

2. Somewhat important

3. Not too important

4. Not at all important

-98. (Don't know)

-99. (Refused)

E8. **[ASK ONLY IF E1= 2, 3, -98 OR -99, ELSE SKIP TO G1] [IF E1=3, READ: "Going back to the [E1DROP] you originally said you would not have installed without the program, do you mean you would not have installed the [E1DROP] at all?" IF E1=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 [E1DROP] at all?" IF E1=-98 or -99, READ "Would you not have installed the [E1DROP] at all?" (DO NOT READ LIST)**

1. (YES, I would **not** have installed the measures **at all**. **[SKIP TO SECTION F]**)

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=E8DROP]

b. Which equipment would you have installed? [CREATE VARIABLE = E8KEEP]

-98. (Don't know)

-99. (Refused)

- E9. Would you have installed the same types of [E8KEEP] but they would have been at a lower level of efficiency? **(DO NOT READ LIST)**
1. (YES, I would **not** have installed **any** [E8KEEP] to the same level of efficiency. [E8KEEP = E9DROP] **[SKIP TO SECTION F]**)
  2. (NO – I would have installed **all** of the [E8KEEP] to the same level of efficiency. [E8KEEP = E9KEEP])
  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 = E9DROP]**
    - b. Which equipment would you have installed? **[CREATE VARIABLE =E9KEEP]**
- 98. (Don't know)
- 99. (Refused)
- E10. Would it have been the same [E9KEEP] but fewer of them? **(DO NOT READ LIST)**
1. (YES, you would have installed fewer of **all** of the [E9KEEP])
  2. (NO, I would **not** have installed fewer of the [E9KEEP].)
  3. (NO, I would have **only** installed fewer for **some** of the [E9KEEP] but would have installed the same for others. **[ASK A AND B BELOW]**)
    - a. Which equipment would you not have installed the same quantity? **[CREATE VARIABLE= E10PARTIAL]**
    - b. Which equipment would you have installed the same quantity of? **[CREATE VARIABLE = E10SAME]**
- 98. (Don't know)
- 99. (Refused)
- E11. And finally, would you have installed the [E9KEEP]... **(READ LIST)**
1. In the same year? **[ASK/RECORD WHICH MEASURES = E11A]**
  2. In one to two years? **[ASK/RECORD WHICH MEASURES = E11B]**
  3. In three to five years? **[ASK/RECORD WHICH MEASURES = E11C]**
  4. More than five years out? **[ASK/RECORD WHICH MEASURES = E11D]**
  5. Upon equipment failure? **[ASK/RECORD WHICH MEASURES = E11e]**
- 98. (Don't know **[ASK/RECORD WHICH MEASURES = E11F]**)
- 99. (Refused **[ASK/RECORD WHICH MEASURES = E11G]**)

- E12. Before you heard about the program were you planning to purchase and install the [E9KEEP]?
1. (Yes, planned to purchase **all** [E9KEEP] measures before learning about the program.)
  2. (No, planned to purchase **only some** of the [E9KEEP] measures before learning about the program. [ASK BELOW])
    - a. Which equipment was purchased prior to learning about the program? [VARIABLE = E12B]
  3. (No, had **not** planned to purchase/install **any** of the [E9KEEP] measures before learning about the program.)
- 98. (Don't know)
- 99. (Refused)

- E13. Overall, would you say the Focus on Energy Multifamily Direct Install Program was very important, somewhat important, not too important or not important at all in your decision to install the [E9KEEP] measures?
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
- 98. (Don't know)
- 99. (Refused)

### F. Other Properties

F1. Do you oversee any other properties that participated in the Multifamily Energy Savings Program in 2013?

1. (YES)
  2. (NO) [SKIP TO SECTION G]
- 98. (Don't know) [SKIP TO SECTION G]
- 99. (Refused) [SKIP TO SECTION G]

F2. Would your answer about the program's influence on conducting energy efficient upgrades have been different for those properties or would you give the same answer?

1. Yes, would have answered differently [SPECIFY HOW RESPONSES WOULD BE DIFFERENT: \_\_\_\_\_]
  2. No, would have answered the same
  3. No, do not own/manage other participating properties
- 98. (Don't know)
- 99. (Refused)

## G. Spillover

G1. 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 H]**
- 98. Don't know **[SKIP TO SECTION H]**
- 99. Refused **[SKIP TO SECTION H]**

G2. What equipment/activities were they?

- Type 1: \_\_\_\_\_
- Type 2: \_\_\_\_\_
- Type 3: \_\_\_\_\_
- 98. Don't know **[SKIP TO SECTION H]**
- 99. Refused **[SKIP TO SECTION H]**

G3. 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]**

- Location 1
- Location 2
- Location 3

G4. **[ASK IF ANY RESPONSES IN G3=1, ELSE SKIP TO G6]** In what percent of your tenant units did you install the **[INSERT TYPE 1-3 THAT HAD A LOCATION OF "IN TENANT UNIT"]**?

- Percent 1: \_\_\_\_\_
- Percent 2: \_\_\_\_\_
- Percent 3: \_\_\_\_\_

G5. **[ASK IF ANY RESPONSES IN G3=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?

- Quantity 1: \_\_\_\_\_
- Quantity 2: \_\_\_\_\_
- Quantity 3: \_\_\_\_\_

G6. **[ASK IF ANY RESPONSES IN G3=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?

Quantity 1: \_\_\_\_\_  
 Quantity 2: \_\_\_\_\_  
 Quantity 3: \_\_\_\_\_

G7. If applicable, do you recall the efficiency level of the equipment or activity? Such as energy star qualified, for example? **[INSERT TYPE 1-3]**?

Efficiency 1: \_\_\_\_\_  
 Efficiency 2: \_\_\_\_\_  
 Efficiency 3: \_\_\_\_\_

G8. Now, I'm going to read a statement about this equipment we've been discussing:

1. Please tell me how important the Focus on Energy program is in your decision to install **[INSERT EACH ONE SELECTED IN G2]**. Is it very important, somewhat important, not too important, or not at all important in your decision to install these energy-efficient product(s)?
  - Very important
  - 2. Somewhat important
  - 3. Not too important
  - 4. Not important at all
- 98. (Don't know)
- 99. (Refused)

## H. Satisfaction

Now I would like to ask you about your satisfaction with the Direct Install equipment from the Multifamily Direct Install Program.

*[USE TRACKING DATA TO DECIDE WHICH OF THESE MEASURES SHOULD BE ASKED]*

H1. Please rate your level of satisfaction for each item as either very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied.

1. *[ASK IF MEASURE = Low-flow or handheld showerhead]* How satisfied were you with the showerheads [IF NEEDED: low-flow or handheld showerhead]?

*[RECORD: 1=Very satisfied,2= somewhat satisfied, 3=not too satisfied,4= not at all satisfied]*

-98. (Don't know)

-99. (Refused)

2. *[ASK IF MEASURE = faucet aerator]* How satisfied were you with the faucet aerators?

*[RECORD: 1=Very satisfied,2= somewhat satisfied, 3=not too satisfied,4= not at all satisfied]*

-98. (Don't know)

-99. (Refused)

3. *[ASK IF MEASURE = CFLs]* How satisfied were you with the CFLs [IF NEEDED: spiral, globe, or candelabra base ]?

*[RECORD: 1=Very satisfied,2= somewhat satisfied, 3=not too satisfied,4= not at all satisfied]*

-98. (Don't know)

-99. (Refused)

4. *[ASK IF MEASURE = pipe wrap]* How satisfied were you with the common area water heater pipe wrap?

*[RECORD: 1=Very satisfied,2= somewhat satisfied, 3=not too satisfied,4= not at all satisfied]*

-98. (Don't know)

-99. (Refused)

5. *[ASK IF MEASURE = LED Exit Signs]* How satisfied were you with the LED exit signs?

*[RECORD: RECORD: 1=Very satisfied,2= somewhat satisfied, 3=not too satisfied,4= not at all satisfied]*

-98. (Don't know)

-99. (Refused)



H2. How satisfied have you been with the Multifamily Direct Install Program overall? **(READ LIST IF NECESSARY)**

1. Very satisfied **[SKIP TO H4]**
2. Somewhat satisfied **[SKIP TO H4]**
3. Not too satisfied
4. Not at all satisfied
- 98. (Don't know) **[SKIP TO H4]**
- 99. (Refused) **[SKIP TO H4]**

H3. **[IF H2= 3 OR 4]** Why were you less than satisfied with this program?

*[Record Response: \_\_\_\_\_]*

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

H4. How likely are you to recommend this program to another property manager or owner of other multifamily properties?

5. Very likely
6. Somewhat likely
7. Not too likely
8. Not at all likely
- 98. (Don't know)
- 99. (Refused)

H5. Do you have any suggestions for ways the program could be improved? **[DO NOT READ; RECORD ALL THAT APPLY]**

1. (No/ None/ Wouldn't change anything/ Keep program as is)
2. (Include additional types of equipment)
3. (Simplify the installation process)
4. (Provide more information)
5. (Use better contractors)
6. (Improve quality/accountability)
7. (Get a message to my owners)
8. (Other *[SPECIFY: \_\_\_\_\_]*)
- 98. (Don't know)
- 99. (Refused)

H6. What is the name and mailing address where you would like your \$25 gift card sent to?

[RECORD FIRST AND LAST NAME, STREET ADDRESS, CITY, STATE, AD 5 DIGIT ZIP CODE.]

[Record Response: \_\_\_\_\_]

[INTERVIEWER RECORD: DO NOT READ.]

1. (Female)
2. (Male)

**CLOSING SCRIPT:** Those are all the questions we have. **Focus on Energy** appreciates your input. Thank you for your time.

**Wisconsin Focus on Energy  
Residential Appliance Recycling Program  
Participant Survey**

Researchable Question	Current Survey Question Mapping
What is customer satisfaction with the Program?	C1-D4
What is customer perception of marketing materials?	B1-B7
How can the Program increase its energy and demand savings?	E1-G5
What are the gross and net electric and gas savings?	G1-G5

**Quotas: 60 Refrigerators and 60 Freezers**

*\*Survey questions labeled with a “\*” are core questions that will be asked across all Focus on Energy phone surveys, where appropriate.*

Hello, my name is \_\_\_\_\_ from \_\_\_\_\_. I'm calling on behalf of **Focus on Energy**. May I please speak to **[NAME]**?

I am following up on your household’s participation in Focus on Energy’s program where you recycled your **[APPLIANCE NAME]**. All your answers are confidential.

**A. Introduction**

- A1. Are you the person in your household who is most familiar with this pick up?
  - 1. Yes, I remember **[SKIP TO A1b]**
  - 2. Someone better to talk to
  - 99. DON’T KNOW about the removal **[IF NEEDED: Focus on Energy offers an incentive to pick up and recycle old working refrigerators and freezers. A contractor would have picked the appliance up at your home and you would have been paid \$30 later in the mail] [IF STILL NOT FAMILIAR, THANK AND TERMINATE]**
  
- A1a. **[ASK IF A1 = 2, 88]** May I please speak with that person? **[IF NOT AVAILABLE, ATTEMPT TO SCHEDULE A CALL BACK]**
  - 1. Yes
  - 2. No **[THANK AND TERMINATE]**
  - 88. REFUSED **[THANK AND TERMINATE]**
  - 99. DON’T KNOW

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

- A1b. Great, **Focus on Energy** would like to make this program as effective as possible. Would you be willing to participate in a short survey to help **Focus on Energy** evaluate and improve the Appliance Recycling Program? All your answers are confidential. **[IF YES, CONTINUE TO A2.]**

**[IF RESPONDENT ASKS HOW LONG, SAY “ABOUT 15 MINUTES.”]**

**[IF THE RESPONDENT INDICATES THAT THIS IS NOT A CONVENIENT TIME, ASK IF THEY WOULD LIKE TO ARRANGE A SPECIFIC TIME FOR US TO CALL THEM BACK.]**

**[IF CUSTOMER IS WARY OF THE SURVEY, REASSURE THEM THAT YOU ARE NOT SELLING ANYTHING. IF NECESSARY, OFFER CAROL STEMRICH (608-266-8174) AS THE PERSON TO CONTACT WITH ANY QUESTIONS ABOUT THE VALIDITY OF THE RESEARCH.]**

- A2. **[ASK IF # REF collected>0]** Our program records indicate you received an incentive for having **[# REF collected]** refrigerator(s) recycled by Focus on Energy’s program on **[PickupDt]**. Is this correct? **[IF NEEDED: Specifically a combo refrigerator/freezer, or standalone refrigerator]**
1. Yes, that is correct
  2. No, not correct
  88. REFUSED
  99. DON’T KNOW
- A3. **[ASK IF A2=2, 88, or 99]** How many refrigerators did you have recycled through Focus on Energy’s program?
1. \_\_\_\_\_ **[RECORD QUANTITY OF REFRIGERATORS]**
  88. REFUSED **[THANK AND TERMINATE]**
  99. DON’T KNOW **[THANK AND TERMINATE]**
- A4. **[ASK IF # FRZ collected>0]** Our program records indicate you received an incentive for having **[# FRZ collected]** freezer(s) recycled by Focus on Energy’s program on **[PickupDt]**. Is this correct? **[IF NEEDED: Specifically a standalone freezer]**
1. Yes, that is correct
  2. No, not correct
  88. REFUSED
  99. DON’T KNOW
- A5. **[ASK IF A4=2, 88, or 99]** How many freezers did you have recycled through Focus on Energy’s program?
1. \_\_\_\_\_ **[RECORD QUANTITY OF FREEZERS]**
  88. REFUSED **[THANK AND TERMINATE]**
  99. DON’T KNOW **[THANK AND TERMINATE]**

## B. Awareness and Knowledge

Now I'd like to ask you some general questions about how you became aware of the program.

B1. \*Where did you most recently learn about Focus on Energy's appliance pick-up and recycling program? **[SELECT ONLY ONE. DO NOT READ, BUT PROMPT IF NECESSARY.]**

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. Focus on Energy or Utility website
9. Other website **[SPECIFY: \_\_\_\_\_]**
10. Email
11. Social Media
12. Focus on Energy or Utility representative
13. Contractor
14. Realtor, home builder
15. Retail stores
16. Home/trade shows
17. Sporting or community event
18. Other **[SPECIFY: \_\_\_\_\_]**
88. REFUSED
99. DON'T KNOW

B2. \*Are there any other ways you heard about the program? **[DO NOT READ. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, 88=REFUSED; 99=DON'T KNOW]**

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. Focus on Energy or Utility website
9. Other website **[SPECIFY: \_\_\_\_\_]**
10. Email
11. Social Media

- 12. Focus on Energy or Utility representative
- 13. Contractor
- 14. Realtor, home builder
- 15. Retail stores
- 16. Home/trade shows
- 17. Sporting or community event
- 18. Other [SPECIFY: \_\_\_\_\_]
- 19. None / no other ways
- 88. REFUSED
- 99. DON'T KNOW

B3. \*Are you aware of any other Focus on Energy Programs? [IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]

- 1. Yes
- 2. No
- 88. REFUSED
- 99. DON'T KNOW

[ASK IF B3=1]

B4. \*Which programs, rebates, or projects? [DO NOT READ; RECORD ALL THAT APPLY]

- 1. (Home Performance with ENERGY STAR)
- 2. (New Homes)
- 3. (Appliance Recycling)
- 4. (Lighting and Appliances)
- 5. (Express Energy Efficiency)
- 6. (Residential Rewards)
- 7. (Geothermal Heat Pumps)
- 8. (Solar Hot Water Systems)
- 9. OMIT
- 10. OMIT
- 11. OMIT
- 12. OMIT
- 13. (Other [SPECIFY: \_\_\_\_\_] )
- 99. (Don't know)
- 88. (Refused)

- B5. \*Have you participated in any other Focus on Energy Programs? **[IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]**
1. Yes
  2. No
  88. REFUSED
  99. DON'T KNOW

[ASK IF B5=1]

- B6. **Which programs, rebates, or projects? [DO NOT READ; BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]**
1. (Home Performance with ENERGY STAR)
  2. (New Homes)
  3. (Appliance Recycling)
  4. (Lighting and Appliances)
  5. (Express Energy Efficiency)
  6. (Residential Rewards)
  7. (Geothermal Heat Pumps)
  8. (Solar Hot Water Systems)
  9. OMIT
  10. OMIT
  11. OMIT
  12. OMIT
  13. (Other **[SPECIFY: \_\_\_\_\_]** )
  14. (Don't know)
  15. (Refused)
- B7. \*What do you think is the best way for Focus on Energy to inform the public about energy-efficiency programs? **[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, 88=REFUSED; 99=DON'T KNOW]**
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. Focus on Energy or Utility website
  9. Other website **[SPECIFY: \_\_\_\_\_]**
  10. Email
  11. Social Media
  12. Focus on Energy or Utility representative
  13. Contractor

14. Realtor, home builder
  15. Retail stores
  16. Home/trade shows
  17. Sporting or community event
  18. Other [SPECIFY: \_\_\_\_\_]
  19. Do not want to receive information
  88. REFUSED
  99. DON'T KNOW
- B8. \*What motivated you to recycle your [APPLIANCE NAME] through Focus on Energy's program?  
**[DO NOT READ. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, 88=REFUSED; 99=DON'T KNOW]**
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. Utility sponsorship of the program [SPECIFY THE PROGRAM: \_\_\_\_\_]
  9. Free pick-up service/others don't pick up/don't have to take it myself
  10. Easy/convenient
  11. Never heard of any others/only one I know of
  12. The appliance was a spare that I did not use very much
  13. The appliance was old and I wanted something with more modern features
  14. I wanted a bigger appliance
  15. Other [SPECIFY: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW
- B9. How informed do you feel about all the ways you can save energy, including buying and using energy efficient appliances and equipment?
1. Very Informed
  2. Somewhat Informed
  3. Not Too Informed
  4. Not At All Informed
  88. (REFUSED)
  99. (DON'T KNOW)



- B10. \*On a scale of zero to five where five is a lot of attention and zero is not a lot of attention, how much attention do you pay to the amount of energy, gas, or electric, that you use in your home?
1. [RECORD ANSWER]
  88. REFUSED
  99. DON'T KNOW
- B11. \*I am going to read through some energy saving actions you may have heard or read about. Please let me know if you frequently, sometimes, or never have taken these actions in your home over the past 12 months. [MARK FOR EACH: 1=FREQUENTLY; 2=SOMETIMES; 3=NEVER; 88=REFUSED; 99=DON'T KNOW].

**[RANDOMIZE ORDER OF LIST]**

- A. Turn off lights in rooms that are unoccupied
  - B. Wash laundry in cold water
  - C. Unplug electronic equipment when not in use
  - D. Turn up cooling temperature in summer or turn down heating temperature in winter to save on energy
  - E. Took shorter showers
  - F. Turn down water heater temperature
- B12. \*Have you taken any other actions to save energy in your home in the last 12 months?
1. Yes [SPECIFY: \_\_\_\_\_]
  2. No actions taken
  88. REFUSED
  99. DON'T KNOW

- B13. \*What challenges, if any, make saving energy difficult in your home? **[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, 88=REFUSED; 99=DON'T KNOW]**
1. Have a leaky/non-efficient/old home (leaky overall, windows, air sealing)
  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. Nothing/none/no challenges
  11. Other **[SPECIFY: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW

### C. Program Process

Now I'd like to ask you some general questions about the process you went through to participate in the program.

- C1. How clear were the program's instructions for how to participate? Would you say:
1. Very Clear
  2. Somewhat Clear
  3. Not Too Clear
  4. Not At All Clear
  88. REFUSED
  99. DON'T KNOW
- C2. Did you feel like the timing for having the appliance(s) picked up was too long, too short, or just about right?
1. Too long
  2. Too short
  3. Just about right
  88. REFUSED
  99. DON'T KNOW

- C3. After you requested the pick-up, did you get a phone call to confirm your pick-up date and time?
1. Yes
  2. No
  88. REFUSED
  99. DON'T KNOW
- C4. On the day of the pick-up, did you receive a call to let you know that someone would arrive in the designated pick-up timeframe?
1. Yes
  2. No
  88. REFUSED
  99. DON'T KNOW
- C5. How satisfied were you with the services of the people who removed your appliance? Would you say ... **[READ LIST]**
1. Very Satisfied
  2. Somewhat Satisfied
  3. Not Too Satisfied
  4. Not At All Satisfied
  88. REFUSED
  99. DON'T KNOW
- C6. How long did it take to receive the \$30 incentive check after your application was submitted? **(RECORD RESPONSE IN MONTHS. ROUND TO HALF MONTH. DECIMALS ALLOWED.)**
- \_\_\_\_\_ **[RECORD RESPONSE IN MONTHS]**
77. HAVE NOT RECEIVED INCENTIVE CHECK YET
  88. REFUSED
  99. DON'T KNOW
- C7. How satisfied were you with the time it took to receive your incentive check for participating? Would you say ... **[READ LIST]**
1. Very Satisfied
  2. Somewhat Satisfied
  3. Not Too Satisfied
  4. Not At All Satisfied
  88. REFUSED
  99. DON'T KNOW

- C8. \*How satisfied are you with the Focus on Energy Appliance Recycling Program overall? Would you say ... **[READ LIST]**
1. Very Satisfied
  2. Somewhat Satisfied
  3. Not Too Satisfied
  4. Not At All Satisfied
88. REFUSED  
99. DON'T KNOW
- C9. **\*[ASK IF (C5=3 OR 4) OR (C7=3 OR 4) OR (C8=3 OR 4)]** What about the Program were you dissatisfied with? **[DO NOT READ; MARK ALL THAT APPLY]**
1. Incentive was too small.
  2. Contractor never called me back.
  3. Contractor never showed up/showed up late.
  4. Contractor was unreliable/unprofessional.
  5. Difficult to get an appointment/time that was convenient for me.
  6. Took too long for them to remove our [refrigerator, freezer].
  7. Other **[SPECIFY: \_\_\_\_\_]**
  8. Nothing
88. REFUSED  
99. DON'T KNOW
- C10. \*How likely is it you would recommend the Appliance Recycling Program to a friend? Use a 0 – 10 scale where 0 means extremely unlikely and 10 means extremely likely.  
\_\_\_\_\_ **[RECORD RESPONSE]**
88. REFUSED  
99. DON'T KNOW
- C11. \*Is there anything you would suggest to improve Focus on Energy's Appliance Recycling Program? **[RECORD RESPONSE]**
1. No/None
88. REFUSED  
99. DON'T KNOW

## D. Satisfaction

- D1. \*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: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW
- D2. \*What type of fuel does your water heater use?
1. Natural Gas
  2. Electricity
  3. Propane/Bottled Gas
  4. Wood
  5. Other [SPECIFY: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW
- D3. \*Thinking about the price you pay and the electric service you receive, how would you rate your electric utility on providing service that's worth what you pay? Would you say ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  88. REFUSED
  99. DON'T KNOW
- D4. \***[ASK IF D1=1 or D2=1]** Thinking about the price you pay and the gas service you receive, how would you rate your gas utility on providing service that's worth what you pay? Would you say ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  88. REFUSED
  99. DON'T KNOW

- D5. \*What utility company provides your electric service?
1. [SPECIFY: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW
- D6. \***[ASK IF D1=1 or D2=1]** What utility company provides your gas service?
1. [SPECIFY: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW

## E. Appliance Characteristics

**[READ THE FOLLOWING TEXT IF (Total APP Collected > 1)]** Although you recycled several appliances through the program, please answer the rest of the questions only about **[IF # REF collected=1 AND # FRZ collected=1 READ: the [APPLIANCE], IF # REF collected=2 OR # FRZ collected=2 READ: one of the [APPLIANCE]s you recycled.**

**[IF ANY RESPONDENTS RECYCLED MULTIPLE REFRIGERATORS OR MULTIPLE FREEZERS THROUGH THE PROGRAM, HAVE THE RESPONDENT SELECT ONE APPLIANCE AND ANSWER ALL QUESTIONS ABOUT IT.]**

- E1. At the time you recycled it, approximately how old was the **[APPLIANCE]**? **[RECORD IN YEARS. ENTER "00" IF LESS THAN ONE YEAR OLD.]**  
 \_\_\_\_\_ **[RECORD YEARS]**  
 88. REFUSED  
 99. DON'T KNOW
- E2. How would you describe the condition of the **[APPLIANCE]** you recycled through the program? Would you say ...? **[READ, RECORD ONE RESPONSE ONLY]**
1. It worked well and was in good physical condition.
  2. It worked okay but had some problems [Example: it wouldn't defrost].
  3. It didn't work (turned on but did not cool)
  88. REFUSED
  99. DON'T KNOW

- E3. In the year before you removed the **[APPLIANCE]**, how much was it used?
1. All the time **[SKIP TO E5]**
  2. Part of the time. **[CLARIFY AS “CERTAIN MONTHS OF THE YEAR” OR “SPECIAL OCCASIONS”]**
  3. Never **[SKIP TO E5]**
  4. **(DO NOT READ)** Other **[SPECIFY: \_\_\_\_\_]**
88. REFUSED **[SKIP TO E5]**  
 99. DON'T KNOW **[SKIP TO E5]**
- E4. During the year, how many total months do you think it was plugged in and running?
- \_\_\_\_\_ **[RECORD MONTHS; RANGE: 1-12; HALF A MONTH=0.5]**
88. REFUSED  
 99. DON'T KNOW
- E5. Before you made the decision to remove the **[APPLIANCE]**, in what room was it used/located?
1. Kitchen
  2. Garage
  3. Porch/patio
  4. Basement
  5. Other **[SPECIFY: \_\_\_\_\_]**
88. REFUSED  
 99. DON'T KNOW

## F. Replacement

- F1. Did you replace the **[APPLIANCE]** you recycled through Focus on Energy's program?
1. Yes
  2. No **[SKIP TO NEXT SECTION]**
88. REFUSED **[SKIP TO NEXT SECTION]**  
 99. DON'T KNOW **[SKIP TO NEXT SECTION]**

- F2. Why did you decide to replace your old **[APPLIANCE]**? **[READ LIST]**
1. Save energy (example: wanted a more efficient appliance)
  2. Save money
  3. Good for the environment
  4. Recommended by a friend/relative
  5. Recommended by a retailer/dealer
  6. Recommended by a contractor
  7. Cash/rebate/incentive payment
  8. Utility sponsorship of the program
  9. Wanted to upgrade (example: more space, new features, appearance)
  10. Old appliance was not working well or at all
  11. Was planning to give previous **[APPLIANCE]** away
  12. Other **[SPECIFY: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
- F3. Was the new replacement **[APPLIANCE]** new or used?
1. New
  2. Used
  88. REFUSED **[SKIP TO NEXT SECTION]**
  99. DON'T KNOW **[SKIP TO NEXT SECTION]**
- F4. Was the new replacement **[APPLIANCE]** an ENERGY STAR or high-efficiency model?
1. Yes
  2. No **[SKIP TO F6]**
  88. REFUSED **[SKIP TO F6]**
  99. DON'T KNOW **[SKIP TO F6]**
- F5. How important was the program in your decision to replace your old **[APPLIANCE]** with an ENERGY STAR or high-efficiency model? Would you say ... **[READ LIST]**
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  88. REFUSED
  99. DON'T KNOW



- F6. Were you already planning to replace your **[APPLIANCE]** before you decided to recycle your existing unit through the Appliance Recycling Program?
1. Yes **[SKIP TO G1]**
  2. No
  88. REFUSED
  99. DON'T KNOW
- F7. Let me make sure I understand The program motivated you to replace your **[APPLIANCE]** with a different **[APPLIANCE]**, is that correct?
1. Correct, the program motivated me to replace the appliance
  2. Incorrect, the program did not motivate me; I would have replaced it anyway
  88. REFUSED
  99. DON'T KNOW

## G. Freeridership

- G1. Had you considered getting rid of the **[APPLIANCE]** before you heard about Focus on Energy's Appliance Recycling Program?  
**[IF NECESSARY, BY "DISPOSE OF," I MEAN REMOVING THE APPLIANCE FROM YOUR HOME BY ANY MEANS, INCLUDING: SELLING IT, GIVING IT AWAY, HAVING SOMEONE PICK IT UP, OR TAKING IT TO THE DUMP OR A RECYCLING CENTER YOURSELF.]**
1. Yes
  2. No **[SKIP TO G7]**
  88. REFUSED
  99. DON'T KNOW
- G2. Would you have kept your **[APPLIANCE]** had the program not been available?
1. Yes
  2. No
  88. REFUSED
  99. DON'T KNOW
- G3. **[ASK ONLY IF G2=1 AND E5 = 1-5]** If you had kept the **[APPLIANCE]**, would you have kept it in the same location you mentioned earlier? That is would it have been located in: **[READ IN ANSWER FROM E5]**?
1. Yes **[SKIP TO G7]**
  2. No **[SKIP TO G7]**
  88. REFUSED **[SKIP TO G7]**
  99. DON'T KNOW **[SKIP TO G7]**

- G4. **[ASK ONLY IF G2<>1]** If the program had not been available how would you have disposed of your **[APPLIANCE]**? **[ALLOW ONLY ONE ANSWER ; PROMPT IF NEEDED, READ LIST IN RANDOM ORDER]**
1. Sold it to a private party either by an ad or to someone you know
  2. Sold it to a used appliance dealer
  3. Given it away to a private party, such as a friend or neighbor
  4. Given it away to a charity organization
  5. Left it on the curb with free sign
  6. Had it removed by the dealer you got your new or replacement **[APPLIANCE]** from **[DISPLAY ONLY IF F1=1]**
  7. Hauled it to the dump yourself [or friend or family member]
  8. Hauled to a recycling center yourself [or friend or family member]
  9. Hired someone to take it to a dump or recycling center
  10. Have it picked up by local waste management company
  11. Kept it
  12. Some other way **[SPECIFY: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW

**[If (G4 = 2 and AGE > 15) or G4 = 4 or G4 = 7 or G4 = 8] then read follow up question G5 along with the corresponding**

**[Read only if G4 = 2 and AGE > 15]**

Used appliance dealers typically only buy units that are less than 15 years old and are in very good condition.

**[Read only if G4 = 4]**

Market research suggests many local charities (Goodwill or Vietnam Veterans of America) do not accept large appliances.

**[Read only if G4 = 7 or 8]**

Appliances are heavy and often require a truck, trailer, or large vehicle to relocate.

- G5. **[ASK IF (G4 = 2 and AGE > 15) or G4 = 4 or G4 = 7 or G4 = 8]** Given this information, would you have **[READ IN ANSWER FROM G4]**, or would you have done something else?
1. Same thing as G4 **[SKIP TO G7]**
  2. Something else
  88. REFUSED **[SKIP TO G7]**
  99. DON'T KNOW **[SKIP TO G7]**

- G6. [ASK IF G5=2] How else would you have disposed of it?  
**[DO NOT READ; ALLOW ONLY ONE ANSWER BUT DO NOT ALLOW PREVIOUS ANSWER]**
1. Sold it to a private party (example: friend, family member, Craig's list)
  2. Sold it to a used appliance dealer
  3. Given it away for free to a private party (example: friend, family member, Craig's list)
  4. Given it away to a charity organization
  5. Left it on the curb with free sign
  6. Had it removed by the dealer you got your new or replacement appliance from  
**[DISPLAY ONLY IF F1= 1]**
  7. Taken it to a dump yourself or recycling center yourself (or friend or family member)
  8. Hiring someone to take it to a dump or recycling center
  9. Have it picked up by local waste management company
  10. Kept it
  11. Some other way **[SPECIFY: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
- G7. What is the main reason you chose Focus on Energy's program? **[DO NOT READ. RECORD ONLY ONE RESPONSE]**
1. Energy conservation
  2. Free pick-up service
  3. Savings on electric bill
  4. To ensure it was recycled
  5. Incentive
  9. Other **[RECORD VERBATIM]**
  88. REFUSED
  99. DON'T KNOW
- G8. Would you have participated in the program if the amount of the rebate had been less?
1. Yes
  2. No **[SKIP TO H1]**
  88. REFUSED
  99. DON'T KNOW
- G9. Would you have participated in the program with no rebate check at all?
1. Yes
  2. No
  88. REFUSED
  99. DON'T KNOW

## H. Spillover

- H1. Since participating in the program, have you received any other rebate or incentive from Focus on Energy for other purchases or upgrades you have made?
1. Yes
  2. No
  88. REFUSED
  99. DON'T KNOW
- H2. Since participating in the program, have you installed any other energy-efficient products in your home for which you did NOT receive for free or receive a program rebate? **[IF NEEDED: By energy-efficient products, I mean appliances such as ENERGY STAR refrigerators or clothes washers; ENERGY STAR lighting such as CFL light bulbs; high efficiency air conditioners and heat pumps, etc.]**
1. Yes
  2. No **[SKIP TO NEXT SECTION]**
  88. REFUSED **[SKIP TO NEXT SECTION]**
  99. DON'T KNOW **[SKIP TO NEXT SECTION]**
- H3. What were the energy-efficient products that you purchased and installed without getting a rebate? Please only mention the equipment that is currently installed and operating. **[DO NOT READ LIST; MARK ALL MEASURES MENTIONED THAT WERE INSTALLED; 1=Yes; 2=No; 88= Refused; 99=Don't Know; Note: If the customer says they bought something but have not installed it, the measure has to be installed and operating for us to count it towards spillover]**
- A. CFLs
  - B. LEDs
  - C. Fluorescent tubes
  - D. ENERGY STAR Lighting fixtures or ceiling fan
  - E. Water-saving showerheads or faucet aerators
  - F. Windows
  - G. Insulation **[ASK FOLLOW UP: "What type (wall, ceiling, floor)?"]**
  - H. Air sealing
  - I. Pipe or water heater insulation
  - J. Water heater
  - K. Central AC
  - L. Furnace
  - M. Boiler
  - N. Other **[SPECIFY: \_\_\_\_\_]**

- H4. **[ASK FOR EACH MEASURE A-I IN H3, WHERE H3A=1, H3B=1, H3C=1, H3D=1, H3E=1, H3F=1, H3G=1, H3I=1] [IF H3A=1, H3B=1, H3C=1, H3D=1, H3E=1, H3F=1 READ: “How many <MEASURE> did you install?” IF H3G=1 OR H3I READ: “How many square feet of insulation did you install?”]**  
**[RECORD QUANTITY]**  
 88. REFUSED  
 99. DON'T KNOW
- H5. **[ASK FOR EACH MEASURE A-I IN H3]** How important was the Appliance Recycling Program in your decision to install the **[MEASURE]**? Was it.... **[READ RESPONSES FOR EACH MEASURE; if respondent has more than two spillover measures, after 2x reading H5, read “And using the same scale, please rate how important the program was on your decision to install the other items you mentioned?”]**  
 1. Very important  
 2. Somewhat important  
 3. Not too important  
 4. Not at all important  
 88. REFUSED  
 99. DON'T KNOW
- H6. **[ASK FOR EACH MEASURE A-I IN H3]** Did you apply for a rebate from Focus on Energy for installing **[LIST MEASURES FROM H3 WHERE H3=1]**?  
 1. Yes, applied for rebate for all items  
 2. No, did not apply for any rebates  
 88. REFUSED  
 99. DON'T KNOW
- H7. **[ASK FOR EACH MEASURE A-I IN H3] [ASK IF H6=2, 88, OR 99]** What are the reasons you did not apply for the Focus on Energy rebate **[IF H6=2, READ: “for all the items you installed”]**?  
 1. Didn't know I could get a rebate  
 2. Didn't qualify  
 3. Too much hassle/paperwork/time  
 4. Other **[SPECIFY: \_\_\_\_\_]**  
 88. REFUSED  
 99. DON'T KNOW

## I. Demographics

Now I have just a few final questions.

- I1. \*What type of home do you live in? Is it a: **[READ LIST]**
  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: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
  
- I2. \*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: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
  
- I3. \*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
  88. REFUSED
  99. DON'T KNOW

14. \*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
  99. (Don't know)
  88. (Refused)
15. \*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: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
16. \***[ASK IF I2=2]** 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: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
17. \***[ASK IF I2=2 AND (ASK IF D1=1 OR D2=1)]** 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: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW

18. \*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.]**  
Number: \_\_\_\_  
88. REFUSED  
99. DON'T KNOW

[ASK IF I8>1]

19. \*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  
8. None  
99. Don't know  
88. Refused
110. \*What is the highest level of school that you have 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  
88. REFUSED  
99. DON'T KNOW



- I11. \*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
  88. REFUSED
  99. DON'T KNOW
- I12. \*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
  88. REFUSED
  99. DON'T KNOW
- I13. **\*[INTERVIEWER RECORD: DO NOT READ.]**  
Gender:
1. Female
  2. Male

**CLOSING SCRIPT:** Those are all the questions we have. **Focus on Energy** appreciates your input. Thank you for your time.

**Wisconsin Focus on Energy  
Residential Lighting & Appliance Program  
Phone Survey**

Researchable Questions	Current Survey Question Mapping
What are the barriers to increased customer participation and how effectively is the Program overcoming those barriers?	B7-B10
Are customers satisfied with the Program?	B8-B10
What is the level of Program awareness among customers and what are their marketing material preferences?	A1; A12-A22
Is the Program designed effectively?	A12-A17; A22

**Quota: 223 surveys; 70 recruits for site visits**

*\*Survey questions labeled with a “\*” are core questions that will be asked across all Focus on Energy phone surveys, where appropriate.*

**A. INTRODUCTION**

Hello, my name is \_\_\_\_\_ and I am calling on behalf of Wisconsin Focus on Energy. We are talking with Wisconsin residents about the lighting they use in their homes.

- A1. Are you familiar with Focus on Energy?
1. Yes
  2. No
  - 88. REFUSED **[THANK AND TERMINATE]**
  - 99. DON'T KNOW

**[IF A1=1, READ]** Great, would you be willing to participate in a short survey to help Focus on Energy evaluate and improve their programs? All your answers will be kept confidential. **[IF YES, CONTINUE TO A2.]**

**[If respondent asks how long, say “About 15 minutes.”]**

**[IF A1=2 or -99, READ]** Focus on Energy offers energy-efficiency programs that help customers save money on their utility bills. Would you be willing to participate in a short survey to help Focus on Energy evaluate and improve their programs? All of your answers will be kept confidential. **[IF YES, CONTINUE TO A2.]**

**[If respondent asks how long, say “About 15 minutes.”]**

A2. Are you the person who usually purchases light bulbs for your home?

1. Yes
2. No **[ASK TO SPEAK TO THE PERSON WHO USUALLY PURCHASES LIGHT BULBS – REPEAT INTRODUCTION WITH CORRECT PERSON, THEN GO TO A3. IF PERSON IS NOT AVAILABLE, TRY TO RESCHEDULE, OTHERWISE TERMINATE]**

**[IF CUSTOMER IS WARY OF THE SURVEY, REASSURE THEM THAT YOU ARE NOT SELLING ANYTHING. IF NECESSARY, OFFER CAROL STEMRICH, CASE COORDINATOR OF THE PUBLIC SERVICE COMMISSION (608-266-8174) AS THE PERSON TO CONTACT WITH ANY QUESTIONS ABOUT THE VALIDITY OF THE RESEARCH.]**

***Awareness of Energy-Saving Light Bulbs and Focus on Energy’s Lighting and Appliance Program***

A3. I’d like to ask you a few questions about different types of light bulbs you may have in your home. Do you have any compact fluorescent light bulbs, also known as CFLs, currently in your home? **[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 **[SKIP TO A5]**
2. No
- 88. REFUSED
- 99. DON’T KNOW

A4. Are you familiar with compact fluorescent bulbs, or CFLs? **[IF NEEDED AND HAVE NOT ALREADY EXPLAINED: 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 A7]**
- 88. REFUSED **[SKIP TO A7]**
- 99. DON’T KNOW **[SKIP TO A7]**

A5. How familiar are you with CFLs? Would you say that you are...?

1. Very familiar
2. Somewhat familiar
3. Not too familiar **[SKIP TO A7]**
4. Not at all familiar **[SKIP TO A7]**
- 88. REFUSED **[SKIP TO A7]**
- 99. DON’T KNOW **[SKIP TO A7]**

A6. Where have you most recently heard about CFLs? **[DO NOT READ RESPONSES. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

1. Through the local utility or local electric company
2. Through an insert that came with your electric bill
3. Through an energy audit in my home
4. Ad or story on TV, newspaper, magazine
5. Radio
6. Retail store display of bulbs
7. Retail store signage or ads **[SPECIFY: \_\_\_\_\_]**
8. Retail sales associate
9. Friend or family member
10. Work; co-worker; promotion in the workplace
11. Online (e.g., websites or banner ads) **[SPECIFY: \_\_\_\_\_]**
12. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

A7. Are you familiar with LED light bulbs? **[IF NEEDED AND HAVE NOT ALREADY EXPLAINED: LED stands for light-emitting diode.]**

1. Yes
2. No **[SKIP TO A12]**
- 88. REFUSED **[SKIP TO A12]**
- 99. DON'T KNOW **[SKIP TO A12]**

A8. How familiar are you with LEDs? Would you say that you are...?

1. Very familiar
2. Somewhat familiar
3. Not too familiar **[SKIP TO A12]**
4. Not at all familiar **[SKIP TO A12]**
- 88. REFUSED **[SKIP TO A12]**
- 99. DON'T KNOW **[SKIP TO A12]**

A9. Where have you most recently heard about LEDs? **[DO NOT READ RESPONSES. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

1. Through the local utility or local electric company
2. Through an insert that came with your electric bill
3. Through an energy audit in my home
4. Ad or story on TV, newspaper, magazine
5. Radio
6. Retail store display of bulbs
7. Retail store signage or ads **[SPECIFY: \_\_\_\_\_]**
8. Retail sales associate
9. Friend or family member
10. Work; co-worker; promotion in the workplace
11. Online (e.g., websites or banner ads) **[SPECIFY: \_\_\_\_\_]**
12. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

A10. Do you have any LED bulbs currently installed in your home, not including holiday lights? **[IF NEEDED: LED stands for light-emitting diode.]**

1. Yes
2. No **[SKIP TO A12]**
- 88. REFUSED **[SKIP TO A12]**
- 99. DON'T KNOW **[SKIP TO A12]**

A11. I am going to list different fixtures in which an LED bulb can be found. Please tell me whether or not you have LED bulbs installed in the following types of fixtures. **[RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, -88=REFUSED; -99=DON'T KNOW]**

- A. Task/Table/desk lamps
- B. Under cabinet lighting
- C. Ceiling or wall fixtures
- D. Recessed/can lighting
- E. Outdoor lighting
- F. Decorative lighting (holiday lights etc.)
- G. Other **[SPECIFY: \_\_\_\_\_]**

A12. **[ASK IF A1=1, AND IF A3 OR A4 = 1]** Are you aware that Focus on Energy works with most stores in your area to offer CFLs at discounted prices?

1. Yes
2. No
- 88. REFUSED
- 99. DON'T KNOW

A13. **[ASK IF A1=1, AND IF A7 = 1]** Are you aware that the Focus on Energy also works with most stores in your area to offer LED bulbs at discounted prices?

1. Yes
2. No
- 88. REFUSED
- 99. DON'T KNOW

A14. **[ASK IF A1=1]** \*Where did you most recently hear about the Focus on Energy Lighting Program, the Program that offers discounts on CFLs and LEDs? **[SELECT ONLY ONE. DO NOT READ, BUT PROMPT IF NECESSARY]**

1. Saw advertisements in the store
2. Retail salesperson told me about it
3. Had a coupon for CFL discount
4. Family/friends/word-of-mouth
5. Focus on Energy or Utility website
6. Other website **[SPECIFY: \_\_\_\_\_]**
7. Email
8. Social Media
9. Focus on Energy or Utility representative
10. Contractor
11. Radio
12. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED **[SKIP TO A16]**
- 99. DON'T KNOW **[SKIP TO A16]**

A15. **[ASK IF A1=1]**\*Are there any other ways that you have heard about the Program? **[DO NOT READ. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

1. Saw advertisements in the store
2. Retail salesperson told me about it
3. Had a coupon for CFL discount
4. Family/friends/word-of-mouth
5. Focus on Energy or Utility website
6. Other website **[SPECIFY: \_\_\_\_\_]**
7. Email
8. Social Media
9. Focus on Energy or Utility representative
10. Contractor
11. Radio
12. Other **[SPECIFY: \_\_\_\_\_]**
13. None / no other ways
- 88. REFUSED
- 99. DON'T KNOW

A16. **\*[ASK IF A1=1]** Are you aware of any other Focus on Energy programs, rebates, or projects? **[IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]**

- 1. Yes
- 2. No
- 88. REFUSED
- 99. DON'T KNOW

A17. **\*[ASK IF A16=1]** Which programs, rebates, or projects? **[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

- 1. Home Performance with ENERGY STAR
- 2. New Homes
- 3. Appliance Recycling
- 4. Lighting and Appliances
- 5. Express Energy Efficiency
- 6. Residential Rewards
- 7. Geothermal Heat Pumps
- 8. Solar Hot Water Systems
- 9. Solar Electric Systems
- 10. Business Incentive Program
- 11. Chain Stores and Franchises
- 12. Small Business Program
- 13. Large Energy Users
- 14. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

A18. **\*[ASK IF A1=1 and A16=1]** Have you participated in any other Focus on Energy programs? **[IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]**

- 1. Yes
- 2. No
- 88. REFUSED
- 99. DON'T KNOW

A19. **\*[ASK IF A18=1]Which programs? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

1. Home Performance with ENERGY STAR
2. New Homes
3. Appliance Recycling
4. Lighting and Appliances
5. Express Energy Efficiency
6. Residential Rewards
7. Geothermal Heat Pumps
8. Solar Hot Water Systems
9. Solar Electric Systems
10. Business Incentive Program
11. Chain Stores and Franchises
12. Small Business Program
13. Large Energy Users
14. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

A20. **\*What do you think is the best way for Focus on Energy to inform the public about energy-efficiency programs? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

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. Focus on Energy or Utility website
9. Other website **[SPECIFY: \_\_\_\_\_]**
10. Email
11. Social Media
12. Focus on Energy or Utility representative
13. Contractor
14. Realtor, home builder
15. Retail stores
16. Home/trade shows
17. Sporting or community event
18. Other **[SPECIFY: \_\_\_\_\_]**
19. Do not want to receive information
- 88. REFUSED
- 99. DON'T KNOW



**B. CFL PURCHASES AND SATISFACTION****[ASK SECTION B IF A3 OR A4 = 1]**

Now I would like to ask you some questions about your lighting purchases just during the last 12 months.

B1. Have you purchased any CFLs in the last 12 months?

1. Yes **[SKIP TO B3]**
2. No
- 88. REFUSED
- 99. DON'T KNOW

B2. **[ASK IF A3=2. IF A3=1 AND B1=2 THEN SKIP TO B4]** Have you ever had a CFL in your home?

1. Yes **[SKIP TO B4]**
2. No **[SKIP TO B11]**
- 88. REFUSED **[SKIP TO B11]**
- 99. DON'T KNOW **[SKIP TO B11]**

- B3. From which stores did you buy the CFLs you purchased in the past 12 months? **[PROMPT IF NECESSARY. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW. IF RESPONDENT INDICATES A NON-SPECIFIC HARDWARE STORE, GROCERY STORE, PROBE FOR SPECIFIC STORE NAME; IF CANNOT REMEMBER STORE NAME, RECORD IN NON-SPECIFIC STORE CATEGORIES.]**

***[RANDOMIZE PROMPTS, BUT ALWAYS HAVE "OTHER" LAST]***

1. Ace Hardware
2. Batteries Plus
3. Farm & Fleet / Fleet/Farm
4. Costco
5. Family Dollar
6. Festival Foods
7. Home Depot
8. Lowes
9. Menards
10. Sam's Club
11. True Value Hardware
12. Wal-Mart
13. Kmart
14. Walgreens
15. NON-SPECIFIC Retail Store **[USE ONLY IF RESPONDENT CAN'T REMEMBER STORE NAME]**
16. NON-SPECIFIC Grocery Store **[USE ONLY IF RESPONDENT CAN'T REMEMBER STORE NAME]**
17. NON-SPECIFIC Hardware Store **[USE ONLY IF RESPONDENT CAN'T REMEMBER STORE NAME]**
18. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

- B4. When a CFL burns out, how likely are you to replace it with a CFL versus a different kind of light bulb? **[READ LIST]**

1. Very likely
2. Somewhat likely
3. Not too likely
4. Not at all likely
- 88. REFUSED
- 99. DON'T KNOW

B5. Have you ever removed a CFL that was installed in your home?

1. Yes
2. No
- 88. REFUSED
- 99. DON'T KNOW

B6. **[ASK IF B5 = 1]** Why did you remove the bulbs(s)? **[DO NOT READ. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

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. Changed to an incompatible fixture
12. Concerned about mercury content
13. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

B7. **[ASK IF B1=1 OR B2=1]** How satisfied are you with the CFLs currently in your home, or, if you have no CFLs installed right now, the ones you have used within the past 3 years? **[READ LIST]**

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied
- 88. REFUSED
- 99. DON'T KNOW

B8. **[ASK IF B7 = 3,4]** What are the reasons you are not satisfied? **[DO NOT READ. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

1. Expensive
2. Takes a long time to reach full brightness
3. Not familiar with them
4. Confused about what type of CFL I need
5. Don't like that they contain mercury
6. Don't like that they have to be recycled (can't just be thrown away)
7. Didn't like the color the light gives off
8. They don't last long
9. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

B9. **[ASK IF B1=1 AND B8≠1]** How satisfied are you with the price you paid in the last 12 months for CFLs? **[READ LIST]**

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied
- 88. REFUSED
- 99. DON'T KNOW

B10. **\*[ASK IF B1=1]** What motivated you to purchase CFLs instead of or in addition to incandescent bulbs in your home? **[DO NOT READ. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

1. Save energy
2. Save money
3. Good for the environment
4. Recommended by a friend/relative
5. Recommended by a retailer/dealer
6. Recommended by a contractor
7. Cash/rebate/incentive payment
8. Utility sponsorship of the program
9. They have a longer bulb life
10. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

B11. **B11A. [ASK IF B2=2,98, OR -99]** What are the reasons you have not bought CFLs? **[DO NOT READ. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

1. Expensive
2. Takes a long time to reach full brightness
3. Not familiar with them
4. Confused about what type of CFL I need
5. Don't like that they contain mercury
6. Don't like that they have to be recycled (can't just be thrown away)
7. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW **[SKIP TO NEXT SECTION]**

**B11B. [ASK IF B2=1]** What are the reasons you have not bought CFLs in the last 12 months? **[DO NOT READ. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

1. Expensive
2. Takes a long time to reach full brightness
3. Not familiar with them
4. Confused about what type of CFL I need
5. Don't like that they contain mercury
6. Don't like that they have to be recycled (can't just be thrown away)
7. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW **[SKIP TO NEXT SECTION]**

B12. \*On a scale of zero to five where five is a lot of attention and zero is not a lot of attention, how much attention do you pay to the amount of energy, gas or electric, that you use in your home? **[READ LIST]**

1. (0-5): \_\_\_\_
- 88. REFUSED **[SKIP TO NEXT SECTION]**
- 99. DON'T KNOW **[SKIP TO NEXT SECTION]**

B13. **[ASK IF B12>2]** \*I am going to read through some energy-saving actions you may have heard or read about. Please let me know if you frequently, sometimes, or never have taken these actions in your home over the past 12 months. **[MARK FOR EACH: 1=FREQUENTLY; 2=SOMETIMES; 3=NEVER; --88=REFUSED; --99=DON'T KNOW]**

**[RANDOMIZE ORDER OF LIST]**

- A. Turn off lights in rooms that are unoccupied
- B. Wash laundry in cold water
- C. Unplug electronic equipment when not in use
- D. Turn up cooling temperature in summer or turn down heating temperature in winter to save on energy
- E. Take shorter showers
- F. Turn down water heater temperature

B14. **[ASK IF B12>2]** \*Have you taken any other actions to save energy in your home in the last 12 months?

- 1. Yes **[SPECIFY: \_\_\_\_\_]**
- 2. No actions taken
- 88. REFUSED
- 99. DON'T KNOW

B15. **[ASK IF B12>2]** \*What challenges, if any, make saving energy difficult in your home? **[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

- 1. Have a leaky/non-efficient/old home (leaky overall, windows, air sealing)
- 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. Rental property (limited ability to make changes)
- 11. Nothing/none/no challenges
- 12. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

## C. DISPOSAL OF CFLS

**[ASK SECTION C IF A3 OR A4 = 1]**

- C1. Have you ever disposed of any CFLs?
1. Yes
  2. No
  - 88. REFUSED
  - 99. DON'T KNOW
- C2. **[ASK IF C1 = 1]** How did you dispose of them? **[DO NOT READ RESPONSES. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**
1. Threw away in trash
  2. Recycled/dropped off at hazardous waste center
  3. Brought to retail store to recycle
  4. Threw away broken bulb in trash
  5. Wrapped in plastic, then threw in trash
  6. Other **[SPECIFY: \_\_\_\_\_]**
  - 88. REFUSED
  - 99. DON'T KNOW
- C3. **[ASK IF C1=2, -88, OR -99]** If you were to dispose of a CFL, how would you do so? **[DO NOT READ RESPONSES. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**
1. Throw away in trash
  2. Recycle/drop off at hazardous waste center
  3. Bring to retail store to recycle
  4. Other **[SPECIFY: \_\_\_\_\_]**
  - 88. REFUSED
  - 99. DON'T KNOW
- C4. Are you aware that Focus on Energy provides free CFL recycling through participating hardware stores and recycling centers? **[IF NEEDED: HOME DEPOT AND LOWES PROVIDE CFL RECYCLING NATIONWIDE AND FOCUS ON ENERGY PROVIDES RECYCLING AT ACE HARDWARE STORES]**
1. Yes
  2. No
  - 88. REFUSED
  - 99. DON'T KNOW

**[IF RESPONDENT ASKS: WHY SHOULD I BE CONCERNED ABOUT THE DISPOSAL OF CFLS? ANSWER: FOCUS ON ENERGY WORKS WITH RETAILERS TO OFFER CFL RECYCLING AND WE ARE LOOKING TO ASSESS THE FAMILIARITY WITH THIS SERVICE]**

## D. LEDs AND OTHER TECHNOLOGY

Now we are going to ask a few questions about LEDs. **[ASK SECTION D IF A7=1]**

- D1. -88-99-88-99 On a scale of zero to five, where five is very favorable and zero is not at all favorable, what is your impression of LEDs?
1. (0-5): \_\_\_\_
  - 88. REFUSED
  - 99. DON'T KNOW
- D2. **[ASK IF D1=0-2]** Why is your impression of LEDs not very favorable? **[DO NOT READ RESPONSES. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**
1. Too expensive
  2. Don't need them
  3. Not interested in using them
  4. Don't know much about them
  5. Don't trust the technology
  6. Don't know how to use them
  7. Other **[SPECIFY: \_\_\_\_\_]**
  - 88. REFUSED
  - 99. DON'T KNOW
- D3. **[ASK IF D1=3-5]** What do you like about LEDs? **[DO NOT READ RESPONSES. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**
1. They save energy
  2. They last a long time
  3. I like the way they look
  4. Other **[SPECIFY: \_\_\_\_\_]**
  - 88. REFUSED
  - 99. DON'T KNOW
- D4. **[ASK IF A10≠1]** On a scale of zero to five where five is very interested and zero is not at all interested, what is your interest in purchasing and installing LED bulbs for your home?
1. (0-5): \_\_\_\_
  - 88. REFUSED
  - 99. DON'T KNOW



D5. **[ASK IF D4 ≤3]** Why would you say your interest is low? **[DO NOT READ RESPONSES. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, --88=REFUSED; --99=DON'T KNOW]**

1. Too expensive
2. Don't need them
3. Not interested in using them
4. Don't know much about them
5. Don't trust the technology
6. Don't know how to use them
7. Other **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

## E. SATISFACTION

E1. \*Thinking about the price you pay and the electric service you receive, how satisfied are you with your electric utility on providing service that's worth what you pay? **[READ LIST]**

1. Very satisfied
2. Somewhat satisfied
3. Somewhat dissatisfied
4. Very dissatisfied
- 88. REFUSED
- 99. DON'T KNOW

E2. \*What utility company provides your electric service?

1. **[SPECIFY: \_\_\_\_\_]**
- 88. REFUSED

## F. -99. DON'T KNOW/CUSTOMER DEMOGRAPHICS

Now I have a few questions for statistical purposes only.

F1. \*What type of home do you live in? Is it a: **[READ LIST]**

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: \_\_\_\_\_]**
- 88. REFUSED
- 99. DON'T KNOW

F2. \*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: \_\_\_\_\_]
- 88. REFUSED
- 99. DON'T KNOW

F3. \*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 LIST IF NECESSARY]

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
- 88. REFUSED
- 99. DON'T KNOW

F4. \*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
- 88. REFUSED
- 99. DON'T KNOW

- F5. **\*[ASK IF F2=2 or 4]** 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 electric company
  2. Electricity included in rent or condo fee
  3. Other **[SPECIFY: \_\_\_\_\_]**
  - 88. REFUSED
  - 99. DON'T KNOW
- F6. \*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 NUMBER: \_\_\_\_\_]**
  - 88. REFUSED
  - 99. DON'T KNOW
- F7. \*What is the highest level of school 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
  - 88. REFUSED
  - 99. DON'T KNOW
- F8. **\*[INTERVIEWER: DO NOT READ.]**
- Gender:
1. Female
  2. Male

## G. RECRUIT FOR ON-SITE SURVEY

### [ASK IF F1=3 AND A3=1]

Within a few weeks, we will be offering people \$50 to allow a trained technician to visit their home. The visit should take about an hour, during which time the technician will gather information on the lighting products used in your home and install meters on up to 5 of the lights in your home. The meters would remain there for approximately 6 months and then we will schedule a visit to remove the meters. By saying yes to participating, you are simply agreeing to be re-contacted to set up an appointment. During the visit, there will be no attempt to sell you anything. Also, should we have more than enough volunteers; we may not contact you at all. If eligible, would you be interested in being a part of our metering study?

G1. Would you be interested in being a part of this type of visit?

1. Yes **[SKIP TO G3]**
2. No **[THANK AND TERMINATE]**
- 88. REFUSED
- 99. DON'T KNOW

G2. **[ASK IF G1 = --88 OR--99]** That is okay, you do not have to decide now. Would it be okay if I take your name and have someone call you when we are scheduling these visits?

1. Yes
2. No **[THANK AND TERMINATE]**
- 88. REFUSED **[THANK AND TERMINATE]**
- 99. DON'T KNOW **[THANK AND TERMINATE]**

G3. Great! Our research does not impact the functioning of your lighting and is typically not visible. All that we would need from you is your permission to install the meters and to record the length of time the lights are on. I have an address on file for you and I would like to confirm if that is still your address and if it is the best address at which to conduct the on-site visit. **[READ ADDRESS TO RESPONDENT AND RECORD YES OR NO AND BEST ADDRESS IF DIFFERENT FROM ADDRESS ON RECORD]** Is this the best address?

1. Yes
2. No **[ASK FOR ADDRESS AND RECORD]**
- 88. REFUSED
- 99. DON'T KNOW

G4. Are you the person to contact for the installation?

1. Yes [CONFIRM NAME]
2. No [GET NAME OF PERSON WE SHOULD CONTACT]

G5. And is the number we called you at today the best number at which to reach you about a visit?

1. Yes [CONFIRM NUMBER]
2. No [GET APPROPRIATE NUMBER]

Thank you very much. As I said, we will be scheduling these visits in the next few weeks and we may call you then.

**Focus on Energy**  
**Home Performance with ENERGY STAR® and**  
**Assisted Home Performance with ENERGY STAR®**  
**Participating Customer Survey**

September 2013

**Quotas: Random sample: 70 for PGM=HP and 70 for PGM =AHP**

Sample Elements:

[MEASURE1], [MEASURE2], etc.

