

PROCESS EVALUATION

Existing Facilities Program

Final Report

Prepared for

**The New York State
Energy Research and Development Authority**

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ABSTRACT AND KEY WORDS

This report presents the results of from a brief process evaluation of NYSERDA's Existing Facilities Program, conducted in conjunction with a larger market characterization and assessment (MCA) study. Findings are from process-related questions included the MCA surveys of 69 end users and 39 service providers conducting in performance-based incentive projects through Existing Facilities.

Program satisfaction is high among both participating end users and service providers, although nearly half of service providers expressed dissatisfaction with the length of time to incentive receipt. Awareness of gas incentives and understanding of performance-based incentives is high, although about one-quarter of the market lags. Both end users and service providers value non-financial program elements as well as program incentives, especially NYSERDA's reputation as a trustworthy source of information and a source of technical expertise. There is considerable confusion among participating end users and, to a lesser but still noteworthy degree, service providers over the existence of both utility programs and Existing Facilities. Finally, service providers reported improved or unchanged relationships with NYSERDA subsequent to a 2008 program change that enabled end users to directly apply to the program without a service provider.

Recommendations are offered on ensuring service providers know the project incentive status, encouraging existing participants to access the other types of incentives available, continue program branding to convey NYSERDA's leadership in energy efficiency, taking steps to ensure program materials are as simple and clear as possible, and conveying in their interactions with service providers NYSERDA's appreciation and gratitude for their support.

KEY WORDS

Process evaluation

Commercial energy efficiency

Performance-based incentives

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EXECUTIVE SUMMARY

The **New York Energy \$martSM** programs are funded by an electric distribution System Benefits Charge (SBC) paid by customers of Central Hudson Gas and Electric Corporation, Consolidated Edison Company of New York, Inc., New York State Electric and Gas Corporation, National Grid, Orange and Rockland Utilities, and Rochester Gas and Electric Corporation. All customers who pay into the SBC are eligible to participate in the programs, which are administered by The New York State Energy Research and Development Authority (NYSERDA), a public benefit corporation established in 1975.

NYSERDA's Existing Facilities Program offers a portfolio of incentive opportunities promoting energy efficiency and demand management to commercial and industrial customers that pay into the SBC. There are two types of Existing Facilities incentives: pre-qualified and performance-based. Pre-qualified electric and gas savings incentives encourage customers working on small-sized energy projects and equipment replacement projects to purchase and install more energy efficient measures. Performance-based incentives are for customers or service providers working on large-scale projects achieving significant gas or electric consumption reductions. The incentives are typically higher than those for pre-qualified projects. The performance-based projects require an engineering analysis and are potentially subject to measurement and verification requirements.

This report provides a brief process evaluation of Existing Facilities performance-based component that was conducted in conjunction with a larger market characterization and assessment (MCA) evaluation. The process evaluation team added questions to surveys completed in the summer of 2011 with 69 participating end users and 39 participating service providers conducting performance-based projects. The survey questions explored topics about which the Existing Facilities program manager was particularly interested in receiving participant feedback. These topics include:

- Satisfaction with program processes and timeliness
- Whether any program components constitute barriers to participation; especially, barriers that limit the number of performance-based projects and natural gas efficiency projects
- Value of participation
- Program value in light of the availability of utility incentives for nonresidential retrofits
- Service provider response to a new program feature in 2008 that enabled customers to directly apply to the program (the prior program accepted applications only from service providers)

CONCLUSIONS AND RECOMMENDATIONS

Satisfaction

Conclusion: Program satisfaction is high among both participating end users and service providers; although close to half of all surveyed service providers indicated some dissatisfaction with the turnaround time between application submittal and incentive receipt. Few contacts expressed dissatisfaction with M&V processes and several appreciated M&V because it assures project quality.

Recommendation: Because service providers seem to be the most affected by processing delays, focus on providing incentive application status updates to service providers. Consider providing automated status updates on projects to free up program staff resources for other purposes. Support service providers in setting appropriate expectations by publicizing the typical length of time for each stage of NYSERDA review.

Barriers

Conclusion: Among surveyed end users and service providers, awareness of gas incentives and understanding of performance-based incentives is moderate. Nearly one-quarter of participating end users and half of nonparticipating end users that use natural gas at their facilities did not know about the Existing Facilities gas savings incentives. Under two-thirds of nonparticipating service providers with awareness of the program describe themselves as confident in understanding the difference between performance-based and pre-qualified incentives. One participating service provider also reported lacking confidence in understanding the two incentive approaches, as did one-fifth of office end users.

Recommendation: Provide all participating end users and service providers, regardless of project type, with a marketing piece (letter or brochure) designed specifically to inform participants, in a simple, compelling way, of the variety of incentives available. Increase marketing to nonparticipating service providers, clearly describing the performance-based incentive approach.

Value of Participation

Conclusion: Although the financial incentives are a primary value of participation, both end users and service providers also value non-financial program elements, especially NYSERDA's reputation as a trustworthy source of information and a source of technical expertise.

Recommendation: Program branding through its marketing collateral, descriptive information, and application forms should explicitly, as well as subtly, convey NYSERDA's leadership in energy efficiency and standards for assuring that project savings meet expectations. Continue to offer assistance with project development to end users and service providers.

Multiple Programs in the Marketplace

Conclusion: There is considerable confusion among participating end users and, to a lesser but still noteworthy degree, service providers over the existence of both utility programs and NYSERDA's Existing Facilities Program. Service providers appear to be encouraging "incentive shopping" among the programs available to their customers, to get them the best value. The comments of some service providers suggest clear program information is more readily obtained for Existing Facilities than for utility programs, yet the comments of some end users suggest that they found information on Existing Facilities to be confusing. Finally, many end users were unaware whether their utilities offered similar programs, suggesting that Existing Facilities currently benefits from low market awareness of these other programs.

Recommendation: Existing Facilities will benefit from program descriptions and application forms that are simple and clear. Program staff might obtain utility program descriptions and application forms and compare Existing Facility materials with utility materials to appreciate what market actors see, identify potential areas for improvement, and discover opportunities to highlight Existing Facilities and NYSERDA value in a manner that compares favorably to utility program information. Finally, program staff might gain insight on the clarity of program materials simply by asking nontechnical staff at NYSERDA to provide feedback on the materials.

Applications Accepted from End Users, as well as Service Providers

Conclusion: Even though a 2008 program feature enabled end users to directly apply to the program instead of applying through service providers, program participation continues to be of importance to service providers' businesses. Service providers are as likely to have experienced improved relationships with NYSERDA as unchanged relationships; only a few reported a deterioration of their relationship with NYSERDA.

Recommendation: Program objectives should explicitly include providing service providers with excellent quality of service, including prompt responses, when interacting with them. Convey through words and actions NYSERDA's appreciation and gratitude for their support. This market stance becomes part of NYSERDA's brand.

INTRODUCTION

The **New York Energy \$martSM** programs are funded by an electric distribution System Benefits Charge (SBC) paid by customers of Central Hudson Gas and Electric Corporation, Consolidated Edison Company of New York, Inc. (ConEdison), New York State Electric and Gas Corporation, National Grid, Orange and Rockland Utilities, and Rochester Gas and Electric Corporation. The programs are available to all electricity distribution customers that pay into the System Benefits Charge (SBC). The New York State Energy Research and Development Authority (NYSERDA), a public benefit corporation established in 1975, began administering the SBC funds in 1998 through NYSEDA's **New York Energy \$martSM** Program. During 2008, several changes arising from the New York State Public Service Commission's (PSC's) Energy Efficiency Portfolio Standard (EEPS) proceeding have affected NYSEDA's **New York Energy \$martSM** Program portfolio and evaluation efforts. The PSC's June 23, 2008, EEPS Order called for an increase in System Benefits Charge collections and a ramp-up of program efforts by NYSEDA and the state's six investor-owned electricity transmission and distribution utilities to meet New York's "15-by-15" electricity reduction goal. NYSEDA complied with the PSC's Order by submitting a Supplemental Revision to the SBC Operating Plan, incorporating approximately \$80 million per year in additional funds for five new or expanded *Fast Track* programs, as well as for general awareness, administration, and evaluation associated with those programs.

1.1 PROGRAM OVERVIEW¹

NYSERDA's Existing Facilities Program offers a portfolio of incentive opportunities promoting energy efficiency and demand management to commercial and industrial customers that pay into the SBC. NYSEDA offers Existing Facilities through Program Opportunity Notice (PON) 1219. The program is a consolidation of two prior NYSEDA programs – the Peak Load Management Program (PLMP) and the Enhanced Commercial and Industrial Performance Program (ECIPP), and provides incentives for projects with both gas and electric savings. The July 1, 2008 merger aimed to provide a less complicated, more accessible program presentation to potential customers. Existing Facilities targets sectors of customers that include commercial and industrial businesses, healthcare facilities, universities and colleges, state and local governments, schools, hospitality/hotels, data centers and communications facilities. There are two types of Existing Facilities incentives: pre-qualified and performance-based:

1.1.1 Pre-Qualified Measures

Pre-qualified electric incentives encourage customers working on small-sized energy projects and equipment replacement projects to purchase and install more energy efficient measures. Some of the electric measures available to qualifying customers are lighting, heating, ventilation and air conditioning (HVAC), chillers, motors, variable frequency drives, and interval meters. Pre-qualified incentives are limited to \$30,000 per facility per year for both electric and natural gas efficiency incentives, leading to a total pre-qualified measure limit of \$60,000 per facility per year (qualifying National Fuel Gas customers are limited to \$25,000 per facility per year.)

¹ *NYSERDA Existing Facilities Program FINAL Evaluation, Measurement, and Verification Plan*, December 11, 2009, is the source of the information in this section.

Customers and Energy Service Companies (ESCOs) apply for pre-qualified incentives by completing an application form and a measure-specific worksheet used to calculate potential incentives.

1.1.2 Performance-Based Incentives

Performance-based incentives are for customers or ESCOs working on large-scale projects achieving significant gas or electric consumption reductions. The incentives are typically higher than those for pre-qualified projects. The performance-based projects require an engineering analysis and are potentially subject to measurement and verification requirements. Performance-based incentives are available for electric efficiency, natural gas efficiency, energy storage, demand response, combined heat and power (CHP), monitoring-based commissioning, and industrial and process efficiency. Each category of performance-based incentive is governed by a distinct set of eligibility limits, incentive limitations, equipment requirements, and other rules.

Customers and ESCOs apply for performance-based incentives by completing an application form and agreeing to an engineering analysis.

1.2 PROCESS EVALUATION

This document presents findings from a brief process evaluation of the Existing Facilities program based solely on questions posed to participating end users and service providers included in surveys conducted for Existing Facilities by NYSERDA's market characterization and assessment (MCA) evaluation contractor. The purpose of this brief evaluation is to assess the program's effectiveness and identify possible recommendations for improvement.

In preparation for designing the survey questions, the process evaluation team interviewed the Existing Facilities program manager and one project manager to better understand the program and to identify topics about which the program manager was particularly interested in receiving participant feedback. These topics include:

- Satisfaction with program processes and timeliness
- Whether any program components constitute barriers to participation; especially, barriers that limit the number of performance-based projects and natural gas efficiency projects
- Value of participation
- Program value in light of the availability of utility incentives for nonresidential retrofits
- Service provider response to a new program feature in 2008 that enabled customers to directly apply to the program (the prior program accepted applications only from service providers)

Section 2:

METHODS AND RESPONDENT CHARACTERISTICS

This section describes the methods used by the process evaluation team to research the Existing Facilities Program and prepare this report, and the characteristics of the survey respondents.

2.1 METHODS

The process team first conducted in-depth interviews in March 2011 with the Existing Facilities program manager and with an Existing Facilities project manager primarily responsible for pre-qualified projects. These interviews helped the process team to:

1. Understand the program and its goals.
2. Comprehend specific issues pertaining to the pre-qualified and performance-based components of the program.
3. Determine what program staff would find valuable from this evaluation.

The process team collaborated with the MCA team to collect the survey data for this evaluation.² The process team added questions to the Existing Facilities Program surveys the MCA team was fielding for participating end users and service providers. These questions provided the process team with information about participant experiences and satisfaction with the program. NYSERDA evaluation staff consulted on the development of these surveys and approved the final versions.

The process team was unable to pursue one element of the research objectives due to a change in the sampling methodology over the course of the MCA and process survey development activities. The final sampling methodology restricted the sample to participants with performance-based incentives, so the team was not able to explore the extent to which lack of awareness of such incentives might contribute to lack of participation in that variant of the Existing Facilities Program. However, the resulting sample, devoted as it was to performance-based participants, provides good coverage of participant response to the more complex program processes those incentives entail.

The MCA team completed 69 participant end-user surveys and 39 participant service-provider surveys in July and August 2011. Table 2-1 depicts the participant summary call disposition.

² The MCA team, lead by Navigant Consulting, prepared a market characterization report for NYSERDA in October 2011.

Table 2-1: Disposition of Participant Surveys by Respondent Type

		End Users		Service Providers	
		Number	Percent*	Number	Percent*
TOTAL SAMPLE USED		126	100%	56	100%
Excluded Sample	Not working/Unusable number	1	1%	0	0%
Not Contacted	Respondent never available	45	36%	12	22%
	Answer Machine				
	Call back/Left 800#				
Unknown Eligibility	No Answer/Busy	5	4%	2	4%
Excluded Organizations	Not Eligible/Not Qualified	0	0%	3	5%
Refused/ Break-off	Refused	6	5%	0	0%
	Break-off				
COMPLETED INTERVIEW		69	55%	39	70%

* Because of rounding, values may not total 100%.

See *Existing Facilities Program, Market Characterization and Assessment Report*, October 14, 2011 (draft), prepared by the MCA team – Navigant Consulting, Inc. – for a description of the population of participating end users as revealed by an analysis of the program database.

The MCA team completed 118 nonparticipant end-user surveys and 116 nonparticipant service provider surveys from September to November 2011. Table 2-2 depicts the nonparticipant summary call disposition. The 118 completed nonparticipant end-user surveys include three pre-test responses, which were included in the analysis, and one response that was omitted from subsequent analysis, because open-ended responses revealed him or her as a service provider.

Table 2-2: Disposition of Nonparticipant Surveys by Respondent Type

		End Users		Service Providers	
		Number	Percent*	Number	Percent*
Total Sample Used		865	100%	1,888	100%
Excluded Sample	Not working/Unusable number	49	6%	411	22%
Not Contacted	Respondent never available	91	11%	120	6%
Unknown Eligibility	No Answer/Busy	35	4%	120	6%
	Left Message/General Callback	334	39%	510	27%
Excluded Organizations	Not Eligible/Not Qualified	105	12%	394	21%
Refused/Break-off	Refused/Break-off	133	15%	217	12%
Completed Interview		118	14%	116	6%

* Because of rounding, values may not total 100%.

The samples used in the joint MCA and process survey research, which yielded the findings presented in this report, were stratified to address key sectors of interest to NYSERDA: offices, hospitals and healthcare, colleges and universities, and retail. These strata samples are representative of the larger population strata (such as participating offices or nonparticipating hospitals and healthcare), with the exception of the nonparticipating end user retail stratum. For that stratum, survey response bias occurred; large retailers – large in store size (big box) and in organizational size (many stores) – declined to participate in the end-user retail survey. Thus, the nonparticipant retail sector is representative of the population of smaller retail firms (smaller stores, few stores). Thus, these nonparticipants differ in composition from the participant retail strata.

Appendices A through D provide the survey instruments for participating end users and service providers and nonparticipating end users and service providers, respectively. Appendices E through H provide the MCA team’s documentation of its survey methodology for all groups.

2.2 RESPONDENT CHARACTERISTICS

The evaluation team sought to understand whether contacts’ survey responses varied according to the contacts’ firm or project characteristics. The subsequent discussion of findings indicates the few statistically significant patterns that emerged linking contact characteristics with responses.

2.2.1 End-User Market Sectors

Consistent with the stratified sampling plan, described in Section 2.1, surveyed end users come primarily from the sectors offices, hospitals and healthcare, colleges and universities, and retail (Table 2-3). Note that the MCA team developed the sample stratification from the participants’ facility type as recorded in the program database. Table 2-3 provides surveyed participating and nonparticipating end users’ type of business.

Table 2-3: Market Sectors of Surveyed Participating and Nonparticipating End Users

Sector	Participating End Users	Nonparticipating End Users
Office	41	46
Hospital/Healthcare	17	34
College or University	6	16
Retail	5	21
Total	69	117

2.2.2 Respondent Survey Characteristics

Participants

Table 2-4 shows the participating contact characteristics considered, and the number of respondents with each characteristic.