[CFL\_QUANTITY]

[FA\_QUANTITY]

[SH\_QUANTITY]

[PIPE\_INS]

[WPS\_FLAG]

[WPS\_BONUS]

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

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

*[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**
- A2. **DATA]? [ONLY SHOW MEASURES FROM SAMPLE AND RECORD YES OR NO FOR EACH.] [1=YES, 2=NO, 99=DON’T KNOW, AND 88=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)

A3. 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. (Showerheads)
9. (Insulation for water heater pipe)
10. (Other [SPECIFY: \_\_\_\_\_] )
99. (Don't know)
88. (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. (Focus on Energy or Utility website)
9. (Other website **[SPECIFY: \_\_\_\_\_]** )
10. (Email)
11. (Social Media)
12. (PHONE CALL from Focus on Energy or Utility representative)
13. (Approached by Contractor)
14. (Realtor, home builder )
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, **[SPECIFY: \_\_\_\_\_]** )
99. (DON'T KNOW)
88. (REFUSED)

B2. Are you aware there is also a separate Home Performance with ENERGY STAR Program offered by Focus on Energy that offers slightly lower incentives, and does not provide a free assessment?

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

### [ASK IFB2=1]

B3. Were you interested in the regular Home Performance with ENERGY STAR program before you learned about the Assisted Home Performance with ENERGY STAR program?

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

B4. How were you informed that you qualified for the Assisted Home Performance Program?

[RECORD RESPONSE]

99. (DON'T KNOW)

88. (REFUSED)

## C. Program Awareness

[ASK C1 AND C2 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. (Focus on Energy or Utility website)
9. (Other website **[SPECIFY: \_\_\_\_\_]** )
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder )
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, **[SPECIFY: \_\_\_\_\_]**)
99. (DON'T KNOW)
88. (REFUSED)

C2. \*Are there any other ways you heard about the program? **[DO NOT PROMPT – RECORD ALL THAT APPLY]**

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. (Focus on Energy or Utility website)
9. (Other website **[SPECIFY: \_\_\_\_\_]** )
10. (Email)
11. (Social Media)

(Focus on Energy or Utility representative)

12. (Contractor)
13. (Realtor, home builder )
14. (Retail stores)
15. (Home/trade shows)
16. (Sporting or community event)
17. (Other, **[SPECIFY: \_\_\_\_\_]**)
99. (DON'T KNOW)
88. (REFUSED)

C3. \*Are you aware of any other Focus on Energy programs, rebates, or projects? **[IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]**

1. (Yes)
2. (No) **[SKIP TO D1]**
99. (DON'T KNOW) **[SKIP TO D1]**
88. (REFUSED) **[SKIP TO D1]**

**[ASK IF C3=1]**

C4. \*Which programs, rebates, or projects? **[DO NOT READ; RECORD ALL THAT APPLY]**

1. (OMIT)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. (Express Energy Efficiency)
6. (Residential Rewards)
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. OMIT
10. OMIT
11. OMIT
12. OMIT
13. (Other **[SPECIFY: \_\_\_\_\_]**)
99. (DON'T KNOW)
88. (REFUSED)

## D. Assessment Process

D1. Thinking back to the time when you were deciding to participate in the **[PGM NAME]** 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: \_\_\_\_\_]**)
99. (Don't know) **[SKIP TO D3]**
88. (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]**
  99. (Don't know)
  88. (Refused)
- D3. How did you find the contractor who conducted your home energy assessment? **[DO NOT READ LIST; INDICATE UP TO THREE]**
1. (Called Focus on Energy)
  2. (Focus on Energy's website)
  3. (Contractor came to my door)
  4. (Referral from friend, family member, colleague)
  5. (Referral from another contractor) **[ASK: What type of contractor? \_\_\_\_\_ ] )**
  6. (Community Event/Fair)
  7. (Radio ad)
  8. (Newspaper ad)
  9. (Online ad **[ASK: What was the source of the online ad? \_\_\_\_\_ ] )**
  10. (WPS website)
  11. (Other **[SPECIFY: \_\_\_\_\_ ] )**
  99. (Don't know)
  88. (Refused)
- D4. Why did you choose the contractor that you did? **[DO NOT READ LIST; RECORD ALL THAT APPLY]**
1. (They were the least expensive/price)
  2. (Referral from friend, family member, colleague)
  3. (Referral from other contractor **[ASK: What type of contractor? \_\_\_\_\_ ] )**
  4. (Influenced by an advertisement or website)
  5. (Timing)
  6. (The quality and value they provide)
  7. (Knowledge/familiarity with the additional incentives for being a WPS customer)
  8. (Other **[SPECIFY: \_\_\_\_\_ ] )**
  99. (Don't know)
  88. (Refused)
- D5. After your home energy assessment, did your contractor give you a report about how your home uses energy, and providing a list of recommended upgrades?
1. (Yes, I got both a report and a list of recommended upgrades)
  2. (I got a report about my house energy use, but no recommended upgrades)
  3. (I got a list of upgrades but not report about my home energy use)
  4. (No, I received nothing in writing) **[SKIP TO D9]**
  99. (Don't know) **[SKIP TO D9]**
  88. (Refused) **[SKIP TOD9]**

- D6. How useful was this report in helping you understand how your home uses energy? Would you say it was... [\[READ LIST\]](#)
1. Very useful [\[SKIP TO D8\]](#)
  2. Somewhat useful [\[SKIP TO D8\]](#)
  3. Not too useful
  4. Not at all useful
  99. (Don't know) [\[SKIP TO D8\]](#)
  88. (Refused) [\[SKIP TO D8\]](#)
- D7. [\[IF D6 = 3 or 4\]](#) Why do you say that the report was not useful?
1. [\[OPEN END RESPONSE\]](#)
  99. (Don't know)
  88. (Refused)
- D8. How important were the assessment results in your decision to make the recommended upgrades? Would you say ... [\[READ LIST\]](#)
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  99. (Don't know)
  88. (Refused)
- D9. How helpful was the contractor in helping you understand the results of home energy assessment? Would you say the contractor was... [\[READ LIST\]](#)
1. Very helpful [\[SKIP TO D11\]](#)
  2. Somewhat helpful [\[SKIP TO D11\]](#)
  3. Not too helpful
  4. Not at all helpful
  99. (Don't know) [\[SKIP TO D11\]](#)
  88. (Refused) [\[SKIP TO D11\]](#)
- D10. [\[IF D9= 3 or 4\]](#) Why do you say that the contractor was not helpful in helping you understand the results of the home energy assessment?
1. [\[OPEN END RESPONSE\]](#)
  99. (Don't know)
  88. (Refused)

D11. Did the contractor also tell you about discounts or incentives that you could get on upgrades through the **[PGM NAME]** program?

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

D12. Please rate how much the contractor focused on the following priorities. Use a scale of 0 to 10 where 0 means that area was "Not a Priority At All" for the contractor and 10 means it was "A Very High Priority." **[RECORD ANSWER FOR EACH, 99 FOR DON'T KNOW, AND 88 FOR REFUSED]**

- D12a. **[IF D5 = 1, 2, or 3]** Your health, safety, and comfort  
 D12b. **[IF D5 = 1 or 2]** Helping you understand the report  
 D12c. **[IF D5 = 1, 2, or 3]** Your purchase of the recommended equipment

## 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)
99. (Don't know) **[SKIP TO E4]**
88. (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]**
99. (Don't know) **[SKIP TO E4]**
88. (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)
99. (Don't know)
88. (Refused)

- E3a. ROOF (ATTIC) INSULATION
- E3b. WALL INSULATION
- E3c. FOUNDATION INSULATION
- E3d. SILL BOX INSULATION (CRAWLSPACE WALL)
- E3e. AIR SEALING
- E3f. CFLS
- E3g. FAUCET AERATORS
- E3h. SHOWERHEADS
- E3i. INSULATION FOR WATER HEATER PIPE

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

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

## F. Satisfaction

Now I have a few questions about your satisfaction with the program. How satisfied were you with...**[REPEAT AS NEEDED]**

F1. The quality of the home energy assessment. Would you say... **[READ LIST, REPEAT AS NEEDED]**

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



F2. The contractor's ability to answer your questions. Would you say... **[READ LIST, REPEAT AS NEEDED]**

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

F3. The professionalism and courtesy of your contractor Would you say... **[READ LIST, REPEAT AS NEEDED]**

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

F4. The quality of your contractor's work. Would you say... **[READ LIST, REPEAT AS NEEDED]**

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

F5. The amount of the incentive you received. Would you say... **[READ LIST, REPEAT AS NEEDED]**

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

F6. \*The Focus on Energy [PGM NAME] program overall? Would you say... [READ LIST, REPEAT AS NEEDED]

1. Very satisfied [SKIP TO F8]
2. Somewhat satisfied [SKIP TO F8]
3. Not too satisfied
4. Not at all satisfied
99. (Don't know) [SKIP TO F8]
88. (Refused) [SKIP TO F8]

[ASK IF F6=3 OR 4]

F7. \*What about the program were you dissatisfied with? [DO NOT READ; RECORD ALL THAT APPLY]

[RECORD ANSWER]

F8. \*How likely would you be to recommend Focus on Energy's [PGM NAME] program to a friend? Use a 0 – 10 scale where 0 means extremely unlikely and 10 means extremely likely.

1. [RECORD ANSWER]
99. (DON'T KNOW)
88. (REFUSED)

F9. \*Is there anything you would suggest to improve Focus on Energy's [PGM NAME] program?

1. (None)
2. (Other [SPECIFY: \_\_\_\_\_ ] )
99. (DON'T KNOW)
88. (REFUSED)

## 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]**
- 88. (REFUSED) **[SKIP TO NEXT MEASURE]**
- 99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

CFL2. How many CFLs did you receive?

**[RECORD NUMBER]**\_\_\_\_\_

- 88. REFUSED **[SKIP TO NEXT MEASURE]**
- 99. DON'T KNOW **[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]**
- 88. (REFUSED) **[SKIP TO NEXT MEASURE]**
- 99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

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

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

**[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]**
- 88. (REFUSED) **[SKIP TO INSTRUCTION BEFORE CFL9]**
- 99. (DON'T KNOW) **[SKIP TO INSTRUCTION BEFORE CFL9]**

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

[RECORD NUMBER] \_\_\_\_\_

- 88. REFUSED
- 99. DON'T KNOW

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: \_\_\_\_\_] )
- 88. (REFUSED)
- 99. (DON'T KNOW)

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: \_\_\_\_\_] )
- 88. (REFUSED)
- 99. (DON'T KNOW)

CFL9. [ASK IF CFL5=1 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: \_\_\_\_\_] )
- 88. (REFUSED)
- 99. (DON'T KNOW)

**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]**
88. (REFUSED) **[SKIP TO NEXT MEASURE]**
99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

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

**[RECORD NUMBER]** \_\_\_\_\_

88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[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]**
88. (REFUSED) **[SKIP TO NEXT MEASURE]**
99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

F4. How many faucet aerators did you install yourself?

**[RECORD NUMBER]** \_\_\_\_\_

88. REFUSED **[SKIP TO NEXT MEASURE IF F3=2]**
99. DON'T KNOW **[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?

**[RECORD NUMBER]** \_\_\_\_\_ **[IF F3=1 and QUANTITY=0, SKIP TO F8]**

88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[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]**
88. (REFUSED) **[SKIP TO F9]**
99. (DON'T KNOW) **[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: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

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: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

## 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]**
88. (REFUSED) **[SKIP TO NEXT MEASURE]**
99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

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

- [RECORD NUMBER]** \_\_\_\_\_
88. REFUSED **[SKIP TO NEXT MEASURE]**
  99. DON'T KNOW **[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]**
88. (REFUSED) **[SKIP TO NEXT MEASURE]**
99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

SH4. Did you install any of the showerheads?

1. Yes **[ASK:**
  - a. **How many?** \_\_\_\_\_ ]
2. No
88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

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

- [RECORD NUMBER]** \_\_\_\_\_ **[IF SH3=1 AND QUANTITY=0, SKIP TO SH7b]**
88. REFUSED **[SKIP TO NEXT MEASURE]**
  99. DON'T KNOW **[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
88. REFUSED
99. DON'T KNOW

**[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: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

**[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: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

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: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

## 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]**
88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[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]**
88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

P3. Did you install the pipe insulation?

1. Yes
2. No **[SKIP TO P7]**
88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[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]**
88. REFUSED **[SKIP TO E1]**
99. DON'T KNOW **[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: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

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: \_\_\_\_\_]** )
88. REFUSED
99. DON'T KNOW

## El. Wall, Attic, Foundation, and Sillbox Insulation

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

E11. 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]**
88. (REFUSED) **[SKIP TO NEXT MEASURE]**
99. (DON'T KNOW) **[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]
  99. (DON'T KNOW) [SKIP TO G4]
  88. (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
  99. (DON'T KNOW)
  88. (REFUSED)
- 88.
- 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 [SKIP TO G4]
  99. (DON'T KNOW) [SKIP TO G5]
  88. (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)
  99. (DON'T KNOW)
  88. (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
  99. (DON'T KNOW)
  88. (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]
  99. (DON'T KNOW) [SKIP TO G10]
  88. (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)
  99. (DON'T KNOW) [SKIP TO G9]
  88. (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)
  99. (DON'T KNOW)
  88. (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 [SKIP TO G10]
  99. (DON'T KNOW) [SKIP TO G11]
  88. (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)
  99. (DON'T KNOW)
  88. (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
  99. (DON'T KNOW)
  88. (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) [\[SKIP TO G16\]](#)
  99. (DON'T KNOW) [\[SKIP TO G16\]](#)
  88. (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)
  99. (DON'T KNOW) [\[SKIP TO G15\]](#)
  88. (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)
  99. (DON'T KNOW)
  88. (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 [\[SKIP TO G16\]](#)
  99. (DON'T KNOW) [\[SKIP TO G17\]](#)
  88. (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)
  99. (DON'T KNOW)
  88. (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
  99. (DON'T KNOW)
  88. (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]**
  99. (DON'T KNOW) **[SKIP TO I1]**
  88. (REFUSED) **[SKIP TO I1]**
- H2. 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?]
99. (DON'T KNOW)
88. (REFUSED)

H3. 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
99. (DON'T KNOW)
88. (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).]

H4. 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)
99. (DON'T KNOW)
88. (REFUSED)

- H5. 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)
  99. (DON’T KNOW)
  88. (REFUSED)

[ASK IF H5=1]

- H6. 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: \_\_\_\_\_])
  99. (DON’T KNOW)
  88. (REFUSED)

- H7. 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
  99. (DON’T KNOW)
  88. (REFUSED)

- H8. 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)
  99. (DON’T KNOW)
  88. (Refused)

## I. WPS Questions

**[ASK IF WPS\_FLAG=1]**

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

11. 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]**
  99. (Don't know) **[SKIP TO J1]**
  88. (REFUSED) **[SKIP TO J1]**
12. How did you first hear about the bonus incentive for WPS customers? **[Do not prompt - ONE ANSWER ONLY]**
1. (Visited Focus on Energy a 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:\_\_\_\_\_]** )
  6. (Friend, family member, colleague)
  7. (Newspaper)
  8. (Radio)
  9. (Community Event/Fair)
  10. (Social Media (Facebook, Twitter))
  11. (Other **[SPECIFY:\_\_\_\_\_]** )
  99. (Don't know)
  88. (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:\_\_\_\_\_]** )
  99. (Don't know)
  88. (Refused)



**[IF WPS\_BONUS=0]**

14. Did you receive a bonus reward?
1. (Yes) **[SKIP TO I6]**
  2. (No) **[SKIP TO I9]**
  99. (Don't know) **[SKIP TO I9]**
  88. (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]**
  99. (Don't know) **[SKIP TO I9]**
  88. (Refused) **[SKIP TO I9]**

**[IF I5=3 OR IF I4=1]**

16. What was the amount of your bonus incentive?
1. **([SPECIFY AMOUNT])**
  99. (Don't know)
  88. (Refused)
17. How important was the WPS bonus of **[WPS\_BONUS]**, that was paid in addition to the standard Focus on Energy incentive, in your decision to participate? Was the bonus ... **[READ LIST]**?
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not important at all
  99. (Don't know)
  88. (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
  99. (Don't know)
  88. (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: \_\_\_\_\_] )
99. (Don't know)
88. (Refused)

## 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)
99. (Don't know)
88. (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: \_\_\_\_\_] )
99. (DON'T KNOW)
88. (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: \_\_\_\_\_] )
  99. (DON'T KNOW)
  88. (REFUSED)
- J4. \*What type of home do you live in? Is it a: [READ LIST
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: \_\_\_\_\_] )
  99. (DON'T KNOW)
  88. (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: \_\_\_\_\_] )
  99. (DON'T KNOW)
  88. (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)
  - 99.(DON'T KNOW)
  88. (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
- 99.(DON'T KNOW)
88. (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: \_\_\_\_\_]** )
99. (Don't know)
88. (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: \_\_\_\_\_]** )
99. (Don't know)
88. (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: \_\_\_\_\_]** )
99. (Don't know)
88. (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]
99. (Don't know)
88. (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
99. (Don't know)
88. (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)
99. (Don't know)
88. (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
99. (Don't know)
88. (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
99. (Don't know)
88. (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)
99. (Don't know)
88. (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 Home Performance with ENERGY STAR®  
AUDIT-ONLY Survey**

**August 2013**

Sample Elements:

[MEASURE1], [MEASURE2], etc.

[CFL\_QUANTITY]

[FA\_QUANTITY]

[SH\_QUANTITY]

[PIPE\_INS]

[WPS\_FLAG]

[WPS\_BONUS]

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

Hello, my name is [FIRST NAME], and I am calling on behalf of Focus on Energy to follow up with you about the [PGM] 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 RESPONDENT ASKS HOW LONG, SAY: “APPROXIMATELY 20 MINUTES.”]*

*[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 that you received an energy assessment through the **[PGM]** program, but have NOT applied for any discounts, rebates, or incentives for equipment recommended by the assessment. Is this correct? *[If needed, clarify: “I’m referring to equipment other than the CFLs, faucet aerators, pipe wrap, or showerheads that may have been installed during your assessment.”]*
1. (Correct, received audit but did not apply for rebates/incentives)
  2. (Incorrect, received audit and received rebates or incentives for measures) **[THANK AND TERMINATE.]**
  3. (Incorrect; didn’t receive audit, no knowledge of audit) **[READ PROGRAM INFORMATION BELOW AND ASK AGAIN. IF RESPONSE DOES NOT CHANGE, THANK AND TERMINATE.]**
  99. (Don’t know) **[ASK TO SPEAK WITH SOMEONE WHO DOES AND BEGIN AT INTRO]**
  88. (Refused) **[THANK AND TERMINATE.]**

**[PROGRAM INFORMATION:** 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?]

- A2. 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?
1. Yes **[Say: “Thank you for agreeing to participate.”]**
  2. No **[Say: “Thank you for your time. Have a nice day/evening.” THANK AND TERMINATE.]**



## 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. (Focus on Energy or Utility website)
9. (Other website **[SPECIFY: \_\_\_\_\_]** )
10. (Email)
11. (Social Media)
12. (PHONE CALL from Focus on Energy or Utility representative)
13. (Approached by Contractor)
14. (Realtor, home builder )
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, **[SPECIFY: \_\_\_\_\_]**)
99. (DON'T KNOW)
88. (REFUSED)

B2. Are you aware there is also a separate Home Performance with ENERGY STAR Program offered by Focus on Energy that offers slightly lower incentives, and does not provide a free assessment?

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

**[ASK IF B2=1]**

B3. Were you interested in the regular Home Performance with ENERGY STAR program before you learned about the Assisted Home Performance with ENERGY STAR program?

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

B4. How were you informed that you qualified for the Assisted Home Performance Program?

[RECORD RESPONSE]

99. (DON'T KNOW)

88. (REFUSED)

## C. Program Awareness

[ASK C1 AND C2 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. (Focus on Energy or Utility website)
9. (Other website [SPECIFY: \_\_\_\_\_] )
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder )
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, [SPECIFY: \_\_\_\_\_] )
99. (DON'T KNOW)
88. (REFUSED)

C2. \*Are there any other ways you heard about the 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. (Focus on Energy or Utility website)
9. (Other website **[SPECIFY: \_\_\_\_\_]** )
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder )
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, **[SPECIFY: \_\_\_\_\_]**)
99. (DON'T KNOW)
88. (REFUSED)

**[ASK EVERYONE]**

C3. \*Are you aware of any other Focus on Energy programs, rebates, or projects? **[IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]**

1. (Yes)
2. (No) **[SKIP TO D1]**
99. (DON'T KNOW) **[[SKIP TO D1]**
88. (REFUSED) **[SKIP TO D1]**

**[ASK IF C3=1]**

C4. Which programs, rebates, or projects? **[DO NOT READ; RECORD ALL THAT APPLY]**

1. (OMIT)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. (Express Energy Efficiency)
6. (Residential Rewards)
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. (OMIT)

- 10. (OMIT)
- 11. (OMIT)
- 12. (OMIT)
- 13. (Other [SPECIFY: \_\_\_\_\_])
- 99. (DON'T KNOW)
- 88. (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: \_\_\_\_\_])
- 99. (Don't know) [SKIP TO D3]
- 88. (Refused) [SKIP TO D3]

[ASK D2 IF MORE THAN ONE RESPONSE IN D1]

D2. Of those reasons, which one of these 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]
- 99. (Don't know)
- 88. (Refused)

D3. How did you find the contractor who conducted your home energy assessment? **[DO NOT READ LIST; INDICATE UP TO THREE]**

1. (Called Focus on Energy)
2. (Focus on Energy's website)
3. (Contractor came to my door)
4. (Referral from friend, family member, colleague)
5. (Referral from another contractor) **[ASK: What type of contractor? \_\_\_\_\_ ]** )
6. (Community Event/Fair)
7. (Radio ad)
8. (Newspaper ad)
9. (Online ad **[ASK: What was the source of the online ad? \_\_\_\_\_ ]** )
10. (WPS website)
11. (Other **[SPECIFY: \_\_\_\_\_ ]** )
99. (Don't know)
88. (Refused)

D4. Why did you choose the contractor that you did? **[DO NOT READ LIST; RECORD ALL THAT APPLY]**

1. (They were the least expensive/price)
2. (Referral from friend, family member, colleague)
3. (Referral from other contractor **[ASK: What type of contractor? \_\_\_\_\_ ]** )
4. (Influenced by an advertisement or website)
5. (Timing)
6. (The quality and value they provide)
7. (Knowledge/familiarity with the additional incentives for being a WPS customer)
8. (Other **[SPECIFY: \_\_\_\_\_ ]** )
99. (Don't know)
88. (Refused)

D5. After your home energy assessment, did your contractor give you a report about how your home uses energy, and providing a list of recommended upgrades?

1. (Yes, I got both a report and a list of recommended upgrades)
2. (I got a report about my house energy use, but no recommended upgrades)
3. (I got a list of upgrades but not report about my home energy use)
4. (No, I received nothing in writing) **[SKIP TO D8]**
99. (Don't know) **[SKIP TO D8]**
88. (Refused) **[SKIP TO D8]**

- D6. How useful was this report in helping you understand how your home uses energy? Would you say it was... [\[READ LIST\]](#)
1. Very useful [\[SKIP TO D8\]](#)
  2. Somewhat useful [\[SKIP TO D8\]](#)
  3. Not too useful
  4. Not at all useful
  99. (Don't know) [\[SKIP TO D8\]](#)
  88. (Refused) [\[SKIP TO D8\]](#)
- D7. [\[IF D6 = 3 or 4\]](#) Why do you say that the report was not useful?
1. [\[OPEN END RESPONSE\]](#)
  99. (Don't know)
  88. (Refused)
- D8. How helpful was the contractor in helping you understand the results of home energy assessment? Would you say the contractor was... [\[READ LIST\]](#)
1. Very helpful [\[SKIP TO D10\]](#)
  2. Somewhat helpful [\[SKIP TO D10\]](#)
  3. Not too helpful
  4. Not at all helpful
  99. (Don't know) [\[SKIP TO D10\]](#)
  88. (Refused) [\[SKIP TO D10\]](#)
- D9. [\[IF D8 = 3 or 4\]](#) Why do you say that the contractor was ineffective in helping you understand the results of the home energy assessment?
1. [\[OPEN END RESPONSE\]](#)
  99. (Don't know)
  88. (Refused)
- D10. Did the contractor also tell you about discounts or incentives that you could get on upgrades through the [\[PGM\]](#) program?
1. Yes
  2. No
  99. (Don't know)
  88. (Refused)

D11. Please rate how much the contractor focused on the following priorities. Use a scale of 0 to 10 where 0 means that area was “Not a Priority At All” for the contractor and 10 means it was “A Very High Priority.” **[RECORD ANSWER FOR EACH, 99 FOR DON’T KNOW, AND 88 FOR REFUSED]**

- D11a. **[IF D5 = 1, 2, or 3]** My health, safety, and comfort
- D11b. **[IF D5 = 1 or 2]** Helping me understand the report
- D11c. **[IF D5 = 1, 2, or 3]** Getting me to purchase the recommended equipment

## E. Retrofit Process

E1. Have you installed any of the upgrades recommended in the assessment, without getting a discount or rebate?

- 1. Yes
- 2. No **[SKIP TO E4]**
- 99. (Don’t know) **[SKIP TO E4]**
- 88. (Refused) **[SKIP TO E4]**

E2. What recommended upgrades have you installed? **[DO NOT READ. RECORD ALL THAT APPLY.]**  
**[SELECT ALL THAT APPLY]**

- 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. Other [SPECIFY: \_\_\_\_\_]
- 99. (Don’t know)
- 88. (Refused)

E3. Why did you not apply for the **[PRG]** rebate? **[DO NOT READ LIST; RECORD ALL THAT APPLY]**

- 1. (I didn’t know how to apply)
- 2. (Took too much time)
- 3. (The money was not a significant amount for me)
- 4. (I did apply, but my application got lost/I had trouble with the process)
- 5. (Other **[SPECIFY: \_\_\_\_\_]** )
- 99. (Don’t know)
- 88. (Refused)

E4. Are you planning to install any additional recommended energy-efficient improvements by the end of this year?

1. Yes
2. No [SKIP TO SECTION F]
99. (Don't know) [SKIP TO SECTION F]
88. (Refused) [SKIP TO SECTION F]

E5. **[IF E4 = 1]** What improvements are you planning to install by the end of this year? **[DO NOT READ; RECORD ALL THAT APPLY]**

1. (ROOF (ATTIC) INSULATION)
2. (WALL INSULATION)
3. (FOUNDATION INSULATION)
4. (SILL BOX INSULATION (CRAWLSPACE WALL))
5. (AIR SEALING)
6. Other [SPECIFY: \_\_\_\_\_]
7. (None)
99. (DON'T KNOW)
88. (REFUSED)

## F. Satisfaction

Now I have a few questions about your satisfaction with the program. How satisfied were you with...**[REPEAT AS NEEDED]**

F1. The quality of the home energy assessment. Would you say... **[READ LIST, REPEAT AS NEEDED]**

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

F2. The contractor's ability to answer questions. Would you say... **[READ LIST AS NEEDED]**

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



F3. The professionalism and courtesy of your contractor. Would you say... **[READ LIST AS NEEDED]**

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

F4. \*The Focus on Energy **[PGM]** program overall? Would you say... **[READ LIST AS NEEDED]**

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

**[ASK IF F4=3 OR 4]**

F5. \*What about the program were you dissatisfied with?

**[RECORD ANSWER]**

F6. \*How likely would you be to recommend Focus on Energy's **[PGM]** program to a friend? Use a 0 – 10 scale where 0 means extremely unlikely and 10 means extremely likely.

- 1. **[RECORD ANSWER]**
- 99. (DON'T KNOW)
- 88. (REFUSED)

F7. Is there anything you would suggest to improve Focus on Energy's **[PGM]** program?

- 1. (None)
- 2. (Other **[SPECIFY: \_\_\_\_\_]**)
- 99. (DON'T KNOW)
- 88. (REFUSED)

## Direct Install Measures

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

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

### Possible measures:

- CFLs (C)
- Faucet aerators (F)
- Showerheads (SH)
- Insulation for water heater pipe (P)

### C. 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?

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]**
88. (REFUSED) **[SKIP TO NEXT MEASURE]**
99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

CFL2. How many CFLs did you receive?

- [RECORD NUMBER]** \_\_\_\_\_
88. REFUSED **[SKIP TO NEXT MEASURE]**
  99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

CFL3. Did the contractor install the CFLs directly into your fixtures or were they left 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]**
88. (REFUSED) **[SKIP TO NEXT MEASURE]**
99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

**[ASK IF CFL3=2, or 3]**

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

[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]
- 88. (REFUSED) [SKIP TO INSTRUCTION BEFORE CFL9]
- 99. (DON'T KNOW) [SKIP TO INSTRUCTION BEFORE CFL9]

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

[RECORD NUMBER] \_\_\_\_\_

- 88. REFUSED
- 99. DON'T KNOW

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: \_\_\_\_\_] )
- 88. (REFUSED)
- 99. (DON'T KNOW)

CFL8. Why did you remove the CFLs? [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: \_\_\_\_\_] )
- 88. (REFUSED)
- 99. (DON'T KNOW)

CFL9. [ASK IF CFL5=1 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: \_\_\_\_\_] )
88. (REFUSED)
99. (DON'T KNOW)

## F. FAUCET AERATORS

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

F1. Our records show 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]
88. (REFUSED) [SKIP TO NEXT MEASURE]
99. (DON'T KNOW) [SKIP TO NEXT MEASURE]

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

- [RECORD NUMBER] \_\_\_\_\_
88. REFUSED [SKIP TO NEXT MEASURE]
  99. DON'T KNOW [SKIP TO NEXT MEASURE]

F3. Did the contractor install the faucet aerators directly into your fixtures or were they left with you to install yourself?

1. (The faucet aerators were installed directly in the fixtures) [SKIP TO F5]
2. (The faucet aerators were left behind for me to install)
3. (Some were installed directly in the fixtures and some were left behind to install)
4. (I did not receive faucet aerators) [SKIP TO NEXT MEASURE]
88. (REFUSED) [SKIP TO NEXT MEASURE]
99. (DON'T KNOW) [SKIP TO NEXT MEASURE]

F4. How many faucet aerators did you install yourself?

- [RECORD NUMBER] \_\_\_\_\_
88. REFUSED [SKIP TO NEXT MEASURE IF F3=2]
  99. DON'T KNOW [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?

- [RECORD NUMBER] \_\_\_\_\_ [IF F3=1 and QUANTITY=0, SKIP TO F8]
88. REFUSED [SKIP TO NEXT MEASURE]
  99. DON'T KNOW [SKIP TO NEXT MEASURE]

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

- 1 (Yes **[RECORD NUMBER REMOVED: \_\_\_\_\_]**)
- 2 (No) **[SKIP TO F9]**
- 88. (REFUSED) **[SKIP TO F9]**
- 99. (DON'T KNOW) **[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: \_\_\_\_\_]** )
- 88. (REFUSED)
- 99. (DON'T KNOW)

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: \_\_\_\_\_]** )
- 88. (REFUSED)
- 99. (DON'T KNOW)

## SH. WATER-SAVING SHOWERHEADS

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

SH1. Our records show that you received **[SH\_QUANTITY]** low flow showerheads. Is this correct?

- 1. (Yes) **[SKIP TO SH3]**
- 2. (Yes, I received low flow showerheads, but quantity is not correct)
- 3. (No, I did not receive any low flow showerheads) **[SKIP TO NEXT MEASURE]**
- 88. (REFUSED) **[SKIP TO NEXT MEASURE]**
- 99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

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

- [RECORD NUMBER]** \_\_\_\_\_
- 88. REFUSED **[SKIP TO NEXT MEASURE]**
- 99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

SH3. Did the contractor install the showerheads directly into your shower or were they left with you to install yourself? **[RECORD ONE RESPONSE]**

- 1 (The showerheads were installed directly in the fixtures) **[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]**
88. (REFUSED) **[SKIP TO NEXT MEASURE]**
99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

SH4. Did you install any of the Showerheads?

1. Yes **[ASK:**
  - a. **How many were installed? \_\_\_\_\_]**
2. No
88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

SH5. **[ASK IF SH3=1 OR 3]** How many showerheads did the contractor install during the visit?  
**[RECORD NUMBER]\_\_\_\_\_ [IF SH3=1 AND QUANTITY=0, SKIP TO SH7b]**

88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

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

- 1 Yes **[RECORD NUMBER REMOVED: \_\_\_\_\_]**
- 2 No
88. REFUSED
99. DON'T KNOW

**[ASK IF SH6=1]**

SH7a. What are the reasons you removed 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: \_\_\_\_\_]**)
88. (REFUSED)
99. (DON'T KNOW)

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

SH7b. What are the reasons you didn't 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: \_\_\_\_\_] )
88. (REFUSED)
99. (DON'T KNOW)

SH8. [ASK IF SUM OF SH4a AND SH5 IS LESS THAN SH\_WUANTITY 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: \_\_\_\_\_] )
88. (REFUSED)
99. (DON'T KNOW)

## P. WATER HEATER PIPE INSULATION

[ASK SECTION IF MEASURE=WATER HEATER PIPE INSULATION, ELSE SKIP TO G1]

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

1. Yes
2. No, I did not receive any water heater pipe insulation [SKIP TO G1]
88. REFUSED [SKIP TO G1]
99. DON'T KNOW [SKIP TO G1]

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

- 1 The pipe insulation was installed directly in the fixtures [SKIP TO P4]
- 2 The pipe insulation was left behind for me to install
- 3 I did not receive pipe insulation [SKIP TO G1]
88. REFUSED [SKIP TO G1]
99. DON'T KNOW [SKIP TO G1]

P3. Did you install the Pipe insulation?

1. Yes
2. No [SKIP TO P7]
88. REFUSED [SKIP TO G1]
99. DON'T KNOW [SKIP TO G1]

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

- 1. Yes
- 2. No **[SKIP TO G1]**
- 88. REFUSED **[SKIP TO G1]**
- 99. DON'T KNOW **[SKIP TO G1]**

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: \_\_\_\_\_]** )
- 88. (REFUSED)
- 99. (DON'T KNOW)

P6. **[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: \_\_\_\_\_]** )
- 88. REFUSED
- 99. DON'T KNOW

## 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 Type= 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]**
- 99. (DON'T KNOW) **[SKIP TO G4]**
- 88. (REFUSED) **[SKIP TO G4]**



- G2. Would you have installed the [READ LIST] without the Focus on Energy program?
1. Fewer CFLs
  2. More CFLs
  3. Or the same number of CFLs
  99. (DON'T KNOW)
  88. (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 [SKIP TO G4]
  99. (DON'T KNOW) [SKIP TO G5]
  88. (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)
  99. (DON'T KNOW)
  88. (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
  99. (DON'T KNOW)
  88. (REFUSED)

**Measure Type:** [Ask this section (G6-G12) about one additional equipment type that has been installed. If they have installed multiple equipment types then randomly select one of these. To determine which equipment types they have installed check the questions below:

[SELECTED MEASURE] – If more than one randomly pick one

Faucet aerator(s) = IF F4>0 OR F5>0

Water-saving showerhead(s) = IF SH4=1 (installed 1 or more showerheads) OR SH5>0

Water heater pipe insulation = IF P3=1 OR P4=1

**INDICATE WHICH EQUIPMENT TYPE WAS SELECTED IN THE DATA FILE**

- G6. Before you heard about the Focus on Energy Home Performance with ENERGY STAR program, had you already been planning to purchase a [SELECTED MEASURE]?
1. (Yes)
  2. (No) [SKIP TO G10]
  99. (Don't know) [SKIP TO G10]
  88. (REFUSED) [SKIP TO G10]
- G7. Would you have installed the same number (IF PIPE INSULATION SAY, "of feet") of [SELECTED MEASURE] without the incentive from Focus on Energy?
1. (Yes) [SKIP TO G9]
  2. (No)
  99. (Don't know) [SKIP TO G9]
  88. (REFUSED) [SKIP TO G9]
- G8. How many (IF PIPE INSULATION SAY, "feet of") [SELECTED MEASURE] would you have installed?
1. [RECORD ANSWER]
  99. (Don't know)
  88. (REFUSED)

**[IF G8=0, SKIP TO G11]**

- G9. When you say you would have installed [SELECTED MEASURE] without the Focus on Energy program, would you have installed [SELECTED MEASURE] that was at the same level of efficiency?
1. (Yes)
  2. (No)
  99. (DON'T KNOW)
  88. (REFUSED)
- G10. And, thinking about timing, without the Focus on Energy program, would you have installed the [SELECTED MEASURE] ... [READ LIST]
1. At the same time [SKIP TO G12]
  2. Within the same year [SKIP TO G12]
  3. One to two years out [SKIP TO G12]
  4. More than two years out [SKIP TO G12]
  5. Never [SKIP TO G11]
  99. (Don't know) [SKIP TO G12]
  88. (REFUSED) [SKIP TO G12]
- G11. So just to confirm, you would not have added [SELECTED MEASURE] at all, without the program. Is that correct?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (REFUSED)

- G12. Please tell me how important was the Focus on Energy program was in your decision to install the energy-efficient [SELECTED MEASURE]? Would you say it was ... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not important at all
  99. (Don't know)
  88. (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] program.

- H1. Since participating in the Focus on Energy [PGM] 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 windows, or ENERGY STAR lighting such as CFL light bulbs.]
1. (Yes)
  2. (No) [SKIP TO I1]
  99. (Don't know) [SKIP TO I1]
  88. (Refused) [SKIP TO I1]
- H2. 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?]
- 99. (DON'T KNOW)
- 88. (Refused)

H3. 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
- 99. (Don't know)
- 88. (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).]

H4. 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: \_\_\_\_\_])
- 99. (Don't know)
- 88. (Refused)

H5. 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)
- 99. (Don’t know)
- 88. (Refused)

[ASK IF H5=1]

H6. 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: \_\_\_\_\_])
- 99. (Don’t know)
- 88. (Refused)

H7. Please tell me how important the Focus on Energy [PGM] 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
- 99. (Don’t know)
- 88. (Refused)

H8. 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)
- 99. (Don’t know)
- 88. (Refused)

## I. WPS Questions

**[ASK IF WPS\_FLAG=1]**

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

11. Are you familiar with the bonus incentive for WPS customers in the Home Performance with ENERGY STAR program? This bonus doubles the normal incentive.
1. (Yes)
  2. (No) **[SKIP TO J]**
  99. (Don't know) **[SKIP TO J]**
  88. (REFUSED) **[SKIP TO J]**
12. How did you first hear about the bonus incentive for WPS customers? **[Do not prompt - ONE ANSWER ONLY]**
1. (Visited Focus on Energy and /or WPS website)
  2. (Other website **[SPECIFY THE WEBSITE:\_\_\_\_\_]** )
  3. (Marketing material/Bill insert/information came in the mail with my bill **[SPECIFY marketing piece or medium:\_\_\_\_\_]** )
  4. (Contractor told me **[SPECIFY TYPE OF CONTACTOR:\_\_\_\_\_]** )
  5. (Friend, family member, colleague)
  6. (Newspaper)
  7. (Radio)
  8. (Community Event/Fair)
  9. (Social Media (Facebook, Twitter))
  10. (Other **[SPECIFY:\_\_\_\_\_]** )
  99. (Don't know)
  88. (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 Home Performance with ENERGY STAR program
  2. After learning about the Home Performance with ENERGY STAR 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:\_\_\_\_\_]** )
  99. (Don't know)
  88. (Refused)

**[IF WPS\_BONUS=0]**

14. Did you receive a bonus reward?
1. (Yes) [SKIP TO I6]
  2. (No) [SKIP TO I9]
  99. (Don't know) [SKIP TO I9]
  88. (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]
  99. (Don't know) [SKIP TO I9]
  88. (Refused) [SKIP TO I9]

**[IF I5=3 OR IF I4=1]**

16. What was the amount of your bonus incentive?
1. ([SPECIFY AMOUNT])
  99. (Don't know)
  88. (Refused)
17. How important was the WPS bonus of [WPS\_BONUS], that was paid in addition to the standard Focus on Energy incentive, in your decision to participate? Was the bonus ... [READ LIST]?
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not important at all
  99. (Don't know)
  88. (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
  99. (Don't know)
  88. (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: \_\_\_\_\_ ] )
  99. (Don't know)
  88. (Refused)

## 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)
  99. (Don't know)
  88. (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: \_\_\_\_\_ ] )
  99. (DON'T KNOW)
  88. (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: \_\_\_\_\_] )
99. (DON'T KNOW)
88. (REFUSED)

J4. \*What type of home do you live in? Is it a: [READ LIST]

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: \_\_\_\_\_]
99. (Don't know)
88. (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: \_\_\_\_\_] )
99. (Don't know)
88. (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)
99. (DON'T KNOW)
88. (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
99. (Don't know)
88. (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: \_\_\_\_\_]** )
99. (Don't know)
88. (Refused)

**[ASK IF J2=2 OR J3=2 AND J4=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: \_\_\_\_\_]** )
99. (Don't know)
88. (Refused))

**[ASK IF J2=1 OR J3=1 AND J4=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: \_\_\_\_\_] )
99. (Don't know)
88. (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]
99. (Don't know)
88. (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
99. (Don't know)
88. (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)
99. (Don't know)
88. (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
99. (Don't know)
88. (Refused)

[ASK 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
99. (Don't know)
88. (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)
99. (Don't know)
88. (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.

## Wisconsin Focus on Energy Participant New Homes Survey

Researchable Questions	Question
What are the reasons participants choose to buy a Program home?	C11:C16, D1:D7
Are customers satisfied with the Program?	E1:E5; H1
What is the level of Program and Focus on Energy awareness among participants and what are their marketing material preferences?	C1:C10, H3:H9
What kinds of measure packages are installed; Do participants leave measures installed; Do participants install additional measures?	F1:F4
Do participants participate in other Focus on Energy programs?	C7:C10
What is the level of energy efficiency awareness among participants?	F1;F4 I1:I3

*Each researchable question should be included in the table along with the survey questions that apply to the table. This allows us to determine whether a survey question is necessary based on the researchable questions. It provides a frame of reference for each survey question.*

Interviewer instructions are in green.

CATI programming instructions are in red.

List items that shouldn't be read are in parenthesis.

Audience: This survey is for participants.

[Variables from sample]

[CONTACT NAME]

[Quotas]

*\*Survey questions labeled with a "\*" are core questions that will be asked across all Focus on Energy phone surveys, where appropriate.*

### A. Introduction

- A1. Hello, I'm [INSERT NAME] calling on behalf of Wisconsin Focus on Energy. May I speak with [CONTACT NAME]? OR [IF NO NAME] May I speak with someone who is knowledgeable about the purchase of your home?
1. (Yes, that is me)
  2. (Yes, person is coming to phone)
  3. (No, person is not able to come to phone right now) [SCHEDULE CALLBACK]
  98. (Don't know) [ASK TO SPEAK WITH SOMEONE WHO KNOWS AND BEGIN AGAIN]
  99. (Refused) [THANK AND TERMINATE]

- A2. [IF NEW PERSON READ: “Hello, I’m [INSERT NAME] calling on behalf of Wisconsin Focus on Energy.] We are talking with Wisconsin home owners about new homes and would like to ask about your experience and satisfaction with buying a Wisconsin Focus on Energy new home. Your input as well as that of other Focus on Energy home owners will be used to make improvements to the program. Do you have about 15 minutes to answer some questions?
1. (Yes)
  2. (No) [SCHEDULE CALLBACK]
  98. (Don’t know) [THANK AND TERMINATE]
  99. (Refused) [THANK AND TERMINATE]

Back-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 or if you can leave a message for that person.]

[IF NEEDED:] This survey is for research purposes only and this is not a marketing call. This is the primary way for Focus on Energy to provide input into the New Homes certification program. Your participation in this study is important so that Focus on Energy can include your perspectives in how their energy efficiency programs are offered.

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

## B. Screeners

- B1. \*About when was your home built? [READ LIST IF NEEDED]
1. (January 2012 and after)
  2. (2011 and Prior) [THANK AND TERMINATE]
  98. (Don’t know) [THANK AND TERMINATE]
  99. (Refused) [THANK AND TERMINATE]
- B2. Were you involved in the decision to purchase this home?
1. (Yes)
  2. (No) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START WITH A2]
  98. (Don’t know) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START WITH A2]
  99. (Refused) [THANK AND TERMINATE]
- B3. What sources of information did you rely upon when looking to buy your new home? [DO NOT READ LIST AND RECORD MULTIPLE RESPONSES]
1. Newspaper
  2. Realtor
  3. Builder or builder’s sales agent
  4. Websites (including MLS)
  5. Magazines [SPECIFY: \_\_\_\_\_]
  6. Television programs on home buying
  7. Radio programs on home buying

- 8. Family/friends
- 9. Relocation service
- 10. Other [SPECIFY: \_\_\_\_\_]
- 98. (Don't know)
- 99. (Refused)

## C. AWARENESS

- C1. Before this call had you ever seen or heard of the Focus on Energy new home certification?
- 1. (Yes) [SKIP TO C3]
  - 2. (No)
  - 98. (Don't know)
  - 99. (Refused)

[DO NOT ASK IF C1 = 1 (yes)]

- C2. The Focus on Energy new home certification is for homes built in Wisconsin that are at least 10% more efficient than a home built to code. Had you seen or heard of such certification before now?
- 1. (Yes)
  - 2. (No) [SKIP TO D1]
  - 98. (Don't know)
  - 99. (Refused)

- C3. Before a home can be certified as a Focus on Energy home, it would need to be tested for energy efficiency and has to be at least 10% more energy efficient than a standard home. To the best of your knowledge, is your new home a Focus on Energy certified home? {Prod if customer is unsure – Focus on Energy is Wisconsin utilities' statewide energy efficiency and renewable resource program.}
- 1. (Yes, pretty sure this is a Focus on Energy Certified home)
  - 2. (No) [SKIP TO C6]
  - 98. (Don't know) [SKIP TO C6]
  - 99. (Refused) [SKIP TO C6]

[DO NOT ASK IF C3 = 2, 98, OR 99]

- C4. How did you learn that your home was a Focus on Energy certified home? [READ LIST. RECORD YES OR NO FOR EACH WHERE 1=YES, 2=NO, 98=DON'T KNOW, AND 99=REFUSED]
- 1. Focus on Energy label on the home – either on a plaque, closing papers, , or on a Home Energy Rating Certificate?
  - 2. A letter stating that the home participated in the Focus on Energy New Home program
  - 3. The builder told me it was a Focus on Energy New Home
  - 4. Was not notified; there are no indicators
  - 5. Another method [SPECIFY: \_\_\_\_\_]
  - 98. (Don't know)
  - 99. (Refused)



[DO NOT ASK IF C3 = 2, 98, OR 99]

- C5. At what point in the home-buying process did you become aware of Focus on Energy certified homes? [READ LIST AND RECORD ONE RESPONSE]
1. Before starting the home search
  2. During the home search
  3. After purchasing the home
  4. Or some other time [SPECIFY: \_\_\_\_\_]
  5. (Not aware of Focus on Energy New Homes)
  98. (Don't know)
  99. (Refused)
- C6. \*Where did you most recently hear about Focus on Energy? [SELECT ONLY ONE. DO NOT READ, BUT PROMPT IF NECESSARY.]
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. (Focus on Energy or Utility Website)
  9. (Other Website [SPECIFY: \_\_\_\_\_] )
  10. (Email)
  11. (Social media)
  12. (Focus on Energy or utility representative)
  13. (Contractor)
  14. (Realtor, home builder)
  15. (Retail stores)
  16. (Home/trade shows)
  17. (Sporting or community event)
  18. (Other [SPECIFY: \_\_\_\_\_] )
  98. (Don't know)
  99. (Refused)
- C7. \*Are you aware of any other Focus on Energy programs, rebates, or projects? [IF NEEDED: "Such as rebates on CFL bulbs, ENERGY STAR Appliances, or energy-efficient upgrades or home energy audits.]
1. (Yes) [ASK C8]
  2. (No)
  98. (Don't know)
  99. (Refused)

- C8. \*Which programs, rebates, or projects? [IF NEEDED: “Such as rebates on CFL bulbs, ENERGY STAR Appliances, or energy-efficient upgrades or home energy audits.]
1. (Home Performance with Energy Star)- Building shell: Insulation
  2. (Appliance recycling) Fridges and Freezers
  3. (ENERGY STAR Lighting and Appliances)
  4. (Express Energy Efficiency) Direct Install lighting, aerators, pipe wrap , and showerheads
  5. (Residential Rewards) Furnaces and Boilers
  6. (Geothermal Heat Pumps)
  7. (Solar Hot Water Systems)
  8. (Solar Electric Systems)
  9. (Business Incentive Program)
  10. (Chain Stores and Franchises)
  11. (Small Business Program)
  12. (Large Energy Users)
  13. (Other [SPECIFY: \_\_\_\_\_ ] )
  14. (Renewable Energy Program)
  98. (Don’t know)
  99. (Refused)

[ASK IF C7=1]

- C9. \*Have you participated in any other Focus on Energy programs? [IF NEEDED: “Such as rebates on CFL bulbs, ENERGY STAR Appliances, or energy-efficient upgrades or home energy audits.]
1. (Yes) [ASK C10]
  2. (No)
  98. (Don’t know)
  99. (Refused)
- C10. \*Which programs, rebates, or projects? [IF NEEDED: “Such as rebates on CFL bulbs, ENERGY STAR Appliances, or energy-efficient upgrades or home energy audits.]
1. (Home Performance with Energy Star)- Building shell: Insulation
  2. (Appliance recycling) Fridges and Freezers
  3. (ENERGY STAR Lighting and Appliances)
  4. (Express Energy Efficiency) Direct Install lighting, aerators, pipe wrap , and showerheads
  5. (Residential Rewards) Furnaces and Boilers
  6. (Geothermal Heat Pumps)
  7. (Solar Hot Water Systems)
  8. (Solar Electric Systems)
  9. (Business Incentive Program)
  10. (Chain Stores and Franchises)
  11. (Small Business Program)
  12. (Large Energy Users)
  13. (Other [SPECIFY: \_\_\_\_\_ ] )
  14. (Renewable Energy Program)
  15. (Don’t know)
  99. (Refused)

[DO NOT ASK IFC5 IS 3, 4, 5, 98, OR 99]

- C11. Did any of the following parties, if any, bring up the fact that some homes are Focus on Energy homes as a selling point? As I read each one, please say yes or no. [RECORD 1 FOR YES, 2 FOR NO, 98 FOR DON'T KNOW, AND 99 FOR REFUSED]
1. The builder or the builder's sales agent
  2. The realtor
  3. Some other source [SPECIFY: \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

[ASK IF C11=1 or 2]

- C12. How knowledgeable was the builder or builder's salesperson about the Focus on Energy certification or installed energy-efficient appliances and/or equipment? Would you say... [READ LIST]
1. Very knowledgeable
  2. Somewhat knowledgeable
  3. Not too knowledgeable
  4. Not at all knowledgeable
  98. (Don't know)
  99. (Refused)

[ASK IF C11=1 or 2]

- C13. How important was the builder or builder's salesperson in your decision to buy your specific home? Would you say... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  98. (Don't know)
  99. (Refused)

[ASK IF C11=3]

- C14. How knowledgeable was the realtor about the Focus on Energy certification or installed energy efficient appliances and/or equipment? Would you say... [READ LIST]
1. Very knowledgeable
  2. Somewhat knowledgeable
  3. Not too knowledgeable
  4. Not at all knowledgeable
  98. (Don't know)
  99. (Refused)

[ASK IF C11=3]

- C15. How important was the realtor in your decision to buy your specific home? Would you say... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  98. (Don't know)
  99. (Refused)
- C16. How important were your friends, family, or coworkers in your decision to buy your specific home? Would you say... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  98. (Don't know)
  99. (Refused)

## D. Decision Making

- D1. Which of the following statements best describes your involvement in the design and building of your new home? [READ ENTIRE LIST AND RECORD ONE RESPONSE]
1. We had the home custom built to our specifications. [GO TO D1]
  2. We selected from a number of home designs that the builder offered and made SOME changes to a standard design. [SKIP TO D3]
  3. We selected from a number of home designs that the builder offered and made a FEW or NO changes to the standard design. [SKIP TO D3]
  4. We bought a model home or a home that was already built [SKIP TO D3]
  98. (Don't know) [SKIP TO D3]
  99. (Refused) [SKIP TO D3]

[ASK IF D1=1]

- D2. How difficult was it to find a Focus on Energy home or a builder who could construct one? Would you say it was very difficult, somewhat difficult, not too difficult, or not difficult at all?
1. Very difficult
  2. Somewhat difficult
  3. Not too difficult
  4. Not difficult at all
  98. (Don't know)
  99. (Refused)

[ASK EVERYONE]

D3. When looking for a new home, what were the most important aspects that you considered? [DO NOT READ LIST; RECORD ALL THAT APPLY]

1. (Price)
2. (Location)
3. (Energy efficiency)
4. (Quality of home construction)
5. (Schools/neighborhood)
6. (Size of home)
7. (Home layout/floor plan)
8. (Builder reputation)
9. (Other [SPECIFY: \_\_\_\_\_] )
98. (Don't know)
99. (Refused)

D4. What were your primary reasons for buying/building a Focus on Energy certified home? [DO NOT READ LIST; RECORD ALL THAT APPLY; PROBE FOR MULTIPLE RESPONSES]

1. (Higher quality home / better constructed)
2. ("Green" / environmentally friendly)
3. (Save energy)
4. (Lower energy/utility bills)
5. (Reduced draftiness)
6. (Better indoor air quality / healthier)
7. (Home is more valuable / resale value)
8. (More comfortable / better temperature regulation)
9. (Other [SPECIFY: \_\_\_\_\_] )
98. (Don't know)
99. (Refused)

D5. How important of a factor was your home's Focus on Energy certification in your decision to buy this particular home rather than another home? Would you say... [READ LIST]

1. Very important [SKIP TO D7]
2. Somewhat important [SKIP TO D7]
3. Not too important [GO TO D6]
4. Not at all important [GO TO D6]
98. (Don't know) [SKIP TO D7]
99. (Refused) [SKIP TO D7]

[ASK IF D5=3 OR 4]

D6. Why was the Focus on Energy new home certification not an important factor?

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

**[ASK EVERYONE]**

- D7. How likely is it that you would have purchased this home if it were not a Focus on Energy certified home? Would you ...
1. Definitely have purchased
  2. Probably have purchased
  3. Might or might not have purchased
  4. Probably not have purchased
  5. Definitely not have purchased
  98. (Don't know)
  99. (Refused)

**E. Energy-Efficient Equipment**

Now I have a few questions about the appliances in your new home.

- E1. To the best of your knowledge, which of the following high efficiency products and features are installed in your new home? **[READ EACH AND RECORD 1 FOR YES AND 2 FOR NO]**
- E1a. ENERGY STAR Lighting (CFLs or fixtures)
  - E1b. Energy-efficient windows
  - E1c. High efficiency insulation
  - E1d. High efficiency rim and band joist spray foam insulation
  - E1e. Energy efficient natural gas, oil, or propane furnace (90% AFUE or greater)
  - E1f. Energy efficient natural gas boiler (90% AFUE or greater)
  - E1g. Energy efficient water heater: (Indirect water heater; also known as a sidearm or boilermate water heater; Storage water heater; Electric water heater; Tankless water heater; also known as an on-demand water heater)
  - E1h. Renewable energy system

**[ASK FOR EACH "YES" IN F1]**

- E2. For each of the high efficiency features installed in your new home, who was the primary decision-maker for selecting them?
1. (Homeowner researched and selected the equipment)
  2. (Builder/architect offered homeowner a list of equipment to choose from)
  3. (Builder/architect selected the model without homeowner involvement)
  98. (Don't know)
  99. (Refused)
- E2a. ENERGY STAR Lighting (CFLs or fixtures)
  - E2b. Energy-efficient windows
  - E2c. High efficiency insulation
  - E2d. High efficiency rim and band joist spray foam insulation
  - E2e. Energy efficient natural gas, oil, or propane furnace (90% AFUE or greater)
  - E2f. Energy efficient natural gas boiler (90% AFUE or greater)
  - E2g. Energy efficient water heater: (Indirect water heater; also known as a sidearm or boilermate water heater; Storage water heater; Electric water heater; Tankless water heater; also known as an on-demand water heater)
  - E2h. Renewable energy system

E3. After moving into the home, did you install any additional energy-efficient appliances or equipment? And/or did you remove or replace any energy efficient appliances/ equipment?

1. (Yes)

E3a. **Ask:**

Please describe what you installed, removed, and/or replaced?

2. (No)

98. (Don't know)

99. (Refused)

**[DO NOT ASK IF E3 IS 2, 98, OR 99]**

E4. How important was the Focus on Energy New Homes program in your decision to add energy-efficient appliances or equipment to your home? Was it ... **[READ LIST]**

1. Very important

2. Somewhat important

3. Not too important

4. Not at all important

98. (Don't know)

99. (Refused)

## F. Satisfaction

F1. How satisfied are you with the energy efficiency features of your new home? Would you say you are ... **[READ LIST]**

1. Very satisfied

2. Somewhat satisfied

3. Not too satisfied

4. Not at all satisfied

98. (Don't know)

99. (Refused)

**[ASK IF Error! Reference source not found.=3 OR 4]**

F2. What would make you more satisfied with the energy efficiency features in your home?

1. **[RECORD ANSWER: \_\_\_\_\_]**

98. (Don't know)

99. (Refused)

- F3. What do you think are the primary benefits of purchasing a Focus on Energy home? [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (Save money)
  2. (Increase comfort)
  3. (Improve indoor air quality)
  4. (Better quality equipment/reduced equipment maintenance)
  5. (Increase resale value of home)
  6. (Environmental concerns)
  7. (Other [SPECIFY: \_\_\_\_\_] )
  98. (Don't know)
  99. (Refused)
- F4. \*How likely is it you would recommend this program to a friend? Use a 0 to 10 scale where 0 means extremely unlikely and 10 means extremely likely.
1. [RECORD ANSWER: \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)
- F5. \*Is there anything you would suggest to improve Focus on Energy's new home certification program?
1. [RECORD ANSWER: \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

## G. Home Value

- G1. Approximately how much did your home cost? Stop me when I read the correct category [READ LIST]
1. Below \$150,000
  2. \$150,00 to less than \$200,000
  3. \$200,000 to less than \$300,000
  4. \$300,000 to less than \$400,000
  5. \$400,000 to less than \$500,000
  6. More than \$500,000
  98. (Don't know)
  99. (Refused)
- G2. Do you think the price was much higher, somewhat higher, about the same, somewhat lower, or much lower than an identical non-Focus on Energy home? [RECORD ONE RESPONSE]
1. Much higher
  2. Somewhat higher
  3. About the same
  4. Somewhat lower
  5. Much lower
  98. (Don't know)
  99. (Refused)



- G3. Have you had any problems with the energy-saving features of your Focus on Energy home?
1. (Yes) **Ask:**  
G3a. Please describe the issues? \_\_\_\_\_
  2. (No)
  98. (Don't know)
  99. (Refused)

## H. Perceptions of Energy Efficient Homes

- H1. Please indicate your level of agreement with the following statements. Would you say you... **[READ LIST]** that **[INSERT STATEMENT]**?
1. Agree strongly
  2. Agree somewhat
  3. Neither agree nor disagree
  4. Disagree somewhat
  5. Disagree strongly
  98. (Don't know)
  99. (Refuse)
- H1a. Focus on Energy homes are hard to find.
- H1b. Focus on Energy homes are more comfortable than standard homes.
- H1c. Most new homes are energy-efficient even if they are not Focus on Energy certified.
- H1d. Focus on Energy homes provide additional quality.
- H1e. Focus on Energy homes have better resale value.
- H1f. It's hard to understand the benefits of Focus on Energy homes.
- H1g. Focus on Energy homes have lower energy bills.
- H2. As a result of purchasing a Focus on Energy home, would you say your familiarity with energy efficiency has increased significantly, increased somewhat, decreased somewhat, decreased significantly?
1. Increased significantly
  2. Increased somewhat
  3. Decreased somewhat
  4. Decreased significantly
  98. (Don't know)
  99. (Refused)
- H3. Were you aware of the Energy-Efficient Mortgage offered by North Shore Bank of Wisconsin?
1. Yes **[SKIP TO H4]**
  2. No **[SKIP TO H8]**
  98. (Don't know)
  98. (Refused)

- H4. [If H3 = 1] Did you use the Energy-Efficient mortgage to purchase your home?
1. Yes
  2. No
  98. (Don't know)
  - H5. 99. (Refused)
- H6. [If H4 =1] How satisfied were you with your experience working with North Shore Bank? {skip to I1}
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  98. (Don't know)
  5. (Refused)
- H7. [If H1 or H4 =2,] Was there a reason why you didn't purchase your home with an Energy Efficient Mortgage from North Shore Bank of Wisconsin?
1. [Please Record: \_\_\_\_\_] [SKIP TO I1]
  98. (Don't know) [SKIP TO I1]
  98. (Refused) [SKIP TO I1]
- H8. [If you had known about North Shore Banks Energy Efficient Mortgage, a special package to allow participants to take on more debt than they would have under a normal mortgage for those who have Focus on Energy certified homes, how likely it that you would you have used it?
1. Very likely
  2. Somewhat likely
  3. Not too likely
  4. Not at all likely
  98. (Don't know)
  99. (Refused)

## I. Energy Efficiency Attitudes

- I1. \*How informed do you feel about all the ways you can save energy, including buying and using energy efficient appliances and equipment? Would you say... [READ LIST]
1. Very informed
  2. Somewhat informed
  3. Not too informed
  4. Not at all informed
  98. (Don't know)
  99. (Refused)

12. \*Outside of building and/or buying your new home, Have you taken any actions to save energy in your home in the last 12 months?
1. (Yes [SPECIFY: \_\_\_\_\_] )
  2. (None / no actions taken)
  98. (Don't know)
  99. (Refused)
13. \*What challenges if any make saving energy difficult in your home? [DO NOT READ LIST; RECORD ALL THAT APPLY. 1=MENTIONED, 2=NOT MENTIONED, 98 = DON'T KNOW, AND 99 = REFUSED]
1. (OMITTED FOR THIS SURVEY)
  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: \_\_\_\_\_] )
  98. (Don't know)
  99. (Refused)

## J. Home Utility Characteristics

Now we have a few questions about the utilities in your home.