Table 2-4: Characteristics of Participating End Users (Project Hosts) and Service Providers Used in Analysis

Participating End Users/ Hosts (n = 69)*	Participating Service Providers (n = 39)*
Facility type <ul style="list-style-type: none"> • Office: n = 41 • Non-office: n = 28 	Firm size more than 10 full-time employees <ul style="list-style-type: none"> • Yes: n = 17 • No: n = 20
Facility size above 100,000 square feet <ul style="list-style-type: none"> • Yes: n = 22 • No: n = 46 	Non-efficiency services offered <ul style="list-style-type: none"> • Yes: n = 15 • No: n = 24
Project year prior to 2010 <ul style="list-style-type: none"> • Yes: n = 21 • No: n = 43 	Gas equipment services offered <ul style="list-style-type: none"> • Yes: n = 12 • No: n = 27
Measure type <ul style="list-style-type: none"> • Lighting: n = 46 • Other: n = 23 	Offers performance-contracting/ESCO services <ul style="list-style-type: none"> • Yes: n = 17 • No: n = 22
Incentive size above \$30,000 <ul style="list-style-type: none"> • Yes: n = 34 • No: n = 35 	Involved with program for more than two years <ul style="list-style-type: none"> • Yes: n = 33 • No: n = 6
Number of projects <ul style="list-style-type: none"> • One: n = 48 • Multiple: n = 21 	Involved with program for more than five years <ul style="list-style-type: none"> • Yes: n = 21 • No: n = 18
Trade ally assisted in coordinating incentives <ul style="list-style-type: none"> • Yes: n = 45 • No: n = 24 	---
Host was the “applicant” per database** <ul style="list-style-type: none"> • Yes: n = 24 • No: n = 43 	---

* Due to missing data, counts do not always sum to total sample size.

** Average facility square footage, incentive size, and project size did not differ significantly between hosts listed as “applicant” and hosts not listed as “applicant.”

Nonparticipants

Table 2-5 shows the nonparticipant contact characteristics considered, and the number of respondents with each characteristic.

Table 2-5: Characteristics of Nonparticipating End Users (Hosts) and Service Providers Used in Analysis

Nonparticipating End Users/ Hosts (n = 117)*	Nonparticipating Service Providers (n = 116)*
Facility type (binary) <ul style="list-style-type: none"> • Office: n = 46 • Non-office: n = 71 	Firm size more than 10 full-time employees <ul style="list-style-type: none"> • Yes: n = 82 • No: n = 32
Facility type (categorical) <ul style="list-style-type: none"> • Office: n = 46 • Hospital/Healthcare: n=34 • College or University: n=16 • Retail: n=21 	Non-efficiency services offered <ul style="list-style-type: none"> • Yes: n = 83 • No: n = 30
Participated in other NYSERDA programs <ul style="list-style-type: none"> • Yes: n = 52 • No: n = 61 	Gas equipment services offered <ul style="list-style-type: none"> • Yes: n = 58 • No: n = 57
Own or lease space <ul style="list-style-type: none"> • Own: n = 84 • Lease/Rent: n=20 	Offers performance-contracting/ESCO services <ul style="list-style-type: none"> • Yes: n = 49 • No: n = 57
---	Participated in other NYSERDA programs <ul style="list-style-type: none"> • Yes: n = 39 • No: n = 71

* Due to missing data, counts do not always sum to total sample size.

Section 3:

PARTICIPANT PROGRAM EXPERIENCE

This section discusses participating end users and service providers’ program experiences. The findings are organized around the areas of concern identified by program staff.

3.1 PROGRAM EXPERIENCE AND SATISFACTION

Satisfaction among participating end users and service providers with six facets of program participation was high (Table 3-1). Although program staff mentioned that in 2009 new software had led to payment issues, the process team failed to find evidence that participants with 2009 project dates were less satisfied than others with program processes.

Table 3-1: Participating End User and Service Provider Satisfaction with Program Processes

Program Process	End Users		Service Providers	
	n**	Percent Agree or Strongly Agree	n**	Percent Agree or Strongly Agree
Inspections have gone smoothly*	65	91%	39	85%
M&V activities have gone smoothly	63	89%	37	65%
Satisfied with communications with program staff*	59	86%	39	72%
Understood application requirements and process	57	82%	39	95%
NYSERDA helped me when I needed it	61	79%	39	90%
Satisfied with time from application submittal to incentive received*	60	75%	39	49%

* Questions were phrased negatively (e.g.: “Inspections have not gone smoothly”). These items have been reverse coded for comparability.

** Respondent numbers exclude contacts who answered “not applicable.”

Both end users and service providers were least satisfied with the time from application submittal to incentive receipt, as compared with the other five program facets explored. Fifteen percent of end users and 41% of service providers provided “dissatisfied” ratings on timeliness of incentive. (Note that three of the six items in Table 3-1, including “timeliness,” are phrased negatively, suggesting a problem, while three items are phrased positively. Thus, 15% and 41% of end users and service providers, respectively, provided “dissatisfied” ratings for timeliness, 10% and 10% provided neutral ratings, and 75% and 49% provided positive ratings. The latter percentages are those given in Table 3-1.)

Findings suggest the application process has improved over time. Over half (55%) of the 33 service providers who had been involved with Existing Facilities for more than two years rated the applications as “easier to complete” than in the past; 6% rated them as more difficult, and 39% rated them as “about the same.”

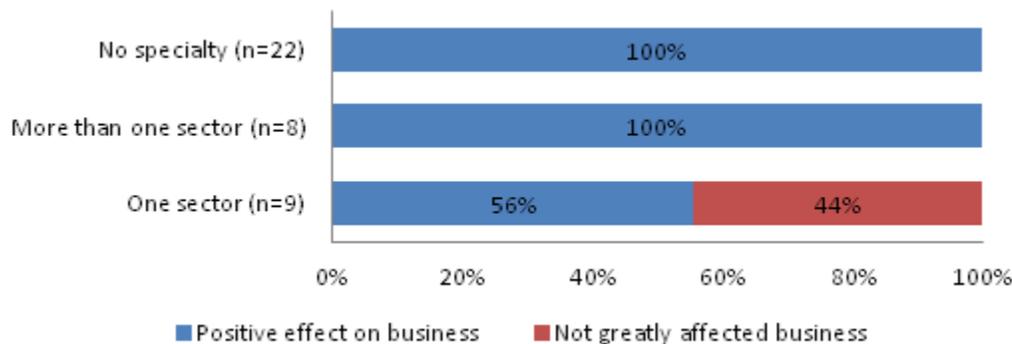
3.2 PARTICIPATING SERVICE PROVIDER RELATIONSHIP WITH NYSERDA AND INVOLVEMENT WITH EXISTING FACILITIES

Customers are able to apply directly to the current Existing Facilities program, while in the previous program only service providers could directly apply to the program and end users needed to apply through service providers. To investigate service provider response to this change, the survey asked participating service providers about their involvement with NYSERDA and the program, and about whether that involvement had changed over the past two years.

3.2.1 Participating Service Provider Involvement with Existing Facilities

Nearly three-fourths of surveyed service providers (72%) indicated that Existing Facilities information played a role in their marketing materials and outreach efforts. Almost all (90%) service provider contacts said that the availability of Existing Facilities incentives had a positive effect on their business. Service providers who reported specializing in a single sector or building type were significantly less likely to report that the program had greatly affected their business, compared to service providers who specialized in more than one sector or who did not specialize in a sector or building type ($p < .05$, Figure 3-1).

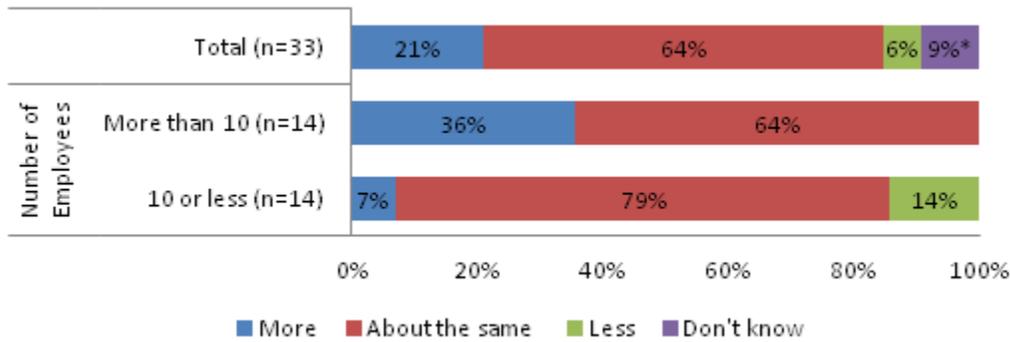
Figure 3-1: Effect of Existing Facilities Program on Service Provider Business, by Sector Specialization



3.2.2 Participating Service Provider Relationship with NYSERDA

Of the 33 service providers who indicated that they had been participating in the Existing Facilities or its predecessor for two years or more, one-fifth (21%) report that NYSERDA values their participation more than before and two-thirds (64%) indicated that NYSERDA values their participation about the same as before. Just two contacts (6%) reported that NYSERDA values their participation less than before. The firms who said “more” were marginally more likely to be large firms, while the firms who said less were all smaller firms (Figure 3-2). Of the two contacts who indicated that NYSERDA valued their participation less than in the past, one explained that he did not hear as much from NYSERDA staff anymore, and the other explained that he at times experienced a lack of understanding on staff’s part.

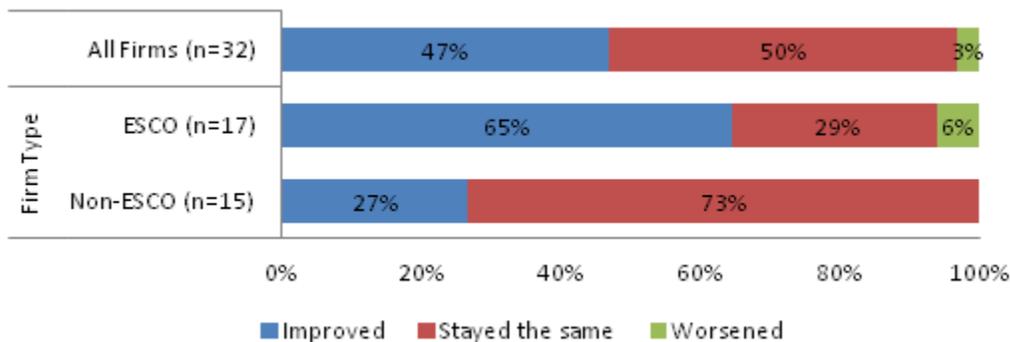
Figure 3-2: Perceived Change in NYSERDA's Valuation of Service Provider Participation, by Firm Size



* Subsequent analysis excluded “don’t know” responses.

The survey also asked participating service providers with more than two years of program experience about whether their interactions with NYSERDA staff had changed over time. About half (47%) of service providers said that their interactions had improved and half (50%) said their interactions with NYSERDA staff had stayed the same. The one contact who indicated that the interaction had worsened mentioned “a lot of administrative layers that were not there before.” ESCO (performance-based) service providers were significantly more likely than other service providers to indicate that their staff interactions had improved (65% compared to 27%; Figure 3-3).

Figure 3-3: Perceived Change in Interactions with NYSERDA Staff, by Firm Type



The absence of service provider concern over direct participant applications also appeared in service providers’ general comments. When asked at the end of the survey about improvements NYSERDA could make, only one participating service provider mentioned that improving the ease with which consumers could participate in the Existing Facilities without a service provider had “made it difficult for the energy companies.”

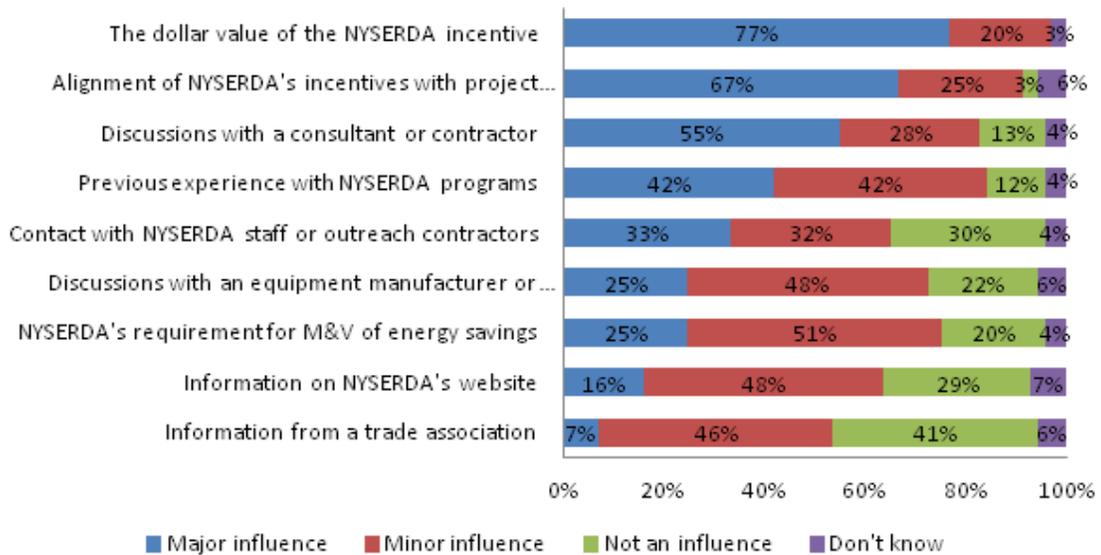
3.3 VALUE OF EXISTING FACILITIES PROGRAM TO PARTICIPANTS

The interviewed program staff expressed an interest in understanding the value of the program to participating customers and service providers.

3.3.1 Factors Influencing Participation

While the value of the NYSERDA incentive and the alignment of NYSERDA’s incentives with the project needs were rated by the most participants as a “major influence” on participation (77% of respondents and 67% of respondents, respectively), other program elements also played a role in participants’ decisions to participate (Figure 3-4). Although 16% of end users overall rated NYSERDA’s website as a major influence on participation, significantly more end users who were listed as the project applicant cited the website as a major influence than others (36% and 7%, respectively, $p<.05$), which ranks this element just after “contact with NYSERDA” as an influence for end-user applicants. Service providers also valued NYSERDA’s incentives highly. Nearly all participating service providers (90%) rated the availability of NYSERDA incentives as “very important” to their customers’ decisions to implement energy efficiency measures.³

Figure 3-4: End-User Ratings of the Influence of Program Elements on Participation (n=69)



Over half of contacts (55%; 58% when “don’t know” responses are excluded) rated discussions with a consultant or contractor as a “major influence.” Participants with smaller buildings or who were not listed as the applicant on their project were particularly likely to rate a contractor or consultant as a “major influence” (Mann-Whitney U Test $p<.05$; Table 3-2).

³ The service provider survey asked: *How important is the availability of NYSERDA incentives in your customers’ decisions to implement energy efficiency measures.* This was the only concept asked of service providers from among the group of end user questions diagrammed in Figure 3-4.

Table 3-2: Influence of Service Provider on End User’s Decision to Participate, by Building Size and Primary Applicant

		Rating		
		Major Influence	Minor Influence	Not an Influence
Total (n=66)*		58%	29%	14%
Building Size	Less than 100,000 sq ft (n=21)	76%	14%	10%
	100,000 sq ft or more (n=44)	48%	36%	16%
Applicant	Owner (n=22)	41%	36%	23%
	ESCO or Other (n=42)	67%	26%	7%

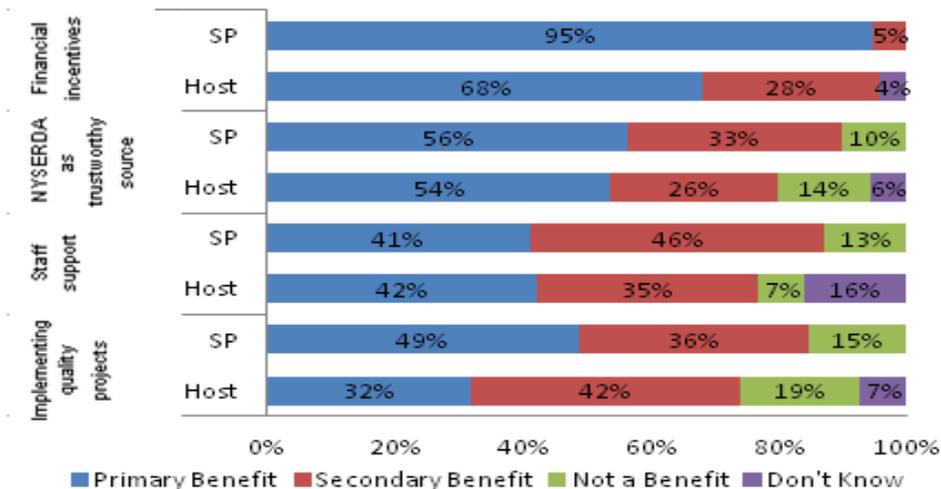
* “Don’t know” responses excluded.

3.3.2 Value of Program Elements to Participants

All end users and service providers valued the financial incentive as a primary or secondary benefit of participation, with 68% of end users and 95% of service providers rating the incentives as a “primary benefit” (Figure 3-5; for brevity, end users referred to as “hosts”). Participants valued the non-financial program components, as well. Very few contacts (under 20%) rated these non-financial program components as “not a benefit” of participation.

Just over half of contacts (54% of end users and 56% of service providers) saw NYSERDA’s reputation as a trustworthy and independent source of information as a primary benefit. Small service provider firms were especially likely to see this program aspect as a primary benefit (70% versus 35% of larger firms, Mann-Whitney U Test $p < .05$). Half of service providers (49%) saw NYSERDA’s help ensuring that they implement quality projects as a primary benefit and nearly as many (41%) rated as primary “NYSERDA staff and its contractors are available to provide support for projects.” Four service providers also reported additional primary benefits, including project validation (two mentions), the ease of the process, and adding credibility for the customer.