- J1. Is this home your primary residence?
1. Yes
  2. No
  98. (Don't know)
  99. (Refused)
- J2. \*What type of fuel do you use to heat your home? [READ LIST IF NEEDED]
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 utility company provides your electric service?

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

J5. \*Thinking about the price you pay and the electric service you receive, how satisfied are you with your electric utility on providing service that's worth what you pay? Would you say... [READ LIST]

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

[ASK IF J1=1 OR J3=1]

J6. What utility company provides your gas service?

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

[ASK IF J1=1 OR J3=1]

J7. \*Thinking about the price you pay and the gas service you receive, how would you rate your gas utility on providing service that's worth what you pay? Would you say... [READ LIST]

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

**K. Demographics**

Now I have a few questions for statistical purposes only.

- K1. \* 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 square feet
  2. 1,000 to less than 1,500 square feet
  3. 1,500 to less than 2,000 square feet
  4. 2,000 to less than 2,500 square feet
  5. 2,500 to less than 3,000 square feet
  6. 3,000 to less than 4,000 square feet
  7. 4,000 square feet or greater
  98. (Don't know)
  99. (Refused)
- K2. \*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)
- K3. \*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)

- K4. \*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)
- K5. [INTERVIEWER RECORD GENDER; DO NOT READ]
1. (Female)
  2. (Male)
- K6. Those are all the questions I have. Thank you very much for your time.

## Wisconsin Focus on Energy Nonparticipant New Homes Survey

Researchable Questions	Question
What are the reasons participants choose to buy a Program home?	C1:C10
Are customers satisfied with the Program?	E1:E5; H1
What is the level of Program and Focus on Energy awareness among participants and what are their marketing material preferences?	C1:C10, E1:E2
What kind of measures are installed; Do participants leave measures installed; Do participants install additional measures?	N/A
Do participants participate in other Focus on Energy programs?	C8:C11
What is the level of energy efficiency awareness among participants?	D1:D5, F1:F3

*Each researchable question should be included in the table along with the survey questions that apply to the table. This allows us to determine whether a survey question is necessary based on the researchable questions. It provides a frame of reference for each survey question.*

Interviewer instructions are in green.

CATI programming instructions are in red.

List items that shouldn't be read are in parenthesis.

Audience: This survey is for participants.

[Variables from sample]

[CONTACT NAME]

[Quotas]

*\*Survey questions labeled with a "\*" are core questions that will be asked across all Focus on Energy phone surveys, where appropriate.*

### A. Introduction

- A1. Hello, I'm [INSERT NAME] calling on behalf of Wisconsin Focus on Energy. May I speak with [CONTACT NAME]? OR [IF NO NAME] May I speak with someone who is knowledgeable about the purchase of your home?
1. (Yes, that is me)
  2. (Yes, person is coming to phone)
  3. (No, person is not able to come to phone right now) [SCHEDULE CALLBACK]
  98. (Don't know) [ASK TO SPEAK WITH SOMEONE WHO KNOWS AND BEGIN AGAIN]
  99. (Refused) [THANK AND TERMINATE]

- A2. [IF NEW PERSON READ: “Hello, I’m [INSERT NAME] calling on behalf of Wisconsin Focus on Energy.] We are talking with Wisconsin home owners about new homes and would like to ask about your experience buying a new home. Your input as well as that of other home owners will be used to make improvements to the Focus on Energy New Home program. Do you have about 15 minutes to answer some questions?
1. (Yes)
  2. (No) [SCHEDULE CALLBACK]
  98. (Don’t know) [THANK AND TERMINATE]
  99. (Refused) [THANK AND TERMINATE]

Back-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 or if you can leave a message for that person.]

[IF NEEDED:] This survey is for research purposes only and this is not a marketing call. This is the primary way for Focus on Energy to provide input into the New Homes certification program. Your participation in this study is important so that Focus on Energy can include your perspectives in how their energy efficiency programs are offered.

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

## B. Screeners

- B1. \*About when was your home built? [READ LIST IF NEEDED]
1. (January 2012 or after)
  2. (2011 and Prior) [THANK AND TERMINATE]
  98. (Don’t know) [THANK AND TERMINATE]
  99. (Refused) [THANK AND TERMINATE]
- B2. Were you involved in the decision to purchase this home?
1. (Yes)
  2. (No) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START WITH A2]
  98. (Don’t know) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START WITH
  98. (Refused) [THANK AND TERMINATE]
- B3. Is this home your primary residence?
1. (Yes)
  2. (No)
  98. (Don’t know)
  98. (Refused)



## C. AWARENESS

- C1. Before this call had you ever seen or heard of the Focus on Energy new home certification?
1. (Yes) [SKIP TO C3]
  2. (No)
  98. (Don't know)
  99. (Refused)

[DO NOT ASK IF C1 = 2 (no)]

- C2. The Focus on Energy new home certification is for homes built in Wisconsin that are at least 10% more efficient than a home built to code. Had you seen or heard of such certification before now?
1. (Yes)
  2. (No)
  98. (Don't know)
  99. (Refused)

- C3. When looking for a new home, what were the most important aspects that you considered? [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (Price)
  2. (Location)
  3. (Energy efficiency)
  4. (Quality of home construction)
  5. (Schools/neighborhood)
  6. (Size of home)
  7. (Home layout/floor plan)
  8. (Builder reputation)
  9. (Other [SPECIFY: \_\_\_\_\_] )
  98. (Don't know)
  99. (Refused)

- C4. What sources of information did you rely upon when looking to buy your new home? [DO NOT READ LIST AND RECORD MULTIPLE RESPONSES]
1. Newspaper
  2. Realtor
  3. Builder or builder's sales agent
  4. Websites (including MLS)
  5. Magazines [SPECIFY: \_\_\_\_\_]
  6. Television programs on home buying
  7. Radio programs on home buying
  8. Family/friends
  9. Relocation service
  10. Other [SPECIFY: \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

- C5. \*Have you participated in any Focus on Energy programs? [IF NEEDED: "Such as rebates on CFL bulbs, ENERGY STAR Appliances, or energy-efficient upgrades or home energy audits.]

1. (Yes) [ASK C6]
2. (No)
98. (Don't know)
99. (Refused)

C6. \*Which programs, rebates, or projects? [IF NEEDED: "Such as rebates on CFL bulbs, ENERGY STAR Appliances, or energy-efficient upgrades or home energy audits.]

1. (Home Performance with Energy Star)- Building shell: Insulation
2. (Appliance recycling) Fridges and Freezers
3. (ENERGY STAR Lighting and Appliances)
4. (Express Energy Efficiency) Direct Install lighting, aerators, pipe wrap , and showerheads
5. (Residential Rewards) Furnaces and Boilers
6. (Geothermal Heat Pumps)
7. (Solar Hot Water Systems)
8. (Solar Electric Systems)
9. (Business Incentive Program)
10. (Chain Stores and Franchises)
11. (Small Business Program)
12. (Large Energy Users)
13. (Other [SPECIFY: \_\_\_\_\_] )
14. (Renewable Energy Program)
98. (Don't know)
99. (Refused)

C7. When you began shopping for a home, did you intend to buy a newly-built home?

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

C8. How important was the builder or builder's salesperson in your decision to buy your specific home?  
Would you say... [READ LIST]

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

- C9. How important was the realtor in your decision to buy your specific home? Would you say... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  98. (Don't know)
  99. (Refused)
- C10. How important were your friends, family, or coworkers in your decision to buy your specific home? Would you say... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  98. (Don't know)
  99. (Refused)

## D. Energy efficiency

- D1. Can you tell me if the new home you chose is an energy-efficient home?
1. (Yes it is) [Go to D2]
  2. (No it isn't) [Go to D3]
  98. (Don't know) [Go to D3]
  99. (Refused) [Go to D3]
- D2. [IF D1 = 1] Does your energy-efficient home have a certification or label to let you know it is energy-efficient?
1. (Yes) [ASK which certification or label? \_\_\_\_\_]
  2. (No)
  98. (Don't know)
  99. (Refused)
- D3. [IF D1 = 2] Were there any specific reasons why you chose not to buy an energy-efficient home? [DO NOT READ, MARK ALL THAT APPLY]
1. (Higher price to purchase an energy-efficient home)
  2. (No energy-efficient homes in the areas I preferred)
  3. Energy Efficiency not a priority
  4. No energy-efficient homes that met home characteristics other than location (size, specific rooms, etc.)
  5. (Other RECORD: \_\_\_\_\_)
  98. (Don't know)
  99. (Refused)

- D4. Do you feel there are advantages to owning an energy-efficient home?
1. (Yes)
  2. (No)
  98. (Don't know)
  99. (Refused)
- D5. [IF D4 = 1] What do you think are the primary benefits of owning an energy-efficient home? [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (Save money)
  2. (Increase comfort)
  3. (Improve indoor air quality)
  4. (Better quality equipment/reduced equipment maintenance)
  5. (Increase resale value of home)
  6. (Environmental concerns)
  7. (Other [SPECIFY: \_\_\_\_\_] )
  98. (Don't know)
  99. (Refused)

## E. Awareness

- E1. While shopping for a new home, you may have seen or read about homebuilder programs that focus on the energy efficiency of the home. Which ones, if any, do you recall seeing or hearing about? [DO NOT READ LIST]
- 1 Focus on Energy
  - 2 ENERGY STAR
  - 3 Guaranteed Performance
  - 4 Environments for Living
  - 5 Energy Advantage
  - 6 LEED for homes
  - 7 Other [SPECIFY] \_\_\_\_\_
  - 98 Don't know
  - 99 Refused
- E2. How does your household typically learn about ways to save energy?
1. Newspaper / Print Media/Direct mail
  2. Equipment Vendor Phone calls
  3. Utility Bill Inserts
  4. Utility Website
  5. Other Web site [IF YES, WHICH WEB SITES?] \_\_\_\_\_
  6. Presentations or home expos
  7. Retail stores [e.g., Sears or Best Buy]
  8. Friends and family
  9. Radio
  10. TV
  11. Other, [SPECIFY] \_\_\_\_\_.
  12. None, have not learned of any energy efficiency opportunities

## F. Energy Efficiency Attitudes

- F1. \*How informed do you feel about all the ways you can save energy, including buying and using energy efficient appliances and equipment? Would you say... [READ LIST]
1. Very informed
  2. Somewhat informed
  3. Not too informed
  4. Not at all informed
  98. (Don't know)
  99. (Refused)
- F2. \* Outside of building and/or buying your new home, have you taken any actions to save energy in your home in the last 12 months?
1. (Yes [SPECIFY: \_\_\_\_\_] )
  2. (None / no actions taken)
  98. (Don't know)
  99. (Refused)
- F3. \*What challenges if any make saving energy difficult in your home? [DO NOT READ LIST; RECORD ALL THAT APPLY. 1=MENTIONED, 2=NOT MENTIONED, 98 = DON'T KNOW, AND 99 = REFUSED]
1. (OMITTED FOR THIS SURVEY)
  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: \_\_\_\_\_] )
  98. (Don't know)
  99. (Refused)

## G. Home Utility Characteristics

Now we have a few questions about the utilities in your home.

- G1. \*What type of fuel do you use to heat your home? [READ LIST IF NEEDED]
1. (Natural gas)
  2. (Electricity)
  3. (Propane/bottled gas)
  4. (Wood)
  5. (Other [SPECIFY: \_\_\_\_\_] )
  98. (Don't know)
  99. (Refused)

- G2. \*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)

- G3. \*What utility company provides your electric service?
1. [RECORD ANSWER: \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

- G4. \*Thinking about the price you pay and the electric service you receive, how satisfied are you with your electric utility on providing service that's worth what you pay? Would you say... [\[READ LIST\]](#)
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  98. (Don't know)
  99. (Refused)

[ASK IF G1=1 OR G2=1]

- G5. What utility company provides your gas service?
1. [RECORD ANSWER: \_\_\_\_\_]
  98. (Don't know)
  99. (Refused)

[ASK IF G1=1 OR G2=1]

- G6. \*Thinking about the price you pay and the gas service you receive, how would you rate your gas utility on providing service that's worth what you pay? Would you say... [\[READ LIST\]](#)
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  98. (Don't know)
  99. (Refused)

## H. Demographics

Now I have a few final questions for statistical purposes only.

- H1. \* 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 square feet
  2. 1,000 to less than 1,500 square feet
  3. 1,500 to less than 2,000 square feet
  4. 2,000 to less than 2,500 square feet
  5. 2,500 to less than 3,000 square feet
  6. 3,000 to less than 4,000 square feet
  7. 4,000 square feet or greater
  98. (Don't know)
  99. (Refused)
- H2. Approximately how much did your home cost? Stop me when I read the correct category **[READ LIST]**
1. Below \$150,000
  2. \$150,00 to less than \$200,000
  3. \$200,000 to less than \$300,000
  4. \$300,000 to less than \$400-000
  5. \$400,000 to less than \$500,000
  6. More than \$500,000
  98. (Don't know)
  99. (Refused)
- H3. \*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)
- H4. \*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)

- H5. \*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)
- H6. [INTERVIEWER RECORD GENDER; DO NOT READ]
1. (Female)
  2. (Male)
- H7. Those are all the questions I have. Thank you very much for your time.



**Focus on Energy Homes Evaluation CY 2013**  
**Interview Guide for Participant Building Performance Consultants**

Researchable Subject	Researchable Questions /Discussion	Question
Participation	What are the barriers to increased participation and how effectively is the Program overcoming those barriers?	1-8
Program Influence	A wide variety of issues can affect the energy savings resulting from the Program. These include builder/customer behaviors and program influence. The evaluation will investigate these issues to provide the best estimate of gross and net energy savings as well as opportunities to increase energy savings.	9-10, 19-20
Satisfaction	What is Customer and Builder satisfaction with the various components of the Program and the Program overall?	16, 18, 24-26
Marketing and Outreach	The evaluation research will assess the effectiveness of program efforts on the supply chain/ new home market and how these efforts have affected business practices.	19-23
Building Practices and Building Performance Consultants (BPCs)	Has the Builder changed construction practices because of the Program/ BPC engagement?	19-23

**Interview Guide**

Business name \_\_\_\_\_

Respondent \_\_\_\_\_

Date \_\_\_\_\_

Interviewer \_\_\_\_\_

**Introduction**

Hello, my name is [NAME] from Cadmus. We are conducting a study on behalf of Wisconsin Focus on Energy. We are talking to building performance consultants about their experience providing services for Focus on Energy’s New Homes Program.

**Screening**

1. Does your company participate in Focus on Energy’s New Homes Program?
  1. Yes
  2. No (Switch to Nonparticipant Guide)
  3. Don’t know

2. The interview will take approximately 15-20 minutes of your time. Do you have time right now for us to complete the interview?
  1. If yes: Thank you. Your individual answers will be kept confidential and only summary information will be shared with Focus on Energy.
  2. If no: What would be the best time for me to call back and talk with you?

Back-up information:

[IF NEEDED:] I am not selling anything, we are interested in your opinions to help improve our programs, and understand how to assist customers in saving money on their utility bills. Your response will remain confidential.”]

[IF BPC IS WARY OF THE SURVEY, REASSURE THEM THAT YOU ARE NOT SELLING ANYTHING. IF NECESSARY Joe Fontaine with the Public Service Commission of Wisconsin, 608-266-0910 CAN BE CONTACTED TO CONFIRM VALIDITY OF THE STUDY.

3. When did your company first start working with Focus on Energy?
4. Which of the following certification programs does your firm currently support?
  1. Focus on Energy
  2. ENERGY STAR New Homes
  3. GreenBuilt Homes
  4. Home Performance With ENERGY STAR
  5. OTHER [RECORD]
5. [IF Q4 = 2] Do you also dual certify homes as both ENERGY STAR and Focus on Energy?
6. About what percentage of your firm’s business involves the Focus on Energy New Homes Program?
7. Do you also work in the Focus on Energy Home Performance Program and/or other Focus on Energy Programs?
8. Please describe how you work with builders on a new home or new home community. **[ASK ONLY of first few interviewees to get a sense of what the process is like and if it’s consistent across BPCs]**
9. Are there other services you provide to builders outside of the Focus on Energy program scope?
10. When you work with a builder on a community (as opposed to a single home), how do you decide which specific homes to test?

11. Please tell me a bit about the data you collect, how it is collected, and who reviews the data from your inspections (REM/rate files)?
12. What is the process you follow with builders who have testing failures? [*Probe for: if a home fails, are more homes tested? Which ones? How many homes have to be corrected? Is the process different for a community v. a single home?*]
13. How much training do you provide to builders during planning or during construction to help them meet program requirements?
14. How satisfied are you with your interactions with builders? [REPEAT LIST IF NECESSARY]
  1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
15. What kind of training do you receive from the Focus on Energy program? How frequent are trainings?
16. How satisfied are you with the training you received from WECC and Focus on Energy? Would you say you are: [ READ LIST, probe for why rating was given]
  1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
17. How satisfied are you with your communication with WECC and Focus on Energy? Would you say you are: [ READ LIST, probe for why rating was given]
  1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
18. What changes, if any, have you seen in home construction in Wisconsin in 2013 relating to energy efficiency?
19. Would you attribute any changes you see in building practices to the Focus on Energy program?

20. Are changes concentrated in any specific area?

Insulation

Windows

HVAC

Air flow balance

Appliances

Square footage

Air Tightness

Whole House Ventilation

Other

21. How has the Wisconsin (or Milwaukee) housing market changed over the past three years?

22. Do you observe differences between Focus on Energy builders and other builders?

23. How satisfied are you with Focus on Energy's New Homes Program overall?

[REPEAT LIST IF NECESSARY]

1. Very satisfied

2. Somewhat satisfied

3. Not too satisfied

4. Not at all satisfied

24. What about the Focus on Energy New Homes Program works well?

[Record answer \_\_\_\_\_]

25. What about the Focus on Energy New Homes Program could be improved?

[Record answer \_\_\_\_\_]

Thank you for your time. Do you have anything you'd like to add regarding the Focus on Energy Homes Program?

**Focus on Energy Homes Evaluation CY 2013**

**Interview Guide for Nonparticipant Building Performance Consultants**

Researchable Subject	Researchable Questions /Discussion	Question
Participation	What are the barriers to increased participation and how effectively is the Program overcoming those barriers?	6
Program Influence	A wide variety of issues can affect the energy savings resulting from the Program. These include builder/customer behaviors and program influence. The evaluation will investigate these issues to provide the best estimate of gross and net energy savings as well as opportunities to increase energy savings.	N/A
Satisfaction	What is Customer and Builder satisfaction with the various components of the Program and the Program overall?	N/A
Marketing and Outreach	The evaluation research will assess the effectiveness of program efforts on the supply chain/ new home market and how these efforts have affected business practices.	5
Building Practices and Building Performance Consultants (BPCs)	Has the Builder changed construction practices because of the Program/ BPC engagement?	7-10

**Interview Guide**

Business name \_\_\_\_\_

Respondent \_\_\_\_\_

Date \_\_\_\_\_

Interviewer \_\_\_\_\_

**Introduction**

Hello, my name is [NAME] from Cadmus. We are conducting a study on behalf of Wisconsin Focus on Energy, utilities’ statewide energy efficiency and renewable resource program. We are talking to building performance consultants about their experience providing services for Focus on Energy’s New Homes Program.

**Screening**

1. Does your company participate in Focus on Energy’s New Homes Program?
  1. Yes (Switch to Participant Guide)
  2. No
  3. Don’t know

2. The interview will take approximately 10 minutes of your time. Do you have time right now for us to complete the interview?
  1. If yes: Thank you. Your individual answers will be kept confidential and only summary information will be shared with Focus on Energy.
  2. If no: What would be the best time for me to call back and talk with you?

Back-up information:

[IF NEEDED:] I am not selling anything, we are interested in your opinions to help improve our programs, and understand how to assist customers in saving money on their utility bills. Your response will remain confidential.”]

[IF BPC IS WARY OF THE SURVEY, REASSURE THEM THAT YOU ARE NOT SELLING ANYTHING. IF NECESSARY Joe Fontaine with the Public Service Commission of Wisconsin, 608-266-0910 CAN BE CONTACTED TO CONFIRM VALIDITY OF THE STUDY.

3. Does your company work on any Focus on Energy Programs, such as Home Performance and/or any other Focus on Energy Programs?
4. Which of the following certification programs does your firm currently support?
  1. ENERGY STAR New Homes
  2. Environments for Living
  3. OTHER [RECORD]
5. Have you been contacted by Focus on Energy New Homes Program staff or received materials about the Focus on Energy New Homes program?
6. Please tell me why you elected not to participate at this time.
7. What changes, if any, have you seen in home construction in Wisconsin in 2013 relating to energy efficiency?
8. Would you attribute any changes you see in building practices to the Focus on Energy program?
9. Are changes concentrated in any specific area?
  - Insulation
  - Windows
  - HVAC
  - Air flow balance
  - Appliances
  - Square footage
  - Radiant barrier
  - Other

10. How has the Wisconsin (or Milwaukee) housing market changed over the past three years?

Thank you for your time. Do you have anything you'd like to add regarding the Focus on Energy Homes Program?

**Focus on Energy Homes Evaluation CY 2013  
Interview Guide for Participant Builders**

Researchable Subject	Researchable Questions /Discussion	Question
Freeridership and NTG	The Program includes multiple measures and no specific equipment, survey questions are asked regarding builders’ sales of ENERGY STAR homes and the number of homes receiving rebates through Focus on Energy.	4:7, 12:17
Participation	What are the barriers to increased participation and how effectively is the Program overcoming those barriers?	8:12
Program Influence	A wide variety of issues can affect the energy savings resulting from the Program. These include builder/customer behaviors and program influence. The evaluation will investigate these issues to provide the best estimate of gross and net energy savings as well as opportunities to increase energy savings.	12:17
Satisfaction	What is Customer and Builder satisfaction with the various components of the Program and the Program overall?	25:32
Marketing and Outreach	The evaluation research will assess the effectiveness of program efforts on the supply chain/ new home market and how these efforts have affected business practices.	15:24
Building Practices and Building Performance Consultants (BPCs)	Has the Builder changed construction practices because of the Program/ BPC engagement?	15:17, 27:29

**Interview Guide**

Business name \_\_\_\_\_

Respondent \_\_\_\_\_

Date \_\_\_\_\_

Interviewer \_\_\_\_\_

**Introduction**

Hello, my name is [NAME] from Cadmus. We are conducting a study on behalf of Wisconsin Focus on Energy, utilities’ statewide energy efficiency and renewable resource program. We are talking to builders about their experience providing services for Focus on Energy’s New Homes Program.



## Screening

1. Does your company participate in Focus on Energy's New Homes Program?
  1. Yes
  2. No (Thank and Terminate)
  3. Don't know
  4. Refused
2. Are you the person responsible for making decisions regarding Focus on Energy New Homes at your company? [IF NEEDED: Focus on Energy is a statewide program overseen by the Wisconsin Public Service Commission to encourage energy efficiency.]
  1. (Yes)
  2. (No, but person can come to phone) [START OVER AT 1 WITH NEW RESPONDENT]
  3. (No, not available [SCHEDULE CALLBACK])
  99. (DON'T KNOW) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START AGAIN]
  88. (REFUSED) [THANK AND TERMINATE]
3. The interview will take approximately 15-20 minutes of your time. Do you have time right now for us to complete the interview?
  1. If yes: Thank you. Your individual answers will be kept confidential and only summary information will be shared with Focus on Energy.
  2. If no: What would be the best time for me to call back and talk with you?

### Back-up information:

[IF NEEDED:] I am not selling anything, we are interested in your opinions to help improve our programs, and understand how to assist customers in saving money on their utility bills. Your response will remain confidential.”]

[IF CUSTOMER IS WARY OF THE SURVEY, REASSURE THEM THAT YOU ARE NOT SELLING ANYTHING. IF NECESSARY Joe Fontaine with the Public Service Commission of Wisconsin, 608-266-0910 CAN BE CONTACTED TO CONFIRM VALIDITY OF THE STUDY.

4. Does your company build homes other than single family homes?
  1. Yes (Record what other types)
  2. No
5. In 2013, how many total homes did you build in Wisconsin (Focus on Energy, and all non-qualified homes)?  
[Record answer \_\_\_\_\_]
6. And of those homes you built in 2013, what percentage were Focus on Energy Homes?  
[Record answer \_\_\_\_\_]

7. What building code or standard do you build to? [READ LIST; FOR EACH OPTION RECORD WHAT % OF HOMES BUILT]
  1. Focus on Energy
  2. Wisconsin code (2006 IECC)
  3. ENERGY STAR
  4. OTHER [RECORD]
  
8. [If Q6 = more than one category] What is the reason for building to different standards in different geographic areas ?
  1. Record answer [\_\_\_\_\_]

## Participation

9. How important were inquiries from customers regarding the Focus on Energy Program in your decision to participate? Would you say: [READ LIST]
  1. Very important
  2. Somewhat Important
  3. Not too Important
  4. Not at all Important
  
10. How important was the opportunity to differentiate your homes from other builders' homes in your decision to participate? [REPEAT LIST IF NECESSARY]
  1. Very important
  2. Somewhat Important
  3. Not too Important
  4. Not at all Important
  
11. How important were the Program's monetary incentives in your decision to participate?
  1. Very important
  2. Somewhat Important
  3. Not too Important
  4. Not at all Important

**Building Energy-Efficient Homes (Freeridership)**

- 12. How important is Focus on Energy’s New Homes Program in your decision to build energy-efficient homes?
  - 1. Very important
  - 2. Somewhat Important
  - 3. Not too Important
  - 4. Not at all Important
  
- 13. If Focus on Energy did not offer the New Homes Program, would you build the same number of energy-efficient homes, fewer homes, or more homes?
  - 1. The same amount
  - 2. Fewer
  - 3. More
  
- 14. [If 13=1] If you would build the same number of energy-efficient homes without the Program, to what standard would you build? *Note: From this response, we need to understand if the builder would build homes to the same standard (Focus on Energy) or to a different efficiency standard like Wisconsin code (2006 IECC) or ENERGY STAR.*  
 Record answer [ \_\_\_\_\_ ]

**Building Practices**

- 15. Has your company changed construction practices in the last 3 years?
  - 1. Yes
  - 2. No
  - 3. Don’t Know
  
- 16. [If Q15=1] Can you describe the change in construction practice?  
 [Record answer \_\_\_\_\_]
  
- 17. [If Q15=1] Which of the changes, if any, resulted from your participation in the Focus on Energy New Homes program?  
 [Record answer \_\_\_\_\_]

**Marketing and Outreach**

Now I’d like to talk about how the New Homes Program is marketed.

- 18. From your experience, what advantages do buyers feel they get from owning a Focus on Energy home?  
 [Record answer \_\_\_\_\_]

19. Has that perception of energy-efficient homes changed over the last three years?
1. Yes
  2. No
  3. Don't know
20. How frequently do buyers ask about energy efficiency when they visit your model homes ?
1. Very frequently
  2. Occasionally
  3. Not very often
  4. Not at all
  5. Don't know
  6. Refused
21. About what percentage of buyers would you say are familiar with the Focus on Energy New Homes Program?
- [Record answer \_\_\_\_\_]
22. Do you think customers are more likely to buy an energy-efficient home if it has with the Focus on Energy label?
1. Yes
  2. No
  3. Other [Record answer \_\_\_\_\_]
23. Does your company market Focus on Energy Homes differently than your other homes?
1. Yes
  2. No
  3. Other [Record answer \_\_\_\_\_]
24. [If Q23=1] What is different about how you market them?
- [Record answer \_\_\_\_\_]
25. Are you aware of the Cooperative Advertising Reimbursement (Prod: Focus on Energy will provide up to 50% of the cost of approved marketing for reimbursement)?
1. Yes (skip to 26)
  2. No (skip to 30)
  98. Don't know
  99. Refused (skip to 26)

26. {If 25= 1} Have you participated in the Cooperative Advertising Reimbursement

1. Yes (skip to 27)
2. No (skip to 29)
98. Don't know
99. Refused (skip to 29)

27. How satisfied are you with the Cooperative Advertising Reimbursement?

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied

28. What can be done to improve the Cooperative Advertising Reimbursement?

1. [Record answer \_\_\_\_\_](skip to 30)
98. Don't know(skip to 30)
99. Refused(skip to 30)

29. Why did you not participate in the Cooperative Advertising Reimbursement?

- 1.. [Record answer \_\_\_\_\_]
98. Don't know
99. Refused

## Program Satisfaction

30. How satisfied are you with the training you received from WECC and Focus on Energy? Would you say you are: [ READ LIST, probe for why rating was given]

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied

31. How could the training you received be improved?

32. How satisfied are you with your communication with WECC and Focus on Energy? Would you say you are: [ READ LIST, probe for why rating was given]

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied

33. What could be improved in regards to your communication with Program staff?

34. How satisfied are you with your interactions with Building Performance Consultants? [REPEAT LIST IF NECESSARY]

- 1. Very satisfied
- 2. Somewhat satisfied
- 3. Not too satisfied
- 4. Not at all satisfied

35. What about the work being done by Building Performance Consultants works well?  
[Record answer \_\_\_\_\_]

36. What could be improved in regards to working with Building Performance Consultants?  
[Record answer \_\_\_\_\_]

37. How satisfied are you with Focus on Energy’s New Homes Program overall?  
[REPEAT LIST IF NECESSARY]

- 1. Very satisfied
- 2. Somewhat satisfied
- 3. Not too satisfied
- 4. Not at all satisfied

38. What about the Focus on Energy New Homes Program works well?  
[Record answer \_\_\_\_\_]

39. What about the focus on Energy New Homes Program could be improved?  
[Record answer \_\_\_\_\_]

Thank you for your time. Do you have anything you’d like to add regarding the Focus on Energy Homes Program?

**WISCONSIN FOCUS ON ENERGY**  
**Residential Rewards Program**  
**Customer Survey 2013**

*Audience: This survey is for customers who received an incentive for purchasing a 95% AFUE furnace with ECM.*

*[Quota: 70]*

Researchable Questions	Discussion	Question
How can the Program increase its energy and demand savings?	A wide variety of issues can affect the energy savings resulting from the Program. These include customer behaviors and program influence. The evaluation will investigate these issues to provide the best estimate of gross and net energy savings as well as opportunities to increase energy savings.	F1-G8
What are the barriers to increased customer participation and how effectively is the Program overcoming those barriers?	The Program is designed to close the price gap between standard and high-efficiency equipment as well as the information gap about the benefits of efficient equipment and sources of financial incentives. The evaluation research will characterize the main barriers to high efficiency equipment and to what extent and how the Program is addressing the identified barriers. This includes an assessment of the current rebate levels.	C1-C4
How is the Program leveraging the current supply chain for program measures and what changes can increase the supply chain's support of the Program?	The plan is that trade allies will promote the Program directly to customers and thus transform the market. The evaluation research will assess the effectiveness of program efforts on the supply chain and how these efforts have affected business practices.	B1-B7
What is customer satisfaction with the Program?	Customer satisfaction with the various components of the Program and the Program overall is an important indicator of program effectiveness.	D1-D8

- Interviewer instructions are in green.
- CATI programming instructions are in red.
- Response choices in parenthesis should not be read
- Questions with an \* are core Focus questions

## A. Introduction

- A1. Hello, my name is [FIRST NAME], and I am calling on behalf of Focus on Energy. Can I please speak with [CUSTOMER NAME]? [IF CUSTOMER UNAVAILABLE SCHEDULE A CALLBACK] We are contacting residents throughout Wisconsin to learn more about your recent experience with Focus on Energy's Residential Rewards Program. Our records show that you received a cash-back Reward from Focus on Energy for purchasing a 95% AFUE furnace with an electronically commutable motor (ECM) through the Residential Rewards program. Is that correct?
1. (Yes)
  99. (No/Don't know) [ASK TO SPEAK WITH SOMEONE WHO KNOWS AND BEGIN AGAIN. IF PERSON DOESN'T RECOGNIZE PROGRAM SAY, "You may remember receiving a Cash-back Reward from Focus on Energy for installing energy efficient equipment in your home such as attic insulation, heating and cooling equipment, or renewable equipment. Does this sound familiar now?" **THANK AND TERMINATE IF DON'T REMEMBER AND NO ONE ELSE IN HOUSEHOLD KNOWS.**]
  88. (Refused) **[THANK AND TERMINATE]**
- A2. Great, would you be willing to participate in a short survey to help Focus on Energy evaluate and improve their programs? All your answers will be kept confidential.
1. (Continue)
  2. (No) **[THANK AND TERMINATE]**
  99. (Don't know) **[THANK AND TERMINATE]**
  88. (Refused) **[THANK AND TERMINATE]**

Back-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 or if you can leave a message for that person.]

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

[IF NEEDED:] I am not selling anything, we are interested in your opinions to help improve our programs, and understand how to assist customers in saving money on their utility bills. Your response will remain confidential."]

[IF CUSTOMER IS WARY OF THE SURVEY, REASSURE THEM THAT YOU ARE NOT SELLING ANYTHING. IF NECESSARY OFFER CAROL STEMRICH (608-266-8174) AS THE PERSON TO CONTACT WITH ANY QUESTIONS ABOUT THE VALIDITY OF THE RESEARCH.]

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



## B. Awareness

B1. \*Where did you most recently hear about the Focus on Energy Residential Rewards program? [DO NOT READ LIST, RECORD ONE ANSWER]

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. (Focus on Energy or Utility website)
9. (Other website [SPECIFY: \_\_\_\_\_])
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder )
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

B2. \*Are there any other ways you heard about the program? [DO NOT READ. RECORD ALL THAT APPLY]

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. (Focus on Energy or Utility website)
9. (Other website [SPECIFY: \_\_\_\_\_])
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder)
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

B3. \*Are you aware of any other Focus on Energy programs, rebates, or projects? [IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]

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

[ASK IF B3=1]

B4. \*Which programs, rebates, or projects? [DO NOT READ; RECORD ALL THAT APPLY]

1. (Home Performance with ENERGY STAR)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. (Express Energy Efficiency)
6. OMIT for this version
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. OMIT for this version
10. OMIT for this version
11. OMIT for this version
12. OMIT for this version
13. (Other [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

B5. \*Have you participated in any other Focus on Energy programs? [RECORD ALL THAT APPLY. IF NEEDED: "Such as rebates on CFL bulbs, ENERGY STAR appliances, or energy-efficient upgrades or home energy audits.]

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

[ASK IF B5=1]

B6. \*Which programs, rebates, or projects? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]

1. (Home Performance with ENERGY STAR)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. (Express Energy Efficiency)
6. OMIT for this version
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. OMIT for this version
10. OMIT for this version
11. OMIT for this version

- 12. OMIT for this version
- 13. (Other [SPECIFY: \_\_\_\_\_])
- 99. (Don't know)
- 88. (Refused)

B7. \*What do you think is the best way for Focus on Energy to inform the public about energy-efficiency programs? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]

- 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. (Focus on Energy or Utility website)
- 9. (Other website [SPECIFY: \_\_\_\_\_])
- 10. (Email)
- 11. (Social Media)
- 12. (Focus on Energy or Utility representative)
- 13. (Contractor)
- 14. (Realtor, home builder)
- 15. (Retail stores)
- 16. (Home/trade shows)
- 17. (Sporting or community event)
- 18. (Other, [SPECIFY: \_\_\_\_\_])
- 19. (Do not want to receive information)
- 99. (Don't know)
- 88. (Refused)

## C. Participation Decisions

I'd like to ask you about factors that influenced your decisions to install the high efficiency furnace through the program.

C1. \*What motivated you to participate in Focus on Energy's Residential Rewards program and purchase your furnace? [DO NOT READ; RECORD ALL THAT APPLY]

- 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. (Utility sponsorship of the program [SPECIFY THE PROGRAM: \_\_\_\_\_])
- 9. (Other [SPECIFY: \_\_\_\_\_])
- 98. (Don't know)
- 88. (Refused)

[ASK IF MORE THAN ONE ANSWER 1-9 IN C1]

C2. \*Which of these factors was most important in your decision to participate in the Residential Rewards program? [SHOW ALL ANSWERS GIVEN IN C1; DO NOT READ]

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. (Utility sponsorship of the program [SPECIFY THE PROGRAM: \_\_\_\_\_])
9. Other [SPECIFY: \_\_\_\_\_]
98. (Don't know)
88. (Refused)

C3. \*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)
99. (Don't know)
88. (Refused)

C4. Is the furnace currently installed in your home?

1. (Yes)
2. (No) [WHY NOT? \_\_\_\_\_]
99. (Don't know)
88. (Refused)

## D. Satisfaction

Now I would like to ask you some questions about your satisfaction with the program.

- D1. How satisfied are you with the Residential Rewards Cash-back application process? Would you say you are ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)
  88. (Refused)

[ASK IF D1=3 OR 4]

- D2. What about the application process were you dissatisfied with? [DON'T READ LIST; RECORD ALL THAT APPLY]
1. (Difficulty filling out the application [ASK: What was difficult? \_\_\_\_\_] )
  2. (Application processing took too long [ASK: How long did it take? \_\_\_\_\_] )
  3. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)

- D3. How satisfied are you with the amount of the reward you received through the Residential Reward program? Would you say you are ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)
  88. (Refused)

[ASK IF D3=3 OR 4]

- D4. What about the reward amount were you dissatisfied with?  
[RECORD ANSWER]

- D5. \*How satisfied are you with Focus on Energy's Residential Rewards program? Would you say you are ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)
  88. (Refused)

[ASK IF D5=3 OR 4]

- D6. \*What about the program were you dissatisfied with?
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- D7. \*How likely is it you would recommend this program to a friend? Use a 0 – 10 scale where 0 means extremely unlikely and 10 means extremely likely.
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- D8. \*Is there anything you would suggest to improve Focus on Energy's Residential Rewards program?
1. (None)
  2. (Other [SPECIFY: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)

## E. Measure Use

Now I'd like to ask a few questions about your ECM fan usage.

- E1. At the time of installation, did your contractor give you any instructions on how often to run the fan?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

[ASK IF E1=1]

- E2. What instructions did your contractor give? Did the contractor instruct you to ... [READ ENTIRE LIST AND RECORD ONE ANSWER]
1. Run the fan all the time, even when not heating or cooling your home
  2. Run the fan occasionally, even when not heating or cooling your home
  3. Run the fan only when heating or cooling your home
  4. Something else [SPECIFY: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)

E3. Under what circumstances do you run the fan? Do you ... [READ ENTIRE LIST AND RECORD ONE ANSWER]

1. Run the fan all the time, even when not heating or cooling your home
2. Run the fan occasionally, even when not heating or cooling your home
3. Run the fan only when heating or cooling your home
4. Something else [SPECIFY: \_\_\_\_\_]
99. (Don't know)
88. (Refused)

E4. Do you have a central air conditioner in your home?

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

## F. Freeridership

I'd like to find out what your plans were for making energy-efficient improvements to your home **before** you found out about the Focus on Energy Residential Rewards program.

F1. **Before** you heard anything about the Focus on Energy Residential Rewards program, had you already purchased or installed the new furnace?

1. (Yes)
2. (No) [SKIP TO F3]
99. (Don't know) [SKIP TO F3]
88. (Refused) [SKIP TO F3]

F2. So just to be clear, you installed the new furnace before you heard anything about the Focus on Energy Residential Rewards program. Is that correct?

1. (Yes, that's correct) [SKIP TO G1]
2. (No, that's not correct)
99. (Don't know)
88. (Refused)

F3. **Before** you heard about the Focus on Energy Residential Rewards program, had you already been **planning to purchase** a furnace?

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

F4. Would you have installed the same furnace without the Cash-back Reward from Focus on Energy?

1. (Yes) [SKIP TO F6]
2. (No)
99. (Don't know)
88. (Refused)

- F5. So I understand, would you have installed a different furnace without the Focus on Energy Cash-back Reward or would you have decided not to replace it?
1. (I would have installed a different furnace)
  2. (I would have decided not to replace it) **[SKIP TO F8]**
  99. (Don't know) **[SKIP TO F10.1]**
  88. (Refused) **[SKIP TO F10.1]**
- F6. When you say you would have installed a furnace without the Focus on Energy Cash-back Reward from Focus on Energy, would you have installed one that was at the same level of efficiency?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)
- F7. And, thinking about timing, without the Focus on Energy Cash-back Reward, would you have installed the furnace ... **[READ LIST]**
1. At the same time **[SKIP TO F10.1]**
  2. Within the same year **[SKIP TO F10.1]**
  3. One to two years out **[SKIP TO F10.1]**
  4. More than two years out **[SKIP TO F10.1]**
  5. Never **[SKIP TO F10.1]**
  99. (Don't know) **[SKIP TO F10.1]**
  88. (Refused) **[SKIP TO F10.1]**
- F8. So just to confirm, you would not have replaced your furnace at all, without a Focus on Energy Cash-back Reward. Is that correct?
1. (Yes) **[SKIP TO F10.1]**
  2. (No)
  99. (Don't know)
  88. (Refused)
- F9. Without the Focus on Energy Cash-back Reward, would you have installed a furnace, but one that was not as energy-efficient?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)
- F10. And with respect to timing, would you have installed the furnace ... **[READ LIST]**
1. At the same time
  2. Within the same year
  3. One to two years out
  4. More than two years out
  5. Never
  99. (Don't know)
  88. (Refused)



- F11. Please tell me how important the Focus on Energy Cash-back Reward was in your decision to purchase the high efficiency furnace. Would you say it was ... [\[READ LIST\]](#)
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  99. (Don't know)
  88. (Refused)

## G. 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 Residential Rewards program.

- G1. Since participating in the Focus on Energy Residential Rewards program, have you installed any other energy-efficient products in your home that you did NOT receive a Cash-back Reward for? 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) [\[SKIP TO I1\]](#)
  99. (Don't know) [\[SKIP TO I1\]](#)
  88. (Refused) [\[SKIP TO I1\]](#)
- G2. What were the products that you installed without getting a Cash-back Reward? [\[DO NOT READ LIST; CLARIFY AS NEEDED TO CODE ANSWER CORRECTLY, RECORD ALL THAT APPLY\]](#)
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. (Other [SPECIFY: \_\_\_\_\_]) [ASK: How many did you install?]
- 99. (Don't know)
- 88. (Refused)

G3. Please tell me how important your experience with the Focus on Energy program was in your decision to install [INSERT EACH ONE SELECTED IN G2]. Was 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
- 99. (Don't know)
- 88. (Refused)

[ASK G4 FOR EACH ONE SELECTED IN G2 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).]

G4. Why didn't you apply for and receive a Cash-back Reward for [INSERT EACH ONE SELECTED IN G2]? [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: \_\_\_\_\_])
- 99. (Don't know)
- 88. (Refused)

G5. 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)
- 99. (Don't know)
- 88. (Refused)

[ASK IF G5=1]

- G6. 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: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)
- G7. Please tell me how important the Focus on Energy Residential Rewards program was in your decision to [INSERT EACH ONE SELECTED IN G6]. 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 G6, "Was it the same influence for every action?"]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  99. (Don't know)
  88. (Refused)
- G8. And, over time, have you continued to take these actions to save energy? Let's start with ... [INSERT EACH ANSWER FROM G6]. [IF NEEDED, "Have you continued to take this action to save energy?"]
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

## H. Energy Attitudes

- H1. \* How informed do you feel about all the ways you can save energy, including buying and using energy efficient appliances and equipment? Would you say ... [READ LIST]
1. Very informed
  2. Somewhat informed
  3. Not too informed
  4. Not at all informed
  99. (Don't know)
  88. (Refused)

H2. \* On a scale of zero to five where five is a lot of attention and zero is not a lot of attention, how much attention do you pay to the amount of energy; gas or electric, that you use in your home

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

H3. \*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: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

H4. \* What type of fuel does your water heater use?

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

H5. \* Thinking about the price you pay and the electric service you receive, how would you rate your electric utility on providing service that's worth what you pay? Would you say ... [READ LIST]

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

[ASK IF H3=1 OR H4=1]

H6. Thinking about the price you pay and the gas service you receive, how would you rate your gas utility on providing service that's worth what you pay? Would you say ... [READ LIST]

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

## I. Demographics

Now I have a few questions for statistical purposes only.

11. \*What type of home do you live in? Is it a: **[READ LIST]**
  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: \_\_\_\_\_]**
  99. (Don't know)
  88. (Refused)
  
12. \* 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: \_\_\_\_\_]**)
  99. (Don't know)
  88. (Refused)
  
13. \* 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)
  99. (Don't know)
  88. (Refused)
  
14. \*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
  99. (Don't know)
  88. (Refused)

15. \*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: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

[ASK IF I2=2]

16. \*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: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

[ASK IF I2=2 OR H3=1 OR H4=1]

17. \*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: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

18. \*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]
99. (Don't know)
88. (Refused)

[ASK IF I8>1]

- I9. \* 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
  99. (Don't know)
  88. (Refused)
- I10. \* 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)
  99. (Don't know)
  88. (Refused)
- I11. \* 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
  99. (Don't know)
  88. (Refused)
- I12. \* 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
  99. (Don't know)
  88. (Refused)

I13. [INTERVIEWER RECORD: DO NOT READ.]

1. (Male)
2. (Female)

**CLOSING SCRIPT:** Those are all the questions we have. **Focus on Energy** appreciates your input. Thank you for your time.



**WISCONSIN FOCUS ON ENERGY**  
**Residential Rewards Program**  
**Customer Survey 2013**

*Audience: This survey is for customers who received an incentive for purchasing energy efficient or renewable measure through the Residential Rewards Program.*

**Measure List:**

Measure List	Measure Name	"A, an or some"
Air Source Heat Pump, >= 16 SEER	Air Source Heat Pump	an
Condensing Water Heater, NG, 90%+	Condensing Water Heater	a
ECM, Furnace, New or Replacement	Efficient Furnace Motor (or ECM)	an
Furnace And A/C, ECM, 95% + AFUE, >= 16 SEER	Furnace with efficient motor and air conditioning	a
Ground Source Heat Pump, Electric Back-up	Ground Source Heat Pump	a
Ground Source Heat Pump, NG Back-up	Ground Source Heat Pump	a
Hot Water Boiler, 90%+ AFUE	Hot Water Boiler	a
Hot Water Boiler, 95%+ AFUE	Hot Water Boiler	a
Insulation, Attic, R-11 to R-38	Attic Insulation	some
LP or Oil Furnace with ECM, 90%+ AFUE (Existing)	Furnace with efficient motor	a
LP or Oil Furnace with ECM, 95% AFUE, DOA	Furnace with efficient motor	a
NG Furnace with ECM, 90%+ AFUE (Existing)	Furnace with efficient motor	a
Solar PV	Solar Panels	some
Solar Thermal, Electric	Solar Water Heater	a
Solar Thermal, NG	Solar Water Heater	a
Tankless Water Heater, NG, EF of 0.82 or greater	Tankless Water Heater	a
Water Heater, Electric, EF of 0.93 or greater	Efficient Water Heater	an
Water Heater, Heat Pump, EF >=2.0, Electric	Water Heater Heat Pump	a
Water Heater, Indirect	Indirect Water Heater	an
Water Heater, NG, EF of 0.67 or greater	Efficient Water Heater	an

*[Quota: 70]*

Researchable Questions	Discussion	Question
How can the Program increase its energy and demand savings?	A wide variety of issues can affect the energy savings resulting from the Program. These include customer behaviors and program influence. The evaluation will investigate these issues to provide the best estimate of gross and net energy savings as well as opportunities to increase energy savings.	F1-G8
What are the barriers to increased customer participation and how effectively is the Program overcoming those barriers?	The Program is designed to close the price gap between standard and high-efficiency equipment as well as the information gap about the benefits of efficient equipment and sources of financial incentives. The evaluation research will characterize the main barriers to high efficiency equipment and to what extent and how the Program is addressing the identified barriers. This includes an assessment of the current rebate levels.	C1-C4
How is the Program leveraging the current supply chain for program measures and what changes can increase the supply chain's support of the Program?	The plan is that trade allies will promote the Program directly to customers and thus transform the market. The evaluation research will assess the effectiveness of program efforts on the supply chain and how these efforts have affected business practices.	B1-B7
What is customer satisfaction with the Program?	Customer satisfaction with the various components of the Program and the Program overall is an important indicator of program effectiveness.	D1-D8

- Interviewer instructions are in green.
- CATI programming instructions are in red.
- Response choices in parenthesis should not be read
- Questions with an \* are core Focus questions

## A. Introduction

- A1. Hello, my name is [FIRST NAME], and I am calling on behalf of Focus on Energy. Can I please speak with [CUSTOMER NAME]? [IF CUSTOMER UNAVAILABLE SCHEDULE A CALLBACK] We are contacting residents throughout Wisconsin to learn more about your recent experience with Focus on Energy's Residential Rewards Program. Our records show that you received a cash-back Reward from Focus on Energy for purchasing ["a, an or some"] [INSERT MEASURE NAME] through the Residential Rewards program. Is that correct?
1. (Yes)
  99. (No/Don't know) [ASK TO SPEAK WITH SOMEONE WHO KNOWS AND BEGIN AGAIN. IF PERSON DOESN'T RECOGNIZE PROGRAM SAY, "You may remember receiving a Cash-back Reward from Focus on Energy for installing energy efficient equipment in your home such as attic insulation, heating and cooling equipment, or renewable equipment. Does this sound familiar now?" THANK AND TERMINATE IF DON'T REMEMBER AND NO ONE ELSE IN HOUSEHOLD KNOWS.]
  88. (Refused) [THANK AND TERMINATE]
- A2. Great, would you be willing to participate in a short survey to help Focus on Energy evaluate and improve their programs? All your answers will be kept confidential.
1. (Continue)
  2. (No) [THANK AND TERMINATE]
  99. (Don't know) [THANK AND TERMINATE]
  88. (Refused) [THANK AND TERMINATE]

Back-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 or if you can leave a message for that person.]

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

[IF NEEDED:] I am not selling anything, we are interested in your opinions to help improve our programs, and understand how to assist customers in saving money on their utility bills. Your response will remain confidential."]

[IF CUSTOMER IS WARY OF THE SURVEY, REASSURE THEM THAT YOU ARE NOT SELLING ANYTHING. IF NECESSARY OFFER CAROL STEMRICH (608-266-8174) AS THE PERSON TO CONTACT WITH ANY QUESTIONS ABOUT THE VALIDITY OF THE RESEARCH.]

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

## B. Awareness

B1. \*Where did you most recently hear about the Focus on Energy Residential Rewards program? [DO NOT READ LIST, RECORD ONE ANSWER]

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. (Focus on Energy or Utility website)
9. (Other website [SPECIFY: \_\_\_\_\_])
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder )
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

B2. \*Are there any other ways you heard about the program? [DO NOT READ. RECORD ALL THAT APPLY]

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. (Focus on Energy or Utility website)
9. (Other website [SPECIFY: \_\_\_\_\_])
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder)
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

B3. \*Are you aware of any other Focus on Energy programs, rebates, or projects? [IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]

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

[ASK IF B3=1]

B4. \*Which programs, rebates, or projects? [DO NOT READ; RECORD ALL THAT APPLY]

1. (Home Performance with ENERGY STAR)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. (Express Energy Efficiency)
6. OMIT for this version
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. OMIT for this version
10. OMIT for this version
11. OMIT for this version
12. OMIT for this version
13. (Other [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

B5. \*Have you participated in any other Focus on Energy programs? [RECORD ALL THAT APPLY. IF NEEDED: "Such as rebates on CFL bulbs, ENERGY STAR appliances, or energy-efficient upgrades or home energy audits.]

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

[ASK IF B5=1]

B6. \*Which programs, rebates, or projects? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]

1. (Home Performance with ENERGY STAR)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. (Express Energy Efficiency)
6. OMIT for this version
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. OMIT for this version
10. OMIT for this version
11. OMIT for this version
12. OMIT for this version
13. (Other [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

- B7. \*What do you think is the best way for Focus on Energy to inform the public about energy-efficiency programs? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]
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. (Focus on Energy or Utility website)
  9. (Other website [SPECIFY: \_\_\_\_\_])
  10. (Email)
  11. (Social Media)
  12. (Focus on Energy or Utility representative)
  13. (Contractor)
  14. (Realtor, home builder)
  15. (Retail stores)
  16. (Home/trade shows)
  17. (Sporting or community event)
  18. (Other, [SPECIFY: \_\_\_\_\_])
  19. (Do not want to receive information)
  99. (Don't know)
  88. (Refused)

## C. Participation Decisions

I'd like to ask you about factors that influenced your decisions to install the [INSERT MEASURE NAME] through the program.

- C1. \*What motivated you to participate in Focus on Energy's Residential Rewards program and purchase your [INSERT MEASURE NAME]? [DO NOT READ; RECORD ALL THAT APPLY]
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. (Utility sponsorship of the program [SPECIFY THE PROGRAM: \_\_\_\_\_])
  9. (Other [SPECIFY: \_\_\_\_\_])
  98. (Don't know)
  88. (Refused)

[ASK IF MORE THAN ONE ANSWER 1-9 IN C1]

- C2. \*Which of these factors was most important in your decision to participate in the Residential Rewards program? [SHOW ALL ANSWERS GIVEN IN C1; DO NOT READ]
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. (Utility sponsorship of the program [SPECIFY THE PROGRAM:\_\_\_\_\_])
  9. Other [SPECIFY: \_\_\_\_\_]
  98. (Don't know)
  88. (Refused)
- C3. \*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)
  99. (Don't know)
  88. (Refused)
- C4. Is the [INSERT MEASURE NAME] currently installed in your home?
1. (Yes)
  2. (No) [WHY NOT?\_\_\_\_\_]
  99. (Don't know)
  88. (Refused)



## D. Satisfaction

Now I would like to ask you some questions about your satisfaction with the program.

- D1. How satisfied are you with the Residential Rewards Cash-back application process? Would you say you are ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)
  88. (Refused)

[ASK IF D1=3 OR 4]

- D2. What about the application process were you dissatisfied with? [DON'T READ LIST; RECORD ALL THAT APPLY]
1. (Difficulty filling out the application [ASK: What was difficult? \_\_\_\_\_] )
  2. (Application processing took too long [ASK: How long did it take? \_\_\_\_\_] )
  3. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)

- D3. How satisfied are you with the amount of the reward you received through the Residential Reward program? Would you say you are ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)
  88. (Refused)

[ASK IF D3=3 OR 4]

- D4. What about the reward amount were you dissatisfied with?  
[RECORD ANSWER]

- D5. \*How satisfied are you with Focus on Energy's Residential Rewards program? Would you say you are ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)

88. (Refused)

[ASK IF D5=3 OR 4]

D6. \*What about the program were you dissatisfied with?

1. [RECORD ANSWER]

99. (Don't know)

88. (Refused)

D7. \*How likely is it you would recommend this program to a friend? Use a 0 – 10 scale where 0 means extremely unlikely and 10 means extremely likely.

1. [RECORD ANSWER]

99. (Don't know)

88. (Refused)

D8. \*Is there anything you would suggest to improve Focus on Energy's Residential Rewards program?

1. (None)

2. (Other [SPECIFY: \_\_\_\_\_])

99. (Don't know)

88. (Refused)

## E. Measure Use

[ASK ONLY IF MEASURE NAME INCLUDED IN THE BOX BELOW, OTHERWISE SKIP TO SECTION F]

Measure Names For Section E
Efficient Furnace Motor (or ECM)
Furnace with efficient motor and air conditioning
Furnace with efficient motor

Now I'd like to ask a few questions about your efficient furnace fan usage.

E1. At the time of installation, did your contractor give you any instructions on how often to run the fan?

1. (Yes)

2. (No)

99. (Don't know)

88. (Refused)

[ASK IF E1=1]

- E2. What instructions did your contractor give? Did the contractor instruct you to ... [READ ENTIRE LIST AND RECORD ONE ANSWER]
1. Run the fan all the time, even when not heating or cooling your home
  2. Run the fan occasionally, even when not heating or cooling your home
  3. Run the fan only when heating or cooling your home
  4. Something else [SPECIFY: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)
- E3. Under what circumstances do you run the fan? Do you ... [READ ENTIRE LIST AND RECORD ONE ANSWER]
1. Run the fan all the time, even when not heating or cooling your home
  2. Run the fan occasionally, even when not heating or cooling your home
  3. Run the fan only when heating or cooling your home
  4. Something else [SPECIFY: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)
- E4. [DO NOT ASK IF MEASURE NAME = Furnace with efficient motor and air conditioning] Do you have a central air conditioner in your home?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

## F. Freeridership

I'd like to find out what your plans were for making energy-efficient improvements to your home **before** you found out about the Focus on Energy Residential Rewards program.