Figure 3-5: Participating Service Provider (SP) and Host Ratings of the Value of Program Components



Nine service providers offered open-ended comments valuing Existing Facilities. Five service providers offered these comments in a follow-up to the question whose responses are tabulated in Figure 3-5, and five providers offered these comments in a discussion of marketplace confusion between Existing Facilities and utility programs.⁴ Service provider comments include:

- *NYSERDA is the best program in the country.*
- *The ease and simplicity of the process.*
- *NYSERDA is a New York State program, so it is easier. NYSERDA is a little more simple.*
- *When I do an audit of a large facility, I may come through with a savings estimate that is extremely high, with a rebate of over \$10,000. NYSERDA will look at the proposal, and if they agree we know we have a good, solid proposal. If they do not agree, we need to look at it and find out why. You have a government agency looking at and approving private companies' work. This is a benefit.*
- *Some companies are running wild, lying about savings and doing substandard work. NYSERDA is not a part of that.*
- *You get higher incentives with the utilities. But, NYSERDA is front and center, and the utility companies are not. NYSERDA has a well thought out program and they understand lighting. The power companies do not understand lighting.*

⁴ One service provider offered positive comments in response to both questions, for a total of nine providers.

PROGRAM AWARENESS, BARRIERS, SUGGESTED CHANGES

This section discusses both participants' and nonparticipants' responses on several topics identified as areas of concern by program staff: awareness and uptake of program features, barriers to program participation, and potential confusion with utility programs. It also summarizes participants' and nonparticipants' suggested changes to the Existing Facilities Program.

4.1 AWARENESS AND UPTAKE OF PROGRAM FEATURES

In interviews conducted in March 2011, program staff identified two areas in which project uptake lagged behind their expectations: performance-based projects, especially among large customers, and gas savings projects. Accordingly, the surveys explored awareness of performance-based and gas incentives, and possible barriers to their uptake.

4.1.1 Nonparticipant Program Awareness

Of the nonparticipating end users surveyed by the MCA team, about half were aware of the Existing Facilities program (55 of 117, or 47%). End users who owned their space were significantly more likely than others to report awareness of the program. Of the end users who were aware of the program, three-fifths (32 of 55, or 58%) reported having contacted NYSERDA representatives, and half (29 of 55, or 53%) reported having visited the NYSERDA website.

Of the nonparticipating service providers surveyed, half were aware of the program (58 of 116, or 50%). Among nonparticipating service providers, those who had participated in other NYSERDA programs and firms with more than 10 employees were significantly more likely to have heard of the program. Of the service providers who were aware of the program, two-fifths (24 of 58, or 41%) reported having contacted NYSERDA representatives, and half (29 of 58, or 50%) had visited the NYSERDA website. Larger firms were significantly more likely than others to have visited the website.

4.1.2 Performance-Based Incentive Understanding and Uptake

Participants

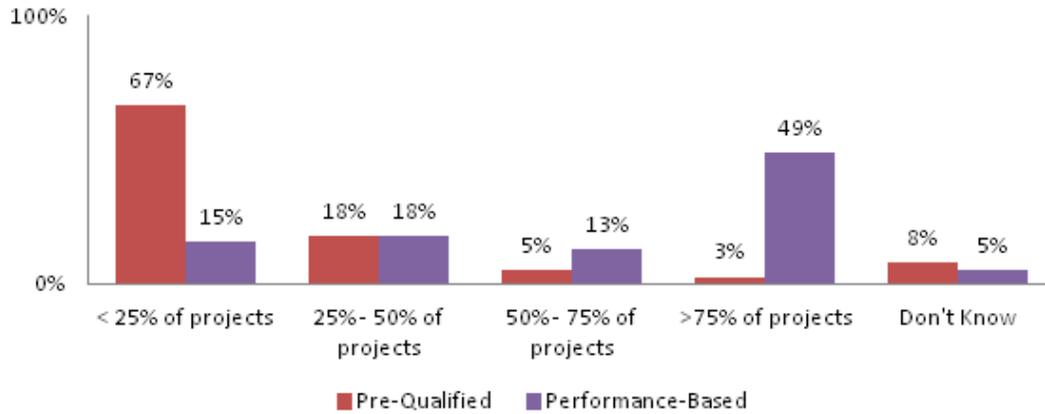
As noted, all surveyed participant contacts had completed performance-based projects. Over four-fifths of participating end users (86%) were either "very" or "somewhat" confident that they understood the differences between the performance-based and pre-qualified approaches to applying for incentives.⁵ Contacts for office facilities were significantly less confident in their understanding of the differences than contacts for other business types (25% versus 57% "very" confident, Mann-Whitney, $p < .05$). All but two of the end users indicating "not too" or "not" confident, or "don't know" regarding confidence in their understanding of the differences between the two approaches were office respondents (eight of 10 contacts). Nearly all (90%) participating service providers reported being "very confident" in their

⁵ Twelve percent were "not too confident" or "not confident at all" about these differences; 3% of respondents did not know.

understanding of the differences between the pre-qualified and the performance-based approaches to applying for incentives; yet one service provider reported being “not confident at all” in this difference.

Participating service provider contacts also reported taking advantage of performance-based incentives more often than pre-qualified incentives when completing energy efficiency retrofit projects in New York. Half of contacts (49%) reported using performance-based incentives in more than three-fourths of their projects, compared to only 3% of contacts who reported using pre-qualified incentives on more than three-fourths of projects (Figure 4-1).

Figure 4-1: Proportion of Service Providers’ Projects by Incentive Type (n=39)



Nonparticipants

Among nonparticipating end users aware of the program, 80% were “very” or “somewhat” confident in their understanding of the difference between the two incentive approaches. Unlike participant findings, nonparticipating office end users were significantly more confident in this understanding than others.

Among nonparticipating service providers aware of the program, 60% were “very” or “somewhat” confident in their understanding of the difference between the two incentive approaches.

4.1.3 Gas Incentive Awareness

Participants

Awareness of incentives for natural gas savings was high among both participating end users and service providers. Over three-quarters (78%) of the 45 end users that use natural gas at their facilities were aware that the Existing Facilities Program offered gas incentives. Participants receiving larger incentives were more likely than those with smaller projects to indicate awareness of the gas incentives, a difference that approaches statistical significance (90% versus 70%, Chi Square, $p<.10$). All service provider contacts who reported offering gas equipment reported awareness of incentives for gas equipment.

Nonparticipants

Among nonparticipant end users who reported using natural gas, half (49%) were aware of the program’s natural gas equipment incentives. This awareness was significantly higher among those who had participated in other NYSERDA programs than others (64% versus 36%, Chi Square, $p<.05$). Awareness of natural gas equipment incentives also differed significantly by sector (15% of retail end-users, compared with 78% of hospital end-users).

Three-fourths (74%) of nonparticipant service providers who reported selling natural gas equipment reported awareness of program incentives for gas equipment.

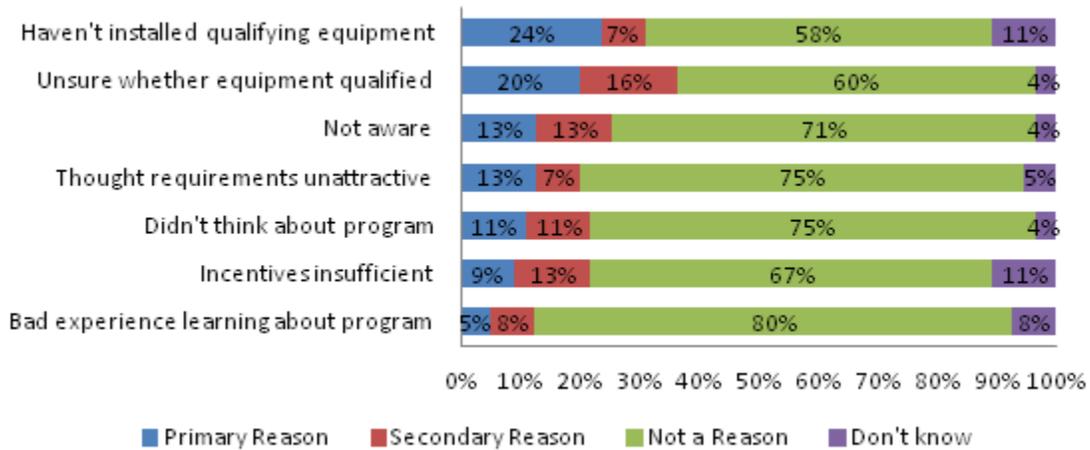
4.2 BARRIERS TO PROGRAM PARTICIPATION

In interviews, program staff indicated an interest in understanding the barriers to program participation. To understand what might discourage end users and service providers to participate in the program, the process team asked nonparticipants to rate the importance of several possible barriers.

Overall, both nonparticipating end users and service providers provided varied reasons for not having participated in the program. The types of reasons most often cited were considerably different for end users than for service providers, though.

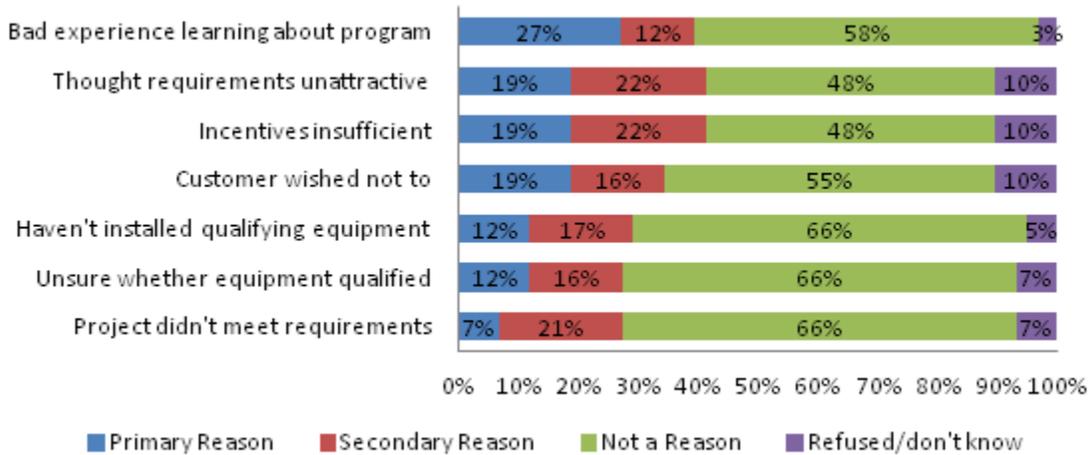
Among the nonparticipant end users who had heard of the program, the most commonly mentioned barriers concerned a lack of knowledge about the program's existence or rules (Figure 4-2). Specifically, the three most commonly mentioned barriers included not having installed qualifying equipment, uncertainty about whether equipment was qualified, and lack of awareness about the program at the time of installation (31%, 36%, and 25% respectively rated as a primary or secondary barrier.) The rating of barriers differed somewhat by business type. Office and college end users were significantly more likely than others to cite not thinking about the program as a reason for not applying (40% versus 4%; Mann-Whitney $p < .05$).

Figure 4-2: Nonparticipant End-User Ratings of Barriers to Program Participation (n=55)



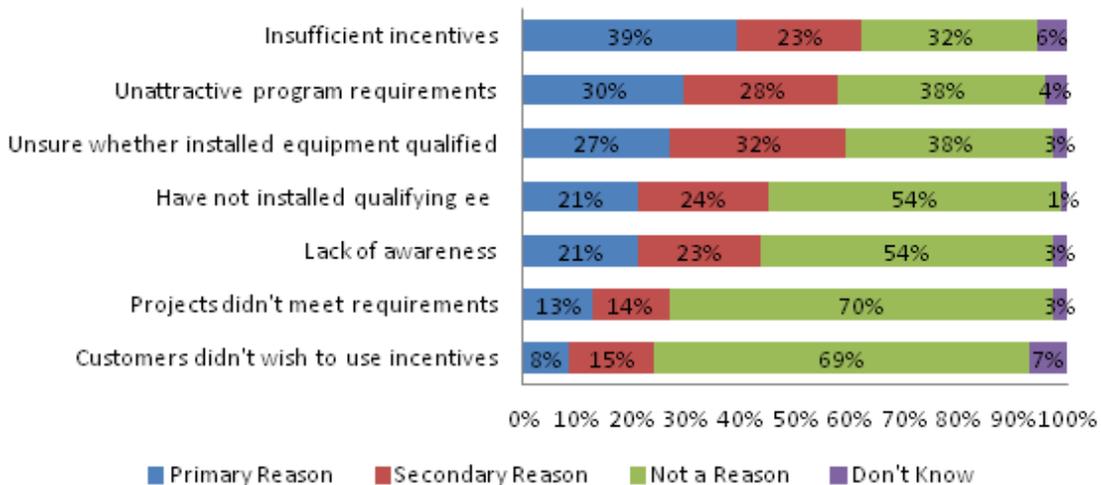
In contrast, among nonparticipant service providers who had heard of the program, the most commonly mentioned primary barriers concerned perceived shortcomings of the program (Figure 4-3). Half of service providers (52%) mentioned an unsatisfactory experience learning about the program from the website or from program representatives, unattractive program requirements, or insufficient incentives as either primary or secondary reasons for not participating in the program. Larger firms were somewhat more likely than smaller firms to cite an unsatisfactory experience learning about the program or insufficient incentives as barriers.

Figure 4-3: Nonparticipating Service Provider Ratings of Barriers to Program Participation (n=58)



To understand whether these barriers were specific to the Existing Facilities program or applicable to all incentive programs, the evaluation team also asked nonparticipant service providers to rate the importance of possible reasons for not using incentive programs in general.⁶ The most commonly cited primary reasons for not using incentives included: insufficient incentives (39%), unattractive program requirements (30%), and being unsure whether equipment qualified (27%; Figure 4-4).

Figure 4-4: Nonparticipant Service Providers' Reasons Projects do not Use Incentives (n=71)



⁶ This question was only asked of service providers who reported that they were familiar with utility efficiency retrofit programs, but that projects receiving utility incentives made up less than half of their efficiency retrofit work.

Negative opinions about NYSERDA were expressed by a minority of nonparticipating service providers (15%), and do not comprise the majority reason for not participating in the program. This finding is consistent with the previously stated finding that nonparticipant service providers' reasons for not participating in programs in general were very similar to reasons for not participating in the Existing Facilities program specifically.

4.3 POTENTIAL CONFUSION WITH UTILITY PROGRAMS

One area of concern identified in interviews with program staff was whether the existence of both NYSERDA and utility incentive programs for commercial efficiency retrofits results in marketplace confusion or affects the delivery of the NYSERDA's Existing Facilities program. To understand the relationship between Existing Facilities and utility programs, the surveys asked end users and service providers about their awareness of utility programs and their perceptions of marketplace confusion over these multiple sources of efficiency project funding.

4.3.1 End-User Awareness of and Contact with Utility Programs

Participants

Surveyed end-user participants reported whether their utilities offered incentives for equipment similar to what they installed through Existing Facilities and, if so, whether they had contacted their utilities about the incentive programs. Nearly half did not know whether their utilities had such programs; 14% both knew their utilities had such programs and had contacted the utilities about them (Table 4-1). End users who were listed as applicants in the program database were somewhat *less* likely to be able to answer the question of whether or not their utility offered incentives than were participants for which an ESCO or other party was listed as applicant (42% versus 65%, Chi Square, $p < .10$).

Table 4-1: Participating End Users' Awareness of, and Contact with, Utility Incentive Programs

Status with Respect to Utility Incentive Program	Percent (n=69)
Contacted utility about incentive programs they knew of	14%
Aware of utility's incentive program but had not contacted	23%
Reported utility did not have incentive program	17%
Did not know whether utility had incentive program	46%

Nonparticipants

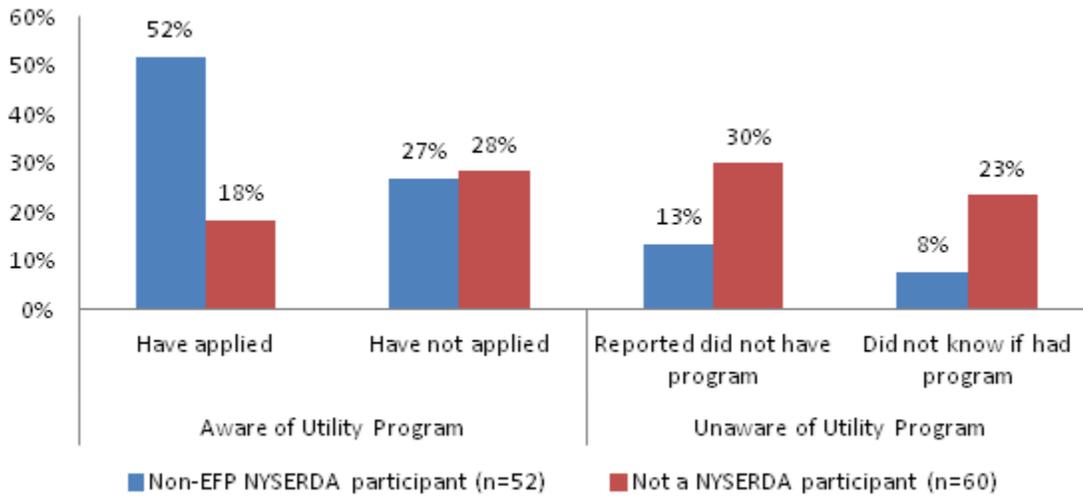
Surveyed end-user nonparticipants reported whether their utilities offered incentives for efficient equipment and, if so, whether they had contacted their utilities about the incentive programs or participated in these programs. Less than a fifth (16%) did not know whether their utilities had such programs; one-third both knew their utilities had such programs and had applied (Table 4-2). Of the three-fifths of end-users (72 of 117, or 62%) who were aware of utility efficiency programs, nearly three-fourths (52 of 72, or 72%) had been in contact with the utility about these programs.