- F1. **Before** you heard anything about the Focus on Energy Residential Rewards program, had you already purchased or installed your [INSERT MEASURE NAME]?
1. (Yes)
  2. (No) [SKIP TO F3]
  99. (Don't know) [SKIP TO F3]
  88. (Refused) [SKIP TO F3]
- F2. So just to be clear, you installed your [INSERT MEASURE NAME] before you heard anything about the Focus on Energy Residential Rewards program. Is that correct?
1. (Yes, that's correct) [SKIP TO G1]
  2. (No, that's not correct)
  99. (Don't know)
  88. (Refused)

- F3. **Before** you heard about the Focus on Energy Residential Rewards program, had you already been **planning to purchase** ["a, an or some"] [INSERT MEASURE NAME]?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)
- F4. Would you have installed the same [INSERT MEASURE NAME] without the Cash-back Reward from Focus on Energy?
1. (Yes) [SKIP TO F6]
  2. (No)
  99. (Don't know)
  88. (Refused)
- F5. So I understand, would you have installed ["a, an or some"] different [INSERT MEASURE NAME] without the Focus on Energy Cash-back Reward or would you have decided to install nothing?
1. (I would have installed a different measure)
  2. (I would have decided to install nothing) [SKIP TO F8]
  99. (Don't know) [SKIP TO F10]
  88. (Refused) [SKIP TO F10]
- F6. [IF MEASURE NAME = Solar panels, solar hot water heaters, or ground source heat pump, SKIP TO F7] When you say you would have installed ["a, an or some"] [INSERT MEASURE NAME] without the Focus on Energy Cash-back Reward from Focus on Energy, would you have installed one that was at the same level of efficiency, [IF MEASURE NAME = Attic Insulation, add: "that is, insulation installed with the same R-value"]?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)
- F7. And, thinking about timing, without the Focus on Energy Cash-back Reward, would you have installed the [INSERT MEASURE NAME]... [READ LIST]
1. At the same time [SKIP TO F10]
  2. Within the same year [SKIP TO F10]
  3. One to two years out [SKIP TO F10]
  4. More than two years out [SKIP TO F10]
  5. Never [SKIP TO F8]
  99. (Don't know) [SKIP TO F10]
  88. (Refused) [SKIP TO F10]

- F8. So just to confirm, you would not have installed ["a, an or some"] [INSERT MEASURE NAME] at all, without a Focus on Energy Cash-back Reward. Is that correct?
1. (Yes) [SKIP TO F11]
  2. (No)
  99. (Don't know)
  88. (Refused)
- F9. [IF MEASURE NAME = Solar panels, solar hot water heaters, or ground source heat pump, SKIP TO F10] Without the Focus on Energy Cash-back Reward, would you have installed ["a, an or some"] [INSERT MEASURE NAME], but [one/some] that was not as energy-efficient [IF MEASURE NAME = Attic Insulation, add: "that is, has a lower R-value"]?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)
- F10. And with respect to timing, would you have installed the [INSERT MEASURE NAME]... [READ LIST]
1. At the same time
  2. Within the same year
  3. One to two years out
  4. More than two years out
  5. Never
  99. (Don't know)
  88. (Refused)
- F11. Please tell me how important the Focus on Energy Cash-back Reward was in your decision to purchase the [INSERT MEASURE NAME]. Would you say it was ... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  99. (Don't know)
  88. (Refused)

## G. 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 Residential Rewards program.

- G1. Since participating in the Focus on Energy Residential Rewards program, have you installed any other energy-efficient products in your home that you did NOT receive a Cash-back Reward for? 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 I1]
  99. (Don't know) [SKIP TO I1]
  88. (Refused) [SKIP TO I1]
- G2. What were the products that you installed without getting a Cash-back Reward? [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. (Other [SPECIFY: \_\_\_\_\_]) [ASK: How many did you install?]
  99. (Don't know)
  88. (Refused)

- G3. Please tell me how important your experience with the Focus on Energy program was in your decision to install [INSERT EACH ONE SELECTED IN G2]. Was 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
  99. (Don't know)
  88. (Refused)

[ASK G4 FOR EACH ONE SELECTED IN G2 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).]

- G4. Why didn't you apply for and receive a Cash-back Reward for [INSERT EACH ONE SELECTED IN G2]? [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: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)

- G5. 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)
  99. (Don't know)
  88. (Refused)

[ASK IF G5=1]

- G6. 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: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)

- G7. Please tell me how important the Focus on Energy Residential Rewards program was in your decision to [INSERT EACH ONE SELECTED IN G6]. 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 G6, "Was it the same influence for every action?"]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  99. (Don't know)
  88. (Refused)
- G8. And, over time, have you continued to take these actions to save energy? Let's start with ... [INSERT EACH ANSWER FROM G6]. [IF NEEDED, "Have you continued to take this action to save energy?"]
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

## H. Energy Attitudes

- H1. \* How informed do you feel about all the ways you can save energy, including buying and using energy efficient appliances and equipment? Would you say ... [READ LIST]
1. Very informed
  2. Somewhat informed
  3. Not too informed
  4. Not at all informed
  99. (Don't know)
  88. (Refused)
- H2. \* On a scale of zero to five where five is a lot of attention and zero is not a lot of attention, how much attention do you pay to the amount of energy; gas or electric, that you use in your home
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- H3. \*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: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)



H4. \* What type of fuel does your water heater use?

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

H5. \* Thinking about the price you pay and the electric service you receive, how would you rate your electric utility on providing service that's worth what you pay? Would you say ... [READ LIST]

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

[ASK IF H3=1 OR H4=1]

H6. Thinking about the price you pay and the gas service you receive, how would you rate your gas utility on providing service that's worth what you pay? Would you say ... [READ LIST]

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

## I. Demographics

Now I have a few questions for statistical purposes only.

I1. \*What type of home do you live in? Is it a: [READ LIST]

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: \_\_\_\_\_]
99. (Don't know)
88. (Refused)

12. \* 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: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)
13. \* 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)
  99. (Don't know)
  88. (Refused)
14. \*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
  99. (Don't know)
  88. (Refused)
15. \*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: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)

[ASK IF I2=2]

16. \*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:\_\_\_\_\_])
  99. (Don't know)
  88. (Refused)

[ASK IF I2=2 OR H3=1 OR H4=1]

17. \*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:\_\_\_\_\_])
  99. (Don't know)
  88. (Refused)

18. \*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]
  99. (Don't know)
  88. (Refused)

[ASK IF I8>1]

19. \* 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
  99. (Don't know)
  88. (Refused)

- I10. \* 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)
  99. (Don't know)
  88. (Refused)
- I11. \* 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
  99. (Don't know)
  88. (Refused)
- I12. \* 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
  99. (Don't know)
  88. (Refused)
- I13. [INTERVIEWER RECORD: DO NOT READ.]
1. (Male)
  2. (Female)

**CLOSING SCRIPT:** Those are all the questions we have. **Focus on Energy** appreciates your input. Thank you for your time.

**WISCONSIN FOCUS ON ENERGY**  
**Enhanced Rewards Program**  
**Participant Survey 2013**

*Audience: This survey is for customers.*

*[Quota: 70]*

Researchable Questions	Discussion	Question
How can the Program increase its energy and demand savings?	A wide variety of issues can affect the energy savings resulting from the Program. These include customer behaviors and program influence. The evaluation will investigate these issues to provide the best estimate of gross and net energy savings as well as opportunities to increase energy savings.	B1-B7; C1-C5; F1-F3; Section G
What are the barriers to increased customer participation and how effectively is the Program overcoming those barriers?	The Program is designed to close the price gap between standard and high-efficiency equipment as well as the information gap about the benefits of efficient equipment and sources of financial incentives. The evaluation research will characterize the main barriers to high efficiency equipment and to what extent and how the Program is addressing the identified barriers. This includes an assessment of the current rebate levels.	C1-C5
How is the Program leveraging the current supply chain for program measures and what changes can increase the supply chain's support of the Program?	The plan is that trade allies will promote the Program directly to customers and thus transform the market. The evaluation research will assess the effectiveness of program efforts on the supply chain and how these efforts have affected business practices.	B1-B7
What is customer satisfaction with the Program?	Customer satisfaction with the various components of the Program and the Program overall is an important indicator of program effectiveness.	D1-D10

- Interviewer instructions are in green.
- CATI programming instructions are in red.
- Response choices in parenthesis should not be read
- Questions with an \* are core Focus questions

## A. Introduction

- A1. Hello, my name is [FIRST NAME], and I am calling on behalf of Focus on Energy. Can I please speak with [CUSTOMER NAME]? [IF CUSTOMER UNAVAILABLE SCHEDULE A CALLBACK] We are contacting residents throughout Wisconsin to learn more about your recent experience with Focus on Energy's Enhanced Rewards Program. Our records show that you participated in the Focus on Energy Enhanced Rewards Program. Is that correct?
1. (Yes)
  99. (No/Don't know) [ASK TO SPEAK WITH SOMEONE WHO KNOWS AND BEGIN AGAIN. IF PERSON DOESN'T RECOGNIZE PROGRAM SAY, "You may remember receiving a Cash-back Reward from Focus on Energy for installing energy efficient heating equipment in your home. Does this sound familiar now?" THANK AND TERMINATE IF DON'T REMEMBER AND NO ONE ELSE IN HOUSEHOLD KNOWS.]
  88. (Refused) [THANK AND TERMINATE]
- A2. Great, would you be willing to participate in a short survey to help Focus on Energy evaluate and improve their programs? All your answers will be kept confidential.
1. (Continue)
  2. (No) [THANK AND TERMINATE]
  99. (Don't know) [THANK AND TERMINATE]
  88. (Refused) [THANK AND TERMINATE]

Back-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 or if you can leave a message for that person.]

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

[IF NEEDED:] I am not selling anything, we are interested in your opinions to help improve our programs, and understand how to assist customers in saving money on their utility bills. Your response will remain confidential."]

[IF CUSTOMER IS WARY OF THE SURVEY, REASSURE THEM THAT YOU ARE NOT SELLING ANYTHING. IF NECESSARY OFFER Joe Fontaine with the Public Service Commission of Wisconsin, 608-266-0910 AS THE PERSON TO CONTACT WITH ANY QUESTIONS ABOUT THE VALIDITY OF THE RESEARCH.]

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

## B. Awareness

B1. \*Where did you most recently hear about the Focus on Energy Enhanced Rewards program? [DO NOT READ LIST, RECORD ONE ANSWER]

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. (Focus on Energy or Utility website)
9. (Other website [SPECIFY: \_\_\_\_\_])
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder)
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

B2. \*Are there any other ways you heard about the program? [DO NOT READ. RECORD ALL THAT APPLY]

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. (Focus on Energy or Utility website)
9. (Other website [SPECIFY: \_\_\_\_\_])
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder)
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

B3. \*Are you aware of any other Focus on Energy programs, rebates, or projects? [IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]

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

[ASK IF B3=1]

B4. \*Which programs, rebates, or projects? [DO NOT READ; RECORD ALL THAT APPLY]

1. (Home Performance with ENERGY STAR)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. (Express Energy Efficiency)
6. Residential Rewards
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. (Business Incentive Program)
10. (Chain Stores and Franchises)
11. (Small Business Program)
12. (Large Energy Users)
13. (Other [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

B5. \*Have you participated in any other Focus on Energy programs? [RECORD ALL THAT APPLY. IF NEEDED: "Such as rebates on CFL bulbs, ENERGY STAR appliances, or energy-efficient upgrades or home energy audits.]

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

[ASK IF B5=1]

B6. \*Which programs, rebates, or projects? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]

1. (Home Performance with ENERGY STAR)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. (Express Energy Efficiency)
6. Residential Rewards
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. (Business Incentive Program)
10. (Chain Stores and Franchises)
11. (Small Business Program)



- 12. (Large Energy Users)
- 13. (Other [SPECIFY: \_\_\_\_\_])
- 99. (Don't know)
- 88. (Refused)

B7. \*What do you think is the best way for Focus on Energy to inform the public about energy-efficiency programs? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]

- 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. (Focus on Energy or Utility website)
- 9. (Other website [SPECIFY: \_\_\_\_\_])
- 10. (Email)
- 11. (Social Media)
- 12. (Focus on Energy or Utility representative)
- 13. (Contractor)
- 14. (Realtor, home builder)
- 15. (Retail stores)
- 16. (Home/trade shows)
- 17. (Sporting or community event)
- 18. (Other, [SPECIFY: \_\_\_\_\_])
- 19. (Do not want to receive information)
- 99. (Don't know)
- 88. (Refused)

## C. Participation Decisions

I'd like to ask you about factors that influenced your decisions to install the high efficiency furnace through the program.

C1. \*What motivated you to participate in Focus on Energy's Enhanced Rewards program and install your furnace? [DO NOT READ; RECORD ALL THAT APPLY]

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. (Utility sponsorship of the program [SPECIFY THE PROGRAM: \_\_\_\_\_])
9. (Other [SPECIFY: \_\_\_\_\_])
98. (Don't know)
88. (Refused)

[ASK IF MORE THAN ONE ANSWER 1-9 IN C1]

C2. \*Which of these factors was most important in your decision to participate in the Enhanced Rewards program? [SHOW ALL ANSWERS GIVEN IN C1; DO NOT READ; RECORD ONE RESPONSE]

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. (Utility sponsorship of the program [SPECIFY THE PROGRAM: \_\_\_\_\_])
9. Other [SPECIFY: \_\_\_\_\_]
98. (Don't know)
88. (Refused)

C3. Were you aware of the Enhanced Rewards Program before you decided to participate?

1. Yes
2. No
99. Don't Know
88. Refused

C4. \*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)
99. (Don't know)
88. (Refused)

C5. Did you face any of the following challenges when deciding to install your new furnace? [READ EACH AND GET YES OR NO. YES=1, NO=2, DON'T KNOW=99, REFUSED=88]

1. You were not aware of the benefits or value of energy saving equipment
2. You have an older home or a home with poor construction
3. Getting other household members to use less energy
4. Not knowing what to do or needing more information about ways to save energy
5. No rebates available for specific improvements needed
6. Not aware of rebate programs
7. Application was long and difficult to fill out
8. Income eligibility application was long and difficult to fill out
9. Other challenges [SPECIFY: \_\_\_\_\_]
99. (Don't know)
88. (Refused)

## D. SATISFACTION

Now I would like to ask you some questions about your satisfaction with the program.

D1. How satisfied are you with the Enhanced Rewards Cash-back application process? Would you say you are ... [READ LIST]

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

[ASK IF D1=2, 3 OR 4]

D2. Why are you [INSERT ANSWER FROM D1] with the application process? [RECORD ANSWER]

- D3. Specifically regarding the Enhanced Rewards Income Eligibility Application, how satisfied are you with that? Would you say you are... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. Don't Know
  99. Refused

[ASK IF D3=2, 3 OR 4]

- D4. Why are you [INSERT ANSWER FROM D3] with the Income eligibility application process?  
[RECORD ANSWER]

- D5. How satisfied are you with the amount of the reward you received through the Enhanced Rewards program? Would you say you are ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)
  88. (Refused)

[ASK IF D5=2,3 OR 4]

- D6. Why are you [INSERT ANSWER FROM D3] with the reward amount?  
[RECORD ANSWER]

- D7. \*How satisfied are you with Focus on Energy's Enhanced Rewards program? Would you say you are ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)
  88. (Refused)

[ASK IF D7=3 OR 4]

- D8. \*What about the Program were you dissatisfied with?  
[RECORD ANSWER]

- D9. \*How likely is it you would recommend this program to a friend? Use a 0 – 10 scale where 0 means extremely unlikely and 10 means extremely likely.
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)

- D10. \*Is there anything you would suggest to improve Focus on Energy's Enhanced Rewards program?
1. (None)
  2. (Other [SPECIFY: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)

## E. Non-Energy Benefits

Now I'd like to ask you some questions about the benefits of your new system.

- E1. Since having the new system installed, has your energy bill increased, decreased, or stayed the same?
1. (Increased)
  2. (Decreased)
  3. (Stayed the same)
  99. (Don't know)
  88. (Refused)
- E2. Did the contractor who installed your new system give you any additional energy saving tips?
1. Yes
  2. No [SKIP TO E4]
  99. (Don't know) [SKIP TO E4]
  88. (Refused) [SKIP TO E4]
- E3. [if E2=1] What tips did your contractor provide?
1. [SPECIFY]
  99. (Don't know)
  88. (Refused)
- E4. What has having this new heating system meant to you?
1. [SPECIFY: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)

## F. Fan use

Now I'd like to ask a few questions about how you use your furnace fan.

- F1. At the time of installation, did your contractor give you any instructions on how often to run the fan?
1. (Yes)
  2. (No) [SKIP TO F3]
  99. (Don't know) [SKIP TO F3]
  88. (Refused) [SKIP TO F3]

[ASK IF F1=1]

- F2. What instructions did your contractor give? Did the contractor instruct you to ... [READ ENTIRE LIST AND RECORD ONE ANSWER]
1. Run the fan all the time, even when not heating or cooling your home
  2. Run the fan occasionally, even when not heating or cooling your home
  3. Run the fan only when heating or cooling your home
  4. Something else [SPECIFY: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)
- F3. Under what circumstances do you run the fan? Do you ... [READ ENTIRE LIST AND RECORD ONE ANSWER]
1. Run the fan all the time, even when not heating or cooling your home
  2. Run the fan occasionally, even when not heating or cooling your home
  3. Run the fan only when heating or cooling your home
  4. Something else [SPECIFY: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)
- F4. Do you have a central air conditioner in your home?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

## G. Energy Attitudes

- G1. \* How informed do you feel about all the ways you can save energy, including buying and using energy efficient appliances and equipment? Would you say ... [READ LIST]
1. Very informed
  2. Somewhat informed
  3. Not too informed
  4. Not at all informed
  99. (Don't know)
  88. (Refused)
- G2. **\*[ASK IF G1=1, 2, or 3]** I am going to read through some energy saving actions you may have heard or read about. Please let me know if you frequently, sometimes, or never have taken these actions in your home over the past 12 months. [RANDOMIZE ORDER].
1. Frequently
  2. Sometimes
  3. Never
  88. (REFUSED)
  99. (DON'T KNOW)

- a. Turn off lights in rooms that are unoccupied
- b. Wash laundry in cold water
- c. Unplug electronic equipment when not in use
- d. Turn up cooling temperature in summer or turn down heating temperature in winter to save on energy
- e. Take shorter showers
- f. Turn down water heater temperature

G3. **\*[ASK IF ANY G1 =1, 2, or 3]** Have you taken any other actions to save energy in your home in the last 12 months?

- 1. (Yes [SPECIFY:\_\_\_\_\_])
- 2. (None / no actions taken)
- 88. REFUSED
- 99. DON'T KNOW

G4. \* On a scale of zero to five where five is a lot of attention and zero is not a lot of attention, how much attention do you pay to the amount of energy; gas or electric, that you use in your home

- 1. [RECORD ANSWER]
- 99. (Don't know)
- 88. (Refused)

G5. \*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:\_\_\_\_\_])
- 99. (Don't know)
- 88. (Refused)

G6. \* What type of fuel does your water heater use?

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

- G7. \* Thinking about the price you pay and the electric service you receive, how satisfied are you with your electric utility on providing service that's worth what you pay? Would you say ... [\[READ LIST\]](#)
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)
  88. (Refused)

[\[ASK IF G5=1 OR G6=1\]](#)

- G8. Thinking about the price you pay and the gas service you receive, how satisfied are you with your gas utility on providing service that's worth what you pay? Would you say ... [\[READ LIST\]](#)
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  99. (Don't know)
  88. (Refused)

## H. Demographics

Now I have a few questions for statistical purposes only.

- H1. \*What type of home do you live in? Is it a: [\[READ LIST\]](#)
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 [\[SPECIFY:\\_\\_\\_\\_\\_\]](#)
  99. (Don't know)
  88. (Refused)
- H2. \* 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 [\[SPECIFY:\\_\\_\\_\\_\\_\]](#))
  99. (Don't know)
  88. (Refused)



H3. \* 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)
99. (Don't know)
88. (Refused)

H4. \*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
99. (Don't know)
88. (Refused)

H5. \*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:\_\_\_\_\_])
99. (Don't know)
88. (Refused)

[ASK IF H1=3]

H6. \*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:\_\_\_\_\_])
99. (Don't know)
88. (Refused)

[ASK IF H1=3 and G5=1 or G6=1]

H7. \*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: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

H8. \*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 also regularly reside/sleep elsewhere?]

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

[ASK IF H8>1]

H9. \* 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
99. (Don't know)
88. (Refused)

H10. \* 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)
99. (Don't know)
88. (Refused)

H11. \* 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
99. (Don't know)
88. (Refused)

H12. [INTERVIEWER RECORD: DO NOT READ.]

1. (Male)
2. (Female)

**CLOSING SCRIPT:** Those are all the questions we have. **Focus on Energy** appreciates your input. Thank you for your time.

- Seal with tape or staple
- 

Focus on Energy  
c/o The Cadmus Group  
1426 Pearl Street, Suite 400  
Boulder, CO 80302

Affix  
Postage  
Here

## PLEASE PROVIDE YOUR FEEDBACK

- 1** Did you receive any of the items listed below during the installation of money-saving products?

**Compact Fluorescent Light Bulbs (CFLs)**

Yes  No

**Bathroom/Kitchen Faucet Aerators**

Yes  No

**Energy-Efficient Showerheads**

Yes  No

- 2** Were any of the items below installed in your home prior to the installation?

**Compact Fluorescent Light Bulbs (CFLs)**

Yes  No  If Yes, how many \_\_\_\_\_

**Bathroom/Kitchen Faucet Aerators**

Yes  No

**Energy-Efficient Showerheads**

Yes  No

- 3** Prior to these installations, were you planning on purchasing any of the items below?

**Compact Fluorescent Light Bulbs (CFLs)**

Yes  No  Maybe

No, already installed in all available sockets

**Bathroom/Kitchen Faucet Aerators**

Yes  No  Maybe

No, already installed in all available faucets

**Energy-Efficient Showerheads**

Yes  No  Maybe

No, already installed in all available showers

**Other Efficient Lighting**

(Please describe : \_\_\_\_\_)

Yes  No  Maybe

No, already installed in all available sockets

- 4** Out of the next 10 light bulbs you buy, about how many do you think will be:



Standard Incandescent bulbs? \_\_\_\_\_



Halogen bulbs? \_\_\_\_\_



CFL bulbs? \_\_\_\_\_



LED bulbs? \_\_\_\_\_

- 5** How many bathrooms do you have in your home?

0  1  2  3  4

- 6** How satisfied are you with the energy savings measures installed in your home?

**Compact Fluorescent Light Bulbs (CFLs)**

Very satisfied  Somewhat satisfied

Not too satisfied  Not at all satisfied

Did not receive

**Bathroom/Kitchen Faucet Aerators**

Very satisfied  Somewhat satisfied

Not too satisfied  Not at all satisfied

Did not receive

**Energy-Efficient Showerheads**

Very satisfied  Somewhat satisfied

Not too satisfied  Not at all satisfied

Did not receive

- 7** Do you have any feedback for us about the energy upgrade to your home?

---

---

# Thank You!

Your input helps us improve our service!

# To thank you for completing this survey, Focus on Energy will include you in a drawing for a free iPad 2!\*

Please be sure to include your name and mailing address.

For questions regarding this questionnaire, please call Sarah Brooks at (303) 389-2522.

*Focus on Energy appreciates your feedback.*

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_



**focus on energy**<sup>sm</sup>

Partnering with Wisconsin utilities

\*16GB Black Wi-Fi iPad 2 or a \$400 gift card to the Apple Store

**Wisconsin Focus on Energy  
Enhanced Rewards  
Nonparticipant Survey**

Researchable Question	Current Survey Question Mapping
What are the barriers to increased customer participation?	B9-B12
What is the customer’s awareness level of FoE and the ER program??	B1-B8

*\*Survey questions labeled with a “\*” are core questions that will be asked across all Focus on Energy phone surveys, where appropriate.*

**A. Introduction**

Hello, my name is \_\_\_\_\_, calling on behalf of Focus on Energy. I am calling to ask you some survey questions that will help Focus on Energy improve their energy-efficiency programs.

- A1. Are you familiar with Focus on Energy?
  - 1. Yes
  - 2. No
  - 88. REFUSED **[THANK AND TERMINATE]**
  - 99. DON'T KNOW

**[Please retain answers to A1 question for all respondents as a component of the call disposition—even if they are terminated in next screener section.]**

**[IF A1=1, READ]** Great, would you be willing to participate in a short survey? All your answers will be kept confidential. **[IF YES, CONTINUE TO A2.]**

**[IF A1=2 OR 99, READ]** Focus on Energy offers energy-efficiency programs that help customers save money on their utility bills. Would you be willing to participate in a short survey? All your answers will be kept confidential. **[IF YES, CONTINUE TO A2.]**

**[If respondent asks how long, say “About 10 minutes.”]**

**If necessary, offer Joe Fontaine with the Public Service Commission of Wisconsin, 608-266-0910 as the person to contact with any questions about the validity of the research.]**

A2. In the past year, did you get an incentive for installing new heating or air conditioning equipment through the Focus on Energy Enhanced Rewards Program?

1. Yes **[THANK AND TERMINATE]**
2. No

88. REFUSED **[THANK AND TERMINATE]**

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

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

## B. Nonparticipant Awareness and Participation Decisions

B1. \*Where did you most recently hear about the Focus on Energy Enhanced Rewards Program?

**[SELECT ONLY ONE. DO NOT READ, BUT PROMPT IF NECESSARY.]**

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. Focus on Energy or Utility website
9. Other website **[SPECIFY: \_\_\_\_\_]**
10. Email
11. Social Media
12. Focus on Energy or Utility representative
13. Contractor
14. Realtor, home builder
15. Retail stores
16. Home/trade shows
17. Sporting or community event
18. Other **[SPECIFY: \_\_\_\_\_]**
88. REFUSED
99. DON'T KNOW

B2. \*Are there any other ways you heard about the program? **[DO NOT READ. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, 88=REFUSED; 99=DON'T KNOW]**

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. Focus on Energy or Utility website
  9. Other website [SPECIFY: \_\_\_\_\_]
  10. Email
  11. Social Media
  12. Focus on Energy or Utility representative
  13. Contractor
  14. Realtor, home builder
  15. Retail stores
  16. Home/trade shows
  17. Sporting or community event
  18. Other [SPECIFY: \_\_\_\_\_]
  19. None / no other ways
  88. REFUSED
  99. DON'T KNOW
- B3. What made you decide to not participate in the Enhanced Rewards Program?
1. [SPECIFY: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW
- B4. **\*[ASK IF A1=1]** Are you aware of any other Focus on Energy Programs? **[IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]**
1. Yes [SPECIFY: \_\_\_\_\_]
  2. No
  88. REFUSED
  99. DON'T KNOW
- B5. **\*[ASK IF A1=1 and B4=1]** Have you participated in any other Focus on Energy Programs? **[IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]**
1. Yes [SPECIFY: \_\_\_\_\_]
  2. No
  88. REFUSED
  99. DON'T KNOW
- B6. **\*What is the best way for Focus on Energy to inform you about energy-efficiency programs? [DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, 88=REFUSED; 99=DON'T KNOW]**
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. Focus on Energy or Utility website
  - 9. Other website **[SPECIFY: \_\_\_\_\_]**
  - 10. Email
  - 11. Social Media
  - 12. Focus on Energy or Utility representative
  - 13. Contractor
  - 14. Realtor, home builder
  - 15. Retail stores
  - 16. Home/trade shows
  - 17. Sporting or community event
  - 18. Other **[SPECIFY: \_\_\_\_\_]**
  - 19. Do not want to receive information
  - 88. REFUSED
  - 99. DON'T KNOW
- B7. How informed do you feel about all the ways you can save energy, including buying and using energy efficient appliances and equipment?
- 1. Very Informed
  - 2. Somewhat Informed
  - 3. Not Too Informed
  - 4. Not At All Informed
  - 88. REFUSED
  - 99. DON'T KNOW
- B8. \*How important to you is saving energy in your home?
- 1. Very important
  - 2. Somewhat important
  - 3. Not too important
  - 4. Not at all important **[SKIP TO NEXT SECTION]**
  - 88. REFUSED **[SKIP TO NEXT SECTION]**
  - 99. DON'T KNOW **[SKIP TO NEXT SECTION]**

- B9. \*I am going to read through some energy saving actions you may have heard or read about. Please let me know if you frequently, sometimes, or never have taken these actions in your home over the past 12 months. **[MARK FOR EACH: 1=FREQUENTLY; 2=SOMETIMES; 3=NEVER; 88=REFUSED; 99=DON'T KNOW].**

**[RANDOMIZE ORDER OF LIST]**

- A. Turn off lights in rooms that are unoccupied
  - B. Wash laundry in cold water
  - C. Unplug electronic equipment when not in use
  - D. Turn up cooling temperature in summer or turn down heating temperature in winter to save on energy
  - E. Took shorter showers
  - F. Turn down water heater temperature
- B10. \*Have you taken any other actions to save energy in your home in the last 12 months?
- 1. Yes **[SPECIFY: \_\_\_\_\_]**
  - 2. No actions taken
88. REFUSED  
99. DON'T KNOW
- B11. \*What challenges, if any, do you face in saving energy in your home? **[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY. MARK FOR EACH: 1=MENTIONED; 2=NOT MENTIONED, 88=REFUSED; 99=DON'T KNOW]**
- 1. Have a leaky/non-efficient/old home (leaky overall, windows, air sealing)
  - 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. Rental property (limited ability to make changes)
  - 11. Nothing/none/no challenges
  - 12. Other **[SPECIFY: \_\_\_\_\_]**
88. REFUSED  
99. DON'T KNOW

## E. Usage Questions

- E1. \*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: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW
- E2. \*What type of fuel does your water heater use?
1. Natural Gas
  2. Electricity
  3. Propane/Bottled Gas
  4. Wood
  5. Other [SPECIFY: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW
- E3. \*Thinking about the price you pay and the electric service you receive, how would you rate your electric utility on providing service that's worth what you pay?
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  88. REFUSED
  99. DON'T KNOW
- E4. **\*[ASK IF E1=1 or E2=1]** Thinking about the price you pay and the gas service you receive, how would you rate your gas utility on providing service that's worth what you pay?
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  88. REFUSED
  99. DON'T KNOW
- E5. \*What utility company provides your electric service?
1. [SPECIFY: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW
- E6. **\*[ASK IF E1=1 or E2=1]** What utility company provides your gas service?
1. [SPECIFY: \_\_\_\_\_]
  88. REFUSED
  99. DON'T KNOW

## F. Demographics

- F1. \*What type of home do you live in? Is it a: **[READ LIST]**
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: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
- F2. \*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: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
- F3. \*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 LIST IF NECESSARY]**
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
  88. REFUSED
  99. DON'T KNOW
- F4. \*About when was your home first built? **[READ LIST IF NECESSARY]**
1. Before 1970s
  2. 1970s
  3. 1980s
  4. 1990-1994
  5. 1995-1999
  6. 2000s
  7. Other **[SPECIFY: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW

- F5. **\*[ASK IF F2=2]** 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: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
- F6. **\*[ASK IF F2=2 and (ASK IF E1=1 or E2=1)]** 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: \_\_\_\_\_]**
  88. REFUSED
  99. DON'T KNOW
- F7. **\*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.**  
**Number: \_\_\_\_\_**
88. REFUSED
  99. DON'T KNOW
- F8. **\*What is the highest level of school that you have 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
  88. REFUSED
  99. DON'T KNOW
- F9. **\*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
  88. REFUSED
  99. DON'T KNOW

Thank you for your time.

**Enhanced Rewards Program  
Participating Trade Ally Interview Guide, 2013**

Researchable Question	Discussion	Supporting Questions
How can the Program increase its energy and demand savings?	A wide variety of issues can affect energy savings resulting from the Program. For example, trade allies may not effectively market the Program; so customers do not understand the benefits of installing retrofit measures. The evaluation will <u>assess trade ally understanding of the Program</u> .	E1-E4, G3
How well is the Program working?	Program effectiveness can be affected at many stages. Thus, speaking to stakeholders at all different levels of involvement with the Program is crucial to getting a well-rounded picture of how effectively the Program is operating.	D1-D3, E1-E4, G1-G2,
Is the Program marketing strategy effective?	Participation (and thus energy savings) is partially dependent on the effectiveness of the Program marketing strategy.	C1, F1-F9
What are the barriers to increased customer participation, and how effectively does the Program overcome those barriers?	The Program seeks to close the price gap between standard and high-efficiency measures, the information gap regarding benefits of efficient measures and sources of financial incentives, and the trade ally services gap for limited income homeowners.	G3-H1
How do trade allies feel about the Program, and are they adequately prepared to face challenges related to Program delivery?	There have been changes to the program since its original inception. These changes have likely led to some confusion among trade allies as well as customers. Trade allies may be able to provide the most informative feedback regarding any confusion in the marketplace as well as participation barriers and ways these can be overcome. Trade allies may also offer suggestions for Program improvements, increasing customer participation, and ways for more trade allies to become qualified Program trade allies.	D1-D3, G1-G2,

**A. Introduction**

Hello, my name is [name] with the Cadmus Group calling on behalf of Wisconsin’s Focus on Energy Programs. Focus on Energy is currently evaluating the Enhanced Rewards Program and as a part of this evaluation we are collecting information from participating contractors on program delivery, marketing, training, and satisfaction.

May I speak with the owner or manager of your company who is most familiar with Focus on Energy? [If transferred, repeat intro]

- A1. {x} Do you have time to speak now? *[If necessary: this interview should take about 10 minutes]*
1. Yes
  2. No *[Schedule time to call back]*

{x} *[If respondent expresses concern:* I can assure you I am not selling anything, this call is for research purposes only. Your responses will be aggregated with the others and your identity will be kept confidential.]

## ***B. Program Overview and Participation***

{x} I'd like to ask you a few questions about your company. Please note that your answers will be kept strictly confidential

- B1. What services does your company offer? **(not including services offered by subcontractors)**  
**[Do not read. Record all that apply]**
1. Audit/assessment services
  2. Heating and air conditioning
  3. Water heating
  4. Renewable **[SPECIFY: \_\_\_\_\_]**
  5. Weatherization
  6. Other **[SPECIFY: \_\_\_\_\_]**
- B2. How many employees does your company have in Wisconsin? **(not including subcontractors)**
- B3. Does your company employ any subcontractors **(individual companies/and or independent contractors)**?
1. Yes **[SPECIFY for which services: \_\_\_\_\_]**
  2. No
- B4. How many projects did you complete for the Enhanced Rewards program in 2013?
- B5. How long has your company been participating in the Enhanced Rewards, Residential Rewards, or other Focus on Energy programs?
- B6. Approximately how many total households did your company work with during 2012 **(including non-Focus on Energy customers, Enhanced Rewards customers, and Residential Rewards customers, if applicable)**?



### C. Awareness and Motivation

C1. How did you first become aware of the Enhanced Rewards Program? **[Do not read, Record all that apply]**

1. Participated in previous/legacy program
2. Focus on Energy or Utility Website
1. Other Website **[SPECIFY: \_\_\_\_\_]**
2. Social Media
3. Launch event
4. Fact sheets
5. Email
6. Colleague
7. Trade organization / trade shows
8. Family/friends/word-of-mouth
9. Focus on Energy staff
10. Utility staff
11. Customer
12. Realtor, home builder
13. Retail stores
14. Sporting or community event
15. Didn't know about it
- 98. OTHER **[SPECIFY: \_\_\_\_\_]**

C2. What are the main reasons you/your company decided to participate in the Enhanced Rewards Program? **[Do not read, Record all that apply]**

1. Created additional business opportunities/got my name out
2. Asked by Focus on Energy
3. Asked by utility
4. Competitive advantage
5. Customers asked about it
6. Other **[SPECIFY: \_\_\_\_\_]**
7. Already participate in the Home Performance Program

### D. Training

D1. What trainings have you attended for this Program? **(both when you first started in the program and on an ongoing basis) [Do not read, Record all that apply]**

1. Initial start-up / enrollment
2. Software training
3. Specialized trainings **[Please describe: \_\_\_\_\_]**
4. Enhanced Rewards Program information trainings
5. None

D2. How helpful were these trainings in equipping you to effectively participate in the Enhanced Rewards Program? Would you say they were

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

D3. Are there additional trainings you think should be offered or additional items that should be covered during the initial training? If so, please describe.

### ***E. Delivery / Process of Participation***

E1. Please describe the process you go through with a typical customer participating in the Enhanced Rewards Program? (from when they first call / you contact, through them receiving the rebate, including scheduling, installation, paperwork, etc.)

E2. Do you actively assist customers in filling out their application?

E3. How have customers responded to the application process?

E4. Do you have any suggestions for how Focus can assist in improving the Program for you or your customers?

E5. Do you encourage customers to install multiple measures? How?

### ***F. Marketing***

F1. What marketing media and tactics do you use? **[Do not read, multiple responses ok]**

1. Mailings/Emails
2. Flyer/Newspaper Ad
3. Social Media
4. Website/Online Ad
5. Word-of-mouth
6. Other **[SPECIFY: \_\_\_\_\_]**

- F2. Do you specifically market the Enhanced Rewards Program to customers? Please explain why you do or do not.
- F3. How do you find most of your Enhanced Rewards Program work?(do you conduct marketing specifically for the program, conduct general marketing and tell resulting customers about the rebate available through the program, or does work come through Focus on Energy/ program administrator etc.)
- F4. Does Focus on Energy provide you with marketing materials and channels to use to promote the program and gain customers? If so, please describe what materials and channels they provide.
- F5. Do you use these materials? If so, please describe which materials you use the most (or find the most helpful).
- F6. How helpful do you find these materials?
1. Very helpful
  2. Somewhat helpful
  3. Not too helpful
  4. Not at all helpful
- F7. Is there anything that could be done to improve these materials?
- F8. How helpful is your affiliation with Focus on Energy in identifying and attaining customers?
5. Very helpful
  6. Somewhat helpful
  7. Not too helpful
  8. Not at all helpful
- F9. Have you signed up with Focus on Energy to be listed as a Trade Ally on the Find it with Focus Website?
1. Yes
  2. No

## **G. Satisfaction (Trade Ally and Customer)**

G1. How satisfied are you with your participation in the Enhanced Rewards Program? Would you say you are...

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied

G2. Have you faced any challenges participating in the Enhanced Rewards Program?

1. Yes **[Please describe: \_\_\_\_\_]**
2. No

G3. Are there any specific barriers that you see that keep your customers from installing the rebated measures?

G4. How satisfied are your customers with the Enhanced Rewards Program overall? Would you say they are...

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied

G5. Have there been any problems or complaints from customers about the Enhanced Rewards Program?

1. Yes **[Please describe: \_\_\_\_\_]**
2. No

## **H. Wrap Up**

H1. Do you have any suggestions for ways the Enhanced Rewards Program could be improved to increase participation?

H2. Do you have any additional comments or suggestions?

Thank you for your time. **[END]**

## Focus on Energy Enhanced Rewards Program Non-Active Registered Contractor Survey

### A. Introduction and Program Experience

- A1. Hello, may I please speak with [CONTACT]. This is [INSERT NAME] calling on behalf of Focus on Energy. We are calling contractors to gather their opinions on the Enhanced Rewards program. [IF NEEDED: This program offers incentives on HVAC equipment to customers who make 60-80% of the state medium income. It was known as the Home Heating Assistance Program until January 1, 2013. ] These responses will be kept confidential and will be used to help improve Focus on Energy's programs. Are you the correct person to speak with about this? [IF NEEDED: The survey will take approximately 10 minutes of your time.]
1. (Yes)
  2. (No)
  3. (Don't know) [ASK TO SPEAK WITH SOMEONE ELSE AND START AGAIN]
  4. (Refused) [THANK AND TERMINATE]
- A2. Are you familiar with the Focus on Energy Enhanced Rewards Program?
1. (Yes)
  2. (No) [ASK TO SPEAK WITH SOMEONE FAMILIAR WITH THE PROGRAM AND START AGAIN]
  98. (Don't know) [ASK TO SPEAK WITH SOMEONE FAMILIAR WITH THE PROGRAM AND START AGAIN]
  99. (Refused) [THANK AND TERMINATE]
- A3. Which of the following equipment types does your company sell or install? [READ LIST; RECORD ALL THAT APPLY]
1. Central air conditioners
  2. Air source heat pumps
  3. Gas boilers
  4. Gas furnaces with a standard (non-ECM) motor
  5. Gas furnaces equipped with an ECM motor
  6. Ground source heat pumps
  96. (None of these) [THANK AND TERMINATE]
  98. (Don't know) [ASK TO SPEAK WITH SOMEONE WHO KNOWS AND BEGIN AGAIN] [THANK AND TERMINATE]
  99. (Refused) [THANK AND TERMINATE]

A4. Has anyone at your company received training about the Enhanced Rewards Program? [IF ASKED WHAT TYPE OF TRAINING SAY: TRAINING TO LEARN HOW TO PARTICIPATE IN THE PROGRAM AND/OR MARKET THE PROGRAM]

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

[ASK IF A4=1]

A4A. What kind of training? (PROBE IF NEEDED: Was that training to learn how to participate in the program or training about how to market the program?) [OPEN END]

A5. Has your company received any marketing materials from Focus on Energy that your business can use to promote energy efficient equipment?

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

[ASK IF A5=1]

A6. How useful were the marketing materials provided by Focus, in terms of helping you sell more energy-efficient equipment? Were they .... [READ LIST]?

1. Very useful
2. Somewhat useful
3. Not too useful
4. Not at all useful
5. (Did not use them)
98. (Don't know)
99. (Refused)

[ASK IF A5=1]

A7. Regarding the marketing materials...

A. What was particularly good about them?

B. What could be improved?

[RECORD RESPONSE; 98 FOR DON'T KNOW AND 99 FOR REFUSED]

[ASK IF A6=5]

A8. Why did you not use the marketing materials?

1. RECORD
98. DK
99. REFUSED

## C. Reasons for not participating

- C1. Our records indicate that you have not submitted any applications in 2013 for the Enhanced Rewards Program. Is that correct?
1. (Yes)
  2. (No) **[SKIP TO C3]**
  00. (Other **[SPECIFY: \_\_\_\_\_]**)
  98. (Don't know)
  99. (Refused)

- C2. Why have you not participated in the Enhanced Rewards Program in 2013?
1. (**[SPECIFY: \_\_\_\_\_]**)
  98. (Don't know)
  99. (Refused)

- C3. What would Focus on Energy need to change about the program for you to participate in the Enhanced Rewards Program?
1. **[RECORD VERBATIM \_\_\_\_\_]**
  2. (Focus could provide more/better technical training)
  3. (Focus could provide more/better sales training)
  4. (Focus could provide more/better training in general **[SPECIFY: \_\_\_\_\_]**)
  5. (Focus could offer more/better discounts/incentives)
  98. (Don't know)
  99. (Refused)

**[ASK EVERYONE ]**

- C4. What other energy efficient heating or cooling equipment do you think Focus on Energy should include in its Enhanced Rewards program? **[DO NOT READ LIST; RECORD EACH EQUIPMENT TYPE AS A DIFFERENT ANSWER]**
1. (I don't think they need to add anything else)
  2. **(RECORD ANSWER 1: \_\_\_\_\_; PROBE: At what discount amount?)**
  3. **(RECORD ANSWER 2: \_\_\_\_\_; PROBE: At what discount amount?)**
  4. **(RECORD ANSWER 3: \_\_\_\_\_; PROBE: At what discount amount?)**
  5. **(RECORD ANSWER 4: \_\_\_\_\_; PROBE: At what discount amount?)**
  6. **(RECORD ANSWER 5: \_\_\_\_\_; PROBE: At what discount amount?)**
  7. **(RECORD ANSWER 6: \_\_\_\_\_; PROBE: At what discount amount?)**
  98. (Don't know)
  99. (Refused)

[ASK EVERYONE ]

- C5. What do you think are the main challenges customers face when deciding to purchase high efficiency equipment over standard equipment? [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (High cost of high efficiency equipment, payback takes too long)
  2. (Lack of financing options)
  3. (Rebate doesn't offset the cost enough)
  00. (OTHER [SPECIFY: \_\_\_\_\_])
  98. (Don't know)
  99. (Refused)

## D. Firmographics

- D1. To finish up the survey, I have two short questions about your company. How many employees work in your company in Wisconsin?  
[RECORD ANSWER]
- D2. How many years has your business been selling residential heating and cooling equipment in Wisconsin? [RECORD ANSWER]
1. (1)
  2. (2)
  3. (3)
  4. (4)
  5. (5)
  6. (More than five)
  98. (Don't know)
  99. (Refused)
- D3. Just to verify the phone number, did we reach you at [PHONE]?
1. (Yes)
  2. (No [ASK: What is the correct number? \_\_\_\_\_] )

Those are all my questions. Thank you very much for your time.



## FOE Express Energy Efficiency Participant Survey

Researchable Question	Discussion	Supporting Questions
What is the Program intent, process, and roles and responsibilities?	It is important to understand the intent and process of the Program to assess how well the processes are working.	NA
How well is the Program working?	Program effectiveness can be affected at many stages. Thus, speaking to stakeholders at all different levels of involvement with the Program is crucial to getting a well-rounded picture of how effectively the Program is operating.	B1-3, C1-10, FA1-7, SH1-8, P1-7, T1-5
Is the Program marketing strategy effective?	Participation (and thus energy savings) is partially dependent on the effectiveness of the Program marketing strategy.	B1-7, G1-6, H1-2, I1-11
How can the Program increase its energy and demand savings?	A wide variety of process issues can affect energy savings, such as trade ally training in marketing and implementing the Program, customer awareness and education about energy-efficiency options and benefits, customer resources to install measures, and whether the Program helps to ensure that direct-install measures persist.  For EEE: Are participants leaving measures installed? Are participants remembering and then implementing audit recommendations and/or participating in other Focus on Energy programs?	B6, AP1-3, G1-6, H1
What are the barriers to increased customer participation, and how effectively does the Program overcoming those barriers?	The Program is designed to close the awareness, knowledge, motivation, price, and convenience gaps that often prevent customer participation. Evaluation research will characterize the primary barriers to selling Program services and how well the Program addresses the identified barriers. This will include assessing the current rebate levels.	C11-12, FA7-10, SH9-10, P8-9, G1-6, H1
How effective is the trade ally network in supporting contractors for Program implementation?	The Program depends on trade allies to market and sell Program services. The Program trained and qualified contractors in the trade ally network to conduct both Program outreach and implementation. Through interviews with trade allies, the Evaluation Team will explore contractor satisfaction, how well the network is working, successes and challenges of selling the Program, and suggestions for improving the Program's operation and success.	NA

Researchable Question	Discussion	Supporting Questions
What is the level of customer satisfaction with the Program?	Customer satisfaction with the various Program components and the overall Program provide an important indicator of Program effectiveness.	F1-6
How well does the Program leverage the current supply chain for Program measures and services?	Evaluation research will be used to assess the effectiveness of the Program’s efforts on influencing the supply chain, and the Team will track how these efforts have affected business practices.	NA

## Introduction

Hello, I am [**name**] calling on behalf of Focus on Energy about some of the programs and services they offer to residential customers. Our records show you recently had an installation visit through the Express Energy Efficiency program. Would you have some time now to answer a few questions about your experience?

**[IF NEEDED: Your answers will help us understand how the program is doing and where it can be improved. The survey should take about 20 minutes.]**

**[If customer is wary of the survey, reassure them that you are not SELLING ANYTHING. If necessary, offer CAROL STEMRICH (608-266-8174) as the person to contact with any questions about the validity of the research.]**

Your responses will be kept strictly confidential. To start, I have a few questions to determine if you qualify for the study.

### A. Screening

A1. Do you recall having someone come to your home to provide you with information about ways to save energy, and to install some products such as energy saving light bulbs, low flow showerheads, or faucet aerators (“**AIR-RATE-ORS**”)?

**[IF NEEDED: This is also known as an Express Energy Efficiency installation visit, and it would have been provided free of charge for a limited time by Focus on Energy. You probably signed up on-line.]**

1. Yes
2. No **[ASK “IS THERE SOMEONE ELSE IN YOUR HOME I COULD SPEAK TO NOW WHO MAY HAVE SIGNED UP FOR THE VISIT OR HAS BEEN INVOLVED IN MAKING WEATHERIZATION IMPROVEMENTS TO YOUR HOME?” IF SO, TRANSFER TO NEW PERSON AND REPEAT INTRO] [IF NO ONE ELSE IS AWARE, THANK AND TERMINATE]**
99. Don’t know **[THANK AND TERMINATE]**
88. Refused **[THANK AND TERMINATE]**

## B. Program Awareness

**B1.** Where did you most recently hear about the Focus on Energy Express Energy Efficiency program? **[DO NOT READ LIST, RECORD ONE ANSWER]**

- 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 (Focus on Energy or Utility website)
- 9 (Other website **[SPECIFY: \_\_\_\_\_]** )
- 10 (Email)
- 11 (Social Media)
- 12 (Focus on Energy or Utility representative)
- 13 (Contractor)
- 14 (Realtor, home builder )
- 15 (Retail stores)
- 16 (Home/trade shows)
- 17 (Sporting or community event)
- 18 (Other, **[SPECIFY: \_\_\_\_\_]** )
99. (Don't know)
88. (Refused)

**B2.** Are there any other ways you heard about the program? **[DO NOT READ. RECORD ALL THAT APPLY]**

- 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 (Focus on Energy or Utility website)
- 9 (Other website **[SPECIFY: \_\_\_\_\_]** )
- 10 (Email)
- 11 (Social Media)
- 12 (Focus on Energy or Utility representative)
- 13 (Contractor)
- 14 (Realtor, home builder)
- 15 (Retail stores)
- 16 (Home/trade shows)

- 17 (Sporting or community event)
- 18 (Other, [SPECIFY: \_\_\_\_\_])
- 19. (None)
- 99. (DON'T KNOW)
- 88. (REFUSED)

## Direct Install Measures

Now I would like to ask you about the energy-saving items you received through the program.

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

### Possible measures:

- CFLs (C)
- Faucet aerators (F)
- Showerheads (SH)
- Water heater temperature turn-down (T)
- Insulation for water heater pipe (P)

### C. CFL

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

- C1. Our records indicate that you received [CFL\_QUANTITY] compact fluorescent light bulbs, also known as CFLs. Is this correct?
  - 1. (Yes) [SKIP TO C3]
  - 2. (Yes, I received CFLs, but quantity is not correct)
  - 3. (No, I did not receive any CFLs) [SKIP TO NEXT MEASURE]
  - 88. (REFUSED) [SKIP TO NEXT MEASURE]
  - 99. (DON'T KNOW) [SKIP TO NEXT MEASURE]

- C2. How many CFLs did you receive?

- [RECORD NUMBER] \_\_\_\_\_
- 88. REFUSED [SKIP TO NEXT MEASURE]
- 99. DON'T KNOW [SKIP TO NEXT MEASURE]

C3. Did the contractor install the CFLs directly into your fixtures or were they left 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]
- 88. (REFUSED) [SKIP TO NEXT MEASURE]
- 99. (DON'T KNOW) [SKIP TO NEXT MEASURE]

[ASK IF C3=1 OR 3]

C4. How many CFLS did the contractor install?

[RECORD NUMBER] \_\_\_\_\_

- 88. REFUSED [SKIP TO NEXT MEASURE]
- 99. DON'T KNOW [SKIP TO NEXT MEASURE]

[ASK IF C3=2 OR IF C3=1 OR 3 AND C4<C2 OR CFL\_QUANTITY]

C5. How many, if any, of the CFLs have you installed yourself?

[RECORD NUMBER] \_\_\_\_\_

C6. Have you since removed any of the CFLs from the original fixture where they were installed?

- 1 (Yes)
- 2 (No) [SKIP TO C11]
- 88. (REFUSED) [SKIP TO C11]
- 99. (DON'T KNOW) [SKIP TO C11]

C7. How many of the light bulbs did you remove?

[RECORD NUMBER] \_\_\_\_\_

- 88. REFUSED
- 99. DON'T KNOW

- C8. What did you do with these [QUANTITY FROM C7] 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: \_\_\_\_\_] )
88. (REFUSED)
99. (DON'T KNOW)
- C9. What are the reasons you removed the bulbs(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: \_\_\_\_\_] )
88. (REFUSED)
99. (DON'T KNOW)
- C10. [ASK IF C6=1 OR C7>0 OR ((CFL\_QUANTITY OR C2)> (C4 OR C5))] 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:\_\_\_\_\_] )
88. (REFUSED)
99. (DON'T KNOW)

C11. How satisfied are you with the CFLs you received? Would you say... [READ LIST]

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied
88. (REFUSED) [SKIP TO INSTRUCTION BEFORE F1]
99. (DON'T KNOW) [SKIP TO INSTRUCTION BEFORE F1]

C12. Can you explain why you are [INSERT RESPONSE FROM C11]? [DO NOT READ, MARK ALL THAT APPLY]

Negative

- 1 (I don't like the color of the light)
- 2 (The light is too bright)
- 3 (The light is too dim)
- 4 (They flicker)
- 5 (They take too long to light up)
- 6 (They don't fit well in my fixtures)
- 7 (They don't look nice in my fixtures)
- 8 (I just didn't like them)
- 9 (They burn out quickly)

Positive

- 10 (They're better than the bulbs I had)
- 11 (They're just fine or I just like them)
- 12 (I like the way they look)
- 13 (They give good light)
- 14 (They save energy)
- 15 (They [will] save me money)
- 16 (They were free)
- 17 (I needed new light bulbs anyway)
- 18 (I won't have to change hard-to-reach fixture)
- 19 (I won't have to change the bulb frequently)
- 20 (Other [SPECIFY: \_\_\_\_\_] )
88. (REFUSED)
99. (DON'T KNOW)

## 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]**
88. (REFUSED) **[SKIP TO NEXT MEASURE]**
99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

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

- [RECORD NUMBER]** \_\_\_\_\_
88. REFUSED **[SKIP TO NEXT MEASURE]**
  99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

F3. Did the contractor install the faucet aerators directly into your fixtures or were they left with you to install yourself?

1. (The faucet aerators were installed directly in the fixtures) **[SKIP TO F5]**
2. (The faucet aerators were left behind for me to install)
3. (Some were installed directly in the fixtures and some were left behind to install)
4. (I did not receive faucet aerators) **[SKIP TO NEXT MEASURE]**
88. (REFUSED)
99. (DON'T KNOW)

F4. How many faucet aerators did you install yourself?

- [RECORD NUMBER]** \_\_\_\_\_
88. REFUSED **[SKIP TO NEXT MEASURE IF F3=2]**
  99. DON'T KNOW **[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?

- [RECORD NUMBER]** \_\_\_\_\_ **[IF F3=1 and QUANTITY=0, SKIP TO F8]**
88. REFUSED **[SKIP TO NEXT MEASURE]**
  99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

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

1. (Yes **[RECORD NUMBER REMOVED: \_\_\_\_\_]**)
2. (No) **[SKIP TO F9]**
88. (REFUSED) **[SKIP TO F9]**
99. (DON'T KNOW) **[SKIP TO F9]**



F7. What are the reasons you removed 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: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

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: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

F9. **[ASK IF F4>0 OR F5>0]** How satisfied are you with the faucet aerators you received? Would you say .... **[READ LIST]**

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

F10. Can you explain why you are **[INSERT RESPONSE FROM F9]**? **[DO NOT READ, MARK ALL THAT APPLY]**

Negative

- 1 (I do not like the kind it is (standard vs. swivel))
- 2 (The flow is too weak/slow)
- 3 (It is at the wrong angle)
- 4 (I just didn't like it)

Positive

- 5 (It is the kind I prefer (standard vs. swivel))
- 6 (It has the right pressure/strength)
- 7 (I needed faucet aerators anyway)
- 8 (It works)
- 9 (My old aerator wasn't working well)
- 10 (It is just fine or I just like it )
- 11. (Other **[SPECIFY: \_\_\_\_\_]** )
- 88. (REFUSED)
- 99. (DON'T KNOW)

## SH. WATER-SAVING SHOWERHEADS

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

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

- 1. (Yes) **[SKIP TO SH3]**
- 2. (Yes, I received low flow showerheads, but quantity is not correct)
- 3. (No, I did not receive any low flow showerheads) **[SKIP TO NEXT MEASURE]**
- 88. (REFUSED) **[SKIP TO NEXT MEASURE]**
- 99. (DON'T KNOW) **[SKIP TO NEXT MEASURE]**

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

- [RECORD NUMBER]** \_\_\_\_\_
- 88. REFUSED **[SKIP TO NEXT MEASURE]**
  - 99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

SH3. Did the contractor install the showerheads directly into your shower or were they left with you to install yourself? **[RECORD ONE RESPONSE]**

- 1 (The showerheads were installed directly in the fixtures) **[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]**
- 88. (REFUSED)
- 99. (DON'T KNOW)

SH4. Did you install any of the Showerheads?

1. Yes [ASK:
  - a. How many were installed? \_\_\_\_\_]
2. No
88. REFUSED [SKIP TO NEXT MEASURE]
99. DON'T KNOW [SKIP TO NEXT MEASURE]

SH5. [ASK IF SH3=1 OR 3] How many showerheads did the contractor install during the visit?  
 [RECORD NUMBER] \_\_\_\_\_ [IF SH3=1 AND QUANTITY=0, SKIP TO SH7b]

88. REFUSED [SKIP TO NEXT MEASURE]
99. DON'T KNOW [SKIP TO NEXT MEASURE]

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

- 1 Yes [RECORD NUMBER REMOVED: \_\_\_\_\_]
- 2 No
88. REFUSED
99. DON'T KNOW

[ASK IF SH6=1]

SH7a. What are the reasons you removed 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: \_\_\_\_\_] )
88. (REFUSED)
99. (DON'T KNOW)

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

SH7b. What are the reasons you didn't 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: \_\_\_\_\_] )
88. (REFUSED)
99. (DON'T KNOW)

SH8. **[ASK IF SUM OF SH4a AND SH5 IS LESS THAN SH\_WUANTITY 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: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

SH9. **[ASK IF SH4=1 OR SH5>0]** How satisfied are you with the showerheads you received? Would you say ... **[READ LIST]**

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

SH10. Can you explain why you are **[INSERT RESPONSE FROM SH9]**? **[DO NOT READ, MARK ALL THAT APPLY]**

Negative

- 1 (I do not like the kind it is (standard vs. swivel))
- 2 (The flow is too weak/slow)
- 3 (It is at the wrong angle)
- 4 (I just didn't like it)

Positive

- 5 (It is the kind I prefer (standard vs. swivel))
- 6 (It has the right pressure/strength)
- 7 (I needed a new showerhead anyway)
- 8 (It works)
- 9 (My old aerator wasn't working well)
- 10 (It is just fine or I just like it)

- 11 (Other **[SPECIFY: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

## 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 P3]**
2. No, I did not receive any water heater pipe insulation **[SKIP TO NEXT MEASURE]**
88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

P3. Did the contractor install the pipe insulation directly on to your water heater pipe or was it left with you to install yourself?

- 1 The pipe insulation was installed directly **[SKIP TO P5]**
- 2 The pipe insulation was left behind for me to install
- 3 I did not receive pipe insulation **[SKIP TO NEXT MEASURE]**
88. REFUSED
99. DON'T KNOW

P4. Did you install the Pipe insulation?

1. Yes
2. No **[SKIP TO P7]**
88. REFUSED **[SKIP TO NEXT MEASURE]**
99. DON'T KNOW **[SKIP TO NEXT MEASURE]**

P5. Have you since removed any of the pipe insulation from where it was originally installed?

- 1 Yes
- 2 No **[SKIP TO P8]**
88. REFUSED **[SKIP TO P8]**
99. DON'T KNOW **[SKIP TO P8]**

P6. 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: \_\_\_\_\_]**)
88. (REFUSED)
99. (DON'T KNOW)

P7. **[ASK IF P4=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: \_\_\_\_\_]** )
88. REFUSED
99. DON'T KNOW

P8. **[ASK IF P4=1 OR P3=1]** How satisfied are you with the pipe insulation you received? Would you say ... **[READ LIST]**

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

P9. Can you explain why you are **[INSERT RESPONSE FROM P8]**? **[DO NOT READ, MARK ALL THAT APPLY]**

Negative

- 1 (I do not like the type of insulation)
- 2 (The water is too hot now)
- 3 (It is not installed right)
- 4 (I just didn't like it)

Positive

- 5 (It has the right insulation)
- 6 (I needed pipe insulation anyway)
- 7 (It works)
- 8 (My old insulation was not in place anymore)
- 9 (It is just fine or I just like it )

- 10 (Other **[SPECIFY: \_\_\_\_\_]** )
88. (REFUSED)
99. (DON'T KNOW)

**T. WATER HEATER TEMPERATURE TURN-DOWN**

**[ASK IF MEASURE=WATER HEATER TEMPERATURE TURN-DOWN, ELSE SKIP TO SECTION O]**

T1. Our records show that the contractor turned down your water heater temperature. Do you remember this?

- 1 Yes
- 2 The water heater temperature was not turned down **[SKIP TO SECTION O]**
88. REFUSED **[SKIP TO SECTION O]**
99. DON'T KNOW **[SKIP TO SECTION O]**

T2. What is the reduced temperature currently set at?

**[RECORD NUMBER]** \_\_\_\_\_

88. REFUSED
99. DON'T KNOW

T3. Did the contractor turn down your water heater temperature or did they suggest that you turn it down?

- 1 The contractor turned down the water heater temperature **[SKIP TO T5]**
- 2 They asked me to turn down the water heater temperature
- 3 My water heater temperature was not turned down **[SKIP TO SECTION O]**
88. REFUSED **[SKIP TO SECTION O]**
99. DON'T KNOW **[SKIP TO SECTION O]**

T4. Did you turn it down to the suggested temperature?

- 1 Yes
- 2 No
88. REFUSED
99. DON'T KNOW

T5. Have you adjusted the water heater temperature since?

- 1 Yes **[ASK: Was it turned up or turned down?]**
  - a. (Up)
  - b. (Down)
- 2 No
88. REFUSED
99. DON'T KNOW

## O. Program Satisfaction (ASK ALL)

- O1. How satisfied were you with the process to sign up for your visit? Would you say you were...  
**[READ LIST]**
1. Very satisfied
  2. Somewhat satisfied
  3. Not very satisfied
  4. Not at all satisfied
  88. (Refused)
  99. (Don't know)
- O2. **[IF O1 =3, 4]** Could you tell me more about why you were not satisfied?  
**[RECORD RESPONSE]**
- O3. How satisfied were you with the process to schedule your visit? Would you say you were...  
  1. Very satisfied
  2. Somewhat satisfied
  3. Not very satisfied
  4. Not at all satisfied
  88. (Refused)
  99. (Don't know)
- O4. **[IF O3 =3,4]** Could you tell me more about why you were not satisfied?  
**[RECORD RESPONSE]**
- O5. How satisfied were you with the skill and professionalism of the technician that visited you? Would you say you were...  
  1. Very satisfied
  2. Somewhat satisfied
  3. Not very satisfied
  4. Not at all satisfied
  88. (Refused)
  99. (Don't know)



- O6. **[IF O5 =3,4]** Could you tell me more about why you were not satisfied?  
 [RECORD RESPONSE]
- O7. \*How satisfied are you with Focus on Energy’s Express Energy Efficiency program overall?Would you say ... [READ LIST]
1. Very satisfied
  2. Somewhat satisfied
  3. Not very satisfied
  4. Not at all satisfied
  88. (Refused)
  99. (Don’t know)
- O8. **[IF O7 =3,4]** Could you tell me more about why you were not satisfied?  
 [RECORD RESPONSE]
- O9. \*How likely is it you would recommend this program to a friend? Use a 0 – 10 scale where 0 means extremely unlikely and 10 means extremely likely.  
 [RECORD ANSWER]
88. Refused
  99. Don’t know
- O10. \*Is there anything you would suggest to improve Focus on Energy’s [PROGRAM NAME] program?
1. (None)
  2. (Other [SPECIFY: \_\_\_\_\_] )
  88. Refused
  99. Don’t know

## M. Cross-Program Marketing

- M1. \*Are you aware of any other Focus on Energy programs, rebates, or projects? **[IF NEEDED: SUCH AS REBATES ON CFL BULBS, ENERGY STAR APPLIANCES, OR ENERGY-EFFICIENT UPGRADES, OR HOME ENERGY AUDITS]**
1. (Yes)
  2. (No) [SKIP TO M5]
  88. (DON’T KNOW) [SKIP TO M5]
  99. (REFUSED) [SKIP TO M5]

M2. \*Which programs, rebates, or projects? **[DO NOT READ; RECORD ALL THAT APPLY]**

1. (Home Performance with ENERGY STAR)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. (Express Energy Efficiency)
6. (Residential Rewards)
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. OMIT
10. OMIT
11. OMIT
12. OMIT
13. (Other **[SPECIFY: \_\_\_\_\_]**)
88. (DON'T KNOW)
99. (REFUSED)

M3. \*Have you participated in any other Focus on Energy programs? **[RECORD ALL THAT APPLY. IF NEEDED: "Such as rebates on CFL bulbs, ENERGY STAR appliances, or energy-efficient upgrades or home energy audits."]**

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

**[ASK IF M3=1]**

M4. \*Which programs, rebates, or projects? **[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]**

1. (Home Performance with ENERGY STAR)
2. (New Homes)
3. (Appliance Recycling)
4. (Lighting and Appliances)
5. OMIT FOR THIS WAVE
6. (Residential Rewards)
7. (Geothermal Heat Pumps)
8. (Solar Hot Water Systems)
9. OMIT
10. OMIT
11. OMIT
12. OMIT
13. (Other **[SPECIFY: \_\_\_\_\_]** )
88. (Don't know)
99. (REFUSED)

M5. \*What do you think is the best way for Focus on Energy to inform the public about energy-efficiency programs? **[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]**

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. (Focus on Energy or Utility website)
9. (Other website **[SPECIFY: \_\_\_\_\_]** )
10. (Email)
11. (Social Media)
12. (Focus on Energy or Utility representative)
13. (Contractor)
14. (Realtor, home builder)
15. (Retail stores)
16. (Home/trade shows)
17. (Sporting or community event)
18. (Other, **[SPECIFY: \_\_\_\_\_]**))
19. (Do not want to receive information)
88. (DON'T KNOW)
99. (REFUSED)

M6. \*What motivated you to participate in Focus on Energy's Express Energy Efficiency program?

**[DO NOT READ LIST, SELECT ALL THAT APPLY]**

1. (Save energy)
2. (Save money/appliance was expensive to run)
3. (Good for the environment/environmentally safe disposal/recycled)
4. (Recommend by a friend/relative)
5. (Recommended by a retailer/dealer)
6. (Recommended by a contractor)
7. (Cash/rebate/incentive program)
8. (Utility sponsorship of the program **[SPECIFY THE PROGRAM:\_\_\_\_\_]** )
9. (Other **[SPECIFY:\_\_\_\_\_]** )
99. (DON'T KNOW)
88. (REFUSED)

## AP. Additional Program Information

AP1. After participating in the program, have you installed any additional **[PROGRAM MEASURES INSTALLED]** on your own without any incentives? **[YES=1, NO=2, 88=REFUSED, 99=DON'T KNOW]**

- A. CFLs **[IF YES, ASK: How many have you installed?\_\_\_\_\_]**
- B. Faucet aerators **[IF YES, ASK: How many have you installed? \_\_\_\_\_]**
- C. Showerheads **[IF YES, ASK: How many have you installed? \_\_\_\_\_]**
- D. Insulation for water heater pipe **[IF YES, ASK: How many have you installed? \_]**

AP2. Did your installation technician provide you with information on other ways you can save energy during your Express Energy Efficiency visit?

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

AP3. Have you taken any of these actions or made any of the improvements suggested?

1. (Yes) **[ASK: Please tell me more about what you did?\_\_\_\_\_]**
2. (No)
88. (Refused)
99. (Don't know)

AP4. Did you receive information on other programs from Focus on Energy or your utility for energy efficiency products and services during your Express Energy Efficiency visit?

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

AP5. Do you plan to participate in any Focus on Energy programs within the next year?

- 1. (Yes) [ASK: Which programs? \_\_\_\_\_]
- 2. (No)
- 88. (Refused)
- 99. (Don't know)

## G. KNOWLEDGE OF AND ATTITUDES TOWARD ENERGY EFFICIENCY

I would now like to ask you a few questions on a slightly different topic.

G1. \*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: \_\_\_\_\_] )
- 88. (Refused)
- 99. (Don't know)

G2. \* What type of fuel does your water heater use?

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

G3. \* Thinking about the price you pay and the electric service you receive, how satisfied are you with your electric utility providing service that's worth what you pay? Would you say ... [READ LIST]

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

**[ASK IF G1=1 OR G2=1]**

G4. Thinking about the price you pay and the gas service you receive, how satisfied are you with your gas utility providing service that's worth what you pay? Would you say ... [READ LIST]

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

**H. FREERIDERSHIP**

I'd like to find out what your plans were for making energy-efficient improvements to your home **before** you found out about the Focus on Energy Express Energy Efficiency program.

**ASK H1-H7 IF Measure Type= CFL**

H1. **Before** you heard about the Focus on Energy Express Energy Efficiency program, had you already been **planning to purchase** CFLs?

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

H2. Would you have installed the same number of CFLs without the Focus on Energy program?

- 1. (Yes) [SKIP TO H4]
- 2. (No)
- 99. (DON'T KNOW)
- 88. (REFUSED)

H3. How many CFLs would you have installed?

1. [RECORD NUMBER]
99. (DON'T KNOW)
88. (REFUSED)

**[IF H3=0, SKIP TO H6]**

H4. When you say you would have installed CFLs without the Focus on Energy program, would you have installed CFLs that were at the same level of efficiency or wattage?

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

H5. 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 H7]
2. Within the same year [SKIP TO H7]
3. One to two years out [SKIP TO H7]
4. More than two years out [SKIP TO H7]
5. Never [SKIP TO H7]
99. (DON'T KNOW) [SKIP TO H7]
88. (REFUSED) [SKIP TO H7]

H6. 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)
99. (DON'T KNOW)
88. (REFUSED)

H7. 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
99. (DON'T KNOW)
88. (REFUSED)

**Measure Type:** [Ask this section (H8-H22) about one additional equipment type that has been installed. If they have installed multiple equipment types then randomly select one of these. To determine which equipment types they have installed check the questions below:

[SELECTED MEASURE] – If more than one randomly pick one

Faucet aerator(s) = IF F4>0 OR F5>0

Water-saving showerhead(s) = IF SH4=1 (installed 1 or more showerheads) OR SH5>0

Water heater pipe insulation = IF P3=1 OR P4=1

**INDICATE WHICH EQUIPMENT TYPE WAS SELECTED IN THE DATA FILE]**

H8. **Before** you heard about the Focus on Energy Express Energy Efficiency program, had you already been **planning to purchase** a [SELECTED MEASURE]?

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

H9. Would you have installed the same number (IF PIPE INSULATION SAY, "of feet") of [SELECTED MEASURE] without the incentive from Focus on Energy?

1. (Yes) [SKIP TO H11]
2. (No)
99. (DON'T KNOW) [SKIP TO H11]
88. (REFUSED) [SKIP TO H11]

H10. How many (IF PIPE INSULATION SAY, "feet of") [SELECTED MEASURE] would you have installed?

1. [RECORD NUMBER]
99. (DON'T KNOW)
88. (REFUSED)

**[IF H10=0, SKIP TO H13]**

H11. When you say you would have installed [SELECTED MEASURE] without the Focus on Energy program, would you have installed [SELECTED MEASURE] that was at the same level of efficiency?

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



H12. And, thinking about timing, without the Focus on Energy program, would you have installed the [SELECTED MEASURE] ... [READ LIST]

1. At the same time [SKIP TO H14]
2. Within the same year [SKIP TO H14]
3. One to two years out [SKIP TO H14]
4. More than two years out [SKIP TO H14]
5. Never [SKIP TO H14]
99. (DON'T KNOW) [SKIP TO H14]
88. (REFUSED) [SKIP TO H14]

H13. So just to confirm, you would not have added [SELECTED MEASURE] at all, without the program. Is that correct?

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

H14. Please tell me how important was the Focus on Energy program was in your decision to install the energy-efficient [SELECTED MEASURE]? Would you say it was ... [READ LIST]

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

### Measure Type: Water Heater Temperature Turndown

[ASK SECTION IF MEASURE=WATER HEATER TEMPERATURE TURNDOWN, ELSE SKIP TO NEXT SECTION]

H15. **Before** you heard anything about the Focus on Energy Express Energy Efficiency program, had you already thought of turning down your water heater temperature?

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

H16. Would you have turned down the temperature of your water heater without the contractor from Focus on Energy visiting your house?

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

## I. 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 Express Energy Efficiency program.

I1. Since participating in the Focus on Energy Express Energy Efficiency program, have you installed any other energy-efficient products in your home that you did NOT receive an incentive for? 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 J1]
99. (DON'T KNOW) [SKIP TO J1]
88. (REFUSED) [SKIP TO J1]

I2. 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?]
- 99. (DON'T KNOW)
- 88. (REFUSED)

13. Please tell me how important the Focus on Energy program is in your decision to install [INSERT EACH ONE SELECTED IN 0]. 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
- 99. (DON'T KNOW)
- 88. (REFUSED)

[ASK I4 FOR EACH ONE SELECTED IN I2 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).]

14. Why didn't you apply for and receive an incentive for [INSERT EACH ONE SELECTED IN 0]? [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: \_\_\_\_\_])
- 99. (DON'T KNOW)
- 88. (REFUSED)

15. 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)
- 99. (DON'T KNOW)
- 88. (REFUSED)

[ASK IF I5=1]

16. 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: \_\_\_\_\_])
99. (DON'T KNOW)
88. (REFUSED)

17. Please tell me how important the Focus on Energy Express Energy efficiency program was in your decision to [INSERT EACH ONE SELECTED IN I6]. 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 I6, "Was it the same importance for every action?"]

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

18. And, over time, have you continued to take these actions to save energy? Let's start with ... [INSERT EACH ANSWER FROM I6]. [IF NEEDED, "Have you continued to take this action to save energy?"]

1. (Yes)
2. (No)
99. (DON'T KNOW)
88. (Refused)

## J. CUSTOMER DEMOGRAPHICS

Now I have a few questions for statistical purposes only.

J1. \*What type of home do you live in? Is it a: [READ LIST]

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: \_\_\_\_\_]
88. (Refused)
99. (Don't know)

J2. \*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: \_\_\_\_\_])
88. (Refused)
99. (Don't know)

J3. \*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)
88. (Refused)
99. (Don't know)

J4. \*How many rooms are in your home, not counting bathrooms?

3. 1
4. 2
5. 3
6. 4
7. 5
8. 6
9. 7
10. 8
11. 9
12. 10 OR MORE
99. (DON'T KNOW)
88. (REFUSED)

J5. \*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: \_\_\_\_\_])
88. (Refused)
99. (Don't know)

J5. **\*[ASK IF J2=2]** 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: \_\_\_\_\_]**)
88. (Refused)
99. (Don't know)

J6. **\*[ASK IF J2=2]** 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: \_\_\_\_\_]**)
88. (Refused)
99. (Don't know)

J7. **\*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.]**

**[RECORD ANSWER]**

88. Refused
99. Don't know

J8. What is the highest level of school that you have 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
88. Refused
99. Don't know

J9. 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
88. Refused
99. Don't know

J10. Which category best describes your total household income in 2011 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
88. Refused
99. Don't know

J11. **[INTERVIEWER RECORD: DO NOT READ.]**

Gender:

1. Female
2. Male

**CLOSING SCRIPT:** Those are all the questions we have. **Focus on Energy** appreciates your input. Thank you for your time.

***Nonresidential Programs***

- Business Incentive Program
- Chain Stores and Franchises
- Large Energy Users
- Small Business Program
- Retrocommissioning Program (Core Participants, Core Trade Allies, and Express Building Tune-Up)
- Design Assistance Program
- The Renewable Energy Competitive Incentive
- Marketing Awareness and Understanding Survey



## Focus on Energy Business Programs – Business Incentive Program Participant Customer Survey CY 2013

Interviewer instructions are in green.

CATI programming instructions are in red.

Words in parenthesis should not be read to respondent

\*Indicates core questions

+Indicates questions on BIP and CSF and possibly LEU

Researchable Questions		
Key Research Topics	Areas of Investigation	Related Questions
<b>Screening</b>	Project initiation process	A4-A7
<b>Marketing and Outreach</b>	Program awareness	B1-B4
	Future communication preferences	L1
<b>Decision Making and Participation</b>	Decision making process	C1-C3
	Key factors influencing customers' decision to participate	C4-C6
	Perceived benefits of participating in program	C7
	Trade ally influence on participation	D1-D2, A7
<b>Barriers</b>	Obstacles to installing high-efficiency equipment	E1-E2
	Equipment not covered by Focus on Energy programs	E3
<b>Net-to-Gross</b>	Determine freeridership to impact net savings	G1-G12, H1-H14
	Determine spillover to impact net savings	I1-I8
<b>Satisfaction</b>	Assess satisfaction with various program components and reasons for dissatisfaction among participants	F1-F3
<b>Firmographics</b>	Determine building and company characteristics of participants	K1-K4
<b>WPS</b>	Questions about WPS EBB program	J1-J9

[210 Business Incentive Participants (BIP) – MARKED IN DATABASE]

### SAMPLE Requirements:

- [PHONE] Phone 1 Area Code and Phone 1
- [COMPANY] Customer Name
- [CONTACT] First Name 1 and Last Name 1
- [ADDRESS]
- [QUANTITY MEASURE 1]
- [MEASURE1] Measure 1 Category
- [MEASURE2]
- [MEASURE3]

- [CUSTOM]
- [UTILITY]
- [INCENTIVE TOTAL]
- [MEASURE 1 OR C\_MEASURE1 INCENTIVE TOTAL]
- [EBB INCENTIVE AMOUNT]
- [# OF MEASURES] – Total number of measure categories in EBB

## A. Introduction

- 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]
  88. (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 Wisconsin Public Service Commission 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])
  99. (DON'T KNOW) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START AGAIN]
  88. (REFUSED) [THANK AND TERMINATE]
- 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 earlier this year?
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]
  99. (Don't Know) [Is there someone we could speak with that would know this? Record name and contact information: \_\_\_\_\_]
  88. (Refused) [THANK AND TERMINATE]

These important questions take 15-20 minutes. Because we value your time, we would like to offer \$20 for your participation. Thank you for agreeing to participate.

- 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; 99=DON'T KNOW; 88 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
  99. DON'T KNOW [ASK TO SPEAK WITH SOMEONE ELSE AND BEGIN AGAIN]
  88. REFUSED [THANK AND TERMINATE]
- A5. Did you receive a financial incentive for installing the upgrades we've been discussing?
1. (Yes)
  2. (No) [SKIP TO B1]
  99. (Don't know) [SKIP TO B1]
  88. (Refused) [SKIP TO B1]

[ASK A6-A7 IF A5=1]

- A6. What company provided the incentive?
1. (Focus on Energy)
  2. (Contractor or vendor)
  3. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)
- A7. Did your organization complete the application for the financial incentive or did the contractor or vendor do that for you?
1. (We completed the application)
  2. (Contractor/vendor completed the application)
  3. (Both)
  99. (Don't know)
  88. (Refused)

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 15 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.]

## B. Awareness

- B1. Focus on Energy offers incentives to businesses for making energy-efficiency upgrades. Contractors, or vendors, or Focus on Energy staff can provide businesses with information and assistance to complete the upgrades. Had you heard about the Focus on Energy incentives available to businesses before today?
1. (Yes)
  2. (No) [SKIP TO C1]
  99. (Don't know) [SKIP TO C1]
  88. (Refused) [SKIP TO C1]
- B2. \*How did your organization learn about the incentives available for this project from Focus on Energy? [DO NOT READ LIST; MULTIPLE RESPONSES POSSIBLE] [IF RESPONDENT MENTIONS WEBSITE CLARIFY IF UTILITY OR FOCUS ON ENERGY WEBSITE SO YOU KNOW HOW TO CODE ANSWER ON LIST.]
1. (Contact with Focus on Energy advisor or representative through phone, email, or in person)
  2. (Focus on Energy monthly newsletter)
  3. (Focus on Energy Website)
  4. (Program sponsored workshop or event)
  5. (Focus on Energy printed program materials)
  6. (Contact with utility representative) [SKIP TO B4]
  7. (Utility mailing, bill insert, or utility Website) [SKIP TO B4]
  8. (Word of mouth (family, friend, or business colleague))
  9. (Contacted by a contractor or vendor through phone, email or in person)
  10. (Previously participated in program/received an incentive)
  11. (Through a trade association or professional organization [SPECIFY: \_\_\_\_\_])
  12. (Other [SPECIFY: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)
- B3. Do you remember hearing about the Focus on Energy incentives from your utility?
1. (Yes)
  2. (No) [SKIP TO C1]
  99. (Don't know) [SKIP TO C1]
  88. (Refused) [SKIP TO C1]

- B4. How did your utility inform you about the Focus on Energy incentives? [READ LIST IF NECESSARY AND RECORD ALL THAT APPLY]
1. (Utility mailing – email or direct mail)
  2. (Utility bill insert)
  3. (Utility Website)
  4. (Representative from your utility)
  5. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)

## C. Decision Making

Now I'd like to understand more about how your organization made decisions about this energy efficiency project.

- C1. Please tell me which of the following people had to approve this project to move forward during the decision making process ... [READ LIST AND RECORD ALL THAT APPLY]
1. Business owner
  2. Facility manager
  3. Plant manager
  4. Energy manager
  5. Financial manager
  6. Corporate or regional executive
  7. "Was there anyone else involved in the decision making process?" Other [SPECIFY: \_\_\_\_\_]
- C2. How long did the approval process take? [RECORD IN MONTHS. IF OVER A YEAR CONVERT TO MONTHS]
1. [SPECIFY MONTHS: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)

[ASK C3 IF A5=1]

- C3. Did the incentives you received give this project an advantage over other projects you may have considered implementing?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

[ASK C4 IF A5=2, 98, OR 99]

C4. If the project cost [INCENTIVE TOTAL] more, would you have...[READ RESPONSES; RECORD ONE RESPONSE]

1. Done the exact same project
2. Done the same project, but would have installed fewer upgrades
3. Completed the project but at a later time
4. Would not have done project at all
99. (Don't know)
88. (Refused)

[ASK EVERYONE]

C5. Is there anything that could have made the decision making process easier for your company?

1. [SPECIFY \_\_\_\_\_]
99. (Don't know)
88. (Refused)

[ASK EVERYONE]

C6. \*What factor was most important to your company's decision to make these energy-efficient upgrades? [DO NOT READ LIST; SINGLE RESPONSE]

1. (Using less energy, reducing energy consumption or energy demand )
2. (Saving money on our utility bills; lower energy bills)
3. (To obtain a program or bonus incentive)
4. (To obtain a tax credit)
5. (To replace old (but still functioning) equipment)
6. (Other [SPECIFY \_\_\_\_\_])
99. (DON'T KNOW)
99. (REFUSED)

C7. +What would you say are the main benefits your company has experienced as a result of the energy efficiency upgrades we've discussed? [DO NOT READ LIST; RECORD ALL THAT APPLY; PROBE FOR MULTIPLE RESPONSES]

1. (The incentive)
2. (Using less energy, reducing energy consumption or energy demand )
3. (Saving money on our utility bills; lower energy bills)
4. (Increased occupant comfort (better or brighter lighting) )
5. (Other [SPECIFY: \_\_\_\_\_])
6. (NO BENEFITS)
99. (DON'T KNOW)
88. (Refused)

## D. Trade Allies

[ASK SECTION D IF A4.1 OR A4.2 OR A4.3=1]

- D1. Did anyone walk through your facility and conduct an assessment to help identify energy-efficiency improvements?
1. (Yes)
  2. (No)
  99. (DON'T KNOW)
  88. (REFUSED)
- D2. Now I have some questions about working with your contractor(s). Please tell me if your contractor(s) was/were very important, somewhat important, not too important, or not at all important for each of the following areas. How important was/were the contractor(s) in helping you: [RECORD ONE OPTION FOR EACH: 1=VERY IMPORTANT; 2=SOMEWHAT IMPORTANT; 3=NOT TOO IMPORTANT; 4=NOT AT ALL IMPORTANT. ALLOW 99 FOR DON'T KNOW AND 88 FOR REFUSED.]
1. Decide which specific upgrades to make
  2. Understand the requirements for the incentive
  3. Estimate the financial benefits of the project
  4. Complete the paperwork
  5. Manage the project

## E. Barriers

- E1. \*What do you see as the biggest challenges to making energy-efficient improvements inside your company? [DO NOT READ; MULTIPLE RESPONSES POSSIBLE]
1. (High initial cost)
  2. (Budget limitations)
  3. (Long payback period)
  4. (Lack of technical knowledge and resources to pursue energy efficiency upgrades [SPECIFY AREAS WHERE TECHNICAL KNOWLEDGE/RESOURCES ARE LACKING: \_\_\_\_\_])
  5. (Lack of corporate support for energy efficiency investments)
  6. (Paperwork too complicated and time consuming)
  7. (Replacing equipment without affecting operations)
  8. (Funding competition for other investments/improvements within organization)
  9. (Don't own building/Tenant)
  10. (Other [SPECIFY: \_\_\_\_\_])
  11. (No challenges)
  99. (Don't know)
  88. (Refused)

- E2. \*What could be done to help your company overcome these challenges? [DO NOT READ LIST, ALLOW MULTIPLE RESPONSES]
1. (Nothing)
  2. (Higher incentives)
  3. (Provide upfront rewards)
  4. (Offer low-interest loans)
  5. (Simplify the paperwork)
  6. (Provide better/more information about program [SPECIFY WHAT TYPE OF INFORMATION THEY NEED: \_\_\_\_\_])
  7. (Provide an energy audit)
  8. (Other [RECORD VERBATIM ANSWER \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)
- E3. Are there any types of energy-efficient equipment or services for which you would like to see incentives? [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (Lighting (outdoor lighting, LEDs, other types)) [ASK: Can you give me an example? \_\_\_\_\_]
  2. (Heating, Air Conditioning, and Ventilation (HVAC) equipment) [ASK: Can you give me an example? \_\_\_\_\_]
  3. (Building shell (insulation, windows, doors)) [ASK: Can you give me an example? \_\_\_\_\_]
  4. (Refrigeration (refrigerators, freezers)) [ASK: Can you give me an example? \_\_\_\_\_]
  5. (Other [SPECIFY: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)



## F. Satisfaction

I would like to know your satisfaction with different aspects of the project.

- F1. I will ask about some different parts of the project. Please indicate if you are very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with each of these areas. If something does not apply, please let me know. [RECORD ONE OPTION FOR EACH A-I 1=VERY SATISFIED; 2=SOMEWHAT SATISFIED; 3=NOT TOO SATISFIED; 4=NOT AT ALL SATISFIED. ALLOW 99 FOR DON'T KNOW, 88 FOR REFUSED, 96 FOR NOT APPLICABLE BUT DO NOT READ AS ANSWER CHOICES. RANDOMIZE A-I ALWAYS ASK JI LAST.]
- a. [ASK IF B1=1] \*Clarity of Focus on Energy's project eligibility requirements
  - b. [ASK IF B1=1] \*Selection of equipment
  - c. [ASK IF B1=1] \*The incentive amounts
  - d. [ASK IF A7=1] \*Program incentive application process
  - e. \*[CUSTOM] The custom project pre-approval process
  - f. [ASK IF B1=1] The Focus on Energy Website
  - g. [ASK IF B1=1] \*Communication with Focus on Energy representatives [NOTE FOR INTERVIEWERS: Includes any contact with Focus on Energy]
  - h. [ASK IF A5=1] \*The time it took to receive the incentive
  - i. [ASK IF ANY A4.1 OR A4.2 OR A4.3 OR A4.4=1] Your experience with the contractor or vendor
  - j. \*Your overall experience with the project
- F2. \*[ASK FOR ANY F1=2, 3 OR 4] Can you say more about why you were [INSERT RESPONSE FROM F1] with [INSERT STATEMENT FROM F1 A-I]. ?
- [FOR F1.B. IF THEY MENTION WANTING MORE EQUIPMENT COVERED BY PROGRAM, FIND OUT WHAT EQUIPMENT]
- [FOR F1.c IF RESPONDENT MENTIONS LOW INCENTIVES, PROBE FOR WHICH EQUIPMENT OR UPGRADES THEY WANT HIGHER INCENTIVES FOR.]
- [FOR F1.g PROBE WHERE COMMUNICATION CAME FROM (i.e., call center, energy advisor, trade ally)
- [RECORD ANSWER]

- F3. \*Is there anything that [IF B1=1 THEN READ, “Focus on Energy” IF B1=2 THEN READ “the contractor”] could have done to improve your overall experience? [DO NOT READ THE LIST, RECORD ALL THAT APPLY]
1. (Better/more communication [SPECIFY: Who would you like more communication from? \_\_\_\_\_])
  2. (Quicker response time [SPECIFY: Who would you like a quicker response time from? \_\_\_])
  3. (Larger selection of eligible equipment [ASK: What energy-efficient equipment should Focus on Energy offer incentives for? \_\_\_\_\_])
  4. (Increasing the incentive amount)
  5. (Simplify the application process)
  6. (Provide quicker approval on applications)
  7. (Send incentive check out faster)
  8. (Other [SPECIFY: \_\_\_\_\_])
  9. (No, nothing)
  99. (DON'T KNOW)
  88. (REFUSED)

## G. +Freeridership

[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]

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, these questions are just about the [MEASURE1 OR C\_MEASURE1] that was purchased.

[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 99=DON'T KNOW OR 88=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]
  99. (DON'T KNOW) [SKIP TO G4]
  88. (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]**
  99. (DON'T KNOW) **[ASK G4]**
  88. (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]**
  99. (DON'T KNOW) **[ASK G5]**
  88. (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]**
  99. (DON'T KNOW) **[SKIP TO I1]**
  88. (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]**
  99. (DON'T KNOW) **[ASK G7]**
  88. (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]**
  99. (DON'T KNOW) **[ASK G8]**
  88. (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]**
  99. (DON'T KNOW) **[SKIP TO I1]**
  88. (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]
  99. (DON'T KNOW) [ASK G10]
  88. (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]
  99. (DON'T KNOW) [ASK G11]
  88. (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]
  99. (DON'T KNOW) [ASK G12]
  88. (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]
  99. (DON'T KNOW) [SKIP TO I1]
  88. (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 99=DON'T KNOW OR 88=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]
  99. (DON'T KNOW) [SKIP TO H4]
  88. (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]
  99. (DON'T KNOW) [ASK H4]
  88. (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]
  99. (DON'T KNOW) [ASK H5]
  88. (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]
  99. (DON'T KNOW) [SKIP TO I1]
  88. (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]
  99. (DON'T KNOW) [ASK H7]
  88. (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]
  99. (DON'T KNOW) [ASK H8]
  88. (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]
  99. (DON'T KNOW) [SKIP TO I1]
  88. (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]
  99. (DON'T KNOW) [ASK H10]
  88. (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]
  99. (DON'T KNOW) [ASK H11]
  88. (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]
  99. (DON'T KNOW) [ASK H12]
  88. (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]**
99. (DON'T KNOW) **[ASK H13]**
88. (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]**
99. (DON'T KNOW) **[SKIP TO I1]**
88. (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 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]**
99. (DON'T KNOW) **[SKIP TO SECTION J]**
88. (REFUSED) **[SKIP TO SECTION J]**

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

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

I3. What were the other energy-efficient products that you installed without getting an incentive? **[DO NOT READ LIST; MARK ALL THAT APPLY; 99=DON'T KNOW, 88=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: \_\_\_\_\_]
  99. DON'T KNOW
  88. REFUSED
14. [REPEAT FOR EACH ITEM MENTIONED IN I3] How many [INSERT ITEM FROM I3] did you install? [RECORD NUMBER \_\_\_\_\_, 99 FOR DON'T KNOW, 88 FOR REFUSED, AND -96 FOR N/A]
15. [REPEAT FOR EACH ITEM MENTIONED IN I3] Please tell me how important the [IF A5=1 READ, "incentive for [INSERT MEASURE1] was" OR IF A5=2 READ, "assistance from your contractor with [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]?
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 [[IF A5=1 READ, "incentive" OR IF A5=2 READ, "assistance from your contractor"] 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
  99. [DO NOT READ] DON'T KNOW
  88. [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)
  99. DON'T KNOW
  88. REFUSED
18. [ASK IF I2=2] What is the address of the location where you installed [INSERT EACH ITEM FROM I3]? [99 FOR DON'T KNOW AND 88 FOR REFUSED]
- ENTER STREET ADDRESS:
- ENTER CITY:
- ENTER STATE:
- ENTER ZIP CODE:



[ASK SECTION J IF WPS IS LISTED AS UTILITY]

## J. WPS Questions

Now we have just a few questions about Wisconsin Public Service, your gas and/or electric company.

- J1. Are you aware of the WPS Energy Bundle Bonus program? This program is offered by Focus on Energy in partnership with WPS, and offers financial incentives in addition to those offered through the Focus on Energy's business program
1. (Yes)
  2. (No) [SKIP TO FIRMOGRAPHICS]
  99. (Don't know) [SKIP TO FIRMOGRAPHICS]
  88. (Refused) [SKIP TO FIRMOGRAPHICS]
- J2. 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: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)

[ASK IF J1=1 AND DID NOT RECEIVE WPS INCENTIVE]

- J3. Did you receive any additional incentives from the WPS Energy Bundle Bonus program?
1. (Yes) [SKIP TO J6]
  2. (No) [SKIP TO J9]
  99. (Don't know) [SKIP TO FIRMOGRAPHICS]
  88. (Refused) [SKIP TO FIRMOGRAPHICS]

[ASK IF J1=1 AND RECEIVED ENERGY BUNDLE BONUS INCENTIVE]

- J4. Our records show that your company received additional incentives of [EBB INCENTIVE] dollars from the WPS Energy Bundle Bonus program for installing the [MEASURE1], [MEASURE2], and [MEASURE3] is that correct?
1. (Yes) [SKIP TO J6]
  2. (No, didn't receive an extra incentive)
  3. (Received incentive; amount is incorrect) [SKIP TO J6]
  99. (Don't know) [SKIP TO FIRMOGRAPHICS]
  88. (Refused) [SKIP TO FIRMOGRAPHICS]

- J5. Just to confirm, your company did **not** receive an additional financial incentive from WPS in addition to the incentive provided by the business program, is that correct? [DO NOT READ LIST]
1. (No , they did **not** receive an incentive from WPS) [SKIP TO J9]
  2. (Yes, they **did** receive an incentive from WPS)
  99. (Don't know) [SKIP TO FIRMOGRAPHICS]
  88. (Refused) [SKIP TO FIRMOGRAPHICS]
- J6. The Energy Bundle Bonus offered increased incentives with each additional measure installed. Was this increase in the incentive a factor in your decision to install more measures?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)
- 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
  99. (Don't know)
  88. (Refused)
- J8. If you had not received the Energy Bundle Bonus incentive for [EBB INCENTIVE] for the [INSERT # OF MEASURE GROUPS] types of equipment, would you have still purchased the [MEASURE1, MEASURE 2], and [MEASURE3]?
1. (Yes) [SKIP TO SECTION K]
  2. (No) [SKIP TO SECTION K]
  3. (Other [SPECIFY/RECORD COMMENTS: \_\_\_\_\_] ) [SKIP TO SECTION K]
  99. (Don't know) [SKIP TO SECTION K]
  88. (Refused) [SKIP TO SECTION K]
- J9. Can you tell us why your company did not receive the additional incentives? [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: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)

## K. Firmographics

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

- K1. \*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: \_\_\_\_\_] )
  99. (DON'T KNOW )
  88. (Refused)
- K2. \*Does your organization lease or own the facility?
1. (Lease)
  2. (Own)
  3. (Other [SPECIFY: \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)
- K3. \*What is the square footage of the heated or cooled space in this facility? [NUMERIC OPEN END UP TO 1,000,000]
1. [RECORD NUMBER: \_\_\_\_\_]
  99. DON'T KNOW
  88. REFUSED
- K4. \*How many people are employed at this location?
1. [RECORD NUMBER: \_\_\_\_\_]
  99. DON'T KNOW
  88. REFUSED

## L. Closing

- L1. \*In the future, how would you like to stay informed about opportunities to save energy and money? [DO NOT READ LIST; MULTIPLE RESPONSES POSSIBLE]
1. (Contact with Focus on Energy representative through phone, email, or in person)
  2. (Focus on Energy monthly newsletter)
  3. (Focus on Energy Website)
  4. (Focus on Energy workshop, event)
  5. (Contact with utility representative)
  6. (Utility mailing, bill insert, utility Website)
  7. (Contractor or vendor through phone, email, or in person)
  8. (Through a trade association or professional organization)
  9. (Other [SPECIFY: \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)
- L2. +Do you have any other comments about energy efficiency decisions and purchases you would like to share?  
[RECORD RESPONSE: \_\_\_\_\_; 99 FOR DON'T KNOW, 88 FOR REFUSED]
- L3. \*[INTERVIEWER RECORD GENDER. DO NOT ASK]
1. (Female)
  2. (Male)
- L4. So that we can send the incentive to the correct place please tell me ...
1. Your name [RECORD NAME; FIRST AND LAST. VERIFY SPELLING]
  2. Street address where you would like the check mailed [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]

***Thank you. We appreciate your help with this survey. You may also be contacted for an on-site visit if you have not been contacted already. Have a nice day.***

## Focus on Energy Business Programs – Chain Stores and Franchises Program Participant Customer Survey CY 2013

Interviewer instructions are in green.

CATI programming instructions are in red.

Words in parenthesis should not be read to respondent

\*Indicates core questions

+Indicates questions on BIP and CSF and possibly LEU

Researchable Questions		
Key Research Topics	Areas of Investigation	Related Questions
<b>Screening</b>	Project initiation process	A4-A7
<b>Marketing and Outreach</b>	Program awareness	B1-B7
	Future communication preferences	L1
<b>Decision Making and Participation</b>	Decision making process	C1-C4
	Key factors influencing customers' decision to participate	C5-C6
	Perceived benefits of participating in program	C7
	Trade ally influence on participation	E1-E2, A7
<b>Barriers</b>	Obstacles to installing high-efficiency equipment	F1-F2
	Equipment not covered by Focus on Energy programs	F3
<b>Net-to-Gross</b>	Determine freeridership to impact net savings	H1-H12,
	Determine spillover to impact net savings	J1-J7
<b>Satisfaction</b>	Assess satisfaction with various program components and reasons for dissatisfaction among participants	F1-G3
<b>Firmographics</b>	Determine building and company characteristics of participants	K1-K4

[60 (Chain Stores and Franchises); 10 DI and 50 Non-DI]

### SAMPLE Requirements:

- [PHONE] Phone 1 Area Code and Phone 1
- [COMPANY] Customer Name
- [CONTACT] First Name 1 and Last Name 1
- [ADDRESS]
- [QUANTITY MEASURE 1]
- [MEASURE1] Measure 1 Category
- [MEASURE2]
- [MEASURE3]
- [CUSTOM]

- [UTILITY]
- [INCENTIVE TOTAL]
- [MEASURE 1 OR C\_MEASURE1 INCENTIVE TOTAL]
- [EBB INCENTIVE AMOUNT]
- [# OF MEASURES] – Total number of measure categories in EBB
- [DI or NON-DI]

DI = Direct install

## A. Introduction

- A1. Hello, may I speak with [CONTACT?] OR [IF NO NAME] May I speak with the person who handles energy decisions for your company's locations in Wisconsin? [IF NOT AT THIS LOCATION, ASK FOR PHONE NUMBER AND NAME AT CORRECT LOCATION AND CALL RESPONDENT]
1. (Yes) [CONTINUE WITH RESPONDENT ON PHONE]
  88. (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 energy decisions at your company's locations in Wisconsin? [IF NEEDED: Focus on Energy is a statewide program overseen by the Wisconsin Public Service Commission 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])
  99. (DON'T KNOW) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START AGAIN]
  88. (REFUSED) [THANK AND TERMINATE]
- A3. Our records show that [COMPANY] installed energy efficient equipment including [MEASURE1], [MEASURE2], and [MEASURE3] through the Focus on Energy Chain Stores and Franchises Program. To ensure our records are correct, can you confirm that you installed these upgrades earlier this year?
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]
  99. (Don't Know) [Is there someone we could speak with that would know this? Record name and contact information: \_\_\_\_\_]
  88. (Refused) [THANK AND TERMINATE]

[IF DI, SKIP TO SECTION B]

- A4. I'm going to read you a short list of project steps. Please tell me if a contractor, vendor, or a 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; 99=DON'T KNOW; 88 REFUSED]
1. Project initiation
  2. Decisions about project design
  3. Equipment selection
  4. Equipment installation
  99. (DON'T KNOW) [ASK TO SPEAK WITH SOMEONE ELSE AND BEGIN AGAIN]
  88. (REFUSED) [THANK AND TERMINATE]
- A5. Did you receive a financial incentive for installing the upgrades we've been discussing?
1. (Yes)
  2. (No) [SKIP TO Error! Reference source not found.]
  99. (Don't know) [SKIP TO B1]
  88. (Refused) [SKIP TO B1]

[ASK A6-A7 IF A5=1]

- A6. What organization provided the incentive?
1. (Focus on Energy)
  2. (Contractor or vendor)
  3. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)
- A7. Did your organization complete the application for the financial incentive or did the contractor or vendor do that for you?
1. (We completed the application)
  2. (Contractor/vendor completed the application)
  99. (Don't know)
  88. (Refused)

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 15 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.]

## B. Awareness

B1. \*How did your organization learn about the incentives available for this project from Focus on Energy? [DO NOT READ LIST; MULTIPLE RESPONSES POSSIBLE] [IF RESPONDENT MENTIONS WEBSITE CLARIFY IF UTILITY OR FOCUS ON ENERGY WEBSITE SO YOU KNOW HOW TO CODE ANSWER ON LIST.]

1. (Contact with Focus on Energy representative through phone, email, or in person)
2. (Focus on Energy monthly newsletter)
3. (Focus on Energy website)
4. (Program sponsored workshop or event)
5. (Focus on Energy printed program materials)
6. (Contact with utility representative)
7. (Utility mailing, bill insert, or utility Website)
8. (Word of mouth (family, friend, or business colleague)
9. (Contacted by a contractor or vendor through phone, email or in person)
10. (Previously participated in program/received an incentive)
11. (Through a trade association or professional organization  
[SPECIFY: \_\_\_\_\_])
12. (Other [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

[SKIP B2 IF B1=6 OR 7]

B2. Do you remember hearing about the Focus on Energy incentives from your utility?

1. (Yes)
2. (No) [SKIP TO C1]
99. (Don't know) [SKIP TO C1]
88. (Refused) [SKIP TO C1]

B3. How did your utility inform you about the Focus on Energy incentives? [READ LIST IF NECESSARY AND RECORD ALL THAT APPLY]

1. (Utility mailing – email or direct mail)
2. (Utility bill insert)
3. (Utility website)
4. (Representative from your utility)
5. (Other [SPECIFY: \_\_\_\_\_] )
99. (Don't know)
88. (Refused)

B4. Are you aware of any special or bonus offerings from Focus on Energy? [IF NEEDED: "Examples include the Refrigeration Makeover Bundle bonus and the LED Fuel Canopy bonus."]

1. (Yes)
2. (No) [IF DI SKIP TO SECTION D, IF NON-DI SKIP TO SECTION C]
99. (Don't know) [IF DI SKIP TO SECTION D, IF NON-DI SKIP TO SECTION C]
88. (Refused) [IF DI SKIP TO SECTION D, IF NON-DI SKIP TO SECTION C]



- B5. What special offerings are you aware of? [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (LED Fuel Canopy)
  2. (ENERGY STAR® LED Lamps)
  3. (Demand Controlled Ventilation)
  4. (High Performance Fluorescent Troffer)
  5. (High Performance LED Troffer)
  6. (Refrigeration Makeover Bundle)
  7. (Rooftop Optimization (RTO))
  8. (Other) [SPECIFY \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)
- B6. Did your company apply for an incentive for one of the special or bonus offerings?
1. (Yes) [Ask: Which special offering? RECORD BELOW]
    - a. (LED Fuel Canopy)
    - b. (ENERGY STAR® LED Lamps)
    - c. (Demand Controlled Ventilation)
    - d. (High Performance Fluorescent Troffer)
    - e. (High Performance LED Troffer)
    - f. (Refrigeration Makeover Bundle)
    - g. (Rooftop Optimization (RTO))
    - h. (Other) [SPECIFY \_\_\_\_\_]
  2. (No)
  99. (Don't know)
  88. (Refused)
- B7. What was the main reason your company [IF B6=1, "chose to" / IF B6=2, "chose not to"] apply for an incentive for one of the special offerings?
1. [RECORD ANSWER \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)

[ASK SECTION C IF NON DI; SKIP TO SECTION D IF DI]

## C. Decision Making – Non-Direct Install Measures

Now I'd like to understand more about how your organization made decisions about the energy efficiency upgrades you completed

- C1. Are you involved in energy-related decisions for this location only, multiple locations in Wisconsin, or multiple locations in and outside of Wisconsin? [RECORD ONE RESPONSE]
1. (This location only)
  2. (Multiple locations in Wisconsin)
  3. (Multiple locations in and outside of Wisconsin)
  4. (Other) [SPECIFY: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)

- C2. Please tell me which of the following people had to approve this project to move forward during the decision making process ... [READ LIST AND GET A YES OR NOT FOR EACH; RECORD ALL THAT APPLY]
1. Store manager
  2. Facility or property manager
  3. Real estate department manager
  4. Energy manager
  5. Financial manager
  6. Corporate or regional executive
  7. Business owner or owners
  8. "Was there anyone else involved in the decision making process?"  
[SPECIFY: \_\_\_\_\_]

- C3. How long did the approval process take? [RECORD IN MONTHS. IF OVER A YEAR CONVERT TO MONTHS]
1. [SPECIFY MONTHS: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)

[ASK C3 IF A5=1]

- C4. Did the incentives you received give this project an advantage over other projects you may have considered implementing?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

[ASK ALL NON-DI]

- C5. Is there anything that could have made the decision making process easier for your company?
1. [SPECIFY \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)

[ASK ALL NON-DI]

- C6. \*What factor was most important to your company's decision to make these energy-efficient upgrades? [DO NOT READ LIST; SINGLE RESPONSE]
1. (To save money on energy bills, reduce energy consumption or energy demand)
  2. (To obtain a program or bonus incentive)
  3. (To obtain a tax credit)
  4. (To replace old (but still functioning) equipment)
  5. (Other [SPECIFY \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)
- C7. +What would you say are the main benefits your company has experienced as a result of the energy efficiency upgrades we've discussed? [DO NOT READ LIST; RECORD ALL THAT APPLY; PROBE FOR MULTIPLE RESPONSES]
1. (The incentive)
  2. (Energy savings)
  3. (Lower energy bills (i.e. – saved money))
  4. (Increased occupant comfort (better or brighter lighting) )
  5. (Other [SPECIFY: \_\_\_\_\_])
  6. (NO BENEFITS)
  99. (DON'T KNOW)
  88. (Refused)

[ASK SECTION D IF DI, SKIP TO INSTRUCTION BEFORE SECTION E IF NON-DI]

## D. Direct Install

Now I'd like to ask about your experience with the program.

- D1. Did the person who installed the upgrades give you a list of recommendations for additional energy efficiency projects that could save energy and money at your facility?
1. (Yes)
  2. (No) [SKIP TO SECTION F]
  99. (DON'T KNOW) [SKIP TO SECTION F]
  88. (Refused) [SKIP TO SECTION F]
- D2. [IF D1=1] Did your company complete any of the recommended projects? [READ LIST IF NEEDED]
1. (Yes, all)
  2. (Yes, some)
  3. (No, none) [SKIP TO D5]
  99. (DON'T KNOW) [SKIP TO SECTION F]
  88. (Refused) [SKIP TO SECTION F]

- D3. [IF D2=1 OR 2] What recommended projects did your company complete?
1. (SPECIFY \_\_\_\_\_)
  99. (DON'T KNOW)
  88. (Refused)
- D4. [IF D2=1 OR 2] Did you receive an incentive from Focus on Energy for any of the recommended projects you completed? [IF NEEDED: "The additional projects that were on the list the installer gave you."]
1. (Yes, all)
  2. (Yes, some)
  3. (No, none)
  99. (DON'T KNOW)
  88. (Refused)
- D5. [IF D2=2 OR 3] What prevented your company from completing [IF D2=2, "all of"] the projects on the list?
1. (SPECIFY \_\_\_\_\_)
  99. (DON'T KNOW)
  88. (Refused)
- D6. [IF D2=2 OR 3] Are you planning to complete any of the recommended projects in the future?
1. (Yes, all)
  2. (Yes, some)
  3. (No, none)
  99. (DON'T KNOW)
  88. (Refused)
- [SKIP TO SECTION F]

[ASK SECTION E IF NON-DI AND A4.1 OR A4.2 OR A4.3=1]

## E. Trade Allies

- E1. Did anyone from Focus on Energy walk through your facility and conduct an assessment to help identify energy-efficiency improvements?
1. (Yes)
  2. (No)
  99. (DON'T KNOW)
  88. (REFUSED)
- E2. Now I have some questions about working with your contractor(s). Please tell me if your contractor(s) was/were very important, somewhat important, not too important, or not at all important for each of the following areas. How important was/were the contractor(s) in helping you: [RECORD ONE OPTION FOR EACH: 1=VERY IMPORTANT; 2=SOMEWHAT IMPORTANT; 3=NOT

TOO IMPORTANT; 4=NOT AT ALL IMPORTANT. ALLOW 99 FOR DON'T KNOW AND 88 FOR REFUSED.]

1. Decide which specific upgrades to make
2. Understand the requirements for the incentive
3. Estimate the financial benefits of the project
4. Complete the paperwork
5. Manage the project

[ASK EVERYONE; DI AND NON-DI]

## F. Barriers

- F1. \*What do you see as the biggest challenges to making energy-efficient improvements inside your company? [DO NOT READ; MULTIPLE RESPONSES POSSIBLE]
1. (High initial cost)
  2. (Budget limitations)
  3. (Long payback period)
  4. (Lack of technical knowledge and resources to pursue energy efficiency upgrades [SPECIFY AREAS WHERE TECHNICAL KNOWLEDGE/RESOURCES ARE LACKING: \_\_\_\_\_])
  5. (Lack of corporate support for energy efficiency investments)
  6. (Paperwork too complicated and time consuming)
  7. (Replacing equipment without affecting operations)
  8. (Funding competition for other investments/improvements within organization)
  9. (Don't own building/Tenant)
  10. (Other [SPECIFY: \_\_\_\_\_])
  11. (No challenges) [SKIP TO F3]
  99. (Don't know)
  88. (Refused)
- F2. \*What could be done to help your company overcome these challenges?[DO NOT READ LIST, ALLOW MULTIPLE RESPONSES]
1. (Nothing)
  2. (Higher incentives)
  3. (Provide upfront rewards)
  4. (Offer low-interest loans)
  5. (Simplify the paperwork)
  6. (Provide better/more information about program [SPECIFY WHAT TYPE OF INFORMATION THEY NEED: \_\_\_\_\_])
  7. (Provide an energy audit)
  8. (Other [RECORD VERBATIM ANSWER \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)

- F3. **[FOR NON-DI ONLY]** Are there any additional types of energy-efficient equipment or services for which you would like to see as part of the Chain Stores and Franchises program offerings?
1. (Lighting (outdoor lighting, LEDs, other types)) **[ASK: Can you give me an example? \_\_\_\_\_ ]**
  2. (Heating, Air Conditioning, and Ventilation (HVAC) equipment) **[ASK: Can you give me an example? \_\_\_\_\_ ]**
  3. (Building shell (insulation, windows, doors)) **[ASK: Can you give me an example? \_\_\_\_\_ ]**
  4. (Refrigeration (refrigerators, freezers)) **[ASK: Can you give me an example? \_\_\_\_\_ ]**
  5. (Other **[SPECIFY: \_\_\_\_\_ ]**)
  99. (Don't know)
  88. (Refused)

**[ASK EVERYONE SECTION G]**

## G. Satisfaction

I would like to know your satisfaction with different aspects of the project.

- G1. I will ask about some different parts of the project. Please indicate if you are very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with each of these areas. If something does not apply, please let me know. **[RECORD ONE OPTION FOR EACH A-I 1=VERY SATISFIED; 2=SOMEWHAT SATISFIED; 3=NOT TOO SATISFIED; 4=NOT AT ALL SATISFIED. ALLOW 99 FOR DON'T KNOW, 88 FOR REFUSED, 96 FOR NOT APPLICABLE BUT DO NOT READ AS ANSWER CHOICES. RANDOMIZE A-I ALWAYS ASK j LAST.]**
- a. \*Clarity of Focus on Energy's project eligibility requirements
  - b. \*Selection of equipment
  - c. \*The incentive amounts
  - d. **[ASK IF A7=1]** \*Program incentive application process
  - e. **[CUSTOM]** The custom project pre-approval process
  - f. The Focus on Energy website
  - g. \*Communication with Focus on Energy representatives **[NOTE FOR INTERVIEWERS: Includes green contact with Focus on Energy]**
  - h. **[ASK IF A5=1]** \*The time it took to receive the incentive
  - i. **[ASK IF ANY A4.1 OR A4.2 OR A4.3 OR A4.4=1]** Your experience with the contractor or vendor
  - j. \*Your overall experience with the project

- G2. **\*[ASK FOR ANY G1=2, 3 OR 4]** Can you say more about why you are **[INSERT RESPONSE FROM G1]** with **[INSERT STATEMENT FROM G1 A-J]**?  
**[FOR G1.B. IF THEY MENTION WANTING MORE EQUIPMENT COVERED BY PROGRAM, FIND OUT WHAT EQUIPMENT]**  
**[FOR G1.c IF RESPONDENT MENTIONS LOW INCENTIVES, PROBE FOR WHICH EQUIPMENT OR UPGRADES THEY WANT HIGHER INCENTIVES.]**  
**[FOR G1.g PROBE WHERE COMMUNICATION CAME FROM (i.e., call center, energy advisor, trade ally)]**  
**[RECORD ANSWER]**

- G3. **\*Is there anything that Focus on Energy could have done to improve your overall experience? [DO NOT READ THE LIST, RECORD ALL THAT APPLY]**
1. (Better/more communication **[SPECIFY: Who would you like more communication from?\_\_\_\_\_]**)
  2. (Quicker response time **[SPECIFY: Who would you like a quicker response time from?\_\_]**)
  3. (Larger selection of eligible equipment **[ASK: What energy-efficient equipment should Focus on Energy offer incentives for?\_\_\_\_\_]**)
  4. (Increasing the incentive amount)
  5. (Simplify the application process)
  6. (Provide quicker approval on applications)
  7. (Send incentive check out faster)
  8. (Other **[SPECIFY:\_\_\_\_\_]**)
  9. (No, nothing)
  99. (DON'T KNOW)
  88. (REFUSED)

**[ASK ONLY NON-DI SECTION H]**

## H. +Freeridership (Non-DI)

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, these questions are just about the **[MEASURE1 OR C\_MEASURE1]** that was purchased.

**[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 heard about the financial incentive, had you...? **[READ LIST AND RECORD ONE FOR EACH: 1=YES OR 2=NO OR 99=DON'T KNOW OR 88=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 learning about the incentive?
1. (Yes) **[ASK H3]**
  2. (No) **[SKIP TO H4]**
  99. (DON'T KNOW) **[SKIP TO H4]**
  88. (REFUSED) **[SKIP TO H4]**
- H3. 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 H4]**
  2. (No) **[ASK H4]**
  99. (DON'T KNOW) **[ASK H4]**
  88. (REFUSED) **[ASK H4]**
- H4. Would you have purchased and installed the same **[MEASURE1 OR C\_MEASURE1]**[s] without the incentive?
1. (Yes) **[SKIP TO H7]**
  2. (No) **[SKIP TO H9]**
  99. (DON'T KNOW) **[ASK H5]**
  88. (REFUSED) **[ASK H5]**
- H5. Would you have installed **something** without the incentive? **[DO NOT READ LIST UNLESS NECESSARY]**
1. (Yes, would have installed something) **[ASK H6]**
  2. (No, would NOT have installed anything) **[SKIP TO H9]**
  99. (DON'T KNOW) **[SKIP TO J1]**
  88. (REFUSED) **[SKIP TO J1]**
- 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]**
  99. (DON'T KNOW) **[ASK H7]**
  88. (REFUSED) **[ASK H7]**
- H7. **[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 H8]**
  2. (No) **[ASKH7.2.a]**
    - a. Would you have installed fewer or more of the **[MEASURE1 OR C\_MEASURE1]**(s)? **[ASK H8]**
  99. (DON'T KNOW) **[ASK H8]**
  88. (REFUSED) **[ASK H8]**



- H8. 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 J1]
  2. Within one to two years? [SKIP TO J1]
  3. Within three to five years? [SKIP TO J1]
  4. In more than five years? [SKIP TO J1]
  99. (DON'T KNOW) [SKIP TO J1]
  88. (REFUSED) [SKIP TO J1]

[ASK H9 TO H12 IF H4 =2 OR H5 = 2]

- H9. 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 H10]
  2. (No, would not have installed anything at all) [SKIP TO J1]
  99. (DON'T KNOW) [ASK H10]
  88. (REFUSED) [ASK H10]

- H10. 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 H11]
  2. (No) [ASK H11]
  99. (DON'T KNOW) [ASK H11]
  88. (REFUSED) [ASK H11]

- H11. [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 H12]
  2. (No) [ASK H11.2A]
    - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1] (s)? [ASK H12]
  99. (DON'T KNOW) [ASK H12]
  88. (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? [SKIP TO J1]
  2. In one to two years? [SKIP TO J1]
  3. In three to five years? [SKIP TO J1]
  4. More than five years out? [SKIP TO J1]
  99. (DON'T KNOW) [SKIP TO J1]
  88. (REFUSED) [SKIP TO J1]

[ASK ONLY DI SECTION J]

## I. +Freeridership (DI)

Now I'd like to talk with you a bit more about your decisions to install the [MEASURE1 OR C\_MEASURE1]. Even though you may have received incentives for other energy saving equipment, these questions are just about the [MEASURE1 OR C\_MEASURE1] that was installed.

11. Approximately how many [MEASURE1 OR C\_MEASURE1]s, if any, did you have installed in your facilities prior to your participation in the Focus on Energy program?
  1. [RECORD #]
  99. (DON'T KNOW)
  88. (REFUSED)
  
12. My records show that you had [QUANTITY MEASURE 1] [MEASURE1 OR C\_MEASURE1] installed through the Focus on Energy Chain Stores and Franchises program. Is that correct?
  1. (Yes) [ASK I3]
  2. (No) [ASK: "What is the correct number?"] [RECORD #] [IF #>0, ASK I3]
  99. (DON'T KNOW) [SKIP TO I4]
  88. (REFUSED) [SKIP TO I4]
  
13. How many of those [MEASURE1 OR C\_MEASURE1]s are still being used? [RECORD #]
14. If you had not received any free [MEASURE1 OR C\_MEASURE1]s from Focus on Energy, how many [MEASURE1 OR C\_MEASURE1]s, if any, would you have purchased for your facilities in the near future?
  1. [RECORD #] [ASK I5]
  99. (DON'T KNOW) [SKIP TO I6]
  88. (REFUSED) [SKIP TO I6]
  
15. And when would you have purchased [MEASURE1 OR C\_MEASURE1]s on your own? Would it have been... [READ LIST]
  1. At the same time that you got the free upgrades from the program
  2. Within a few months
  3. Within a year
  4. More than a year later
  99. (DON'T KNOW)
  88. (REFUSED)
  
16. Will you describe in your own words how the Focus on Energy program affected your purchase and use of [MEASURE1 OR C\_MEASURE1]s? [PROBE UNTIL UNPRODUCTIVE AND CLARIFY VAGUE RESPONSES]
  1. [RECORD VERBATIM]
  99. (Don't know)
  88. (Refused)

[ASK EVERYONE SECTION J]

## J. Spillover

- J1. 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, et cetera.
1. (Yes) [ASK J2]
  2. (No) [SKIP TO SECTION K]
  99. (DON'T KNOW) [SKIP TO SECTION K]
  88. (REFUSED) [SKIP TO SECTION K]
- J2. 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)
  99. (DON'T KNOW)
  88. (REFUSED)
- J3. What were the other energy-efficient products that you installed without getting an incentive? [DO NOT READ LIST; MARK ALL THAT APPLY; 99=DON'T KNOW, 88=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: \_\_\_\_\_]
  99. (DON'T KNOW)
  88. (REFUSED)
- J4. [REPEAT FOR EACH ITEM MENTIONED IN J3] How many [INSERT ITEM FROM J3] did you install? [RECORD NUMBER \_\_\_\_\_, 99 FOR DON'T KNOW, 88 FOR REFUSED, AND -96 FOR N/A]
- J5. [REPEAT FOR EACH ITEM MENTIONED IN J3] Please tell me how important the incentive was in your decision to install [INSERT ITEM FROM J3]. Was it very important, somewhat important, not too important, or not at all important [INSERT ITEM FROM J3]?