Table 4-2: Nonparticipant End-User Awareness of and Application to Utility Programs

Status with Respect to Utility Incentive Program	Percent (n=117)
Aware, have applied to utility program	34%
Aware, plan to apply	11%
Aware, may apply	9%
Aware, will not apply	6%
Reported utility did not have incentive program	23%
Did not know whether utility had incentive program	16%

Nonparticipating end users who had participated in other NYSERDA programs were more likely than others to know that their utility offered incentive programs for efficiency retrofits and to have applied (Chi Square, $p < .05$; Figure 4-5). This suggests that end users that participate in one efficiency program have heightened awareness of all efficiency programs for which they might be eligible. Thus, although nonparticipant end users’ awareness of utility efficiency programs was higher than participants,’ this finding is largely driven by nonparticipant end users who had previously participated in other NYSERDA programs, as they were more aware of utility programs than other nonparticipant end users.

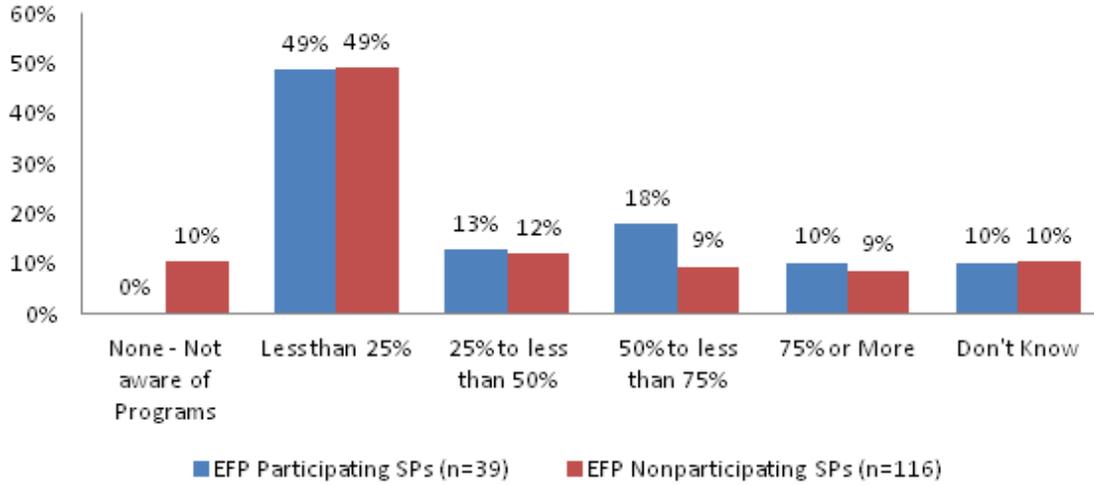
Figure 4-5: Nonparticipant End-User Awareness of, and Application to, Utility Programs, by Status as Former NYSERDA non-EFP Participant



4.3.2 Service Provider Awareness of, and Contact with, Utility Programs

Overall, participating and nonparticipating service providers reported very similar proportions of projects using utility incentives (Figure 4-6). Half of participating and nonparticipating service providers (49%) reported that projects with utility incentives make up less than a quarter of their efficiency retrofit work.

Figure 4-6: Percentage of Projects Using Utility Incentives, by Service Provider Type (Participant or Nonparticipant)

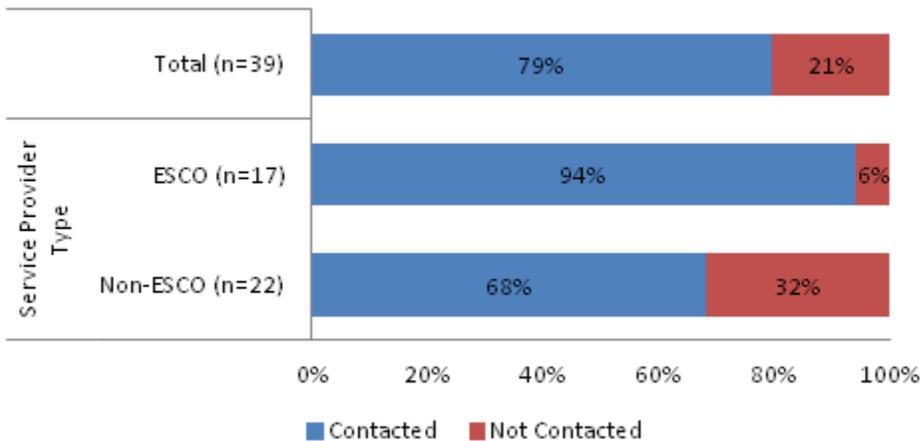


The following sections provide more detail about participating and nonparticipating service providers’ awareness, contact with, and use of utility programs for commercial efficiency retrofits.

Participants

Among surveyed participating service providers, all were aware of utility programs, and four-fifths (79%) reported being contacted by utilities about commercial incentive programs (Figure 4-7). Firms offering performance contracting or ESCO services were significantly more likely than other service providers to report contact from utilities about programs (94% compared to 68%).

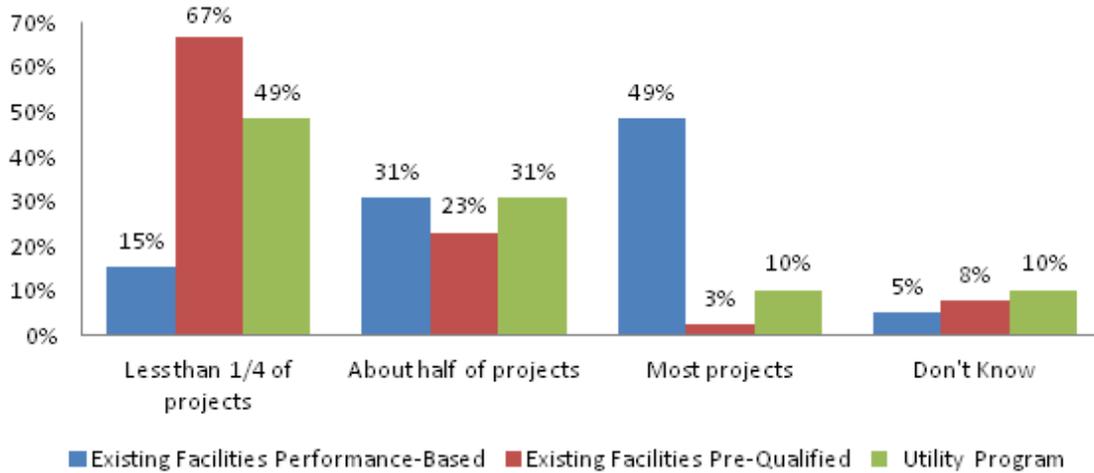
Figure 4-7: Participating Service Providers Contacted by Utilities about Programs



Service providers indicated the degree to which the energy efficiency retrofit projects their firms complete take advantage of various incentives, specifically NYSERDA’s performance-based incentives, NYSERDA’s pre-qualified incentives, and incentives from a utility company’s energy efficiency program. Both NYSERDA and utility programs played a role in the energy efficiency retrofit projects for nearly all participating service providers; only one service provider indicated that projects without incentives make

up more than 25% of his or her energy efficiency retrofit project work. For about half of the surveyed service providers, NYSERDA performance-based projects comprise the bulk of their energy-efficiency work and they do little work for utility incentive programs (Figure 4-8). The other half of the service providers do a variety of project types and conduct projects for both NYSERDA and utility efficiency programs.

Figure 4-8: Service Providers' Report of Percent of Projects Using Incentives, by Type (n=39)



Nonparticipants

Among nonparticipant service providers, 90% reported awareness of utility efficiency programs, and half reported that projects with utility incentives make up less than one-fourth of their efficiency retrofit work (Table 4-3).

Table 4-3: Nonparticipant Service Provider Awareness and Use of Utility Programs

Status with Respect to Utility Incentive Program	Percent (n=116)
Aware of utility incentives, less than 25% of efficiency projects use them	49%
Aware of utility incentives, 25% to 75% of efficiency projects use them	22%
Aware of utility incentives, more than 75% of efficiency projects use them	9%
Aware of utility incentives, don't know what percent of efficiency projects use them	10%
Not aware of utility incentives	10%

While the small number of nonparticipating service providers who were unaware of utility incentives precludes a statistical comparison, all of the 11 unaware service providers were small firms, and nearly all (9 of 11) were service providers who had *not* previously participated in other NYSERDA programs. Furthermore, service providers who had not previously participated in other NYSERDA programs did not report significantly different percentages of projects using utility incentives than did previous NYSERDA participants.