[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 [[IF A5=1 READ, “incentive” OR IF A5=2 READ, “assistance from your contractor”] was in your decision to install [ANSWER FROM J3]”]

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

J6. [ASK FOR ALL MENTIONED IN J3] Did you receive an incentive for installing [INSERT ANSWER FROM J3]? [DO NOT READ ANSWER LIST]

1. (Yes)
2. (No)
3. (Item did not qualify)
4. (Contractor or vendor received the incentive)
99. (Don't know)
88. (Refused)

J7. [ASK IF J2=2] What is the address of the location where you installed [INSERT EACH ITEM FROM J3]? [99 FOR DON'T KNOW AND 88 FOR REFUSED]

ENTER STREET ADDRESS:

ENTER CITY:

ENTER STATE:

ENTER ZIP CODE:

[ASK EVERYONE SECTION K]

## K. Firmographics

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

K1. \*What industry is your company in? [CODE ONE RESPONSE BELOW; DON'T READ UNLESS NECESSARY]

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

- K2. \*Does your organization lease or own the facility?
1. (Lease)
  2. (Own)
  3. (Both)
  4. (Other [SPECIFY: \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)
- K3. \*What is the approximate heated or cooled square footage of this facility? [NUMERIC OPEN END UP TO 1,000,000]
1. [RECORD NUMBER: \_\_\_\_\_]
  99. DON'T KNOW
  88. REFUSED
- K4. \*How many people are employed at this location?
1. [RECORD NUMBER: \_\_\_\_\_]
  99. DON'T KNOW
  88. REFUSED
- [ASK EVERYONE SECTION L]

## L. Closing

- L1. \*In the future, how would you like to stay informed about opportunities to save energy and money? [DO NOT READ LIST; MULTIPLE RESPONSES POSSIBLE]
1. (Contact with Focus on Energy representative through phone, email, or in person)
  2. (Focus on Energy monthly newsletter)
  3. (Focus on Energy Website)
  4. (Focus on Energy workshop, event)
  5. (Contact with utility representative)
  6. (Utility mailing, bill insert, utility Website)
  7. (Contractor or vendor through phone, email, or in person)
  8. (Through a trade association or professional organization)
  9. (Other [SPECIFY: \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)
- L2. +Do you have any other comments about energy efficiency decisions and purchases you would like to share?  
[RECORD RESPONSE: \_\_\_\_\_; 99 FOR DON'T KNOW, 88 FOR REFUSED]
- L3. \*[INTERVIEWER RECORD GENDER. DO NOT ASK]
1. (Female)
  2. (Male)

***Thank you. We appreciate your help with this survey. You may also be contacted for an on-site visit if you have not been contacted already. Have a nice day.***

## Focus on Energy Business Programs – Large Energy Users Participant Customer Survey CY 2013

Interviewer instructions are in green.

CATI programming instructions are in red.

Words in parenthesis should not be read to respondent

\*Indicates core questions

+Suggestions

Researchable Questions		
Key Research Topics	Areas of Investigation	Related Questions
<b>Screening</b>	Project initiation process	A4-A8
<b>Marketing and Outreach</b>	Program Awareness	B1-B3
	Future communication preferences	J1
	Key factors influencing customers' decision to participate in program	C1-C2
	Influence of energy teams	C5-C6, C9-C12
	Perceived benefits of participating in program	C4
	Trade ally influence on participation	C3,
<b>Barriers</b>	Obstacles to installing high-efficiency equipment	D1-D2
	Obstacles to forming energy teams	C7-C8
	Obstacles to participating in the Large Energy Users Program	D3-D4
	Equipment not covered by Focus on Energy programs	D5
<b>Satisfaction</b>	Assess satisfaction with various program components and reasons for dissatisfaction among participants	E1-E6
	Assess satisfaction with energy teams and Focus on Energy's support of those teams	C13-C16
<b>Net-to-Gross</b>	Determine freeridership to impact net savings	F1-F12, G1-G14
	Determine spillover to impact net savings	H1-H7
<b>Firmographics</b>	Determine building and company characteristics of participants	I1-I4

[Quotas]

Custom=30

Prescriptive/Hybrid=50

## SAMPLE Elements:

- [PHONE] Phone 1 Area Code and Phone 1
- [CUSTOMER ID]
- [APPLICATION ID]
- [COMPANY] Customer Name
- [CONTACT] First Name 1 and Last Name 1
- [SITE ADDRESS]
- [QUANTITY MEASURE 1]
- [MEASURE1] Measure 1 Category
- [MEASURE2]
- [MEASURE3]
- MEASURE GROUP
- [CUSTOM]
- [THERM SAVINGS FOR MEASURE 1, MEASURE 2, MEASURE 3, AND CUSTOM]

## A. Introduction

- 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]
  88. (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 Wisconsin Public Service Commission 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]
  99. (DON'T KNOW) [ASK TO SPEAK WITH SOMEONE WHO WOULD KNOW AND START AGAIN]
  88. (REFUSED) [THANK AND TERMINATE]

- A3. +Our records show that you installed energy efficient equipment including [MEASURE1], [MEASURE2], and [MEASURE3] at [INSERT ADDRESS]. To ensure our records are correct, can you confirm that you installed this/these upgrades earlier this year?
1. (Yes)
  2. (No, wrong year) [Record correct year, if possible]
  3. (No, wrong address) [RECORD CORRECT ADDRESS]
  4. (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: \_\_\_\_\_] )
  5. (No, I did not install any measures) [THANK AND TERMINATE]
  99. (Don't Know) [Is there someone we could speak with that would know this? Record name and contact information:\_\_\_\_\_]
  88. (Refused) [THANK AND TERMINATE]
- A4. \*I'm going to read you a short list. Please tell me if a contractor, vendor, utility account manager, or Focus on Energy-Energy Advisor was involved in any of the following steps: [READ LIST AND SELECT ALL THAT APPLY: 1=CONTRACTOR OR VENDOR INVOLVED, 2=FOCUS ON ENERGY - ENERGY ADVISOR; 3=UTILITY ACCOUNT MANAGER, 4=NONE INVOLVED; 99=DON'T KNOW; 88 REFUSED]
1. Project initiation [IF =1 THEN SKIP SECTION F AND ASK SECTION G]
  2. Decisions about project design [IF =1 THEN SKIP SECTION F AND ASK SECTION G]
  3. Equipment selection [IF =1 THEN SKIP SECTION F AND ASK SECTION G]
  4. Equipment installation
  99. DON'T KNOW [ASK TO SPEAK WITH SOMEONE ELSE AND BEGIN AGAIN]
  88. REFUSED [THANK AND TERMINATE]
- A5. Did anyone walk through your facility and conduct an assessment to help identify energy-efficiency improvements? [RECORD ALL THAT APPLY]
1. (Yes - contractor)
  2. (Yes – Focus on Energy - Energy Advisor)
  3. (No)
  4. (Other [SPECIFY \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)
- A6. \*Did you receive a financial incentive for installing the upgrades we've been discussing?
1. (Yes)
  2. (No) [SKIP TO B1]
  99. (Don't know) [SKIP TO B1]
  88. (Refused) [SKIP TO B1]



[ASK A7-A8 IF A6=1]

- A7. \*What company provided the incentive?
1. (Focus on Energy)
  2. (Contractor or vendor)
  3. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)
- A8. \*Did your organization complete the application for the financial incentive or did the contractor or vendor, someone else do that for you?
1. (We completed the application)
  2. (Contractor/vendor completed the application)
  3. (Energy Advisor completed the application)
  4. (Utility account manager completed the application)
  99. (Don't know)
  88. (Refused)

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.]

## B. Awareness

- B1. +Focus on Energy offers incentives to businesses for making energy-efficiency upgrades. Contractors, or vendors, or Focus on Energy staff can provide businesses with information and assistance to complete the upgrades. Had you heard about the Focus on Energy incentives available to businesses before today?
1. (Yes)
  2. (No) [SKIP TO B3]
  99. (Don't know) [SKIP TO B3]
  88. (Refused) [SKIP TO B3]

B2. \*How did your organization learn about the incentives available for this project from Focus on Energy? [DO NOT READ LIST; MULTIPLE RESPONSES POSSIBLE] [IF RESPONDENT MENTIONS WEBSITE CLARIFY IF UTILITY OR FOCUS ON ENERGY WEBSITE SO YOU KNOW HOW TO CODE ANSWER ON LIST.]

1. (Contact with Focus on Energy advisor through phone, email, or in person)
2. (Focus on Energy monthly newsletter)
3. (Focus on Energy website)
4. (Focus on Energy sponsored workshop or event)
5. (Focus on Energy printed program materials)
6. (Contact with utility representative)
7. (Utility mailing, bill insert, or utility Website)
8. (Word of mouth (family, friend, or business colleague)
9. (Contacted by a contractor or vendor through phone, email or in person)
10. (Previously participated in program/received an incentive)
11. (Through a trade association or professional organization  
[SPECIFY: \_\_\_\_\_])
12. (Other [SPECIFY: \_\_\_\_\_])
99. (Don't know)
88. (Refused)

[IF THERMS THEN ASK]

B3. Before today had your organization heard about the \$0.40 per therm incentive bonus?

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

## C. Decision Making

Now I'd like to understand more about how your organization made decisions about this energy efficiency project.

C1. \*What factor was most important to your company's decision to make these energy-efficient upgrades? [DO NOT READ LIST; SINGLE RESPONSE]

1. (To use less energy, reduce energy consumption or energy demand)
2. (To save money on our utility bills; lower energy bills)
3. (To obtain a program or bonus incentive)
4. (To obtain a tax credit)
5. (To replace old (but still functioning) equipment)
6. (Other [SPECIFY \_\_\_\_\_])
99. (DON'T KNOW)
88. (Refused)

[IF THERMS AND B3=1]

- C2. How important was the \$0.40 per therm bonus, in your decision to make these energy-efficient upgrades? Would you say it was ... [READ LIST]: 1=VERY IMPORTANT, 2=SOMEWHAT IMPORTANT; 3=NOT TOO IMPORTANT; 4=NOT AT ALL IMPORTANT; 99=DON'T KNOW; 88 REFUSED]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  99. DON'T KNOW
  88. REFUSED
- C3. [ASK IF A4.1 OR A4.2 OR A4.3=1] Please tell me if your contractor(s) was/were very important, somewhat important, not too important, or not at all important for each of the following areas. How important was/were the contractor(s) in helping you: [RECORD ONE OPTION FOR EACH: 1=VERY IMPORTANT; 2=SOMEWHAT IMPORTANT; 3=NOT TOO IMPORTANT; 4=NOT AT ALL IMPORTANT. ALLOW 99 FOR DON'T KNOW AND 88 FOR REFUSED.]
1. Decide which specific upgrades to make
  2. Understand the requirements for the incentive
  3. Estimate the financial benefits of the project
  4. Complete the paperwork
  5. Manage the project
- C4. +What would you say are the main benefits your company has experienced as a result of the energy efficiency upgrades we've discussed? [DO NOT READ LIST; RECORD ALL THAT APPLY; PROBE FOR MULTIPLE RESPONSES]
1. (The incentive)
  2. (To using less energy, reduce energy consumption or energy demand )
  3. (To save money on our utility bills; lower energy bills)
  4. (Increased occupant comfort (better or brighter lighting) )
  5. (Other [SPECIFY: \_\_\_\_\_])
  6. (NO BENEFITS)
  99. (DON'T KNOW)
  88. (Refused)
- Now I'd like to ask you some questions about whether or not your company has formed an energy team, and the role and value of that team.
- C5. Has your company established an energy team as a result of your participation in the Large Energy Users program?
1. (Yes) [SKIP TO C9]
  2. (No)
  99. (Don't know)
  88. (Refused)

- C6. Did your company have an energy team prior to your participation in the Large Energy Users program?
1. (Yes) [SKIP TO C9]
  2. (We have an individual or individuals but not a formal team)
  3. (No)
  99. (Don't know)
  88. (Refused)
- C7. [ASK IF C6 = 2 OR 3, 99 OR 88] What do you see as the biggest challenges to forming an energy team at your company? [DO NOT READ; MULTIPLE RESPONSES POSSIBLE]
1. (Lack of staff or time)
  2. (Lack of technical knowledge and resources to pursue energy efficiency upgrades [SPECIFY AREAS WHERE TECHNICAL KNOWLEDGE/RESOURCES ARE LACKING: \_\_\_\_\_])
  3. (Lack of corporate support)
  4. (Lack of support from Focus on Energy)
  5. (Don't own building/Tenant)
  6. (Other [SPECIFY: \_\_\_\_\_])
  7. (No challenges)
  99. (Don't know)
  88. (Refused)
- C8. [ASK IF ANY C7 = 1-7 or 99 or 88] What could be done to help your company form an energy team?
1. (Nothing) [SKIP TO D1]
  2. (Other) [RECORD VERBATIM \_\_\_\_\_][SKIP TO D1]
  99. (Don't know) [SKIP TO D1]
  88. (Refused) [SKIP TO D1]
- [IF C5 OR C6 = 1, ASK C9-C16]
- C9. How long has the energy team been established in your company? [READ LIST IF NECESSARY]
1. (Less than one year)
  2. (One to five years)
  3. (More than five years)
  4. (More than ten years)
  99. (DON'T KNOW )
  88. (REFUSED )
- C10. How important was the energy team in your decision to make these energy-efficient upgrades? Would you say it was: [READ LIST: 1=VERY IMPORTANT, 2=SOMEWHAT IMPORTANT; 3=NOT TOO IMPORTANT; 4=NOT AT ALL IMPORTANT; 99=DON'T KNOW; 88 REFUSED]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not at all important
  99. (DON'T KNOW )
  88. (REFUSED )

- C11. What services does your energy team provide? Do they ... [READ EACH] [RECORD 1=YES, 2=NO, 99=DON'T KNOW, 88=REFUSED]
1. Develop corporate energy use policies and procedures
  2. Encourage employee behaviors that reduce energy use
  3. Evaluate process energy use such as (heat recovery, or refrigeration)
  4. Monitor building energy use such as (lighting or HVAC)
  5. Evaluate corporate sustainability such as greenhouse gas emissions, carbon footprint reporting transportation, or fleet purchases
  6. Identify energy efficiency project opportunities
  7. Calculate projected savings
  8. Obtain executive support for projects
  9. Obtain corporate funding for projects
  10. Review bids from contractors
  11. Oversee project installation
  12. Verify energy savings
  13. Provide some other services? [RECORD VERBATIM] \_\_\_\_\_
- C12. Which corporate decisions does your energy team influence? Do they influence ... [READ LIST] [RECORD 1=YES, 2=NO, 99=DON'T KNOW, 88=REFUSED] :
1. All capital expenditures related to energy consumption
  2. Transportation and fleet expenditures
  3. Energy purchasing
  4. Equipment purchasing
  5. Facility new construction or remodels or expansions
  6. New product or process development
  7. Or something else? [RECORD VERBATIM]\_
- C13. How would you rate the overall value provided by the energy team? [READ LIST: 1=VERY VALUABLE, 2=SOMEWHAT VALUABLE; 3=NOT TOO VALUABLE; 4=NOT AT ALL VALUABLE; 99=DON'T KNOW; 88 REFUSED]
1. Very valuable
  2. Somewhat valuable
  3. Not too valuable
  4. Not at all valuable
  99. (DON'T KNOW )
  88. (REFUSED )
- C14. How could the energy team add more value?  
[RECORD VERBATIM]

- C15. Now I'd like to ask you about your satisfaction with services provided by Focus on Energy, to your energy team. Please indicate if you are very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with each of these areas. If something does not apply, please let me know. **[RECORD ONE OPTION FOR EACH A-I 1=VERY SATISFIED; 2=SOMEWHAT SATISFIED; 3=NOT TOO SATISFIED; 4=NOT AT ALL SATISFIED. ALLOW 99 FOR DON'T KNOW, 88 FOR REFUSED, 96 FOR NOT APPLICABLE BUT DO NOT READ AS ANSWER CHOICES.**
- Support provided by the Focus on Energy Advisor
  - Materials provided by Focus on Energy
  - Training provided by Focus on Energy

- C16. \* You said you were **[INSERT RESPONSE FROM C15]** with **[INSERT STATEMENT FROM C15 a-c]**. Can you say more about why you are **[INSERT RESPONSE FROM C15]**?  
**[RECORD VERBATIM\_\_\_\_\_]**

## D. Barriers

- D1. \*What do you see as the biggest challenges to making energy-efficient improvements inside your company? **[DO NOT READ; MULTIPLE RESPONSES POSSIBLE]**
- (High initial cost)
  - (Budget limitations)
  - (Long payback period)
  - (Lack of technical knowledge and resources to pursue energy efficiency upgrades **[SPECIFY AREAS WHERE TECHNICAL KNOWLEDGE/RESOURCES ARE LACKING:\_\_\_\_\_]**)
  - (Lack of corporate support for energy efficiency investments)
  - (Paperwork too complicated and time consuming)
  - (Replacing equipment without affecting operations)
  - (Funding competition for other investments/improvements within organization)
  - (Don't own building/Tenant)
  - (Other **[SPECIFY:\_\_\_\_\_]**)
  - (No challenges) **[SKIP TO D3]**
  - (Don't know) **[SKIP TO D3]**
  - (Refused) **[SKIP TO D3]**
- D2. \*What could be done to help your company overcome these challenges?**[DO NOT READ LIST, ALLOW MULTIPLE RESPONSES]**
- (Nothing)
  - (Higher incentives)
  - (Provide upfront rewards)
  - (Offer low-interest loans)
  - (Simplify the paperwork)
  - (Provide better/more information about program **[SPECIFY WHAT TYPE OF INFORMATION THEY NEED:\_\_\_\_\_]**)
  - (Provide an energy audit)
  - (Other **[RECORD VERBATIM ANSWER\_\_\_\_\_]**)
  - (DON'T KNOW)
  - (REFUSED)

- D3. What do you see as the **largest** challenge in working with the Large Energy Users program? [DO NOT READ; SINGLE RESPONSE ALLOWED]
1. (No challenges)
  2. (Identifying a project)
  3. (Understanding if my project/equipment qualifies)
  4. (Completing the application process) [ASK: CUSTOM OR PRESCRIPTIVE. CODE 1 FOR CUSTOM, CODE 2 FOR PRESCRIPTIVE]
  5. (Preapproval of custom projects)
  6. (Communication/support from Focus on Energy staff [ASK: What type of communication or support do you need?\_\_\_])
  7. (Communication/support from Energy Advisors [ASK: What type of communication and support do you need?\_\_\_] )
  8. (Communication/support from contractor/vendor [ASK: What type of communication and support do you need?\_\_\_])
  9. (Keeping up with program and staff changes [ASK: What changes?\_\_\_\_\_])
  10. (Website [ASK: What is challenging?\_\_\_\_\_] )
  11. (Other) [RECORD VERBATIM\_\_\_\_\_])
  99. (Don't know)
  88. (Refused)
- D4. What works well with the Large Energy Users program?
1. [RECORD VERBATIM ANSWER\_\_\_\_\_]
  99. (Don't know)
  88. (Refused)
- D5. +Are there any other types of energy-efficient equipment or services for which you would like to see incentives?
1. (Lighting (outdoor lighting, LEDs, other types)) [ASK: Can you give me an example? \_\_\_\_\_]
  2. (Heating, Air Conditioning, and Ventilation (HVAC) equipment) [ASK: Can you give me an example? \_\_\_\_\_]
  3. (Building shell (insulation, windows, doors)) [ASK: Can you give me an example? \_\_\_\_\_]
  4. (Refrigeration (refrigerators, freezers)) [ASK: Can you give me an example? \_\_\_\_\_]
  5. (Other [SPECIFY:\_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)

## E. Satisfaction

I would like to know your satisfaction with different aspects of the project.

- E1. \*I will ask about some different parts of the project. Please indicate if you are very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with each of these areas. If something does not apply, please let me know. [RECORD ONE OPTION FOR EACH A-I 1=VERY SATISFIED; 2=SOMEWHAT SATISFIED; 3=NOT TOO SATISFIED; 4=NOT AT ALL SATISFIED. ALLOW 99 FOR DON'T KNOW, 88 FOR REFUSED, 96 FOR NOT APPLICABLE BUT DO NOT READ AS ANSWER CHOICES. RANDOMIZE A-N ALWAYS ASK O LAST.]
- a. \*[ASK IF B1=1] \*Clarity of Focus on Energy's project eligibility requirements
  - b. [ASK IF B1=1] \*Selection of eligible equipment
  - c. The incentive amounts
  - d. Increase in the custom project incentive cap
  - e. [ASK IF A8=1] \*Prescriptive incentive application process
  - f. [CUSTOM] \*Custom project pre-approval process
  - g. \*The Focus on Energy website
  - h. \*Communication with Focus on Energy representatives [NOTE FOR INTERVIEWERS: Includes any contact with Focus on Energy]
  - i. [ASK IF A5=1]\*The time it took to receive the incentive
  - j. [ASK IF ANY A4.1 OR A4.2 OR A4.3 OR A4.4=1] +Your experience with the contractor or vendor
  - k. The level of expertise provided by the program Energy Advisors
  - l. The availability of the Energy Advisors
  - m. The level of expertise provided by other Focus on Energy program staff
  - n. The training provided by Focus on Energy
  - o. \*Your overall experience with the project
- E2. \*[ASK FOR ANY E1=2, 3 OR 4] You said you were [INSERT RESPONSE FROM E1] with [INSERT STATEMENT FROM E1 a-o]. Can you say more about why you are [INSERT RESPONSE FROM E1]? [FOR E1.b IF RESPONDENT MENTIONS WANTING MORE EQUIPMENT COVERED BY PROGRAM, FIND OUT WHAT EQUIPMENT] [FOR E1.c IF THEY MENTION LOW INCENTIVES, PROBE FOR WHICH MEASURES THEY WANT HIGHER INCENTIVES FOR.] [FOR E1.h PROBE WHERE COMMUNICATION CAME FROM (i.e., call center, energy advisor, trade ally)] [FOR E1.n IF THEY MENTION TRAINING, PROBE WHAT THE ISSUES ARE AND WHAT KIND OF TRAINING THEY WANT].
- [RECORD ANSWER]



- E3. \*Is there anything that [IF B1=1 THEN READ, “Focus on Energy” IF B1=2 THEN READ “the contractor”] could have done to improve your overall experience with the Large Energy Users program? [DO NOT READ THE LIST, RECORD ALL THAT APPLY]
1. (Better/more communication [SPECIFY: Who would you like more communication from? \_\_\_\_\_])
  2. (Quicker response time [SPECIFY: Who would you like a quicker response time from? \_\_] )
  3. (Larger selection of eligible equipment [ASK: What energy-efficient equipment should Focus on Energy offer incentives for? \_\_\_\_\_])
  4. (Increasing the incentive amount)
  5. (Simplify the application process)
  6. (Allow me to fill out the applications online)
  7. (Simplify the website)[ASK: In what way? \_\_\_\_\_]
  8. (Provide quicker approval on applications)
  9. (Send incentive check out faster)
  10. (Provide more face-time with my Energy Advisor (this may include more frequent visits))
  11. (Other [SPECIFY: \_\_\_\_\_] )
  12. (No, nothing)
  99. (DON'T KNOW)
  88. (REFUSED)
- E4. Is the project delivering more, less, or about the same energy savings as projected?
1. (More) [SKIP TO NEXT SECTION]
  2. (Less)
  3. (About the same) [SKIP TO NEXT SECTION]
  99. (Don't know) [SKIP TO NEXT SECTION]
  88. (Refused) [SKIP TO NEXT SECTION]
- E5. What percentage of the projected energy savings is being delivered? [RANGE 1-100]
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- E6. Why do you think the project is delivering lower savings that projected?
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)

## F. +Freeridership

[ASK EITHER SECTION F OR SECTION G]

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

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, these questions are just about the [MEASURE1 OR C\_MEASURE1] that was purchased.

[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.]

- F1. 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 99=DON'T KNOW OR 88=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]?
- F2. 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 F3]
  2. (No) [SKIP TO F4]
  99. (DON'T KNOW) [SKIP TO F4]
  88. (REFUSED) [SKIP TO F4]
- F3. 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 F4]
  2. (No) [ASK F4]
  99. (DON'T KNOW) [ASK F4]
  88. (REFUSED) [ASK F4]
- F4. Would you have purchased and installed the same [MEASURE1 OR C\_MEASURE1][s] without the incentive?
1. (Yes) [SKIP TO F7]
  2. (No) [SKIP TO F9]
  99. (DON'T KNOW) [ASK F5]
  88. (REFUSED) [ASK F5]
- F5. Would you have installed **something** without the incentive? [DO NOT READ LIST UNLESS NECESSARY]
1. (Yes, would have installed something) [ASK F6]
  2. (No, would NOT have installed anything) [SKIP TO F9]
  99. (DON'T KNOW) [SKIP TO H1]
  88. (REFUSED) [SKIP TO H1]

- F6. 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 F7]
  2. (No) [ASK F7]
  99. (DON'T KNOW) [ASK F7]
  88. (REFUSED) [ASK F7]
- F7. And without the incentive, would you have installed the same number of [MEASURE1 OR C\_MEASURE1][s]?
1. (Yes) [ASK F8]
  2. (No) [ASK F7.2.a]
    - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1](s)? [ASK F8]
  99. (DON'T KNOW) [ASK F8]
  88. (REFUSED) [ASK F8]
- F8. Without the incentive, would you have installed the [MEASURE1 OR C\_MEASURE1][s]...[READ LIST AND RECORD ONE RESPONSE]
1. Within the same year? [SKIP TO H1]
  2. Within one to two years? [SKIP TO H1]
  3. Within three to five years? [SKIP TO H1]
  4. In more than five years? [SKIP TO H1]
  99. (DON'T KNOW) [SKIP TO H1]
  88. (REFUSED) [SKIP TO H1]
- [ASK F9 TO F12 IF F4 = 2 OR F5 = 2]
- F9. 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 F10]
  2. (No, would not have installed anything at all) [SKIP TO H1]
  99. (DON'T KNOW) [ASK F10]
  88. (REFUSED) [ASK F10]
- F10. 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 F11]
  2. (No) [ASK F11]
  99. (DON'T KNOW) [ASK F11]
  88. (REFUSED) [ASK F11]

- F11. Without the incentive, would you have installed the same [MEASURE1 OR C\_MEASURE1][s]?
1. (Yes) [ASK F12]
  2. (No) [ASK F11.2.a]
    - a. Would you have installed fewer or more of the [MEASURE1 OR C\_MEASURE1] (s)? [ASK F12]
  99. (DON'T KNOW) [ASK F12]
  88. (REFUSED) [ASK F12]
- F12. 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 H1]
  2. In one to two years? [SKIP TO H1]
  3. In three to five years? [SKIP TO H1]
  4. More than five years out? [SKIP TO H1]
  99. (DON'T KNOW) [SKIP TO H1]
  88. (REFUSED) [SKIP TO H1]

## G. +Freeridership

[ASK EITHER SECTION F OR SECTION G]

[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.]

- G1. 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 99=DON'T KNOW OR 88=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 you began working with your contractor?
1. (Yes) [ASK G3]
  2. (No) [SKIP TO G4]
  99. (DON'T KNOW) [SKIP TO G4]
  88. (REFUSED) [SKIP TO G4]

- G3. 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 G4]**
  2. (No) **[ASK G4]**
  99. (DON’T KNOW) **[ASK G4]**
  88. (REFUSED) **[ASK G4]**
- G4. Would you have purchased and installed the same **[MEASURE1 OR C\_MEASURE1][s]** without the assistance from your contractor?
1. (Yes) **[SKIP TO G7]**
  2. (No) **[SKIP TO G9]**
  99. (DON’T KNOW) **[ASK G5]**
  88. (REFUSED) **[ASK G5]**
- G5. Would you have installed **something** without the involvement of your contractor? **[DO NOT READ LIST UNLESS NECESSARY]**
1. (Yes, would have installed something) **[ASK G6]**
  2. (No, would NOT have installed anything) **[SKIP TO G9]**
  99. (DON’T KNOW) **[SKIP TO H1]**
  88. (REFUSED) **[SKIP TO H1]**
- 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]**
  99. (DON’T KNOW) **[ASK G7]**
  88. (REFUSED) **[ASK G7]**
- G7. And without the involvement of your contractor would you have installed the same number of **[MEASURE1 OR C\_MEASURE1][s]**?
1. (Yes) **[ASK G8]**
  2. (No) **[ASK G7.2.a]**
    - a. Would you have installed fewer or more of the **[MEASURE1 OR C\_MEASURE1](S)**? **[ASK G8]**
  99. (DON’T KNOW) **[ASK G8]**
  88. (REFUSED) **[ASK G8]**

- G8. 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 H1]**
  2. Within one to two years? **[SKIP TO H1]**
  3. Within three to five years? **[SKIP TO H1]**
  4. In more than five years? **[SKIP TO H1]**
  99. (DON'T KNOW) **[SKIP TO H1]**
  88. (REFUSED) **[SKIP TO H1]**
- [ASK G9 TO G13 IF G4=2 OR G5= 2]**
- G9. 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 G10]**
  2. (No) **[SKIP TO H1]**
  99. (DON'T KNOW) **[ASK G10]**
  88. (REFUSED) **[ASK G10]**
- G10. 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 G11]**
  2. (No) **[ASK G11]**
  99. (DON'T KNOW) **[ASK G11]**
  88. (REFUSED) **[ASK G11]**
- G11. Without the assistance from your contractor, would you have installed the same **[MEASURE1 OR C\_MEASURE1][s]**?
1. (Yes) **[ASK G12]**
  2. (No) **[ASK G11.2.a]**
    - a. Would you have installed fewer or more of the **[MEASURE1 OR C\_MEASURE1][s]**? **[ASK G12]**
  99. (DON'T KNOW) **[ASK G12]**
  88. (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? **[ASK G13]**
  2. In one to two years? **[ASK G13]**
  3. In three to five years? **[ASK G13]**
  4. More than five years out? **[ASK G13]**
  99. (DON'T KNOW) **[ASK G13]**
  88. (REFUSED) **[ASK G13]**

- G13. If the assistance or information from your contractor had not been available, would you have done anything differently on this project?
1. (Yes) [ASK G14]
  2. (No) [SKIP TO H1]
  99. (DON'T KNOW) [SKIP TO H1]
  88. (REFUSED) [SKIP TO H1]

- G14. What would you have done differently?  
[RECORD OPEN ENDED RESPONSE]

## H. +Spillover

- H1. 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 H2]
2. (No) [SKIP TO SECTION I]
99. (DON'T KNOW) [SKIP TO SECTION I]
88. (REFUSED) [SKIP TO SECTION I]

- H2. Are these products also installed at [ADDRESS] or at a different location?

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

- H3. What were the other energy-efficient products that you installed without getting an incentive? [DO NOT READ LIST; MARK ALL THAT APPLY; 99=DON'T KNOW, 88=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: \_\_\_\_\_]
- 99. DON'T KNOW
- 88. REFUSED

H4. [REPEAT FOR EACH ITEM MENTIONED IN H3] How many [INSERT ITEM FROM H3] did you install? [RECORD NUMBER \_\_\_\_\_, 99 FOR DON'T KNOW, 88 FOR REFUSED, AND -96 FOR N/A]

H5. [REPEAT FOR EACH ITEM MENTIONED IN H3] Please tell me how important the [IF A6=1 READ, "incentive was" OR IF A6=2 READ, "assistance from your contractor was"] in your decision to install [INSERT ITEM FROM H3]. Was it very important, somewhat important, not too important, or not at all important [INSERT ITEM FROM H3]?

[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 [IF A6=1 READ, "incentive" OR IF A6=2 READ, "assistance from your contractor"] was in your decision to install [ANSWER FROM H3]"

- 1. Very important
- 2. Somewhat important
- 3. Not too important or
- 4. Not at all important
- 99. [DO NOT READ] DON'T KNOW
- 88. [DO NOT READ] REFUSED

H6. [ASK FOR ALL MENTIONED IN H3] Did you receive an incentive for installing [INSERT ANSWER FROM H3]? [DO NOT READ ANSWER LIST]

- 1. (Yes)
- 2. (No)
- 3. (Item did not qualify)
- 4. (Contractor or vendor received the incentive)
- 99. DON'T KNOW
- 88. REFUSED

H7. [ASK IF H2=2] What is the address of the location where you installed [INSERT EACH ITEM FROM H3]? [99 FOR DON'T KNOW AND 88 FOR REFUSED]

ENTER STREET ADDRESS:

ENTER CITY:

ENTER STATE:

ENTER ZIP CODE:



## I. Firmographics

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

11. \*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: \_\_\_\_\_] )
  99. (DON'T KNOW )
  88. (Refused)
12. \*Does your organization lease or own the facility?
1. (Lease)
  2. (Own)
  3. (Other [SPECIFY: \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)
13. \*What is the approximate heated or cooled square footage of this facility? [NUMERIC OPEN END UP TO 10,000,000]
1. [RECORD NUMBER: \_\_\_\_\_]
  99. DON'T KNOW
  88. REFUSED
14. \*How many people are employed at this location?
1. [RECORD NUMBER: \_\_\_\_\_]
  99. DON'T KNOW
  88. REFUSED

**J. Closing**

- J1. \*In the future, how would you like to stay informed about opportunities to save energy and money? [DO NOT READ LIST; MULTIPLE RESPONSES POSSIBLE]
1. (Contact with Focus on Energy representative through phone, email, or in person)
  2. (Focus on Energy monthly newsletter)
  3. (Focus on Energy Website)
  4. (Focus on Energy workshop, event)
  5. (Contact with utility representative)
  6. (Utility mailing, bill insert, utility Website)
  7. (Contractor or vendor through phone, email, or in person)
  8. (Through a trade association or professional organization)
  9. (Other [SPECIFY:\_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)
- J2. +Do you have any other comments about energy efficiency decisions and purchases you would like to share?  
[RECORD RESPONSE: \_\_\_\_\_; 99 FOR DON'T KNOW, 88 FOR REFUSED]
- J3. \*[INTERVIEWER RECORD GENDER. DO NOT ASK]
1. (Female)
  2. (Male)

***Thank you. We appreciate your help with this survey. You may also be contacted for an on-site visit if you have not been contacted already. Have a nice day.***

**Focus on Energy Business Programs – Small Business Program  
Participant Customer Survey**

Interviewer instructions are in green.

CATI programming instructions are in red.

Items in parenthesis should not be read

\*Indicates core questions

+Indicates questions on BIP and CSF and possibly LEU

Researchable Questions		
Key Research Topics	Areas of Investigation	Related Questions
<b>Marketing and Outreach</b>	Program awareness	C1, C2
	Future communication preferences	K1
<b>Decision Making and Participation</b>	Factors influencing customers’ decision to participate	D1-D4
	Perceived benefits of participating in program	D5-D7
	Benefits other than energy savings	D5
<b>Barriers</b>	Obstacles to installing high-efficiency equipment	E1-E2, G3, G4
	Equipment not covered by Focus on Energy programs	F4
<b>Net-to-Gross</b>	Determine freeridership to impact net savings	H1-H13
	Determine spillover to impact net savings	I1-I6
<b>Satisfaction</b>	Assess satisfaction with various program components and reasons for dissatisfaction among participants	F1-F3
	How effective is the energy assessment in driving more retrofits?	G1-G7
<b>Firmographics</b>	Determine building and company characteristics of participants	J1-J5

[69 SBP – MARKED IN DATABASE]

SBP Quotas –

Target Group	Minimum completes	Number of sample records
Group 1	1	69
Group 2	1	211
Group 3	1	401
Group 4	1	1,311
Group 5	1	35
Group 6	1	68
Group 7	1	159
Group 8	1	513
<b>Subtotal</b>	<b>8</b>	<b>2,767</b>
Groups 1-4	50*	1,992
Groups 5-8	19*	775
<b>TOTAL</b>	<b>69</b>	

\*This count includes the minimum counts in the above individual cells.

Note to QA reviewers and survey interviewers: The Focus on Energy Small Business Program provides free energy assessments to small business customers by a Focus on Energy-trained contractor. Following the energy assessment, customers can elect to have all or some these three energy-efficiency equipment packages:

**Free Energy Savings Package:** Includes compact fluorescent lamps (CFLs), CFL reflectors, vending machine controllers, LED open sign, faucet aerators, water saving showerheads, and an engine heating block for agricultural customers.

**Gold Energy Savings Package (customer pays \$129 co-pay fee):** Includes all the free measures plus additional CFLs, T8 lamp replacements, LED exit signs, wall box occupancy sensors, and hot water wire wrap.

**Additional Measures:** Customers can choose to purchase additional measures (in addition to the \$129 co-pay fee) at discounted prices once they reach the quantity limits under the Gold co-pay package.

SAMPLE Requirements:

- [PHONE] Phone 1 Area Code and Phone 1
- [COMPANY] Site Name
- [CONTACT] First Name 1 and Last Name 1
- [ADDRESS] Address and City
- [PACKAGE]

## A. Introduction

- A1. Hello, I am [INSERT NAME] calling with a short survey on behalf of Wisconsin’s Focus on Energy program. May I speak with [CONTACT?] OR [IF NO NAME] may I speak with the person who handles energy decisions for your company? [IF A NEW PERSON, INTRODUCE YOURSELF AGAIN AND WHO YOU ARE CALLING FOR.]
1. (Yes) [CONTINUE WITH RESPONDENT ON PHONE]
  88. (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 15 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 its energy efficiency program offerings.

[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]

## B. Screeners

- B1. Our records show that [COMPANY ] has participated in the Focus on Energy program that offers free assessments and discounted energy-efficiency equipment to small business customers at [ADDRESS.] [IF NEEDED: This equipment could have been installed by a contractor for free, as part as an expanded package for a co-payment, or you could have purchased individual devices at discounted rates.] Do you recall having this equipment installed? [IF NEEDED: We would like to understand the quality of your experience and how Focus on Energy might improve their programs going forward.]
1. (Yes)
  2. (Yes but address is incorrect [RECORD CORRECT ADDRESS. CONTINUE IF IN WISCONSIN.]
  3. (No) [THANK AND TERMINATE]
  99. (DON’T KNOW) [FIND SOMEONE WHO KNOWS, REINTRODUCE YOURSELF AND WHO YOU ARE CALLING FOR AND START WITH B1]
  88. (REFUSED) [THANK AND TERMINATE]

## C. Awareness

- C1. How did your organization learn about the Focus on Energy program for small business customers? **[DO NOT READ LIST; MULTIPLE RESPONSES POSSIBLE]** [IF MAIL, ASK: Do you recall who it was from? TO DETERMINE HOW TO CODE ANSWER]
1. (Contact with Focus on Energy advisor or representative through phone, email, or in person)
  2. (Focus on Energy monthly newsletter)
  3. (Focus on Energy website)
  4. (Focus on Energy workshop or event)
  5. (Focus on Energy printed program materials)
  6. (Contact with utility representative) **[SKIP TO D1]**
  7. (Utility mailing, bill insert, or utility website) **[SKIP TO D1]**
  8. (Word of mouth (family, friend, or business colleague)
  9. (Contacted by contractor or vendor through phone, email, or in person)
  10. (Previously participated in program/received an incentive)
  11. (Through a trade association or professional organization **[SPECIFY: \_\_\_\_\_]** )
  12. (Other **[SPECIFY: \_\_\_\_\_]** )
  99. (DON'T KNOW)
  88. (REFUSED)

**[SKIP C2 IF C1=6 or 7]**

- C2. Do you remember hearing about the Focus on Energy program for small business customers from your utility?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

## D. Decision Making

Now I'd like to understand more about how your organization makes decisions about energy projects.

- D1. \* What factor was most important to your company's decision to install energy-efficient equipment discounted by Focus on Energy's Small Business program? **[DO NOT READ LIST; SINGLE RESPONSE]**
1. (Using less energy, reducing energy consumption or energy demand)
  2. (Saving money on our utility bills; lower energy bills)
  3. (To receive the free energy assessment)
  4. (To receive free or discounted energy efficiency equipment)
  5. (To replace old or broken equipment)
  6. (My contractor recommended it)
  7. (Other **[SPECIFY \_\_\_\_\_]** )
  88. (DON'T KNOW)
  99. (REFUSED)

- D2. **[FREE PACKAGE ONLY]** Our records show that you participated in the program by receiving the free energy assessment and free energy-saving equipment package. Please tell me what prevented you from upgrading to the \$129 Gold co-pay package? **[DO NOT READ LIST; RECORD ALL THAT APPLY]** **[IF NEEDED: The program allows customer to purchase a package of equipment at a co-pay or discounted price. This is also called the Gold Package.]**
1. (Didn't need the equipment included in the gold package) **[SKIP TO D5]**
  2. (Didn't have the money to pay for the package) **[SKIP TO D5]**
  3. (Didn't have the time to participate) **[SKIP TO D5]**
  4. (Still planning on installing) **[SKIP TO D5]**
  5. (Didn't know I could purchase a co-pay package) **[SKIP TO D5]**
  6. (Other **[SPECIFY: \_\_\_\_\_]** ) **[SKIP TO D5]**
  99. (Don't know) **[SKIP TO D5]**
  88. (Refused) **[SKIP TO D5]**
- D3. **[\$129 GOLD PACKAGE]** What factors were important to your company's decision to install the \$129 Gold co-pay package of energy-efficient equipment? **[DO NOT READ LIST; RECORD ALL THAT APPLY]** **[IF NEEDED: The program allows customer to purchase a package of equipment at a co-pay or discounted price. This is also called the Gold Package.]**
1. (The cost of the Gold co-pay package was a good deal)
  2. (The variety of energy-efficient equipment was good)
  3. (The contractor recommended it with the free energy assessment)
  4. (To save money on energy bills, reduce energy consumption or energy demand )
  5. (To replace old or broken equipment)
  6. (Other **[SPECIFY: \_\_\_\_\_]** )
  88. (DON'T KNOW)
  99. (REFUSED)
- D4. **[GOLD PLUS]** What factors were important to your company's decision to purchase and install energy-efficient equipment in addition to the \$129 Gold co-pay package? **[DO NOT READ LIST; RECORD ALL THAT APPLY]**
1. (The discounted or reduced prices of the equipment offered were a good deal)
  2. (The selection of the equipment offered was good)
  3. (The contractor recommended it with the free energy assessment)
  4. (To save money on energy bills, reduce energy consumption, or energy demand)
  5. (To replace old or broken equipment)
  6. (Other **[SPECIFY: \_\_\_\_\_]** )
  99. (Don't know)
  88. (Refused)

- D5. \*What would you say are the main benefits of participating in Focus on Energy’s program for small business customers? [DO NOT READ LIST; RECORD ALL THAT APPLY; PROBE FOR MULTIPLE RESPONSES]
1. (Receiving the free or discounted equipment)
  2. (Using less energy, reducing energy consumption or energy demand )
  3. (Saving money on our utility bills; lower energy bills)
  4. (Improves the lighting in the facility)
  5. (Learning about energy-efficiency opportunities in my facility with the free assessment)
  6. (Other [SPECIFY: \_\_\_\_\_])
  7. (NO BENEFITS)
  99. (DON’T KNOW)
  88. (Refused)
- D6. Since receiving the free energy assessment, have you noticed a decrease in your energy bills?
1. (Yes)
  2. (No) [SKIP TO E1]
  99. (Don’t know) [SKIP TO E1]
  88. (Refused) [SKIP TO E1]
- D7. How many dollars per month has your energy bill decreased?
1. [RECORD ANSWER]
  99. (Don’t know)
  88. (Refused)

## E. Barriers

- E1. \*What do you see as the biggest challenges to making energy-efficient improvements inside your company? [DO NOT READ; MULTIPLE RESPONSES POSSIBLE]
1. (High initial cost)
  2. (Budget limitations)
  3. (Long payback period)
  4. (Lack of technical knowledge and resources to pursue energy efficiency upgrades)  
[SPECIFY AREAS WHERE TECHNICAL KNOWLEDGE/RESOURCES ARE LACKING: \_\_\_\_\_])
  5. (Lack of corporate support for energy efficiency investments)
  6. (Paperwork too complicated and time consuming)
  7. (Replacing equipment without affecting operations)
  8. (Funding competition for other investments/improvements within organization)
  9. (Don’t own building/Tenant)
  10. (Other [SPECIFY: \_\_\_\_\_] )
  11. (NO CHALLENGES) [SKIP TO F1]
  88. (DON’T KNOW) [SKIP TO F1]
  99. (Refused) [SKIP TO F1]



- E2. \*What could Focus on Energy do to help your company overcome these challenges? [DO NOT READ; MULTIPLE RESPONSES POSSIBLE]
1. (Nothing)
  2. (Provide higher incentives)
  3. (Provide upfront rewards)
  4. (Offer low-interest loans)
  5. (Simplify the paperwork)
  6. (Provide better/more information about program [SPECIFY WHAT TYPE OF INFORMATION THEY NEED: \_\_\_\_\_] )
  7. (Other [SPECIFY: \_\_\_\_\_] )
  88. (DON'T KNOW)
  99. (Refused)

## F. Program Satisfaction

I would like to know your satisfaction with different aspects of Focus on Energy's Small Business Program.

- F1. \*I will ask about some different parts of the program. Please indicate if you are very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with each of these areas. [RECORD ONE OPTION FOR EACH A-G: 1=VERY SATISFIED; 2=SOMEWHAT SATISFIED; 3=NOT TOO SATISFIED; 4=NOT AT ALL SATISFIED. ALLOW 99 FOR DON'T KNOW AND 88 FOR REFUSED BUT DO NOT READ AS ANSWER CHOICES. RANDOMIZE A-F; ALWAYS ASK G LAST.]
- a. \*Price of energy-efficient equipment
  - b. \*Selection of energy-efficient equipment
  - c. \*The Focus on Energy website
  - d. \*Communication from Focus on Energy representatives
  - e. \*Information you received from the energy assessment
  - f. \*Your experience with the contractor
  - g. \*Your overall experience with the Focus on Energy's Small Business program
- F2. \*[ASK FOR ANY RESPONSES IN PREVIOUS QUESTION = "somewhat satisfied" OR "not too satisfied" OR "not at all satisfied"] You said you were [INSERT RESPONSE FROM ABOVE] with [INSERT STATEMENT A-G] Can you say more about why you are [INSERT RESPONSE FROM ABOVE]? [RECORD FOR EACH OF THE STATEMENTS THAT = SOMEWHAT SATISFIED, NOT TOO SATISFIED, OR NOT AT ALL SATISFIED]

- F3. \*Is there anything that Focus on Energy could have done to improve your overall experience? [DO NOT READ; RECORD ALL THAT APPLY]
1. (Better/more communication from Focus on Energy representatives)
  2. (Quicker response time from Focus on Energy)
  3. (Larger selection of eligible equipment)
  4. (Decrease the price of the equipment packages or individual equipment [ASK: Do you have any equipment in mind? [SPECIFY] \_\_\_\_\_ ] )
  5. (Other [SPECIFY: \_\_\_\_\_ ] )
  6. (No, nothing)
  88. (DON'T KNOW)
  89. (REFUSED)
- F4. Are there any types of energy-efficient equipment or services for which you would like to see as part of the Small Business Program offerings? [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (Lighting (outdoor lighting, LEDs, other types)) [ASK: Can you give me an example? \_\_\_\_\_ ] )
  2. (Heating, Air Conditioning, and Ventilation (HVAC) equipment) [ASK: Can you give me an example? \_\_\_\_\_ ] )
  3. (Building shell (insulation, windows, doors)) [ASK: Can you give me an example? \_\_\_\_\_ ] )
  4. (Refrigeration (refrigerators, freezers)) [ASK: Can you give me an example? \_\_\_\_\_ ] )
  5. (Other [SPECIFY: \_\_\_\_\_ ] )
  99. (Don't know)
  88. (Refused)

## G. Experience with Focus on Energy Free Energy Assessments

Now we would like to talk about the recommendations included in the free energy assessment.

- G1. Please describe the recommendations that your firm followed through with?
1. [RECORD RESPONSE]
  2. (None) [SKIP TO G3]
  99. (Don't know)
  88. (Refused)
- G2. Did you follow through with all, some, or none of the recommendations outlined in the energy assessment including savings tips?
1. (All) [SKIP TO G6]
  2. (Some)
  3. (None)
  99. (Don't know) [SKIP TO G6]
  88. (Refused) [SKIP TO G6]

[ASK IF G2=2 OR 3 OR G1=2]

- G3. What recommendations did your organization choose not to implement?
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- G4. What prevented your organization from implementing all of the assessment recommendations?
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- G5. If you think you might implement these recommendations in the future, when do you think that would happen? Would it happen in ... [READ LIST; SELECT ONE ANSWER]
1. Less than six months from now
  2. Six months to one year from now
  3. In one to two years
  4. Never
  5. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)
- G6. Did your contractor or program staff recommend any other Focus on Energy programs to you or others in your organization? [IF NEEDED: For example, other efficient equipment incentive programs offered by Focus on Energy or by your utility.]
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

[ASK IF G2=2 OR 3]

- G7. How important was the Focus on Energy free energy assessment in your decision to install the energy efficient equipment? Was it ... [READ LIST]
1. Very important
  2. Somewhat important
  3. Not so important
  4. Not at all important
  99. (Don't know)
  88. (Refused)

[ASK SECTION H IF PURCHASED GOLD PACKAGE OR ADDITIONAL MEASURES]

**H. Freeridership**

Now I'd like to talk with you about the new equipment you purchased and installed that was recommended in the Focus on Energy free energy assessment report. The equipment may have included measures in the Gold co-pay package such as CFLs, T8 lamps, occupancy sensors, or LED exit signs among others.

[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. First, did your business have specific plans to install the energy-efficient equipment before your contractor conducted the free energy assessment?
  - 1. (Yes) [ASK H2]
  - 2. (No) [SKIP TO H4]
  - 99. (DON'T KNOW) [SKIP TO H4]
  - 88. (REFUSED) [SKIP TO H4]
  
- H2. Before you received the energy assessment, was the purchase of the energy-efficient equipment recommended by your contractor included in your organization's budget?
  - 1. (Yes )
  - 2. (No)
  - 99. (DON'T KNOW)
  - 88. (REFUSED)
  
- H3. Had your organization already ordered or purchased the energy-efficient equipment before you received the recommendations in the energy assessment report?
  - 1. (Yes)
  - 2. (No)
  - 99. (DON'T KNOW)
  - 88. (REFUSED)
  
- H4. Would you have purchased and installed the same equipment without the energy assessment report from your contractor?
  - 1. (Yes) [SKIP TO H6]
  - 2. (No) [SKIP TO H9]
  - 99. (DON'T KNOW) [ASK H5]
  - 88. (REFUSED) [ASK H5]

- H5. [ASK IF H4=99 OR 88] Would you have purchased and installed **something** else, but not the recommended equipment, without the information you received in the energy assessment? [DO NOT READ LIST UNLESS NECESSARY]
1. (Yes, would have done something else) [CONTINUE TO H7]
  2. (No, would NOT have installed anything) [SKIP TO H9]
  99. (DON'T KNOW) [SKIP TO H13]
  88. (REFUSED) [SKIP TO H13]
- H6. [ASK IF H4=1] When you say you **would have purchased and installed** the same equipment, would you have installed the same type that was just as energy efficient?
1. (Yes )
  2. (No)
  99. (DON'T KNOW)
  88. (REFUSED)
- H7. [ASK H7-H8 IF H4=1 OR H5=1 ] And without the information you received in the energy assessment report, would you have purchased and installed the same amount of new equipment?
1. (Yes)
  2. (No)
  99. (DON'T KNOW )
  88. (REFUSED)
- H8. Without the information from the contractor's energy assessment, would you have purchased and installed the recommended energy-efficient equipment...[READ LIST AND RECORD ONE RESPONSE]
1. Within the same year?
  2. Within one to two years?
  3. Within three to five years?
  4. In more than five years?
  99. (DON'T KNOW)
  88. (REFUSED)
- H9. [ASK H9 TO H12 IF H4=2 OR H5= 2] When you say **you would not have purchased and installed** the same efficient equipment without the recommendations from the energy assessment, do you mean you would not have installed the equipment at all?
1. (Yes) [SKIP TO I1]
  2. (No)
  99. (DON'T KNOW)
  88. (REFUSED)
- H10. Without the information from the contractor's energy assessment report, would you have put in the same type of equipment but it would not have been as energy efficient?
1. (Yes)
  2. (No)
  99. (DON'T KNOW )
  88. (REFUSED)

- H11. Without the information from the contractor’s energy assessment, would you have purchased and installed a smaller number of efficient equipment?
1. (Yes)
  2. (No)
  99. (DON’T KNOW)
  88. (REFUSED)

- H12. And, would you have purchased and installed the same equipment. . . **[READ LIST AND RECORD ONE RESPONSE]**
1. In the same year?
  2. In one to two years?
  3. In three to five years?
  4. More than five years out?
  99. (DON’T KNOW)
  88. (REFUSED)

**[ASK IF H4=2 or 98 or 99 OR IF H5=2 OR 99 OR 88]**

- H13. Before receiving information from the contractor’s energy assessment report had you ever installed any of the same type of efficient equipment that you installed through the program?
1. (Yes)
  2. (No)
  99. (DON’T KNOW)
  88. (REFUSED)

## I. Spillover

- I1. Since purchasing and installing energy-efficient equipment discounted by the Focus on Energy Small Business Program, has your business added efficient equipment that you did not receive a Focus on Energy rebate or discount for? By energy-efficient equipment, I mean high efficiency lighting such as LEDs, T8s; high efficiency motors and variable speed drives; high efficiency air conditioners and heat pumps, or efficient water heating equipment
1. (Yes) **[ASK I2]**
  2. (No) **[SKIP TO SECTION J]**
  99. (DON’T KNOW) **[SKIP TO SECTION J]**
  88. (REFUSED) **[SKIP TO SECTION J]**
- I2. Were these products recommended by your contractor during the Focus on Energy Small Business Program free energy assessment?
1. (Yes) **[ASK I3Error! Reference source not found.]**
  2. (No) **[SKIP TO SECTION J]**
  99. (DON’T KNOW) **[SKIP TO SECTION J]**
  88. (REFUSED) **[SKIP TO SECTION J]**

13. What were the other energy-efficient products that your business installed? [DO NOT READ LIST; MARK ALL THAT APPLY; 99=DON'T KNOW, 88=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: \_\_\_\_\_] )
99. (DON'T KNOW)
88. (REFUSED)

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

[RECORD NUMBER \_\_\_\_\_, 99 FOR DON'T KNOW, 88 FOR REFUSED, AND -96 FOR N/A]

15. [REPEAT FOR EACH ITEM MENTIONED IN I3] Please tell me how important the Focus on Energy Small Business program 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]?

[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 program was on your decision to install [ANSWER FROM I3]" ]

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

- I6. [ASK FOR ALL MENTIONED IN I3] Did your business receive a discount or rebate for installing [INSERT ANSWER FROM I3]? [DO NOT READ ANSWER LIST]
1. (Yes)
  2. (No)
  3. (Item did not qualify)
  99. (DON'T KNOW)
  88. (REFUSED)

## J. Firmographics

We are almost finished. I have just a few questions about your company.

- J1. 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: \_\_\_\_\_] )
  99. (DON'T KNOW)
  88. (Refused)
- J2. \*Does your organization lease or own the facility?
1. (Lease)
  2. (Own)
  3. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)



- J3. \*What is the approximate square footage of the heated or cooled space in this facility?? [RECORD ANSWER]
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- J4. \*How many people are employed at this location?
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- J5. [RECORD: DO NOT READ]
1. (Female)
  2. (Male)

## K. Closing

- K1. \*In the future, how would you like to stay informed about opportunities to save energy and money from Focus on Energy? [DO NOT READ LIST, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY.]
1. (Contact with Focus on Energy representative through phone, email, or in person)
  2. (Focus on Energy monthly newsletter)
  3. (Focus on Energy Website)
  4. (Focus on Energy workshop, event)
  5. (Focus on Energy printed program materials)
  6. (Utility mailing, bill insert, or utility Website)
  7. (Contractor or vendor through phone, email, or in person)
  8. (Through a trade association or professional organization [SPECIFY: \_\_\_\_\_] )
  9. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)
- K2. We have one last question. Would you be willing to answer a few questions in another call to help our team learn more specifically about the installed equipment? [IF NEEDED: "Our focus today has been on your experience with the program. As part of our research, we also verify the energy savings achieved by the program and your answers will help with this work.]
1. (Yes, correct person) [CONFIRM PHONE NUMBER]
  2. (Yes, referred to someone else) [RECORD REFERRAL NAME AND PHONE NUMBER]
  3. (No)
  99. (Don't know)
  88. (Refused)

[IF NEEDED: This phone call will be about 10-15 minutes long. You will be asked about how the equipment is being used, whether it is working or has failed, hours of operation, and other questions related to the usage of the equipment. ]

***Thank you. We appreciate your help with this survey. You may also be contacted for an on-site visit if you have not been contacted already. Have a nice day.***

**Focus on Energy Business Programs – Small Business Program  
Partial Participant Customer Survey**

Interviewer instructions are in green.

CATI programming instructions are in red.

Items in parenthesis should not be read

\*Indicates core questions

+Indicates questions on BIP and CSF and possibly LEU

Researchable Questions		
Key Research Topics	Areas of Investigation	Related Questions
<b>Marketing and Outreach</b>	Program awareness	C1, C2
	Future communication preferences	J1
<b>Decision Making</b>	Factors influencing customers’ decision to participate	D1-D4
<b>Barriers</b>	Obstacles to installing high-efficiency equipment	E1-E2, G2
	Equipment not covered by Focus on Energy programs	F4
<b>Satisfaction</b>	Assess satisfaction with various program components and reasons for dissatisfaction among participants	F1-F3
	How effective is the energy assessment in driving more retrofits?	G1,G3-G4
<b>Firmographics</b>	Determine building and company characteristics of participants	I1-I5

Note to QA reviewers and survey interviewers: The Focus on Energy Small Business Program provides free energy assessments to small business customers by a Focus on Energy-trained contractor. Following the energy assessment, customers can elect to have energy-efficiency equipment packages installed. These partial participants had the assessment but did not have any equipment installed.

SAMPLE Requirements:

- [PHONE] Phone 1 Area Code and Phone 1
- [COMPANY] Customer Name
- [CONTACT] First Name 1 and Last Name 1
- [ADDRESS] Address and City

## SBP Quotas –

Target Group	Target	Number of sample records
Group 1	57	276
Group 2	13	63
<b>Total</b>	<b>70</b>	<b>339</b>

### A. Introduction

- A1. Hello, I am [INSERT NAME] calling with a short survey on behalf of Wisconsin’s Focus on Energy program. May I speak with [CONTACT?] OR [IF NO NAME] may I speak with the person who handles energy decisions for your company? [IF A NEW PERSON, INTRODUCE YOURSELF AGAIN AND WHO YOU ARE CALLING FOR.]
1. (Yes) [CONTINUE WITH RESPONDENT ON PHONE]
  88. (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 15 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 its energy efficiency program offerings.

[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]

### B. Screeners

- B1. Our records show that [COMPANY ] has received a free energy assessment offered by Focus on Energy but did not have any equipment installed at [ADDRESS.] Do you recall having this assessment done? [IF NEEDED: We would like to understand if the assessment was helpful to you and how Focus on Energy might improve their program going forward.]
1. (Yes)
  2. (Yes but address is incorrect [RECORD CORRECT ADDRESS. CONTINUE IF IN WISCONSIN.]
  3. (No) [THANK AND TERMINATE]
  99. (DON’T KNOW) [FIND SOMEONE WHO KNOWS, REINTRODUCE YOURSELF AND WHO YOU ARE CALLING FOR AND START WITH B1]
  88. (REFUSED) [THANK AND TERMINATE]

## C. Awareness

- C1. \*How did your organization learn about the Focus on Energy program for small business customers? [DO NOT READ LIST; MULTIPLE RESPONSES POSSIBLE] [IF MAIL, ASK: Do you recall who it was from? TO DETERMINE HOW TO CODE ANSWER]
1. (Contact with Focus on Energy advisor through phone, email, or in person)
  2. (Focus on Energy monthly newsletter)
  3. (Focus on Energy website)
  4. (Focus on Energy workshop or event)
  5. (Focus on Energy printed program materials)
  6. (Contact with utility representative) [SKIP TO D1]
  7. (Utility mailing, bill insert, or website) [SKIP TO Error! Reference source not found.]
  8. (Word of mouth (family, friend, or business colleague)
  9. (Contacted by contractor or vendor through phone, email, or in person)
  10. (Previously participated in program/received an incentive)
  11. (Through a trade association or professional organization [SPECIFY: \_\_\_\_\_] )
  12. (Other [SPECIFY: \_\_\_\_\_] )
  99. (DON'T KNOW)
  88. (REFUSED)

[SKIP C2 IF C1=6 or 7]

- C2. Do you remember hearing about the Focus on Energy program for small business customers from your utility?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

## D. Decision Making

- D1. Do you remember being offered discounted efficient equipment following the free energy assessment?
1. (Yes)
  2. (No) [SKIP TO SECTION 0]
  99. (Don't know) [SKIP TO SECTION 0]
  88. (Refused) [SKIP TO SECTION 0]
- D2. How compelling was the offer for discounted equipment? Would you say ... [READ LIST]
1. Very compelling
  2. Somewhat compelling
  3. Not too compelling
  4. Not at all compelling
  99. (Don't know)
  88. (Refused)

- D3. What are your reasons for saying [INSERT ANSWER FROM D1]?
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- D4. Please tell me what prevented you from having any of the discounted equipment installed following the energy assessment. [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (Didn't need the equipment included)
  2. (Didn't have the money to pay for the package)
  3. (Didn't have the time to participate)
  4. (Still planning on installing)
  5. (Didn't know I could purchase a co-pay package)
  6. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)

## E. Barriers

- E1. \*What do you see as the biggest challenges to making energy-efficient improvements inside your company? [DO NOT READ; MULTIPLE RESPONSES POSSIBLE]
1. (High initial cost)
  2. (Budget limitations)
  3. (Long payback period)
  4. (Lack of technical knowledge and resources to pursue energy efficiency upgrades)  
[SPECIFY AREAS WHERE TECHNICAL KNOWLEDGE/RESOURCES ARE LACKING: \_\_\_\_\_]
  5. (Lack of corporate support for energy efficiency investments)
  6. (Paperwork too complicated and time consuming)
  7. (Replacing equipment without affecting operations)
  8. (Funding competition for other investments/improvements within organization)
  9. (Don't own building/Tenant)
  10. (Other [SPECIFY: \_\_\_\_\_] )
  11. (NO CHALLENGES) [SKIP TO SECTION F]
  88. (DON'T KNOW) [SKIP TO SECTION F]
  99. (Refused) [SKIP TO SECTION F]

- E2. \*What could Focus on Energy do to help your company overcome these challenges? [DO NOT READ; MULTIPLE RESPONSES POSSIBLE]
1. (Nothing)
  2. (Provide higher incentives)
  3. (Provide upfront rewards)
  4. (Offer low-interest loans)
  5. (Simplify the paperwork)
  6. (Provide better/more information about program [SPECIFY WHAT TYPE OF INFORMATION THEY NEED: \_\_\_\_\_] )
  7. (Provide an energy audit)
  8. (Other [SPECIFY: \_\_\_\_\_])
  88. (DON'T KNOW)
  99. (Refused)

## F. Program Satisfaction

I would like to know your satisfaction with different aspects of Focus on Energy's Small Business Program.

- F1. \*I will ask about some different parts of the program. Please indicate if you are very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with each of these areas. If something does not apply, let me know. [RECORD ONE OPTION FOR EACH A-G: 1=VERY SATISFIED; 2=SOMEWHAT SATISFIED; 3=NOT TOO SATISFIED; 4=NOT AT ALL SATISFIED. ALLOW 97 FOR NOT APPLICABLE, 99 FOR DON'T KNOW, AND 88 FOR REFUSED BUT DO NOT READ AS ANSWER CHOICES. RANDOMIZE A-F; ALWAYS ASK G LAST.]
- a. Price of energy-efficient equipment
  - b. \*Selection of energy-efficient equipment
  - c. \*The Focus on Energy website
  - d. \*Communication from Focus on Energy representatives
  - e. Information you received from the energy assessment
  - f. \*Your experience with the contractor
  - g. \*Your overall experience with the Focus on Energy's Small Business program
- F2. \*[ASK FOR ANY RESPONSES IN PREVIOUS QUESTION = "somewhat satisfied" OR "not too satisfied" OR "not at all satisfied"] Can you say more about why you are [INSERT RESPONSE FROM ABOVE] with [INSERT EACH STATEMENT FROM ABOVE WITH 2, 3 OR 4 AS ANSWER]? [RECORD FOR EACH OF THE STATEMENTS THAT = SOMEWHAT SATISFIED, NOT TOO SATISFIED, OR NOT AT ALL SATISFIED]
- [FOR F1.b IF RESPONDENT MENTIONS WANTING MORE EQUIPMENT COVERED BY PROGRAM, FIND OUT WHAT EQUIPMENT]
- [FOR F1.d PROBE WHERE COMMUNICATION CAME FROM (i.e., call center, energy advisor, trade ally)]

- F3. \*Is there anything that Focus on Energy could have done to improve your overall experience? [DO NOT READ; RECORD ALL THAT APPLY]
1. (Better/more communication from Focus on Energy representatives)
  2. (Quicker response time from Focus on Energy in answering questions)
  3. (Larger selection of eligible equipment) [ASK: What energy-efficient equipment should Focus on Energy offer incentives for? \_\_\_\_\_]
  4. (Decrease the price of the equipment packages or individual equipment [ASK: Do you have any equipment in mind? [SPECIFY] \_\_\_\_\_ ] )
  5. (Other [SPECIFY: \_\_\_\_\_ ] )
  6. (No, nothing)
  88. (DON'T KNOW)
  89. (REFUSED)
- F4. Are there any additional types of energy-efficient equipment or services you would like to see as part of the Small Business Program offerings? [DO NOT READ LIST; RECORD ALL THAT APPLY]
1. (Lighting (outdoor lighting, LEDs, other types)) [ASK: Can you give me an example? \_\_\_\_\_ ] )
  2. (Heating, Air Conditioning, and Ventilation (HVAC) equipment) [ASK: Can you give me an example? \_\_\_\_\_ ] )
  3. (Building shell (insulation, windows, doors)) [ASK: Can you give me an example? \_\_\_\_\_ ] )
  4. (Refrigeration (refrigerators, freezers)) [ASK: Can you give me an example? \_\_\_\_\_ ] )
  5. (Other [SPECIFY: \_\_\_\_\_ ] )
  99. (Don't know)
  88. (Refused)

## G. Experience with Focus on Energy Free Energy Assessments

Now we would like to talk about the recommendations included in the energy assessment.

- G1. Did you act on any recommendations made following the energy assessment?
1. (Yes) [Ask: Which recommendations did you act on? \_\_\_\_\_ ]
  2. (No)
  99. (Don't know)
  88. (Refused)
- G2. Do you plan to act on any [IF G1=1 "additional"] recommendations from the free energy assessment in the future?
1. (Yes)
  2. (No) [SKIP TO G4]
  99. (Don't know) [SKIP TO G4]
  88. (Refused) [SKIP TO G4]



- G3. [IF G2 = 1] Which recommendations?
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)
- G4. Did your contractor or program staff recommend any other Focus on Energy programs to you or others in your organization? [IF NEEDED: For example, other efficient equipment incentive programs offered by Focus on Energy or by your utility.]
1. (Yes) [ASK: Which ones? \_\_\_\_\_]
  2. (No)
  99. (Don't know)
- G5. How useful was the Focus on Energy free assessment in explaining the costs and benefits associated with having efficient equipment installed? Was it ... [READ LIST]
1. Very useful
  2. Somewhat useful
  3. Not too useful
  4. Not at all useful
  99. (Don't know)
  88. (Refused)
- G6. What benefits did you expect from the free energy assessment? [DO NOT READ LIST, MARK ALL THAT ARE MENTIONED]
1. (Recommendations on how to save energy)
  2. (Information on equipment to install to save energy)
  3. (Information on equipment discounts offered by the Small Business Program)
  4. (Information on other Focus on Energy programs)
  5. (Fiscal information on energy use and savings)
  6. (None)
  7. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)
- G7. How well did the free energy assessment meet your expectations? Would you say ... [READ LIST]
1. Very well
  2. Somewhat well
  3. Not too well
  4. Not at all well
  99. (Don't know)
  99. (Refused)
- G8. What are your reasons for saying [INSERT ANSWER FROM G7]?
1. [RECORD ANSWER]
  99. (Don't know)
  88. (Refused)

- G9. Do you have any recommendations on how to improve the free energy assessment?
1. [RECORD ANSWER]
  2. (No/none)
  99. (Don't know)
  88. (Refused)

## H. Spillover

- H1. Since receiving the free energy assessment by the Focus on Energy Small Business Program, has your business added efficient equipment that you did not receive a Focus on Energy rebate or discount for? By energy-efficient equipment, I mean high efficiency lighting such as LEDs, T8s; high efficiency motors and variable speed drives; high efficiency air conditioners and heat pumps, or efficient water heating equipment
1. (Yes) [ASK H2]
  2. (No) [SKIP TO SECTION I]
  99. (DON'T KNOW) [SKIP TO SECTION I]
  88. (REFUSED) [SKIP TO SECTION I]
- H2. Were these products recommended by your contractor during the Focus on Energy Small Business Program free energy assessment?
1. (Yes) [ASK H3]
  2. (No) [SKIP TO SECTION I]
  99. (DON'T KNOW) [SKIP TO SECTION I]
  88. (REFUSED) [SKIP TO SECTION I]
- H3. What were the other energy-efficient products that your business installed? [DO NOT READ LIST; MARK ALL THAT APPLY; 99=DON'T KNOW, 88=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: \_\_\_\_\_] )
  99. (DON'T KNOW)
  88. (REFUSED)

H4. [REPEAT FOR EACH ITEM MENTIONED IN H3] How many [INSERT ITEM FROM H3] did you install?

[RECORD NUMBER \_\_\_\_\_, 99 FOR DON'T KNOW, 88 FOR REFUSED, AND -96 FOR N/A]

H5. [REPEAT FOR EACH ITEM MENTIONED IN H3] Please tell me how important the Focus on Energy Small Business program was in your decision to install [INSERT ITEM FROM H3]. Was it very important, somewhat important, not too important, or not at all important [INSERT ITEM FROM H3]?

[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 program was on your decision to install [ANSWER FROM H3]"

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

H6. [ASK FOR ALL MENTIONED IN H3] Did your business receive a discount or rebate for installing [INSERT ANSWER FROM H3]? [DO NOT READ ANSWER LIST]

1. (Yes)
2. (No)
3. (Item did not qualify)
99. (DON'T KNOW)
88. (REFUSED)

## I. Firmographics

We are almost finished. I have just a few questions about your company.

I1. 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: \_\_\_\_\_] )
- 99. (DON'T KNOW)
- 88. (Refused)

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

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

13. \*What is the approximate heated or cooled square footage of this facility? [RECORD ANSWER]

- 1. [RECORD ANSWER]
- 99. (Don't know)
- 88. (Refused)

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

- 1. [RECORD ANSWER]
- 99. (Don't know)
- 88. (Refused)

15. [RECORD: DO NOT READ]

- 1. (Female)
- 2. (Male)

## J. Closing

J1. \*In the future, how would you like to stay informed about opportunities to save energy and money from Focus on Energy? [DO NOT READ LIST, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY.]

- 1. (Contact with Focus on Energy representative through phone, email, or in person)
- 2. (Focus on Energy monthly newsletter)
- 3. (Focus on Energy website)
- 4. (Focus on Energy workshop, event)
- 5. (Focus on Energy printed program materials)
- 6. (Utility mailing, bill insert, or utility Website)
- 7. (Contractor or vendor through phone, email, or in person)
- 8. (Through a trade association or professional organization [SPECIFY: \_\_\_\_\_] )
- 9. (Other [SPECIFY: \_\_\_\_\_] )
- 99. (Don't know)
- 88. (Refused)

[IF G2 = 1] You indicated that you plan to act on recommendations from the free energy assessment in the future. When you are ready or if you have any questions relating to the recommendations or assessments, please call 1-877-229-6678.

***Thank you. We appreciate your help with this survey. You may also be contacted for an on-site visit if you have not been contacted already. Have a nice day.***

**Focus on Energy, Retrocommissioning Program  
Core Participant Phone Survey**

October 2013

Research Objectives	Items
Understand program awareness, decision-making, and marketing	A1-A3
Assess participant satisfaction; identify program successes, challenges , and ways for improvement	B1-B13
Understand reasons for partial implementation of recommendations	C1-C4
Follow up on retrocommissioning results (i.e., persistence)	D1-D8
Assess free ridership	FR0a-FR9
Determine spillover activities	SO6-SO8a
Gather customer firmographics	E1-E4

**Survey Audience**

Cadmus will seek to contact **two** representatives for each active participant, a building owner representative and a facilities representative. Obtaining both perspectives will be important for assessing decision-making, free ridership, and spillover (likely to be provided by owner representatives) as well as satisfaction with program administration, delivery, and implementation (likely to be provided by facilities representatives).

The contact person(s) listed in the sample will be contacted for the survey. Where possible, Cadmus will attempt to make appointments prior to contacting participants by phone.

Answer choices shown in parentheses are never read by the interviewer.

Target Number of Participants = Census of 2012 and 2013 projects, or up to 15

**Introduction** [READ IF APPOINTMENT WAS MADE]

Hello. I'm [INSERT NAME], calling from The Cadmus Group on behalf of Focus on Energy. Thank you for scheduling some time to talk with me about your experiences with the Focus on Energy Retrocommissioning Program. [SKIP TO S2]

**Introduction** [ASK IF NO APPOINTMENT WAS MADE]

Hello. I'm [INSERT NAME], calling from The Cadmus Group on behalf of Focus on Energy Wisconsin. We're talking with businesses about their experiences with an energy efficiency incentive program. Your answers will be used as part of a study to evaluate and improve Focus on Energy's programs.

May I speak with [CUSTOMERFIRSTNAME + CUSTOMERLASTNAME]? [GO TO S1]

[IF CONTACT IS NOT AVAILABLE, SCHEDULE CALL BACK].

[IF NEEDED]

This phone call is designed to last no longer than 20 minutes. Let me assure you this is not a sales call. This is a fact-finding survey only. Your individual responses will be kept confidential.

## S. Screeners – For No Appointment Participants

**S1.** Our records show you are the contact person for your organization's participation in Focus on Energy's Retrocommissioning Program -- Is that right? [IF NEEDED: This involved your company undertaking an energy audit to enhance the performance of your building's systems and identify energy saving opportunities.]

1. (Yes, on the phone)
2. (No, but person can come to phone) [START OVER FROM INTRO WITH NEW RESPONDENT]
3. (No, not available) [SCHEDULE CALLBACK]
98. (Don't Know) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]
99. (Refused) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]

**S1a.** And is this a good time to talk?

[IF NEEDED: This phone call is designed to last no longer than 20 minutes. Let me assure you this is not a sales call. This is a fact-finding survey only, to help Focus on Energy improve their programs. Your individual responses will be kept confidential.]

1. (Yes) [CONTINUE]
2. (No) [SCHEDULE CALL BACK]
99. (Refused)

## S. Screeners – For All Participants

**S2.** To confirm for our records, can you please describe your role at the company? [DO NOT READ] [IF SPEAKING WITH MORE THAN ONE PERSON, RECORD BOTH TITLES]

1. (Owner)
2. (President/CEO/COO)
3. (Senior Vice President/Vice President/Other decision maker)
4. (Energy Manager)
5. (Facilities Manager)
6. (Engineer)
7. Other: \_\_\_\_\_

**S3a.** It looks like [COMPANY] has done [X MANY] retrocommissioning projects under the Focus on Energy Program, is that correct?

1. (Yes)
2. (No) [RECORD CORRECT NUMBER] \_\_\_\_\_
98. (Don't know)
99. (Refused)

[NOTE: List all projects recorded in SPECTRUM and confirm each one with the respondent. Some respondents may have more than one project, in different stages.]

[ASK IF ONE PROJECT]

**S3b.** Our records show that your retrocommissioning project [is/was] [active/completed], is that correct? [OR]

1. (Yes, correct)
2. (No) [RECORD NUMBER OF ACTIVE PROJECTS: \_\_\_\_\_]  
[RECORD NUMBER OF COMPLETED PROJECTS: \_\_\_\_\_]
98. (Don't Know) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]
99. (Refused) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]

[ASK IF MORE THAN ONE PROJECT]

**S3c.** Our records show that [X MANY] projects are active and [X MANY] projects are complete, is that correct?

1. (Yes, correct)
2. (No) [RECORD NUMBER OF ACTIVE PROJECTS: \_\_\_\_\_]  
[RECORD NUMBER OF COMPLETED PROJECTS: \_\_\_\_\_]
98. (Don't Know) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]
99. (Refused) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]



[ASK IF ACTIVE]

**S4.** And can you tell me about the current stage of the project(s)? [DO NOT READ, PROBE IF NECESSARY WITH BELOW PHASES AND CLARIFY WHERE NEEDED]

1. (Submitted Opportunity Assessment, awaiting approval)
2. (Received proposal from RSP, has not yet approved it.)
3. (Approved proposal; in Audit Stage)
4. (In Implementation Stage)
5. (Completed Implementation, in Verification)
6. (Completed verification, in Persistence Stage)
7. (Other [SPECIFY]\_\_\_\_\_)

## A. Program Awareness

Next, I'd like to ask a few questions about how you got involved in Focus on Energy's Retrocommissioning Program.

**A1.** How did your organization learn about the Program?

[MULTIPLE RESPONSE, LIMIT TO NO MORE THAN 3 RESPONSES]

1. (Contact with Focus on Energy advisor or representative through phone, email, or in person)
2. (Focus on Energy monthly newsletter)
3. (Focus on Energy website)
4. (Focus on Energy workshop or event)
5. (Focus on Energy printed program materials)
6. (Contact with utility representative)
7. (Utility mailing, bill insert, or Website)
8. (Word of mouth (family, friend, or business colleague)
9. (Contacted by contractor or vendor through phone, email, or in person)
10. (Previously participated in program/received an incentive)
11. (Through a trade association or professional organization [SPECIFY:\_\_\_\_\_])
12. (Other [SPECIFY:\_\_\_\_\_])
13. (ENGINEERING FIRM/RSP)
98. (DON'T KNOW)
99. (REFUSED)

**A2.** What were the most important factors that influenced your decision to participate?

[MULTIPLE RESPONSE, LIMIT TO NO MORE THAN 3 RESPONSES]

1. (Using less energy, reducing energy consumption or energy demand)
2. (Saving money on our utility bills; lower energy bills)
3. (To obtain a program or bonus incentive)
4. (To obtain a tax credit)
5. (To replace old (but still functioning) equipment)
6. (Other [SPECIFY \_\_\_\_\_ ] )
98. (DON'T KNOW)/99. (REFUSED)

[ASK IF A1 = 1,6,9 OR 13]

**A3.** Was there anything specific in the information that [INSERT ANSWER FROM A1] provided to you that helped you decide you wanted to conduct this project? [OPEN END]

## B. Program Satisfaction

Now I'd like to ask some questions about your satisfaction with the Program.

**B1.** As you probably know, CLEAResult administers the program on behalf of Focus on Energy. Thinking about your experience with your CLEAResult representatives, would you say you were:

1. Very satisfied
2. Somewhat satisfied
3. Not too satisfied
4. Not at all satisfied
96. (Didn't have contact with CLEAResult)
98. (Don't know)
99. (Refused)

**B2.** Can you tell me why you gave CLEAResult this rating? [OPEN END, 98=Don't know, 99=Refused]

\_\_\_\_\_

**B3.** Was your utility account representative involved with the project at all?

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

**[ASK IF B3=1]**

**B3a.** Using the same scale, how satisfied would you say you were with your experience with your utility Account Manager during the process?

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

**B4.** Can you tell me why you gave that rating? [OPEN END, 98=Don't know, 99=Refused]

\_\_\_\_\_

**B5a.** Using the same scale, how would you describe your satisfaction with... [ASK EACH FOR a, b, c, d AND e]

- a. The application process
- b. The clarity of program requirements and processes
- c. The Focus on Energy Website
- d. The incentive amount and the incentive structure
- e. The time it took to receive the incentive
- f. Your experience with the Retrocommissioning Service Provider who conducted the audit

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

[ASK FOR ANY B5a=2, 3 OR 4]

**B5b.** Can you say more about why you were [INSERT RESPONSE FROM B5a] with [INSERT STATEMENT FROM B5a] ?

**B6.** Did you experience any challenges or hurdles during your participation in the program?

1. (Yes) [IF YES, ASK] What were they?
2. (No)
98. (Don't know)

[ASK IF PROJECT COMPLETED]

**B7.** How satisfied are you with the way the building(s) is/are performing now after the retrocommissioning?

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

[ASK IF B7=2,3,4]

**B7a.** Can you tell me a little more about why you aren't satisfied?

**B8.** What would you say are the main benefits your company has experienced as a result of the energy retrocommissioning project we've discussed? [DO NOT READ LIST; RECORD ALL THAT APPLY; PROBE FOR MULTIPLE RESPONSES]

1. (The incentive)
2. (Using less energy, reducing energy consumption or energy demand) [RECORD VERBATIM COMMENTS ABOUT HOW THEY KNOW...]
3. (Saving money on our utility bills; lower energy bills) [RECORD VERBATIM COMMENTS ABOUT HOW THEY KNOW..... ask how much they are saving]
4. (Increased occupant comfort (better or brighter lighting) )
5. (Other [SPECIFY: \_\_\_\_\_])
6. (NO BENEFITS)
98. (DON'T KNOW)
99. (REFUSED)

**B9.** Thinking about your overall experience with the Retrocommissioning Program, would you say you are:

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

[ASK IF B8=2,3, or 4]

**B10.** Can you tell me a little more about why you weren't satisfied? [OPEN END, 98=Don't know, 99=Refused]

**B11.** What would you say worked especially well in the Retrocommissioning Program? [OPEN END, 98=Don't know, 99=Refused]

**B12.** Based on your experience with this project, would you consider participating in the Focus on Energy Retrocommissioning Program with any other buildings or facilities?

1. (Yes) [RECORD IF THEY SAY HOW MANY \_\_\_\_\_]
2. (No, have other buildings but would not retro commission)
3. (No, do not have any other buildings)
98. (Don't know)
99. (Refused)

[ASK IF B12=2] [RECORD COMMENTS VERBATIM]

**B13.** What are your reasons for not retro commissioning any other buildings? [OPEN END]

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**B14.** Do you have any suggestions for how Focus on Energy could improve the Retrocommissioning Program?

[RECORD VERBATIM, BIN LATER]

1. (Better/more communication from Focus on Energy representatives)
2. (Quicker response time from Focus on Energy in answering questions )
3. (Larger selection of eligible equipment [ASK: What energy-efficient equipment should Focus on Energy offer incentives for?\_\_\_\_\_ ] )
4. (Increasing the incentive amount )
5. (Simplify the application process)
6. (Provide quicker approval on applications)
7. (Send incentive check out faster)
8. (Other [SPECIFY:\_\_\_\_\_ ] )
9. (No, nothing)
98. (DON'T KNOW)
99. (REFUSED)

**B15.** In general, what do you see as the biggest challenges to making energy-efficient improvements inside your company or organization? [DO NOT READ; MULTIPLE RESPONSES POSSIBLE]

1. (High initial cost)
2. (Budget limitations)
3. (Long payback period)
4. (Lack of technical knowledge and resources to pursue energy efficiency upgrades [SPECIFY WHERE TECHNICAL KNOWLEDGE/RESOURCES ARE LACKING:\_\_\_\_\_])
5. (Lack of corporate support for energy efficiency investments)
6. (Paperwork too complicated and time consuming)
7. (Replacing equipment without affecting operations)
8. (Funding competition for other investments/improvements within organization)
9. (Don't own building/Tenant)
10. (Other [SPECIFY:\_\_\_\_\_])
11. (NO CHALLENGES)
98. (Don't know)
99. (Refused)

[ASK IF IN IMPLEMENTATION PHASE OR PROJECT COMPLETED][ASK FOR EACH PROJECT LISTED]

## C. Implementation

**C1a.** Now I'd like to ask you some questions about the improvements you made to your building. Looking at my records, it looks like the final workbook recommended [READ LIST OF MEASURES], and [all of these were implemented] [XX was implemented]. Is that correct?

1. (Yes, all were implemented) [SKIP TO FREE RIDERSHIP SECTION]
2. (Yes, partial list was implemented)
3. (No, incorrect measures) [RECORD CORRECT LIST:\_\_\_\_\_]
98. (Don't know)
99. (Refused)

**C1b.** Did you use a contractor to implement the recommendations?

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

[ASK C2-C4 IF PARTIAL IMPLEMENTATION; C1a=2]

**C2.** Can you tell me the main reasons why you aren't planning to/didn't implement those recommendations? [DO NOT READ] [MARK ALL THAT APPLY]

1. (Didn't have more money in the budget)
2. (Return on investment wasn't high enough compared with other measures)
3. (Changes in the facility operation)
4. (We are going to phase it in)
5. (After further investigation, perception is that measure is unnecessary)
6. (After further investigation, perception is that measure is not feasible)
98. (Don't know)
99. (Refused)
00. Other [SPECIFY: \_\_\_\_\_]

**C3.** Does your company have plans to follow up on the remaining retrocommissioning recommendations?

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

[ASK IF C3=YES]

**C4.** Can you tell me the approximate time frame in which your company plans to follow up on these recommendations? Would you say:

1. In less than 1 year
2. In 1 to 3 years
3. In more than 3 but less than 5 years
4. More than 5 years
98. (Don't know)
99. (Refused)

[ASK IF IN IMPLEMENTATION PHASE OR PROJECT COMPLETED] [ASK FOR EACH PROJECT LISTED]

## D. Persistence

**D1.** Did you, your facility staff, or building occupants receive any training from Focus on Energy or your provider about the measures that were implemented, or about how to maintain the system improvements that were made?

1. (Yes)
2. (No)
3. (Training on some things) [PROBE: what did they receive training on?]
98. (Don't know)
99. (Refused)

**D2a.** Did you, Focus on Energy, or your provider update the existing operations and maintenance manual, or provide a Systems Manual to document updates or changes to building systems, operating characteristics, controls sequences, etc.?

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

[ASK IF D2A=YES]

**D2b.** What components of this documentation have you found to be most useful in maintaining the building? [OPEN END]

\_\_\_\_\_

[ASK IF PROJECT COMPLETE]

**D3a.** Have you received any feedback from building occupants [OR tenants] on the changes to the building systems? [IF Yes, what has the feedback been?]

[ASK IF PROJECT COMPLETE]

**D3.** To the best of your knowledge, have you had to make any changes to your building systems since the building was retrocommissioned, such as reverting back to previous set-points or controls sequences?

1. (Yes) [WHICH ONES AND WHY WERE THEY ADJUSTED? RECORD COMMENTS \_\_\_\_\_]
2. (No)
98. (Don't know)
99. (Refused)

[ASK IF PROJECT INCLUDED HVAC/OCCUPANCY SENSORS]

**D4a.** And do you plan to recalibrate sensors (e.g., temperature, pressure, CO2) as part of either annual or semi-annual maintenance?

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

[ASK IF D4A=NO]

**D4b.** What are your reasons for not doing this? [OPEN END]

\_\_\_\_\_



**D5.** Are there any other changes to your routine maintenance that you have made as a result of going through the retrocommissioning program? [OPEN END]

\_\_\_\_\_

**D6.** Have any systems been put in place to track building or HVAC system performance on an ongoing basis?

1. (Yes) [What type of tracking is done? (e.g., utility benchmarking, trend data review).  
RECORD COMMENTS \_\_\_\_\_]
2. (No)
98. (Don't know)
99. (Refused)

**D7.** As you may know, the Focus program provides a bonus incentive for what is called "persistence," to make sure the building maintains optimal operation and energy consumption over time. Does your company plan to conduct more data trending after verification so that you will be eligible for the persistence bonus incentive?

1. (Yes)
2. (No)
96. (Didn't know about the bonus incentive)
98. (Don't know)
99. (Refused)

[ASK IF D7=2]

**D8.** What are your company's reasons for not doing this? [OPEN END]

\_\_\_\_\_

[ASK FREE RIDERSHIP AND SPILLOVER SECTIONS ONLY IF PROJECT COMPLETED] [IF MORE THAN ONE PROJECT, ASK ABOUT EACH SEPARATELY. INFORM RESPONDENT WHICH ONE YOU ARE TALKING ABOUT].

## FR. Free Ridership

Next, I have some questions to learn more about your decision to retrocommission the building and the influence of the Focus on Energy Program.

**FR0a.** First, did your organization have specific plans to retrocommission the building before learning about the Focus on Energy Retrocommissioning Program incentive?

1. (Yes)
2. (No) [SKIP TO FR1]
98. (Don't know)
99. (Refused)

**FR0b.** Prior to participating in the incentive program, were retrocommissioning activities included in your organization’s capital or operating budget?

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

**FR1.** Focus on Energy’s Retrocommissioning Program (provided an incentive of [\$XX])/(is likely to provide an incentive of approximately [\$XX]). Would your organization have conducted the retrocommissioning without receiving this incentive?

- 1. (Yes) [SKIP TO FR2]
- 2. (No) [SKIP TO FR5]
- 98. (Don’t know)
- 99. (Refused)

[ASK IF FR1=DON’T KNOW OR REFUSED]

**FR1a.** Would you have done something without the incentive program?

- 1. (Yes, would have done something) [CONTINUE TO FR2]
- 2. (No, would not have installed anything) [SKIP TO FR5]
- 98. (Don’t know) [SKIP TO FR9]
- 99. (Refused) [SKIP TO FR9]

[ASK FR2-FR4 IF FR1 or FR1a=YES]

**FR2.** Let me make sure I understand. Would you have made exactly the same type of improvements that were included in Focus on Energy’s proposal?

- 1. (Yes)
- 2. (No)
- 3. (Some, but not all) [SPECIFY \_\_\_\_\_]
- 98. (Don’t know)
- 99. (Refused)

**FR3.** And would you have made the same number of improvements?

- 1. (Yes)
- 2. (No) [SPECIFY WHICH ONES \_\_\_\_\_]
- 98. (Don’t know)
- 99. (Refused)

**FR4.** And would you have conducted the retrocommissioning...

1. Within the same year? [SKIP TO FR9]
2. Within one to two years? [SKIP TO FR9]
3. Within three to five years? [SKIP TO FR9]
4. In more than five years? [SKIP TO FR9]
98. Don't know [SKIP TO FR9]
99. Refused [SKIP TO FR9]

[SKIP TO FR9]

[ASK FR5-FR8 if FR1 OR FR1a= NO]

**FR5.** So, you would not have retrocommissioned the building at all. Is that correct?

1. (Yes/correct, would not have installed anything without the program incentive ) [SKIP TO FR9]
2. (No/not correct, would have done something without the incentive)
98. (Don't know)
99. (Refused)

**FR6.** Again, help me understand. Would you have performed some general operations and maintenance, but not made the same type of improvements?

1. (Yes) [SPECIFY \_\_\_\_\_]
2. (No)
98. (Don't know)
99. (Refused)

**FR7.** Would you have made some improvements, but fewer of them?

1. (Yes) [SPECIFY WHICH ONES YOU WOULD HAVE MADE: \_\_\_\_\_]
2. (No)
98. (Don't know)
99. (Refused)

**FR8.** And finally, would you have retrocommissioned the building...

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

[ASK EVERYONE]

**FR9.** Before participating in the Program, had you ever retrocommissioned this building or another [COMPANY NAME] facility?

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

## SO. Spillover

Now we'd like to ask a few questions about other energy efficient equipment.

**SO1.** Since participating in the program, has your company made any energy efficiency improvements or installed any energy-efficient equipment for which you did not receive a program incentive? [IF NEEDED: By energy-efficient equipment, 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)
2. (No) [SKIP TO CUSTOMER FIRMOGRAPHICS SECTION]
98. (Don't know) [SKIP TO CUSTOMER FIRMOGRAPHICS SECTION]
99. (Refused) [SKIP TO CUSTOMER FIRMOGRAPHICS SECTION]

[IF SO1=YES]

**SO2.** Are these improvements or equipment also installed at [ADDRESS] or at a different location?

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

**SO3.** What were the other energy-efficient improvements you made 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

[REPEAT FOR EACH ITEM MENTIONED IN SO3]

**SO4.** How many [insert item from SO3] did you install?

[RECORD NUMBER \_\_\_\_\_, 98 FOR DON'T KNOW, 99 FOR REFUSED, AND -96 FOR N/A]]

[REPEAT FOR EACH ITEM MENTIONED IN SO3]

**SO5.** Please tell me how important the Focus on Energy Retrocommissioning Program was in your decision to install [INSERT ITEM FROM SO3]. Was it very important, somewhat important, not too important, or not at all important [INSERT ITEM FROM SO3]?

[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..."]

1. Very important
2. Somewhat important
3. Not too important or
4. Not at all important
98. DON'T KNOW
99. [DO NOT READ] REFUSED

[ASK FOR ALL MENTIONED IN SO3]

**SO6.** Did you receive an incentive for installing [INSERT ANSWER FROM SO3]? [DO NOT READ ANSWER LIST]

1. (Yes)
2. (No)
96. (Item did not qualify)
98. (DON'T KNOW)
99. (REFUSED)

[ASK IF SO6=2]

**SO6b.** Do you know if your contractor or vendor received an incentive?

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

[ASK IF SO2=2]

**SO7.** What is the address of the location where you installed [INSERT EACH ITEM FROM SO3]? [98 FOR DON'T KNOW AND 99 FOR REFUSED]

ENTER STREET ADDRESS:

ENTER CITY:

ENTER STATE:

ENTER ZIP CODE:

## E. Customer Firmographics

This is the last section of the survey. I would like to ask you some questions about your company. These questions will help us with our analysis and your answers are strictly confidential.

**E1. What industry is your company in? [MARK ONLY ONE; 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)

**E2. Is the space heated using electricity or gas?**

1. (Electricity)
2. (Gas)
3. (Other) [SPECIFY \_\_\_\_\_]
98. (Don't know)
99. (Refused)

**E3. Does your organization lease or own the facility?**

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

**E4. Approximately how many employees work at your current location? [NUMERIC OPEN END.  
98=Don't know, 99=Refused]**

\_\_\_\_\_

## Closing

**F1.** Are there any types of energy-efficient equipment or services for which you would like to see incentives? [DO NOT READ LIST; RECORD ALL THAT APPLY]

1. (Lighting (outdoor lighting, LEDs, other types)) [ASK: Can you give me an example? \_\_\_\_\_ ] )
2. (Heating, Air Conditioning, and Ventilation (HVAC) equipment) [ASK: Can you give me an example? \_\_\_\_\_ ] )
3. (Building shell (insulation, windows, doors)) [ASK: Can you give me an example? \_\_\_\_\_ ] )
4. (Refrigeration (refrigerators, freezers)) [ASK: Can you give me an example? \_\_\_\_\_ ] )
5. (Other [SPECIFY: \_\_\_\_\_ ] )
98. (Don't know)
99. (Refused)

**F2.** In the future, how would you like to stay informed about opportunities to save energy and money?[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]

1. (Contact with Focus on Energy representative through phone, email, or in person)
2. (Focus on Energy monthly newsletter)
3. (Focus on Energy website)
4. (Focus on Energy workshop, event)
5. (Focus on Energy printed program materials)
6. (Contact with utility representative)
7. (Utility mailing, bill insert, website)
8. (Contractor or vendor through phone, email, or in person)
9. (Through a trade association or professional organization)
10. Other [SPECIFY: \_\_\_\_\_ ] )
98. (DON'T KNOW)
99. (REFUSED)

Do you have any final thoughts or comments?

### CLOSING SCRIPT:

Thank you for your participation in this survey and in Focus on Energy's Program. Focus on Energy appreciates your responses and will use this feedback to improve its program effectiveness.



**Focus on Energy Retrocommissioning  
Participating Retrocommissioning Service Provider  
Phone Interview Guide**

October 2013

Name of Provider: \_\_\_\_\_

Date: \_\_\_\_\_

Interviewer: \_\_\_\_\_

*Note: Interviews will be scheduled via email prior to calls which will explain the full purpose of the survey.  
[ASK TO SPEAK WITH PERSON LISTED ON CONTACT LIST]*

Hello, my name is \_\_\_\_\_.

I am calling on behalf of Focus on Energy. We are contacting service providers who are part of the Focus on Energy Retrocommissioning Service Provider network to get their feedback about their experience with the program and how it might be improved.

S1. Are you the best person to speak with about this?

1. Yes [Continue]
2. No [Record name and contact info of correct contact, try to reach them]

\_\_\_\_\_

S2. Is this a good time to talk? [If not, what is a good time for me to call you?]

[SCHEDULE APPOINTMENT] \_\_\_\_\_

**[If needed:** The interview usually takes about 15 minutes. Please note that your responses are completely confidential.]

**Introduction**

**Program Awareness and Participation**

PA1. How did you first learn about the Focus RCx program? [DO NOT READ. MARK ALL THAT APPLY]

1. CLEAResult/Focus representative
2. Focus on Energy newsletter or mail
3. Professional organization
4. FoE trade ally network
5. Other [SPECIFY] \_\_\_\_\_
98. Don't know
99. Refused

PA2. About how many retrocommissioning projects have you worked on under the Focus program?  
[Open end]

PA3. Do you work with any other organizations or utilities on retrocommissioning incentive programs outside of Focus?

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

PA4. Other than the retrocommissioning program, has your company participated in any other Focus on Energy business incentive programs?

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

[ASK IF PA4 = 1, yes]

PA5 Which Focus incentive programs have you participated in? (DO NOT READ, MARK ALL THAT APPLY)  
(PROBE IF NECESSARY)

1. Business Incentive Program
2. Large Energy Users Program
3. Design assistance (new construction\_
4. Small business
5. Chains stores & franchises
6. Multifamily
97. Other (SPECIFY): \_\_\_\_\_
98. Don't know

PA6. What are the ways that you typically learn about program changes or updates from Focus? (DO NOT READ, MARK ALL THAT APPLY) [RECORD VERBATIM COMMENTS, BIN LATER]

1. Website
2. Meetings
3. I receive notifications in the mail
4. I receive notifications via email
5. Other (SPECIFY)\_\_\_\_\_
98. Don't know
99. Refused

Now I have some questions for you about your experience with the Retrocommissioning program specifically.

**[SKIP IF RSP HAS NOT COMPLETED ANY PROJECTS]**

## Program Satisfaction

PS1. Thinking about your overall experience with the retrocommissioning program, how satisfied are you overall? Would you say... (READ LIST)

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

[ASK IF LESS THAN SATISFIED [3 or 4]

PS2. Why do you give it that rating?

PS3. On the same rating scale, how would you rate your overall experience working with CLEAResult on this program? [IF NEEDED: CLEAResult implements the program on behalf of Focus]

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

PS4. Why do you give it that rating?

## [KEEP FOR ALL]

### Training

T0. What was your level of experience with building commissioning or retrocommissioning before participating in the Focus on Energy program? Would you say you had:

1. Significant experience
2. Some experience
3. Little to no experience

T1. Thinking about the training that you received from CLEAResult for the Retrocommissioning program, how helpful would you say that was? Would you say (READ LIST):

1. Very helpful
2. Somewhat helpful
3. Not very helpful
4. Not helpful at all.
98. Don't know
99. Refused

[ASK IF SOMEWHAT OR NOT HELPFUL, 2, 3, 4]

T2. Why do you say that?

T3. Are there any topics that you would like to receive more training on?

## Program Delivery

PD1. Overall, how would you characterize the program requirements? [Probe with: Do you think they are clear? Why/why not? Where is there confusion? Are they too burdensome? Where? Why?]

### [SKIP IF RSP HAS NOT COMPLETED ANY PROJECTS]

PD2. I am going to read you several project stages that a project goes through during the program. For each stage, if you were involved, I'd like you to tell me if the stage went smoothly or you encountered difficulties. [INSTRUCTIONS: IF AT ANY STAGE THE RSP SAID THEY HAD DIFFICULTY, ASK THEM TO EXPLAIN WHY AND RECORD VERBATIM COMMENTS BEFORE MOVING ON TO THE NEXT STAGE].

- a. The first stage is the Opportunity Assessment that you may have completed with the customer. How would you say that went?
  1. Smoothly
  2. Had difficulties
  96. N/A wasn't involved
- b. What about the proposal stage? [1=Smoothly, 2=Had difficulties, 96=N/A]
- c. And developing the workbook with savings calculations after the audit? [1=Smoothly, 2=Had difficulties, 96=N/A]
- d. The incentive agreement? [1=Smoothly, 2=Had difficulties, 96=N/A]
- e. And finally the verification? [1=Smoothly, 2=Had difficulties, 96=N/A]

PD3a. The program was recently modified to allow customers to receive 50% of the incentive up front, before implementing the RCx measures. Do you think this change has been effective?

PD4. Overall, what are the areas that you think are working particularly well?

PD5. Do you have recommendations on how the retrocommissioning program could be improved?

**[ASK ALL]**  
**Marketing**

M1a. Since participating in the program, have you recommended the retrocommissioning program to any of your customers?

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

[ASK IF M1a=1]

M1b. About how many customers would you say you have talked to about the retrocommissioning program? [RECORD RESPONSE] Would you say this represents most of your customers, or a small percentage?

[ASK IF M1a=1]

M1c. Which customers make good candidates for the program? [OPEN END]

[ASK IF M1a=1]

M1d. How does your firm promote the retrocommissioning program? *[DO NOT READ. MARK ALL THAT APPLY]*

1. Use/distribute Focus on Energy marketing materials on-site
2. Mailers
3. Word of mouth
4. Direct them to the website
5. Other (SPECIFY) \_\_\_\_\_
98. Don't know
99. Refused

[ASK IF M1a =2]

M1e. Can you tell me a little more about why you haven't recommended the program? [DO NOT READ]

1. (Didn't have time)
2. (Program was not a good fit for them)
3. (Did not have enough knowledge to recommend)
4. (Program requirements too burdensome)
5. (Other) [SPECIFY] \_\_\_\_\_

M2. What other materials, program guidelines, or instructions could CLEAResult provide that would help with promoting the program?

\_\_\_\_\_ [RECORD RESPONSE]

98. Don't know
99. Refused

M4. Have any of your customers asked you about the Focus Retrocommissioning Program?

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

## Program Effectiveness

PE1. In your experience, what are the main barriers to customers pursuing building retrocommissioning?

*[DO NOT READ. CIRCLE ALL THAT APPLY]*

- 1. (Lack of information)
- 2. (Availability of capital)
- 3. (Uncertainty of savings)
- 4. (Focus on core business)
- 5. (Other \_\_\_\_\_) *[RECORD RESPONSE]*
- 98. (Don't know)
- 99. (Refused)

PE2. How could Focus improve its retrocommissioning program to overcome these barriers and boost participation?

## Spillover

SO1. Since joining the Focus retrocommissioning provider network, have you added any other energy-efficient equipment or services to your customer offerings?

- 1. Yes
- 2. No *[SKIP TO F1]*
- 98. Don't know *[SKIP TO F1]*
- 99. Refused *[SKIP TO F1]*

SO2. *[IF SO1 = YES]* Please describe the type of the equipment or services that you added.

- \_\_\_\_\_ *[RECORD RESPONSE]*
- 98. Don't know
  - 99. Refused

SO3. *[IF SO1= YES]* How influential would you say the Focus program was in your decision to add energy-efficient equipment or services to your customer offerings? Would you say...*[READ LIST]*

- 1. Very important
- 2. Somewhat important
- 3. Not very important
- 4. Not important at all.
- 98. Don't know
- 99. Refused

## Firmographics

Lastly, I have two quick questions about your company.

F1. How many people does your firm employ?

\_\_\_\_\_ [RECORD RESPONSE]

98. Don't know

99. Refused

F2. Can you please classify your typical customer (i.e., commercial building owners, hospitals, schools)?

\_\_\_\_\_ [RECORD RESPONSE]

98. Don't know

99. Refuse

F3. Do you have any additional comments about the Focus retrocommissioning program?

\_\_\_\_\_ [RECORD RESPONSE]

## Closing

Thank you for your time. Focus on Energy greatly values your feedback.

**Focus on Energy, Retrocommissioning Program  
Express Building Tune-Up Participant Phone Survey**

October 2013

Research Objectives	Items
Understand program awareness, decision-making, and marketing	A1-A3
Assess participant satisfaction; identify program successes, challenges , and ways for improvement	B1-B13
Follow up on retrocommissioning results (i.e., persistence)	D1-D8
Assess free ridership	FR0a-FR9
Determine spillover activities	SO6-SO8a
Gather customer firmographics	E1-E4

**Survey Audience**

Cadmus will seek to contact **two** representatives for each active participant, a building owner representative and a facilities representative. Obtaining both perspectives will be important for assessing decision-making, free ridership, and spillover (likely to be provided by owner representatives) as well as satisfaction with program administration, delivery, and implementation (likely to be provided by facilities representatives).

The contact person(s) listed in the sample will be contacted for the survey. Where possible, Cadmus will attempt to make appointments prior to contacting participants by phone.

Answer choices shown in parentheses are never read by the interviewer.

Target Number of Participants = Census of 2012 and 2013 projects, or up to 15

**Introduction** [READ IF APPOINTMENT WAS MADE]

Hello. I’m [INSERT NAME], calling from The Cadmus Group on behalf of Focus on Energy. Thank you for scheduling some time to talk with me about your experiences with the Focus on Energy Express Building Tune Up Program. [SKIP TO S2]



## **Introduction** [ASK IF NO APPOINTMENT WAS MADE]

Hello. I'm [INSERT NAME], calling from The Cadmus Group on behalf of Focus on Energy Wisconsin. We're talking with businesses about their experiences with an energy efficiency incentive program. Your answers will be used as part of a study to evaluate and improve Focus on Energy's programs.

May I speak with [CUSTOMERFIRSTNAME + CUSTOMERLASTNAME]? [GO TO S1]  
 [IF CONTACT IS NOT AVAILABLE, SCHEDULE CALL BACK].

[IF NEEDED]

This phone call is designed to last no longer than 20 minutes. Let me assure you this is not a sales call. This is a fact-finding survey only. Your individual responses will be kept confidential.

## **S. Screeners – For No Appointment Participants**

**S1.** Our records show you are the contact person for your organization's participation in Focus on Energy's Express Building Tune Up Program -- Is that right? [IF NEEDED: This involved your company going through a pre-screening process with a technical service provider to identify low-cost adjustments that can improve your building's energy savings.

1. (Yes, on the phone)
2. (No, but person can come to phone) [START OVER FROM INTRO WITH NEW RESPONDENT]
3. (No, not available) [SCHEDULE CALLBACK]
98. (Don't Know) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]
99. (Refused) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]

**S1a.** And is this a good time to talk?

[IF NEEDED: This phone call is designed to last no longer than 20 minutes. Let me assure you this is not a sales call. This is a fact-finding survey only, to help Focus on Energy improve their programs. Your individual responses will be kept confidential.]

1. (Yes) [CONTINUE]
2. (No) [SCHEDULE CALL BACK]
99. (Refused)

**S. Screeners – For All Participants**

**S2.** To confirm for our records, can you please describe your role at the company? [DO NOT READ] [IF SPEAKING WITH MORE THAN ONE PERSON, RECORD BOTH TITLES]

1. (Owner)
2. (President/CEO/COO)
3. (Senior Vice President/Vice President/Other decision maker)
4. (Energy Manager)
5. (Facilities Manager)
6. (Engineer)
7. Other: \_\_\_\_\_

**S3a.** It looks like [COMPANY] has done [X MANY] projects under the Focus on Energy Express Building Tune-Up Program, is that correct?

1. (Yes)
2. (No) [RECORD CORRECT NUMBER] \_\_\_\_\_
98. (Don't know)
99. (Refused)

[NOTE: List all projects recorded in SPECTRUM and confirm each one with the respondent. Some respondents may have more than one project, in different stages.]

[ASK IF ONE PROJECT] **S3b.** Our records show that your Express Building Tune Up project [is/was] [active/completed], is that correct? (Yes, correct)

2. (No) [RECORD NUMBER OF ACTIVE PROJECTS: \_\_\_\_\_]  
[RECORD NUMBER OF COMPLETED PROJECTS: \_\_\_\_\_]
98. (Don't Know) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]
99. (Refused) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]

[ASK IF MORE THAN ONE PROJECT]

**S3c.** Our records show that [X MANY] projects are active and [X MANY] projects are complete, is that correct?

1. (Yes, correct)
2. (No) [RECORD NUMBER OF ACTIVE PROJECTS: \_\_\_\_\_]  
[RECORD NUMBER OF COMPLETED PROJECTS: \_\_\_\_\_]
98. (Don't Know) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]
99. (Refused) [ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]

[ASK IF ACTIVE]

**S4.** And can you tell me about the current stage of the project(s)? [DO NOT READ, PROBE IF NECESSARY WITH BELOW PHASES AND CLARIFY WHERE NEEDED]

1. (Had a meeting with contractor)
2. (Completed walk-through assessment)
3. (Contractor has completed some work, not all)
1. (Other [SPECIFY]\_\_\_\_\_)

## A. Program Awareness

Next, I'd like to ask a few questions about how you got involved in Focus on Energy's Express Building Tune Up Program.

**A1.** How did your organization learn about the Program?

[MULTIPLE RESPONSE, LIMIT TO NO MORE THAN 3 RESPONSES]

1. (Contact with Focus on Energy advisor or representative through phone, email, or in person)
2. (Focus on Energy monthly newsletter)
3. (Focus on Energy website)
4. (Focus on Energy workshop or event)
5. (Focus on Energy printed program materials)
6. (Contact with utility representative)
7. (Utility mailing, bill insert, or Website)
8. (Word of mouth (family, friend, or business colleague)
9. (Contacted by contractor or vendor through phone, email, or in person)
10. (Previously participated in program/received an incentive)
11. (Through a trade association or professional organization [SPECIFY: \_\_\_\_\_] )
00. (Other [SPECIFY] \_\_\_\_\_)
98. (Don't Know)
99. (Refused)

**A2.** What were the most important factors that influenced your decision to participate?

[MULTIPLE RESPONSE, LIMIT TO NO MORE THAN 3 RESPONSES]

1. (Using less energy, reducing energy consumption or energy demand)
2. (Saving money on our utility bills; lower energy bills)
3. (To obtain a program or bonus incentive)
4. (To obtain a tax credit)
5. (To replace old (but still functioning) equipment)
00. (Other [SPECIFY] \_\_\_\_\_)
98. (Don't know)
99. (Refused)

[ASK IF A1 = 1,6,9 OR 13]

**A3.** Was there anything specific the information that [INSERT ANSWER FROM A1] provided to you that helped you decide you wanted to conduct this project?  
[IF PROJECT IS COMPLETE]

## B. Program Satisfaction

Now I'd like to ask some questions about your satisfaction with the Program.

**B0.** Did you have any contact with any Focus on Energy representatives during your project?

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

[ASK IF B0=1]

**B1.** Thinking about your experience with the Focus on Energy representatives, would you say you were:

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

**B2.** Can you tell me why you gave the Focus representatives this rating? [OPEN END, 98=Don't know, 99=Refused]

\_\_\_\_\_

**B3.** Was your utility account representative involved with the project at all?

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

[ASK IF B3=1]

**B3a.** Using the same scale, how satisfied would you say you were with your experience with your utility Account Manager during the process?

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

**B4.** Can you tell me why you gave that rating? [OPEN END, 98=Don't know, 99=Refused]

\_\_\_\_\_

**B5a.** Using the same scale, how would you describe your satisfaction with... [ASK EACH FOR a, b, AND c]

- a. The application process
- b. The clarity of program requirements and processes
- c. The Focus on Energy Website
- d. Your experience with the Contractor who conducted the audit and provided the tune-up

1. Very satisfied
2. Somewhat satisfied
3. Not very satisfied
4. Not at all satisfied
96. (Not Applicable/wasn't involved)
98. (Don't know)
99. (Refused)

[ASK FOR ANY B5a=2, 3 OR 4]

**B5b.** Can you say more about why you were [INSERT RESPONSE FROM B5a] with [INSERT STATEMENT FROM B5a] ?

**B6.** Did you experience any challenges or hurdles during your participation in the program?

1. (Yes) [IF YES, ASK] What were they?
2. (No)
98. (Don't know)

[ASK IF PROJECT COMPLETED]

**B7.** How satisfied are you with the way the building(s) is/are performing now after the tune-up?

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

[ASK IF B7=3,4]

**B7a.** Can you tell me a little more about why you aren't satisfied?

**B8.** What would you say are the main benefits your company has experienced as a result of the building tune-up ? [DO NOT READ LIST; RECORD ALL THAT APPLY; PROBE FOR MULTIPLE RESPONSES]

1. (The incentive)
2. (Using less energy, reducing energy consumption or energy demand ) [RECORD VERBATIM COMMENTS ABOUT HOW THEY KNOW...]
3. (Saving money on our utility bills; lower energy bills) [RECORD VERBATIM COMMENTS ABOUT HOW THEY KNOW..... ask how much they are saving]
4. (Increased occupant comfort (better or brighter lighting) )
5. (Other [SPECIFY: \_\_\_\_\_])
6. (NO BENEFITS)
98. (DON'T KNOW)
99. (REFUSED)

**B9.** Thinking about your overall experience with the Express Building Tune Up Program, would you say you are:

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

[ASK IF B9=2, 3, OR 4]

**B10.** Can you tell me a little more about why you weren't satisfied? [OPEN END, 98=Don't know, 99=Refused]

---

**B11.** What would you say worked especially well in the Building Tune-Up Program? [OPEN END, 98=Don't know, 99=Refused]

**B12.** Based on your experience with this project, would you consider conducting an Express Building Tune up through the Focus on Energy Program with any other buildings or facilities?

1. (Yes) [RECORD IF THEY SAY HOW MANY \_\_\_\_\_]
2. (No, have other buildings but would not retro commission)
3. (No, do not have any other buildings)
98. (Don't know)
99. (Refused)

[ASK IF B12=2] [RECORD COMMENTS VERBATIM]

**B13.** What are your reasons for not conducting tune-ups on other buildings? [OPEN END]

\_\_\_\_\_

**B14.** Do you have any suggestions for how Focus on Energy could improve the Program? [OPEN END, 98=Don't know, 99=Refused]

[RECORD VERBATIM, BIN LATER]

1. (Better/more communication from Focus on Energy representatives)
2. (Quicker response time from Focus on Energy in answering questions )
3. (Larger selection of eligible equipment [ASK: What energy-efficient equipment should Focus on Energy offer incentives for? \_\_\_\_\_] )
4. (Increasing the incentive amount )
5. (Simplify the application process)
6. (Provide quicker approval on applications)
7. (Send incentive check out faster)
8. (Other [SPECIFY: \_\_\_\_\_] )
9. (No, nothing)
98. (DON'T KNOW)
99. (REFUSED)

**B14.** In general, what do you see as the biggest challenges to making energy-efficient improvements inside your company or organization? [DO NOT READ; MULTIPLE RESPONSES POSSIBLE]

1. (High initial cost)
2. (Budget limitations)
3. (Long payback period)
4. (Lack of technical knowledge and resources to pursue energy efficiency upgrades [SPECIFY WHERE TECHNICAL KNOWLEDGE/RESOURCES ARE LACKING:\_\_\_\_\_])
5. (Lack of corporate support for energy efficiency investments)
6. (Paperwork too complicated and time consuming)
7. (Replacing equipment without affecting operations)
8. (Funding competition for other investments/improvements within organization)
9. (Don't own building/Tenant)
10. (Other [SPECIFY:\_\_\_\_\_])
11. (NO CHALLENGES)
98. (Don't know)
99. (Refused)

[ASK IF IN IMPLEMENTATION PHASE OR PROJECT COMPLETED]

## D. Persistence

**D1.** Did you, your facility staff, or building occupants receive any training from Focus on Energy or your contractor about the measures that were implemented, or about how to maintain the system improvements that were made?

1. (Yes)
2. (No)
3. (Training on some things) [PROBE: what did they receive training on?]
98. (Don't know)
99. (Refused)

**D2a.** Did you or your contractor update the existing operations and maintenance manual or provide a Systems Manual to document updates or changes to building systems, operating characteristics, controls sequences, etc.?

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

[ASK IF D2A=YES]

**D2b.** What components of this documentation have you found to be most useful in maintaining the building? [OPEN END]

---



[ASK IF PROJECT COMPLETE]

**D3a.** Have you received any feedback from building occupants [OR tenants] on the changes to the building systems? [IF Yes, what has the feedback been?]

**D3.** To the best of your knowledge, have you had to make any changes to your building systems since the Tune Up, such as reverting back to previous set-points or controls sequences?

1. (Yes) [WHICH ONES AND WHY WERE THEY ADJUSTED? RECORD COMMENTS\_\_\_\_\_]
2. (No)
98. (Don't know)
99. (Refused)

[ASK IF PROJECT INCLUDED HVAC/OCCUPANCY SENSORS]

**D4a.** And do you plan to recalibrate sensors (e.g., temperature, pressure, CO2) as part of either annual or semi-annual maintenance?

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

[ASK IF D4A=NO]

**D4b.** What are your reasons for not doing this? [OPEN END]

\_\_\_\_\_

**D5.** Are there any other changes to your routine maintenance that you have made as a result of going through the Express Building Tune Up program? [OPEN END]

\_\_\_\_\_

**D6.** Have any systems been put in place to track building or HVAC system performance on an ongoing basis?

1. (Yes) [What type of tracking is done? (e.g., utility benchmarking, trend data review). RECORD COMMENTS\_\_\_\_\_]
2. (No)
98. (Don't know)
99. (Refused)

[ASK FREE RIDERSHIP AND SPILLOVER SECTIONS ONLY IF PROJECT COMPLETED] [IF MORE THAN ONE PROJECT, ASK ABOUT EACH SEPARATELY. INFORM RESPONDENT WHICH ONE YOU ARE TALKING ABOUT].

**FR. Free Ridership**

Next, I have some questions to learn more about your decision to tune-up the building and the influence of the Focus on Energy Program.

**FR0a.** First, did your organization have specific plans to do a building tune-up before learning about the Focus on Energy Program?

- 1. (Yes)
- 2. (No) [SKIP TO FR1]
- 98. (Don't know)
- 99. (Refused)

**FR0b.** Prior to participating in the rebate program, was this type of building tune-up activity included in your organization's capital or operating budget?

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

**FR1.** Focus on Energy's Program provides a discount to help customers afford a building tune-up. Without the program, it's likely the services you received from your contractor would have cost [\$\$X] as opposed to the \$250 you paid. Would your organization have conducted the tune-up without receiving this discount?

- 1. (Yes) [SKIP TO FR2]
- 2. (No) [SKIP TO FR5]
- 98. (Don't know)
- 99. (Refused)

[ASK IF FR1=DON'T KNOW OR REFUSED]

**FR1a.** Would you have done something without the discount?

- 1. (Yes, would have done something) [CONTINUE TO FR2]
- 2. (No, would not have installed anything) [SKIP TO FR5]
- 98. (Don't know) [SKIP TO FR9]
- 99. (Refused) [SKIP TO FR9]

[ASK FR2-FR4 IF FR1 or FR1a=YES]

**FR2.** Let me make sure I understand. Would you have made exactly the same type of system improvements that your contractor provided?

1. (Yes)
2. (No)
3. (Some, but not all) [SPECIFY \_\_\_\_\_]
98. (Don't know)
99. (Refused)

**FR3.** And would you have made the same number of improvements?

1. (Yes)
2. (No) [SPECIFY WHICH ONES \_\_\_\_\_]
98. (Don't know)
99. (Refused)

**FR4.** And would you have conducted the tune-up...

1. Within the same year?
2. Within one to two years?
3. Within three to five years?
4. In more than five years?
98. Don't know
99. Refused

[SKIP TO FR9]

[ASK FR5-FR8 if FR1 OR FR1a= NO]

**FR5.** So, you would not have conducted the building tune-up at all. Is that correct?

1. (Yes/correct, would not have conducted anything without the program) [SKIP TO FR9]
2. (No/not correct, would have done something without the rebate)
98. (Don't know)
99. (Refused)

**FR6.** Again, help me understand. Would you have performed some general operations and maintenance, but not made the same type of improvements?

1. (Yes) [SPECIFY \_\_\_\_\_]
2. (No)
98. (Don't know)
99. (Refused)

**FR7.** Would you have made some improvements, but fewer of them?

1. (Yes) [SPECIFY WHICH ONES \_\_\_\_\_]
2. (No)
98. (Don't know)
99. (Refused)

**FR8.** And finally, would you have conducted a tune-up of the building...

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

[ASK EVERYONE]

**FR9.** Before participating in the Program, had you ever retrocommissioned this building or another [COMPANY NAME] facility?

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

## SO. Spillover

Now we'd like to ask a few questions about other energy efficient equipment.

**SO1.** Since participating in the program, has your company made any energy efficiency improvements or installed any energy-efficient equipment for which you did not receive a program incentive? [IF NEEDED: By energy-efficient equipment, 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)
2. (No) [SKIP TO CUSTOMER FIRMOGRAPHICS SECTION]
98. (Don't know) [SKIP TO CUSTOMER FIRMOGRAPHICS SECTION]
99. (Refused) [SKIP TO CUSTOMER FIRMOGRAPHICS SECTION]

[IF SO1=YES]

**SO2.** Are these improvements or equipment also installed at [ADDRESS] or at a different location?

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

**SO3.** What were the other energy-efficient improvements you made 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.]

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

[REPEAT FOR EACH ITEM MENTIONED IN SO3]

**SO4.** HOW MANY [INSERT ITEM FROM SO3] DID YOU INSTALL?

[RECORD NUMBER \_\_\_\_\_, 98 FOR DON'T KNOW, 99 FOR REFUSED, AND -96 FOR N/A]

[REPEAT FOR EACH ITEM MENTIONED IN SO3]

**SO5.** Please tell me how important the Focus on Energy Building Tune-Up Program was in your decision to install [INSERT ITEM FROM SO3]. Was it very important, somewhat important, not too important, or not at all important [INSERT ITEM FROM SO3]?

[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..."]

1. Very important
2. Somewhat important
3. Not too important or
4. Not at all important
98. DON'T KNOW
99. [DO NOT READ] REFUSED

[ASK FOR ALL MENTIONED IN SO3]

**SO6.** Did you receive an incentive for installing [INSERT ANSWER FROM SO3]? [DO NOT READ ANSWER LIST]

- 1. (Yes)
- 2. (No)
- 96. (Item did not qualify)
- 98. (DON'T KNOW)
- 99. (REFUSED)

[ASK IF SO6=2]

**SO6b.** Do you know if your contractor or vendor received an incentive?

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

[ASK IF SO2=2]

**SO7.** What is the address of the location where you installed [INSERT EACH ITEM FROM SO3]? [98 FOR DON'T KNOW AND 99 FOR REFUSED]

ENTER STREET ADDRESS:

ENTER CITY:

ENTER STATE:

ENTER ZIP CODE:

## E. Customer Firmographics

This is the last section of the survey. I would like to ask you some questions about your building and organization. These questions will help us with our analysis and your answers are strictly confidential.

**E1. What industry is your company in? [MARK ONLY ONE; 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)

**E2. Is the space heated using electricity or gas?**

1. (Electricity)
2. (Gas)
3. (Both)
4. (Other) [SPECIFY \_\_\_\_\_]
98. (Don't know)
99. (Refused)

**E3. Does your organization lease or own the facility?**

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

**E4. Approximately how many full-time employees work at your current location? [NUMERIC OPEN END. 98=Don't know, 99=Refused]**

\_\_\_\_\_

## Closing

**F1.** Are there any types of energy-efficient equipment or services for which you would like to see incentives? [DO NOT READ LIST; RECORD ALL THAT APPLY]

1. (Lighting (outdoor lighting, LEDs, other types)) [ASK: Can you give me an example? \_\_\_\_\_]
2. (Heating, Air Conditioning, and Ventilation (HVAC) equipment) [ASK: Can you give me an example? \_\_\_\_\_]
3. (Building shell (insulation, windows, doors)) [ASK: Can you give me an example? \_\_\_\_\_]
4. (Refrigeration (refrigerators, freezers)) [ASK: Can you give me an example? \_\_\_\_\_]
5. (Other [SPECIFY: \_\_\_\_\_])
6. (Don't know)
7. (Refused)

**F2.** In the future, how would you like to stay informed about opportunities to save energy and money?[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY]

1. (Contact with Focus on Energy representative through phone, email, or in person)
2. (Focus on Energy monthly newsletter)
3. (Focus on Energy website)
4. (Focus on Energy workshop, event)
5. (Focus on Energy printed program materials)
6. (Contact with utility representative)
7. (Utility mailing, bill insert, website)
8. (Contractor or vendor through phone, email, or in person)
9. (Through a trade association or professional organization)
10. Other [SPECIFY: \_\_\_\_\_]
99. (DON'T KNOW)
100. (REFUSED)

Do you have any final thoughts or comments?

Thank you for your participation in this survey and in Focus on Energy's Program. Focus on Energy appreciates your responses and will use this feedback to improve its program effectiveness.



## Focus on Energy 2013 Design Assistance Program Participant Survey

The Focus on Energy Design Assistance Program provides technical assistance, design incentives, and equipment rebates for qualifying new construction projects to help building owners and design teams optimize energy and demand savings and reduce operating costs.

### SURVEY AUDIENCE

The participant survey is designed for Wisconsin utility customers who completed a building or are in the process of completing a building as participants in the Design Assistance program.

### KEY

[RED TEXT] – Skip pattern instructions

[GREEN TEXT] – Instructions for interviewer

[BLUE TEXT] – Data to be pulled from sample

### INTRODUCTION AND SCREENING

Hello, may I speak with [CONTACT NAME]?

My name is [INTERVIEWER NAME] and I'm calling from the Cadmus Group on behalf of Wisconsin Focus on Energy. My firm was hired to evaluate the Design Assistance program for new building construction and we are talking with building owners and developers like you about their experiences with the program. Please be assured that this is not a sales call and that your responses are kept confidential and will only be used to help improve the Design Assistance program.

[IF RESPONDENT ASKS "HOW LONG": This survey should take about 30 minutes.]

1. Just to confirm, our records show that you [COMPLETED CONSTRUCTION OF / ARE IN THE PROCESS OF DESIGNING OR CONSTRUCTING] [BUILDING] through the Wisconsin Focus on Energy Design Assistance program. Is that correct? [IF NEEDED: THE FOCUS ON ENERGY DESIGN ASSISTANCE PROGRAM PROVIDES DESIGN ASSISTANCE AND FINANCIAL REBATES FOR QUALIFYING NEW CONSTRUCTION PROJECTS TO HELP BUILDING OWNERS OPTIMIZE ENERGY SAVINGS AND REDUCE OPERATING COSTS]
  1. Yes [SKIP TO Q3]
  2. No
  98. Don't know
  99. Refused [THANK AND TERMINATE]
  
2. [IF Q1 = 2 OR 98] Is there someone available that may be more familiar with your company's participation in the Design Assistance program?
  1. Yes [ASK TO SPEAK TO THAT PERSON, RECORD NAME AND TITLE AND REPEAT INTRODUCTION]
  2. No [THANK AND TERMINATE]
  98. Don't know [THANK AND TERMINATE]
  99. Refused [THANK AND TERMINATE]

**[ASK IF ACTIVE PARTICIPANT]**

3. I understand that you are in the process of designing and constructing a building with design and financial assistance from the program. Can you please tell me what stage of the program you are currently in? **[READ LIST]**

1. Submitted project for pre-approval
2. Received incentive agreement
3. Commenced construction
4. Completed construction
5. Completed verification
6. Received rebate
97. Other **[SPECIFY: \_\_\_\_\_]**
98. Don't know
99. Refused

4. What is the primary intended use for this building? **[READ LIST IF NEEDED]**

1. Commercial – office
2. Commercial – retail **[including restaurant, grocery/convenience stores, bank branches, personal services such as gyms and florists]**
3. Commercial - other
4. Industrial – warehouse
5. Industrial – production facility
6. Industrial – other
7. Data center
8. Hotel
9. Multifamily
10. Health care – hospital
11. Health care – medical offices
12. Government – state
13. Government – local
14. School – K-12
15. School – university or college
97. Other **[SPECIFY: \_\_\_\_\_]**
98. Don't know
99. Refused

## PROGRAM AWARENESS AND MOTIVATION

This section is asked of all respondents (as appropriate based on design or building phase identified in Q3). Questions examine program awareness, marketing channels, and reasons for participation.

Now, I'd like to talk to you about how you heard about the Design Assistance program and your reasons for participating.

5. First, how did you learn about the Design Assistance program? **[DO NOT READ, ALLOW MULTIPLE RESPONSES]**
  1. Architect
  2. Engineer, builder, other member of design team
  3. Utility account manager
  4. Focus on Energy program staff
  5. Focus on Energy Website
  6. Printed program materials **[FOLLOW UP: "And from whom did you receive the printed program materials?"]**
  7. Through a trade or professional organization or association **[FOLLOW UP: "Which trade or professional organization informed you of the program?"]**
  8. Participation in other Focus on Energy programs
  9. Word of mouth: other building owner
  10. Word of mouth: family, friend, neighbor
  97. Other **[SPECIFY: \_\_\_\_\_]**
  98. Don't know
  99. Refused
  
6. **[ASK IF MORE THAN ONE RESPONSE TO Q5]** Of the sources of information you just mentioned, which one was most influential in your decision to participate in the Design Assistance program? **[DO NOT READ]**
  1. Architect
  2. Engineer, builder, other member of design team
  3. Utility account manager
  4. Focus on Energy program staff
  5. Focus on Energy Website
  6. Printed program materials
  7. Through a trade or professional organization or association
  8. Participation in other Focus on Energy programs
  9. Word of mouth: other building owner
  10. Word of mouth: family, friend, neighbor
  97. Other **[SPECIFY: \_\_\_\_\_]**
  98. Don't know
  99. Refused

7. Can you suggest any ways that the Design Assistance program could reach potential participants more effectively?

[RECORD RESPONSE: \_\_\_\_\_]

98. Don't know

99. Refused

8. What are the most important reasons you decided to participate in the program? [DO NOT READ, ALLOW MULTIPLE RESPONSES]

1. To save money on utility bills, to save money on electric bills

2. To save energy

3. To obtain a rebate

4. To reduce operating costs

5. Previous experience with other Focus on Energy programs

6. To help protect the environment

7. To "be green"

8. To make my building more attractive to tenants

9. Part of a broader building plan (LEED, ex)

10. Recommended by utility representative

11. Recommended by architect, engineer, builder, other member of design team

12. Recommended by family, friend, neighbor

97. Other [SPECIFY: \_\_\_\_\_]

98. Don't know

99. Refused

9. My records show that you [RECEIVED ENERGY MODELING SERVICES FROM THE DESIGN ASSISTANCE PROGRAM/USED A MEMBER OF YOUR DESIGN TEAM TO COMPLETE THE ENERGY MODEL], is that correct?

1. Yes

2. No

98. Don't know

99. Refused

10. What factors influenced you to choose [YOUR OWN/THE PROGRAM'S] energy modeling services?

[RECORD RESPONSE: \_\_\_\_\_]

98. Don't know

99. Refused

### DESIGN AND CONSULTATION SERVICES

This section is asked of respondents who used the program's energy modeling services (as confirmed in Q9). Questions assess perceived value of the design and consultation services and the extent to which the program influenced changes in building design.

I have a couple of questions about how you typically design for energy efficient equipment in a new building.

11. Before you enrolled in the Design Assistance program, did your organization typically use energy modeling when designing new buildings, or was this new because of your participation in the program?

[RECORD RESPONSE: \_\_\_\_\_]

12. Before you enrolled in the Design Assistance program, did your organization have a policy on using LEED or another green building ratings system for its new buildings?

1. Yes [FOLLOW UP: What was the policy?]
2. No
98. Don't know
99. Refused

Now I'd like to talk specifically about the energy modeling services you received through the program.

13. Focus on Energy paid for the cost of the energy modeling [IF COMPLETE: "which was about **[\$COST]**"]. Without this assistance, would your firm have conducted energy modeling to examine energy use during the building design phase?

1. Yes
2. No
3. It depends (specifics...)

14. How important was the energy modeling when you decided which energy features to include in your new building? Were the recommendations...?

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

Next we would like to talk just about the financial incentives the program offers. Our records show the financial incentive is [DOLLAR AMOUNT FROM INCENTIVE AGREEMENT]. When answering these questions, please only think about the impact that this incentive had on your decision making.

15. What is the likelihood that you would have included the energy-efficiency features and equipment in this building without incentives of [DOLLAR AMOUNT FROM INCENTIVE AGREEMENT]? Would you say:

1. No Likelihood
2. Low Likelihood
3. Moderate Likelihood
4. High Likelihood

16. Just to confirm, did the incentives enable you to complete a different, or more energy efficient, project than you would have without the incentives?
1. Yes [FOLLOW UP: What did you do differently because incentives were available?]
  2. No
    98. Don't know
    99. Refused
17. And if you didn't receive the Focus on Energy assistance and incentives, would you have installed the same equipment with the same level of energy efficiency?
1. Same level of energy efficiency (better than code or standard)
  2. Standard (prescribed by code or standard)
18. If you had not received the energy modeling services and financial incentives for energy savings, do you think your building would have been more energy-efficient, less efficient, or just as efficient?
1. More efficient [FOLLOW UP: "A lot more, or a little more?"]
  2. Just as efficient
  3. Less efficient [FOLLOW UP: "A lot less, or a little less?"]
  98. Don't know
  99. Refused
19. What was most helpful about the energy-efficient design recommendations?  
[RECORD RESPONSE: \_\_\_\_\_]
20. What would have improved the value of the energy-efficient design recommendations for you?  
[RECORD RESPONSE: \_\_\_\_\_]

## PROGRAM PARTICIPATION AND SATISFACTION

This section is asked of all respondents (as appropriate based on design or building phase identified in Q3). Questions assess participants' satisfaction with each stage of the program and examine reasons for dissatisfaction. Questions also examine program effects (increased knowledge and future decision making).

Next, I'd like to ask you some questions about the process of getting design services and financial incentives from the program and your satisfaction with the Design Assistance program.

21. Did you experience any difficulties enrolling in the program?

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

[ASK IF Q21 = YES]

21a. What difficulties did you experience?

[RECORD RESPONSE: \_\_\_\_\_]

- 98. Don't know
- 99. Refused

22. [Did/Has] the amount of time you [were required to dedicate to the program meet/have been required to dedicate to the program so far met] your expectations? [DO NOT READ]

- 1. Yes
- 2. No, spent more time than expected
- 3. No, spent less time than expected
- 98. Don't know
- 99. Refused

[ASK IF Q22 = 2]

22a. What stage or stages of the program took more time than you expected?

[RECORD RESPONSE: \_\_\_\_\_ PROBE for how long this took and what they think caused this]

- 98. Don't know
- 99. Refused

23. How satisfied are you with the amount of time it took for your project to get pre-approval from Focus on Energy? Would you say you are...?

- 1. Very satisfied
- 2. Somewhat satisfied [FOLLOW UP: "Why do you say that?"]
- 3. Not too satisfied [FOLLOW UP: "Why do you say that?"]
- 4. Not at all satisfied [FOLLOW UP: "Why do you say that?"]
- 98. Don't know
- 99. Refused

24. How would you rate your satisfaction with the design assistance and [IF APPLICABLE] energy modeling services you received from the Design Assistance program? Would you say you are ...?

- 1. Very satisfied
- 2. Somewhat satisfied
- 3. Not too satisfied [FOLLOW UP: "Why do you say that?"]
- 4. Not at all satisfied [FOLLOW UP: "Why do you say that?"]
- 98. Don't know
- 99. Refused

25. **[IF APPLICABLE]** How satisfied were you with the verification process? Would you say you were...?
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied **[FOLLOW UP: "Why do you say that?"]**
  4. Not at all satisfied **[FOLLOW UP: "Why do you say that?"]**
  98. Don't know
  99. Refused
26. **[IF APPLICABLE]** How satisfied are you with the amount of time it took to receive your rebate? Would you say you are...?
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied
  4. Not at all satisfied
  98. Don't know
  99. Refused
27. **[IF APPLICABLE]** How satisfied are you with the dollar amount of your rebate? Would you say you are...?
1. Very satisfied
  2. Somewhat satisfied
  3. Not too satisfied **[FOLLOW UP: "Why do you say that?"]**
  4. Not at all satisfied **[FOLLOW UP: "Why do you say that?"]**
  98. Don't know
  99. Refused
28. **[IF BUILDING IS COMPLETE]** Is the performance of your building meeting your expectations?
1. Very satisfied
  2. Somewhat satisfied **[FOLLOW UP: "Why do you say that?"]**
  3. Not too satisfied **[FOLLOW UP: "Why do you say that?"]**
  4. Not at all satisfied **[FOLLOW UP: "Why do you say that?"]**
  98. Don't know
  99. Refused
29. In your opinion, what is the single most valuable benefit of participating in the Design Assistance program?
- [RECORD RESPONSE: \_\_\_\_\_]**
98. Don't know
  99. Refused
30. What, if anything, did you learn from your participation in the Design Assistance program about designing or building more energy-efficient buildings?
- [RECORD RESPONSE: \_\_\_\_\_]**
98. Don't know
  99. Refused



31. How do you think your participation in the program will influence your approach to new building projects in the future?

[RECORD RESPONSE: \_\_\_\_\_]

98. Don't know

99. Refused

## **BARRIERS**

This section is asked of all respondents. Questions examine market barriers, barriers to participation, and suggestions for improvement.

32. In general, what challenges or obstacles, if any, do building owners like you face when designing or building efficient buildings?

[RECORD RESPONSE: \_\_\_\_\_]

98. Don't know

99. Refused

33. What aspects of the Design Assistance program itself, if any, could discourage building owners or design teams from participating in the program?

[RECORD RESPONSE: \_\_\_\_\_]

98. Don't know

99. Refused

34. What suggestions do you have to improve the Design Assistance program?

[RECORD RESPONSE: \_\_\_\_\_]

98. Don't know

99. Refused

Those are all the questions I have for you today. Thank you for your time, and the valuable feedback you provided.

## Focus on Energy Renewable Energy Competitive Incentive Program Customer Interview Guide

Research Objectives	Item
Assess level of customer awareness; Determine how customers learned of the Program and how best to reach them	B1, B2
Identify behaviors and decision-making practices regarding renewable energy technology adoption and installation.	C1, C2
Determine barriers to Program participation and perceived benefits (energy and non-energy related) resulting from program participation and installation of renewable energy technologies.	D1-D3
Assess satisfaction with various Program components from the bidding process to implementation and payment processing	E1-E3
Assess freeridership	F1-F8
Determine spillover activities	G1-G6
Firmographics	H1-H3

### Note to Reviewer:

This RECIP interview will be delivered over the phone by Cadmus staff familiar with the program. Where possible, Cadmus will attempt to make appointments prior to contacting participants by phone, with 4-6 RECIP customers at various stages of the project.

## Introduction

### *[READ IF APPOINTMENT WAS MADE]*

Hello. I'm *[INSERT NAME]*, calling from Cadmus on behalf of Focus on Energy. Thank you for scheduling some time to talk with me about your experiences with the Renewable Energy Competitive Incentive Program.

### *[ASK IF NO APPOINTMENT WAS MADE]*

Hello. I'm *[INSERT NAME]*, calling from The Cadmus Group on behalf of Focus on Energy. We'd like to talk with you about your experiences with the Renewable Energy Competitive Incentive program sponsored by Focus on Energy. Your answers will be used as part of a study to evaluate and improve Focus on Energy's programs.

May I speak with *[INSERT CUSTOMER CONTACT NAME]*

### *[IF NEEDED]*

This phone call is designed to last about 20 minutes. Let me assure you this is not a sales call. This is a fact-finding survey only. Your individual responses will be kept confidential.

## A. Screener and Project Confirmation

*[ASK IF NO APPOINTMENT MADE]*

- A1. Our records show you are the contact person for your organization’s participation in Focus on Energy’s RECIP Program -- Is that right? *[IF NEEDED: The Renewable Energy Competitive Incentive Program provides incentives for renewable energy systems installed through a competitive proposal process]*
1. (Yes, on the phone)
  2. (No, but person can come to phone) *[START OVER FROM INTRO WITH NEW RESPONDENT]*
  3. (No, not available) *[SCHEDULE CALLBACK]*
  99. (Don’t Know) *[ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]*
  98. (Refused) *[ASK IF THERE IS SOMEONE THERE TO TALK TO, OTHERWISE TERMINATE]*
- A2. And is this a good time to talk? *[IF NEEDED AND NOT ALREADY STATED: This phone call is designed to last no longer than 20 minutes. Let me assure you this is not a sales call. We are contacting you to help Focus on Energy improve their programs. Your individual responses will be kept confidential.]*
1. (Yes) *[CONTINUE]*
  2. (No) *[SCHEDULE CALL BACK]*
  98. (Refused)

*[FOR ALL PARTICIPANTS]*

- A3. Our records show that your *[INSERT PROJECT]* was approved by Focus on Energy's RECIP program *[IF INSTALLED “and was recently installed”]*. Would you please tell me about the current stage of your renewable energy project? *[IF NEEDED : FOR EXAMPLE HOW FAR ALONG ARE YOU IN THE PROJECT’S INSTALLATION?]*
1. *[Record Response]* \_\_\_\_\_
  99. (Don’t know)
  98. (Refused)
- A4. To confirm for our records, what is your title at the company? *[DO NOT READ]*
1. (Owner)
  2. (President/CEO/COO)
  3. (Senior Vice President/Vice President/Other decision maker)
  4. (Energy Manager)
  5. (Facilities Manager)
  6. (Engineer)
  7. Other: \_\_\_\_\_
  98. (Refused)

## B. Program Awareness and Communication

B1. How did your organization learn about the RECIP program? *[DO NOT READ; MULTIPLE RESPONSES POSSIBLE]*

1. (Contact with Focus on Energy advisor or representative through phone, email, or in person)
2. (Focus on Energy monthly newsletter)
3. (Focus on Energy website)
4. (Focus on Energy workshop or event)
5. (Focus on Energy printed program materials)
6. (Contact with utility representative)
7. (Utility mailing, bill insert, or Website)
8. (Word of mouth (family, friend, or business colleague))
9. (Contacted by contractor or vendor through phone, email, or in person)
10. (Previously participated in program/received an incentive)
11. (Through a trade association or professional organization *[SPECIFY: \_\_\_\_\_]* )
12. (Other *[SPECIFY: \_\_\_\_\_]* )
99. (Don't know)
98. (Refused)

B2. In the future, how would you like to stay informed about RECIP and other opportunities to save energy and money? *[DO NOT READ, BUT PROMPT IF NECESSARY. RECORD ALL THAT APPLY.]*

1. (Contact with Focus on Energy representative through phone, email, or in person)
2. (Focus on Energy monthly newsletter)
3. (Focus on Energy website)
4. (Focus on Energy workshop, event)
5. (Focus on Energy printed program materials)
6. (Contact with utility representative)
7. (Utility mailing, bill insert, website)
8. (Contractor or vendor through phone, email, or in person)
9. (Through a trade association or professional organization)
10. Other *[SPECIFY: \_\_\_\_\_]* )
99. (Don't know)
98. (Refused)

## C. Decision Making

C1. What were the most important factors in your company's decision to submit a proposal to Focus on Energy's RECIP program and install your *[INSERT PROJECT]*? *[DO NOT READ; MULTIPLE RESPONSES POSSIBLE]*

1. (Using less energy, reducing energy consumption or energy demand)
2. (Saving money on our utility bills; lower energy bills)
3. (To obtain a program incentive)
4. (To obtain a tax credit)
5. (Environmental)
6. (Other *[SPECIFY \_\_\_\_\_]* )
99. (Don't know)
98. (Refused)

- C2. How did your company decide which type of renewable energy technology to install?
1. *[Record Response]* \_\_\_\_\_
  99. (Don't know)
  98. (Refused)

## D. Participation Benefits and Barriers

- D1. Has the *[INSERT PROJECT]* we've discussed provided benefits beyond energy savings? *[DO NOT READ; MULTIPLE RESPONSES POSSIBLE]*
1. Yes [IF YES: What were they?
    - a. (Improved our corporate image)
    - b. (Improved the sustainability of our company)
    - c. (Improved employee morale)
    - d. (Increased technical knowledge)
    - e. (Lowered maintenance costs)
    - f. (Less carbon emissions)[APPROXIMATELY HOW MUCH CARBON HAVE YOU REDUCED?]
    - g. (Less waste) *[WHAT TYPE OF WASTE, AND APPROXIMATELY HOW MUCH WASTE HAVE YOU ELIMINATED?]*
    - h. (Water savings) [APPROXIMATELY HOW MANY GALLONS OF WATER HAVE YOU SAVED?]
    - i. (Other: *[SPECIFY: \_\_\_\_\_]*)
  2. No
  99. (Don't know)
  98. (Refused)
- D2. In general, what do you see as the most challenging aspect to installing renewable energy projects? *[DO NOT READ; MULTIPLE RESPONSES POSSIBLE]*
1. (High initial cost)
  2. (Budget limitations)
  3. (Long payback period)
  4. (Lack of technical knowledge and resources to pursue renewable energy projects *[SPECIFY WHERE TECHNICAL KNOWLEDGE/RESOURCES ARE LACKING: \_\_\_\_\_]*)
  5. (Lack of corporate support for renewable energy investments)
  6. (Paperwork too complicated and time consuming) *[CAN YOU CLARIFY WHAT PART WAS MOST COMPLICATED? \_\_\_\_\_]*
  7. (Replacing equipment without affecting operations)
  8. (Funding competition for other investments/improvements within organization)
  9. (Other *[SPECIFY: \_\_\_\_\_]* )
  10. (NO CHALLENGES)
  99. (Don't know)
  98. (Refused)

- D3. What could Focus on Energy do to help your company with these challenges? *[DO NOT READ LIST; MULTIPLE RESPONSES POSSIBLE]*
1. (Nothing)
  2. (Higher incentives)
  3. (Provide upfront rewards)
  4. (Offer low-interest loans)
  5. (Simplify the paperwork/RFP process) *[HOW CAN THE RFP PROCESS BE SIMPLIFIED? \_\_\_\_\_ ]*
  6. (Provide better/more information about program *[SPECIFY WHAT TYPE OF INFORMATION THEY NEED: \_\_\_\_\_ ]*)
  7. (Other *[RECORD VERBATIM ANSWER \_\_\_\_\_ ]*)
  99. (Don't know)
  98. (Refused)

## E. Program Satisfaction and Improvement

- E1. Next, I will ask about different aspects of your participation in the RECIP program. Please tell me if you are very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with each of these areas. If something does not apply, please let me know.

Let's start with *[INSERT 1]*. Would you say you are very satisfied, someone satisfied, not too satisfied, or not at all satisfied with the... *[RECORD ONE OPTION FOR EACH. 1=VERY SATISFIED; 2=SOMEWHAT SATISFIED; 3=NOT TOO SATISFIED; 4=NOT AT ALL SATISFIED. ALLOW 99 FOR DON'T KNOW, 98 FOR REFUSED, 96 FOR NOT APPLICABLE]*

1. The competitive bidding process
  2. Proposal evaluation criteria
  3. The Focus on Energy website
  4. Communication with Focus on Energy representatives *[NOTE FOR INTERVIEWERS: Includes any contact with Focus on Energy]*
  5. Your overall experience with the Focus on Energy RECIP program
- E2. *[FOR EACH RESPONSE 1-5] Can you tell me a little more about why you gave it that rating? [OPEN END, 98 = Don't know, 99 = Refused]* \_\_\_\_\_
- E3. *[Do you have any suggestions for how Focus on Energy could improve the RECIP program? [OPEN END, 98 = Don't know, 99 = Refused]* \_\_\_\_\_

## F. Freeridership

Next I have some questions to learn more about your decision to install the [INSERT PROJECT] and the influence of the Focus on Energy RECIP.

- F1. First, would your organization have installed the [INSERT PROJECT] without the incentives offered through the RECIP program?
1. Yes
  2. No
  99. (Don't know)
  98. (Refused)
- F2. I will read four statements and would like you to select the one that best describes where you were in the planning of your project's installation when you first learned of Focus on Energy's RECIP program. *[READ ALL AND SELECT ONE]*
1. We had no formal plans for the project.
  2. We had already spoken to installation contractors but had not received any quotes for the project.
  3. We had already spoken to installation contractors and had received a quote.
  4. We had received a quote and decided upon the renewable energy system we wanted to install.
  99. (Don't know)
  98. (Refused)
- F3. Prior to participating in the RECIP, was the [INSERT PROJECT] included in your organization's capital or operating budget?
1. (Yes)
  2. (No)
  99. (Don't know)
  98. (Refused)
- F4. *[IF YES TO F1]* Without the RECIP program, would you have installed... *[READ LIST AND SELECT ONE]*
1. The same size system
  2. A smaller system
  3. No new system at all
  99. (Don't know)
  98. (Refused)
- F5. *[IF YES TO F1]* Without the RECIP incentive, would you have installed the renewable energy project... *[READ LIST; WHEN RESPONSE SELECTED, SKIP TO SECTION G]*
1. Within the same year
  2. Within one to two years
  3. Within three to five years
  99. (Don't know)
  98. (Refused)

- F6. *[ASK IF NO TO F3]* To confirm, when you say you would not have installed the same *[INSERT PROJECT]*, do you mean that without the incentive from RECIP, that you would not have installed *[INSERT PROJECT]* at all?
1. Yes *[SKIP TO SECTION G/SPILLOVER]*
  2. No
  99. (Don't know)
  98. (Refused)
- F7. *[ASK IF NO TO F3]* Without the RECIP program, would you have installed... *[READ LIST AND SELECT ONE]*
1. The same size system
  2. A smaller system
  3. No new system at all
  99. (Don't know)
  98. (Refused)
- F8. *[ASK IF NO TO F3]* Any finally, would you have installed the *[INSERT PROJECT]*, .... *[READ LIST AND SELECT ONE]*
1. Within the same year
  2. Within one to two years
  3. Within three to five years
  99. (Don't know)
  98. (Refused)

## G. Spillover

- G1. Since installing your renewable energy system, has your company installed additional renewable energy equipment at this location or others in Wisconsin for which you did not receive a Focus on Energy program incentive?
1. (Yes)
  2. (No) *[SKIP TO G4]*
  99. (Don't know) *[SKIP TO CLOSING SECTION]*
  98. (Refused) *[SKIP TO CLOSING SECTION]*
- G2. What type of renewable energy equipment did you install?
1. *[Record Response]* \_\_\_\_\_
  99. (Don't know)
  98. (Refused)



- G3. How important was your experience with the Focus on Energy RECIP Program in your decision to install additional renewable energy equipment? Would you say: [READ LIST]
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not important at all
  99. (Don't know)
  98. (Refused)
- G4. Since participating in the program, has your company made any energy efficiency improvements or installed any additional energy-efficient equipment for which you did not receive a Focus on Energy program incentive? [IF NEEDED: By energy-efficient products, I mean high efficiency lighting such as T5s or high performance T8s; high efficiency motors and variable speed drives; high efficiency air conditioners and heat pumps, efficient heating or water heating equipment, etc.]
1. (Yes)
  2. (No) [SKIP TO CLOSING SECTION]
  99. (Don't know) [SKIP TO CLOSING SECTION]
  98. (Refused) [SKIP TO CLOSING SECTION]
- G5. What type of energy-efficient improvements or equipment, and how many did your organization install? [MULTIPLE RESPONSE] [OPEN END. 99= Don't Know. 98= Refused. 96=N/A].
1. (RECORD EQUIPMENT: \_\_\_\_\_ QUANTITY: \_\_\_\_\_)
  2. (RECORD EQUIPMENT: \_\_\_\_\_ QUANTITY: \_\_\_\_\_)
  3. (RECORD EQUIPMENT: \_\_\_\_\_ QUANTITY: \_\_\_\_\_)
  4. (RECORD EQUIPMENT: \_\_\_\_\_ QUANTITY: \_\_\_\_\_)
- G6. How important was your experience with the Focus on Energy RECIP Program in your decision to purchase and install additional efficient equipment? Would you say:
1. Very important
  2. Somewhat important
  3. Not too important
  4. Not important at all
  99. (Don't know)
  98. (Refused)

## H. Customer Firmographics

Finally, I would like to ask you some questions about your company. These questions will help us with our analysis and your answers are strictly confidential.

- H1. Does your organization lease or own the facility served by the [INSERT PROJECT]?
1. (Lease)
  2. (Own)
  3. (Other [SPECIFY: \_\_\_\_\_])
  99. (DON'T KNOW)
  88. (REFUSED)

H2. What is the approximate heated or cooled square footage of this facility? *[NUMERIC OPEN END UP TO 10,000,000]*

- 1. *[RECORD NUMBER: \_\_\_\_\_]*
- 99. DON'T KNOW
- 88. REFUSED

H3. How many people are employed at this location?

- 1. *[RECORD NUMBER: \_\_\_\_\_]*
- 99. DON'T KNOW
- 88. REFUSED

***Thank you. We appreciate your help with this survey. You may also be contacted for an on-site visit if you have not been contacted already. Have a nice day.***

*Market Awareness and Understanding Survey*

## Focus on Energy Marketing Awareness and Understanding Survey

### Research Objectives:

1. Assess the general population of residential customers (approximately 600 surveys) to determine how the level of general awareness and understanding of Focus on Energy’s residential energy-efficiency programs changes over time, after the 2013 umbrella marketing campaign and prior to the launch of the 2014 umbrella marketing campaign.
2. As part of this work, the Evaluation Team will also leverage existing program survey efforts to collect data on the following, and analyze that data against the general awareness survey to identify key themes and trends from which we can base our recommendations:
  - Identify the ways Focus on Energy residential customers learn about the programs (bill inserts, direct mail, television, etc.).
  - Assess Focus on Energy’s residential customers’ knowledge of residential program specifics (e.g., rebate amounts, eligibility requirements).
  - Understand residential customer awareness and understanding levels among different customer demographics and segments.
  - Establish a point of comparison between program-specific measures of awareness and understanding.

Researchable Questions	Question
To what degree are customers aware that Focus on Energy offers any residential energy-efficiency programs?	C1, D1-D2, F6
To what degree are customers aware of specific Focus on Energy residential energy-efficiency programs?	E1, E2, F1-F7
How are customers learning about residential energy efficiency programs?	C1-C2, D2, H11, H14
To what extent do customers understand the benefits of the Focus on Energy residential programs?	F8, F10, G1e
How are customers motivated to move along the engagement spectrum from awareness to participation? How willing are customers to save energy?	F9, H4, H5, H8, H9
What are the barriers to participation?	B1-B5, H4, H5, H1, H2, H3, H10
What helps facilitate moving through this engagement spectrum?	H1, F8, F9, G1
What has been experience of participating customers, including their understanding and familiarity with the services they received?	G1-G5
What relationship exists between participation in residential programs and awareness and understanding, in terms of their perceived value of service and with Focus on Energy as a partner in helping them manage energy costs?	G2-G5, H2, H5
What are customer awareness, knowledge, attitudes, (i.e., interest, concern intention), and experience with taking energy savings actions?	H1-H14
What are customer demographic and household characteristics and opinions about the economy? (age, income, children, family size, life stage)	I1-I14, B1-B5

\*Core questions from Focus on Energy process surveys  
 +Questions from the 2011 Midwest Energy Survey (MES)

Interviewer instructions are in green.

CATI programming instructions are in red.

List items that shouldn't be read are in parenthesis.

Audience: This survey is for the general population of Wisconsin.

Focus on Energy program participants get asked F4-F6 and Section G in addition to the rest of the survey.

Quotas:

*N=600*

*Zone 1 = 228*

*Zone 2 = 138*

*Zone 3 = 138*

*Zone 4 = 96*

## A. Introduction

- A1. Hello, my name is [INTERVIEWER NAME] from [FIRM]. I'm calling on behalf of a statewide research initiative. We are conducting an important study among Wisconsin residents to learn about what you have heard recently about energy use. We are not selling anything. May I speak with the person who is primarily responsible for your household's energy-related decisions? [IF NEEDED: This would be the person who is responsible for making large home improvement decisions.] [IF TRANSFERRED TO A NEW PERSON, READ INTRODUCTION AGAIN. IF NOT ONE IS AVAILABLE, SCHEDULE A CALLBACK.]
1. (Yes, available)
  2. (Not available right now) [SCHEDULE A CALLBACK]
  88. (Refused) [THANK AND TERMINATE]
- A2. Thank you. Your answers are confidential and will only be used for research purposes. This call may be monitored or recorded for quality assurance purposes. [IF NEEDED: We are not selling anything and this study will take about 20 minutes of your time.]
1. (Continue)
  88. (Refused) [THANK AND TERMINATE]

A3. What county in Wisconsin do you live in? [RECORD ONE RESPONSE; IF NOT ON LIST THANK AND TERMINATE]

Response Code	County	Zone
1	Adams	2
2	Ashland	4
3	Barron	4
4	Bayfield	4
5	Brown	3
6	Buffalo	4
7	Burnett	4
8	Calumet	3
9	Chippewa	4
10	Clark	4
11	Columbia	2
12	Crawford	2
13	Dane	2
14	Dodge	2
15	Door	3
16	Douglas	4
17	Dunn	4
18	Eau Claire	4
19	Florence	3
20	Fond du Lac	2
21	Forest	3
22	Grant	2
23	Green	2
24	Green Lake	2
25	Iowa	2
26	Iron	4
27	Jackson	4
28	Jefferson	2
29	Juneau	2
30	Kenosha	1
31	Kewaunee	3
32	La Crosse	4
33	LaFayette	2
34	Langlade	3
35	Lincoln	3
36	Manitowoc	3
37	Marathon	3
38	Marinette	3

Response Code	County	Zone
39	Marquette	2
40	Menominee	3
41	Milwaukee	1
42	Monroe	4
43	Oconto	3
44	Oneida	3
45	Outagamie	3
46	Ozaukee	1
47	Pepin	4
48	Pierce	4
49	Polk	4
50	Portage	3
51	Price	4
52	Racine	1
53	Richland	2
54	Rock	2
55	Rusk	4
56	Saint Croix	4
57	Sauk	2
58	Sawyer	4
59	Shawano	3
60	Sheboygan	1
61	Taylor	4
62	Trempealeau	4
63	Vernon	4
64	Vilas	3
65	Walworth	1
66	Washburn	4
67	Washington	1
68	Waukesha	1
69	Waupaca	3
70	Waushara	2
71	Winnebago	3
72	Wood	3
73	Other [THANK AND TERMINATE]	
99	Don't know [THANK AND TERMINATE]	
88	Refused [THANK AND TERMINATE]	

Back-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 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 will help to improve programs that assist customers in saving energy. Your answers are confidential and will be used only for research purposes.

## B. Economy

First, I would like to ask you some general questions about household costs.

- B1. +I am going to begin by reading a list of issues. Please indicate whether you are not at all concerned, somewhat concerned, or very concerned about each issue. How concerned are you about ... [READ EACH] [RECORD 1=NOT AT ALL CONCERNED, 2=SOMEWHAT CONCERNED, 3=VERY CONCERNED, 99=DON'T KNOW, 88=REFUSED] [RANDOMIZE]
- B1a. The economy
  - B1b. National security
  - B1c. Climate change
  - B1d. Public health
  - B1e. The environment
  - B1f. Energy
  - B1g. Education
  - B1h. Crime
- B2. +Have you been making greater efforts recently to control costs than you would have done four years ago?
- 1. (Yes)
  - 2. (No) [SKIP TO SECTION C]
  - 99. (Don't know)
  - 88. (Refused)
- B3. +Have you deferred any larger purchases you would normally have made?
- 1. (Yes)
  - 2. (No) [SKIP TO B5]
  - 99. (Don't know) [SKIP TO B5]
  - 88. (Refused) [SKIP TO B5]
- B4. +What purchase(s) did you defer?
- 1. [RECORD ANSWER]
  - 99. (Don't know)
  - 88. (Refused)



- B5. +Which one of these categories is your highest priority for controlling spending? [READ ENTIRE LIST AND RECORD ONE RESPONSE]
1. Housing-related costs
  2. Transportation
  3. Food
  4. Medical costs and health care
  5. Electricity and other energy utilities
  6. Telecommunications, including phone, Internet, and monthly TV charges
  7. Entertainment and recreation
  8. Education and child care
  9. Clothing
  99. (Don't know)
  88. (Refused)

## C. General Awareness

I have a few questions about information you may have seen or heard about energy efficiency.

- C1. What companies or types of company are you aware of that promote energy efficiency in Wisconsin? [DON'T READ LIST RECORD ALL THAT APPLY]
1. (Focus on Energy)
  2. (Public Service Commission of Wisconsin)
  3. (Utility company; Alliant, WPS, Xcel, We Energies, MG&E, )
  4. (Government officials/representatives)
  5. (Retailers (ex. Walmart, Home Depot, Sears))
  6. (Manufacturers (ex. Lighting companies: GE, Philips))
  7. (ENERGY STAR)
  8. (Other [SPECIFY: \_\_\_\_\_] )
  9. (None)
  99. (Don't know)
  88. (Refused)

- C2. Where have you seen or heard about energy efficiency? [DON'T READ LIST RECORD ALL THAT APPLY]
1. (Radio)
  2. (TV)
  3. (Newspaper)
  4. (Internet search)
  5. (Website [SPECIFY: Which website? \_\_\_\_\_] )
  6. (Word of mouth (family, friend, colleague))
  7. (Utility bill insert)
  8. (Other mailing)
  9. (Contractor, energy auditor)
  10. (Community event [SPECIFY: Which community event? \_\_\_\_\_] )
  11. (Booth at the county or state fair)
  12. (Other, [SPECIFY: \_\_\_\_\_])
  13. (Nowhere, haven't seen or heard anything about energy efficiency)
  99. (Don't know/don't remember)
  88. (Refused)

## D. Awareness of Focus on Energy

[ASK IF C1≠1 (Focus on Energy)]

- D1. +Have you heard of Wisconsin's Focus on Energy program? [IF NEEDED: Focus on Energy helps Wisconsin residents lower their energy consumption and costs by making their homes more energy efficient. They offer cash-back rewards and incentives for making energy efficiency improvements.]
1. (Yes)
  2. (No) [SKIP TO F1]
  99. (Don't know) [SKIP TO F1]
  88. (Refused) [SKIP TO F1]
- D2. +How did you first hear about Focus on Energy? [DON'T READ LIST; RECORD ALL THAT APPLY]
1. (Radio)
  2. (TV)
  3. (Newspaper)
  4. (Internet search)
  5. (Website [SPECIFY: Which website? \_\_\_\_\_] )
  6. (Word of mouth (family, friend, colleague))
  7. (Utility bill insert)
  8. (Other mailing)
  9. (Contractor, energy auditor)
  10. (Community event [SPECIFY: Which community event? \_\_\_\_\_] )
  11. (Booth at the county or state fair)
  12. (Other, [SPECIFY: \_\_\_\_\_])
  99. (Don't know/don't remember)
  13. (Refused)

## E. Specific Program Awareness

Now I would like to talk to you about your awareness of specific Focus on Energy programs.

- E1. \*Which programs, incentives, or projects are you aware of? [DO NOT READ; RECORD ALL THAT APPLY]
1. (Home Performance with ENERGY STAR)
  2. (New Homes)
  3. (Appliance Recycling)
  4. (Lighting and Appliances)
  5. (Express Energy Efficiency)
  6. (Residential Rewards)
  7. (Geothermal Heat Pumps)
  8. (Solar Hot Water Systems)
  9. OMIT
  10. OMIT
  11. OMIT
  12. OMIT
  13. (Other [SPECIFY: \_\_\_\_\_])
  99. (Don't know)
  88. (Refused)
- E2. I'm going to read you a list of energy-efficiency programs offered by Wisconsin's Focus on Energy program. Please tell me how familiar you are with each one. Let's start with [INSERT EACH ONE E2a-E2g]. Would you say you are very familiar, somewhat familiar, not too familiar, or not at all familiar? [RANDOMIZE LIST] [1=very familiar, 2=somewhat familiar, 3=not too familiar, 4=not at all familiar, 99=Don't know, and 88=Refused]
- E2a. Home Performance with ENERGY STAR. This program provides home energy assessments that pinpoint how to make your home more energy efficient.
  - E2b. New Homes Program. This program pairs prospective homeowners with builders and energy experts to build new homes that are more efficient.
  - E2c. Appliance Recycling Program. This program offers free pickup and recycling of old refrigerators and freezers and a \$50 reward for each working appliance you recycle.
  - E2d. Lighting and Appliance Program. This program offers instant, in-store discounts on a variety of energy-efficient lighting and water-saving products at retailers throughout Wisconsin.]
  - E2e. Express Energy Efficiency Program. This program provides free, professional installation of energy-saving products that can help homeowners save on utility bills.
  - E2f. Residential Rewards Program. This program offers hundreds of dollars in Cash-Back Rewards for heating and cooling equipment, water heating equipment, and air sealing and attic insulation.
  - E2g. Renewable Energy Program. This program offers cash-back rewards for renewable energy installations such as geothermal heat pumps and solar hot water systems.

## F. Program Participation, Motivation, and Benefits

- F1. Have you installed any of the following equipment since 2011? [READ EACH AND RECORD 1=YES, 2=NO, 99=DON'T KNOW, AND 88=REFUSED] [IF NO/DK/RF TO ALL EQUIPMENT SKIP TO F4]
- F1a. Refrigerator
  - F1b. Clothes washer
  - F1c. Water heater
  - F1d. Furnace
- F2. Did you receive an incentive, discount, or cash-back reward for purchasing [INSERT EACH YES FROM F1]?
- 1. (Yes)
  - 2. (No) [SKIP TO F4]
  - 99. (Don't know) [SKIP TO F4]
  - 88. (Refused) [SKIP TO F4]
- F3. Which company or type of company provided the discount, cash-back reward, or incentive for the [INSERT EACH FROM F1]? [DON'T READ LIST RECORD ALL THAT APPLY]
- 1. (Focus on Energy)
  - 2. (Utility company; Alliant, WPS, Xcel, We Energies, MG&E, )
  - 3. (Retailers (ex. Ace, Walmart, Home Depot, Sears))
  - 4. (Manufacturers (ex. Amana, GE, Philips))
  - 5. (Other [SPECIFY: \_\_\_\_\_] )
  - 99. (Don't know)
  - 88. (Refused)
- F4. Have you received an incentive, discount, or cash-back reward for purchasing **other** energy efficient products, services, or appliances for your home since 2011? [IF NEEDED: This could include compact fluorescent light bulbs (swirly bulbs), energy efficiency appliances, central air conditioner, home weatherization such as caulking or air sealing, recycling an old refrigerator or freezer or getting a home energy assessment or an insulation upgrade.]
- 1. (Yes)
  - 2. (No) [SKIP TO INSTRUCTION BEFORE F8]
  - 99. (Don't know) [SKIP TO INSTRUCTION BEFORE F8]
  - 88. (Refused) [SKIP TO INSTRUCTION BEFORE F8]

[ASK IF F4=1]

F5. What products or services did you purchase to receive the incentive, discount, or cash-back reward? [DON'T READ LIST; SELECT ALL THAT APPLY]

1. (Energy efficient appliance)
2. (Recycled an old refrigerator or freezer)
3. (Central air conditioner)
4. (Compact fluorescent light bulbs (swirly bulbs))
5. (Home energy assessment or audit)
6. (Insulation upgrade)
7. (Home weatherization including caulking or air sealing)
8. (Other [SPECIFY: \_\_\_\_\_] )
99. (Don't know)
88. (Refused)

[ASK IF F4=1]

F6. +What company or type of company provided the discount, cash-back reward, or incentive for these products or services? [DON'T READ LIST RECORD ALL THAT APPLY]

1. (Focus on Energy) [SKIP TO F8]
2. (Utility company; Alliant, WPS, Xcel, We Energies, MG&E, )
3. (Retailers (ex. Ace, Walmart, Home Depot, Sears))
4. (Manufacturers (ex. Amana, GE, Philips))
5. (Other [SPECIFY: \_\_\_\_\_] )
99. (Don't know)
88. (Refused)

[ASK IF FOCUS ON ENERGY NOT MENTIONED IN F6 OR ANY IN F3 AND C1=1 (Focus on Energy) OR D1=1 (yes)]

F7. +Have you received any discounts, cash-back rewards or rebates from Focus on Energy since 2011?

1. (Yes)
2. (No) [SKIP TO F9]
99. (Don't know) [SKIP TO F9]
88. (Refused) [SKIP TO F9]

[ASK IF ANY IN F3=1 OR F6=1 OR F7=1]

F8. \*What motivated you to participate in the Focus on Energy program? [DO NOT READ LIST; RECORD ALL THAT APPLY]

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. (Other [SPECIFY: \_\_\_\_\_] )
99. (Don't know)
88. (Refused)

[ASK IF F1=1 (yes) TO ANY EQUIPMENT TYPE OR F4=1]

- F9. Did an equipment failure prompt you to think about replacing or upgrading this equipment with energy efficient equipment?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

[ASK IF ANY IN F3=1 OR F6=1 OR F7=1]

- F10. What would you say are the main benefits your household has experienced as a result of participating in the Focus on Energy program? [DO NOT READ LIST; RECORD ALL THAT APPLY; PROBE FOR MULTIPLE RESPONSES]
1. (The incentive)
  2. (Energy savings)
  3. (Lower energy bills (i.e. – saved money))
  4. (Increased comfort (better or brighter lighting) )
  5. (Good for the environment)
  6. (Other [SPECIFY: \_\_\_\_\_] )
  7. (No benefits)
  99. (Don't know)
  88. (Refused)

[ASK SECTION G ASK IF ANY IN F3=1 OR F6=1 OR F7=1]

## G. Satisfaction with Focus on Energy

I'd like to talk with you about your satisfaction with Focus on Energy.

- G1. How satisfied are you with the following aspects of Focus on Energy? Please answer with very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied and if something doesn't apply, let me know. The first item is ... [READ EACH] [ROTATE G1a-G1e. ALWAYS ASK G1f LAST.] [RECORD 1=VERY SATISFIED, 2=SOMEWHAT SATISFIED, 3=NOT TOO SATISFIED, 4=NOT AT ALL SATISFIED, 96=NOT APPLICABLE, 99=DON'T KNOW, AND 88=REFUSED] [REPEAT SCALE AS NEEDED]
- G1a. Selection of equipment
  - G1b. Ease of participation
  - G1c. The Focus on Energy website
  - G1d. Quality of work
  - G1e. Anticipated cost savings as a result of your project
  - G1f. Overall satisfaction with Focus on Energy's residential program
- G2. +Would you take advantage of the services offered by Focus on Energy again?
1. (Yes)
  2. (No)
  99. (Don't know)
  88. (Refused)

- G3. +Would you refer a friend to Focus on Energy?  
 1. (Yes)  
 2. (No)  
 99. (Don't know)  
 88. (Refused)
- G4. How valuable do you think your participation in the Focus on Energy program was in saving energy and reducing energy costs in your home? Would you say ... [READ LIST]  
 1. Very valuable [SKIP TO SECTION H]  
 2. Somewhat valuable [SKIP TO SECTION H]  
 3. Not too valuable  
 4. Not valuable at all  
 99. (Don't know) [SKIP TO SECTION H]  
 88. (Refused) [SKIP TO SECTION H]
- G5. Why do you say your participation in the Focus on Energy program was not very valuable?  
 1. [RECORD ANSWER]  
 99. (Don't know)  
 88. (Refused)

## H. Energy-Efficiency Attitudes and Barriers

[ASK EVERYONE]

Now I'd like to know a little more about your home's energy use.

- H1. How would you rate your knowledge of the different ways you can save energy in your home? Would you say ... [READ LIST]  
 1. Very knowledgeable  
 2. Somewhat knowledgeable  
 3. Not too knowledgeable  
 4. Not at all knowledgeable  
 99. (Don't know)  
 88. (Refused)
- H2. +Which of the following best describes how far your household is willing to go to save energy if it means saving some money too? [READ LIST AND RECORD ONE RESPONSE]  
 1. We would not do anything differently to reduce our electricity consumption  
 2. We would reduce consumption only if the cost savings are very high  
 3. We would reduce consumption only when it is convenient  
 4. We would put up with a little inconvenience to reduce our consumption  
 5. We would go out of our way to cut down our electric consumption  
 6. (Other [SPECIFY: \_\_\_\_\_] )  
 99. (Don't know)  
 88. (Refused)

- H3. How energy-efficient would you say your home is currently? Would you say ... **[READ LIST]**
1. Very inefficient
  2. Somewhat inefficient
  3. Somewhat efficient
  4. Very efficient
  99. (Don't know)
  88. (Refused)
- H4. Which of the following statements describes how easy or difficult reducing energy is in your home? Is it ... **[READ LIST]**? **[RECORD ONE ANSWER]**
1. Very easy
  2. Somewhat easy if we make minor adjustments
  3. Not easy unless we make major adjustments
  4. Not at all easy
  99. (Don't know)
  88. (Refused)
- H5. How interested are you in reducing energy use in your home? Are you ... **[READ LIST]**
1. Very interested
  2. Somewhat interest
  3. Not too interested
  4. Not at all interested
  99. (Don't know)
  88. (Refused)
- H6. +Have you taken any specific steps in the past year to reduce your home's energy usage?
1. (Yes)
  2. (No) **[SKIP TO H8Error! Reference source not found.]**
  99. (Don't know) **[SKIP TO H8]**
  88. (Refused) **[SKIP TO H8]**
- H7. Please describe what you have done to reduce your home's energy use. **[RECORD ALL THAT APPLY; DO NOT READ LIST]**
1. (Got more efficient lights/light bulbs)
  2. (Turned off lights more consistently)
  3. (Bought more efficient appliances/electronics)
  4. (Turned off appliances/electronics more consistently)
  5. (Unplugged electronics and appliances when not in use)
  6. (Adjusted the thermostat)
  7. (Added insulation to the home)
  8. (Weatherized, caulked, air sealed home)
  9. (Got new windows/doors)
  10. (Other **[SPECIFY: \_\_\_\_\_]** )
  99. (Don't know)
  88. (Refused)



- H8. Does your household have specific plans within the next year – that is by next Fall 2014 – to make energy improvements to your home that will save electricity?
1. (Yes)
  2. (No) [SKIP TO H10]
  99. (Don't know) [SKIP TO H10]
  88. (Refused) [SKIP TO H10]
- H9. What type of improvements are you planning that will save electricity in your home? [RECORD ALL THAT APPLY; DO NOT READ LIST]
1. (Install more efficient lights/light bulbs)
  2. (Turn off lights more consistently)
  3. (Buy more efficient appliances/electronics)
  4. (Turn off appliances/electronics more consistently)
  5. (Unplug electronics and appliances when not in use)
  6. (Adjust the thermostat)
  7. (Add insulation to the home)
  8. (Weatherize, caulk, air seal home)
  9. (Get new windows/doors)
  10. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)
- H10. \*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: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)
- H11. How often do you receive information from your utility about energy saving opportunities? Would you say .... [READ LIST]
1. Frequently
  2. Occasionally
  3. Rarely
  4. Never [SKIP TO H13]
  99. (Don't know)
  88. (Refused) [SKIP TO H13]

- H12. How useful do you find this information? Would you say ...[\[READ LIST\]](#)
1. Very useful
  2. Useful, but redundant
  3. Generally useful, but not specific enough
  4. Not useful at all
  99. (Don't know)
  88. (Refused)
- H13. Which of the following messages would motivate you the most to make energy efficiency upgrades in your home? [\[READ LIST; SELECT ONE\]](#)
1. Environmental benefits and impacts
  2. Increased comfort of your home
  3. Ease of making energy efficient upgrades
  4. Energy savings
  5. Money Savings
  6. Increasing value of your home
  7. Success stories from family or friends or neighbors
  8. Wasting less energy and money
  99. (Don't know)
  88. (Refused)
- H14. Where do you look for information about energy efficiency programs and ways to save energy in your home?  
[\[DO NOT READ RECORD ALL THAT APPLY\]](#)
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)
  99. (Don't know)
  88. (Refused)

## I. Demographics

Finally, I have few questions about you and your household. These are for classification purposes only. All of your answers are confidential.

11. +Do you own or rent this residence?
1. (Own)
  2. (Rent/lease)
  3. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don't know)
  88. (Refused)
12. +Is your home a ... [READ LIST]
1. Single family home
  2. Row or townhouse
  3. A unit in a multi-family structure
  4. A mobile home or house trailer
  5. Something else [SPECIFY: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)
13. +In approximately what year was your home built?
1. [RECORD ANSWER: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)
14. How long have you lived in your home? [READ LIST IF NEEDED]
1. (Less than one year)
  2. (1 year to less than 3 years)
  3. (3 years to less than 5 years)
  4. (5 years to less than 10 years)
  5. (10 years or more)
  99. (Don't know)
  88. (Refused)
15. +Approximately how many square feet of living space does your home have?
1. [RECORD ANSWER: \_\_\_\_\_]
  99. (Don't know)
  88. (Refused)

16. +Which utility provides your electricity? [DO NOT READ LIST; RECORD ONE ANSWER]
1. (Wisconsin Power & Light, WPL (Alliant Energy))
  2. (Madison Gas & Electric (MG&E))
  3. (We Energies (Wisconsin Electric Power Company))
  4. (Wisconsin Public Service Corporation (“Pub Service”, Intergys))
  5. (Xcel Energy (Northern States Power Company, NSP))
  6. (Other [SPECIFY: \_\_\_\_\_] )
  99. (Don’t know)
  88. (Refused)
17. +Which utility provides your natural gas? [READ LIST IF NECESSARY]
1. (Wisconsin Power & Light, WPL (Alliant Energy))
  2. (Madison Gas & Electric (MG&E))
  3. (We Energies (Wisconsin Electric Power Company))
  4. (Wisconsin Public Service Corporation (“Pub Service”, Intergys))
  5. (Xcel Energy (Northern States Power Company, NSP))
  6. (Other [SPECIFY: \_\_\_\_\_] )
  7. (Not applicable, we don’t use natural gas)
  99. (Don’t know)
  88. (Refused)
18. \*Which of the following categories best represents your age? Please stop me when I get to the appropriate category. [READ LIST]
1. 18-24
  2. 25-34
  3. 35-44
  4. 45-54
  5. 55-64
  6. 65 or older
  99. (Don’t know)
  88. (Refused)
19. +How many people in each of the following age categories live in your household most of the year?
1. Under 18 years old [RECORD NUMBER: \_\_\_\_\_]
  2. 18 through 64 [RECORD NUMBER: \_\_\_\_\_]
  3. 65 and above [RECORD NUMBER: \_\_\_\_\_]
  99. (Don’t know)
  88. (Refused)

- I10. +What is the highest level of education you have completed? [\[READ LIST\]](#)
1. Some high school
  2. High school graduation
  3. Some technical school or college
  4. Technical school graduation (associates degree)
  5. College graduation (bachelor's degree)
  6. Advanced degree (master's degree or higher)
  99. (Don't know)
  88. (Refused)
- I11. What is your employment status? Would you say ... [\[READ LIST\]](#)
1. Employed full-time
  2. Employed part-time
  3. Not employed
  4. Retired
  5. Something else [\[SPECIFY: \\_\\_\\_\\_\\_\]](#)
  99. (Don't know)
  88. (Refused)
- I12. +Which of the following income categories best describes your total annual household income in 2012, before taxes? Please stop me when I get to the right category. [\[READ LIST\]](#)
1. Less than \$25,000
  2. \$25,000 to less than \$50,000
  3. \$50,000 to less than \$75,000
  4. \$75,000 to less than \$100,000
  5. \$100,000 or more
  99. (Don't know)
  88. (Refused)
- I13. What is your current marital status? Are you ... [\[READ LIST\]](#)
1. Married
  2. Partnered or in a committed relationship
  3. Single
  4. Separated, divorced, or widowed
  5. Something else
  88. Refused
- I14. +Gender [\[INTERVIEWER RECORD: DO NOT READ\]](#)
1. (Female)
  2. (Male)

Those are all the questions we have. We appreciate your input. Thank you for your time