Of the 90% of service providers who were aware of utility programs, just over a third (38 of 104, or 37%) reported having been contacted by utilities about incentives.

4.3.3 Confusion over Multiple Programs

Participants

Of the participating end-user contacts who reported that their utilities offered comparable incentives, about one-quarter (7 of 26) indicated there was “considerable confusion” in the marketplace about efficiency incentive programs, and an additional half (14 of 26) indicated that there was “a little confusion.” Participating service providers were more likely than end users to indicate marketplace confusion; half of service providers (49%) rated the level of confusion as “considerable;” and one-third said there was “a little confusion;” while only 18% said there was “not much confusion.”

The 21 end users and 32 service providers indicating either “a little” or “considerable” confusion described the source of confusion in open-ended responses. The three most common sources of confusion are interrelated: lack of sufficient information about the NYSERDA and utility programs, including understanding the rules and requirements and whether a given application qualifies for a program; difficulty in determining the differences between the programs; and difficulty understanding which program offers the best value for the end user. Seven of 21 end users (33%) and 26 of 32 service providers (81%) reported one or more of these reasons for confusion (Table 4-4).

Table 4-4: Participant Explanations of Marketplace Confusion over Commercial Efficiency Retrofit Programs (Open-Ended Responses Categorized; Multiple Responses Allowed)

Explanations of Confusion	End Users (n=21)	Service Providers (n=32)
Determining differences in rules, requirements, eligibility; getting information	29%	59%
Determining which program provides best value to end user	10%	44%
Customer confusion about “who” NYSERDA is; about why NYSERDA and utilities both offer incentives	20%	25%
Don’t know; response not relevant	33%	6%

While most of the comments about the difficulty in getting program information did not make explicit whether it was the NYSERDA program, utility programs, or both, nonetheless the service provider responses to this question were either neutral – or favored NYSERDA – in comparing NYSERDA and the utilities. Five service contractors explicitly compared NYSERDA favorably to the utilities, in response to this question about market confusion. For example, *“NYSERDA has been doing this for a while and they are concrete about what is required, whereas the utilities are evolving and it is never the same. There are private calculations done.”* Only two end users made an evaluative statement about NYSERDA in response to this question; one comment was positive and one was negative. These comments were, *“NYSERDA was super. I knew the process”*; and *“NYSERDA is just not clear on what to apply for in different programs.”*

In spite of the fact that only end users who were aware of comparable utility programs were asked about market confusion, their comments revealed continuing confusion. To some extent, confusion about the program was echoed in end-user participants’ final comments; while only one participant explicitly

mentioned clarification of NYSEERDA and utility incentives, one-fifth of respondents (20%) suggested improving program marketing and outreach, the most commonly recommended program change.⁷

Although not explicitly asked who was confused, eight service provider contacts specified that their customers were confused, eight specified that they themselves were confused, and three indicated that both they and their customers were confused (the remainder did not specify). Four service provider contacts used “competition” to describe this relationship between the NYSEERDA and utility programs. Two of these contacts said that, due to contracts utilities have with service provider, they were now competing with the utilities for business. Three service providers indicated a preference for NYSEERDA’s programs, because they are “well thought out,” or because they are statewide programs.

Representative comments from end users and service providers include:

- *People have a hard time understanding the difference between what NYSEERDA offers and what the utility company offers. They tend to see it as the same thing. (end user)*
- *I guess it is confusing as to why there are utilities offering incentives and NYSEERDA offering incentives. Customers are confused as to what NYSEERDA is and the difference between [NYSEERDA and utility] incentives and also as to where the money comes from. (service provider)*
- *Confusion comes from all the different entities that offer rebate programs and confusion about who NYSEERDA really is. [In contrast,] the end users always knows who their utility is. (service provider)*
- *We did not know what NYSEERDA was about. (end user)*

Nonparticipants

Nonparticipating end users and service providers reported confusion between Existing Facilities and the utility programs in similar proportions as the participants. Of the nonparticipant end-user contacts who reported awareness of both the Existing Facilities program and utility programs, about one-quarter (10 of 41) indicated there was “considerable confusion” in the marketplace about efficiency incentive programs, and an additional half (17 of 41) indicated that there was “a little confusion” (one fourth said there was “not much confusion” and one-eighth said “don’t know”). Among the participating service providers who reported awareness of both types of programs, half (29 of 55) rated the level of confusion as “considerable,” and one-fifth (10 of 55) said there was “a little confusion” (15% said there was “not much confusion,” and 15% were unsure).

The 27 nonparticipating end-users and 39 service providers who indicated “considerable” or “a little” confusion described the source of this confusion in open-ended responses (Table 4-5). The most frequently mentioned explanations included confusion about why multiple sources of incentives exist (34% of end-users, 26% of service providers) and difficulty in getting information about the differences in program rules and requirements (30% of end-users, 48% of service providers). The proportions of nonparticipating end users and service providers providing each explanation are similar to those for the participating end users

⁷ However, the process evaluation team often finds that “increase marketing, increase awareness” is the most common suggestion given by efficiency program participants and nonparticipants alike in response to open-ended questions seeking recommendations for program improvement.

and service providers, except that nonparticipating service providers did not mention maximizing the program value for the end-user.

Table 4-5: Nonparticipant Explanations of Marketplace Confusion over Commercial Efficiency Retrofit Programs (Open-Ended Responses Categorized; Multiple Responses Allowed)

Explanations of Confusion	End Users (n=27)	Service Providers (n=39)
Confusion about “who” NYSERDA is; about why NYSERDA and utilities both offer incentives	34%	26%
Determining differences in rules, requirements, eligibility; getting information	30%	48%
Determining which program provides best value to end user	11%	0%
Other	0%	10%
Don’t know; response not relevant	15%	16%

An additional five responding service providers (13%) volunteered reasons why they do not often use incentives. Three of the five mentioned that the amount of the incentive often does not justify the hassle of the application process.

Two service providers also made general comments about NYSERDA. One of these comments revealed frustration and the other confusion: “I have done a lot with [NYSERDA] and they have no clue;” “it is confusing and difficult to become a NYSERDA member.”

4.4 SUGGESTED PROGRAM CHANGES

Participants

When asked about recommended changes to the program, half the participating end users (49%) and over four-fifths of participating service providers (84%) made concrete suggestions for program changes (Table 4-6). In these suggestions, participating end users and service providers mentioned similar topics, but with considerably different frequency.

Table 4-6: Suggested Program Changes (multiple responses allowed)

Change	End Users (n=67)	Service Providers (n=38)
No changes; don't know	49%	16%
Improve program marketing/outreach	21%	0%
Changes to incentive structure or eligibility	9%	13%
Increase incentives	7%	18%
Shorten turnaround between application, work, and incentive receipt	3%	26%
Simplify or improve application process or materials	3%	11%
Simplify or improve project approval and measurement and verification process	3%	13%
Other	4%	16%

Among end users, the most frequent suggestion was to improve program marketing and outreach (21% of participants). Only six contacts (9%) suggested changes to program processes (including application processing time, application process or materials, and project approval and M&V process).

In contrast, the participating service providers most commonly mentioned a desire for faster and simplified project processes, with half of responding service providers (47%) mentioning one of these interrelated issues. The most common single suggested change, mentioned by one fourth of respondents (26%), was to shorten the application turnaround time. One respondent specifically mentioned the need for a tracking system.

Among the “other” responses, one end user and two service providers mentioned the need for clarity between (or elimination of) the utility programs. Two service providers mentioned NYSERDA staffing (having qualified staff serve each market segment, and increasing staff and staff accessibility), among other responses. Only one service provider suggested no longer allowing customers to apply directly to NYSERDA.

Nonparticipants

When asked for suggestions to change the Existing Facilities program, 25 nonparticipant end-users and 45 nonparticipant service providers offered comments (Table 4-7). Among both end-users and service providers, the most frequently mentioned topics included simplifying program information (18% of end users, 28% of service providers) and improving program marketing and outreach (16% of end-users, 29% of service providers).

Table 4-7: Suggested Program Changes (Multiple Responses Allowed)

Change	End Users (n=55)	Service Providers (n=58)
No response, no changes, don't know	55%	26%
Simplify program information, application process or materials	18%	28%
Improve program marketing/outreach	16%	29%
Changes to incentive amount, structure or eligibility	11%	12%
Simplify or improve project approval and measurement and verification process, turnaround time	4%	14%
Other	4%	5%
Utility coordination	2%	3%
General NYSERDA comment	2%	3%

Although 14% of service providers mentioned the need to simplify, improve, or shorten project approval and M&V process, just three service providers and one end user explicitly mentioned that the review/M&V process was excessively complicated or long.

Representative service provider comments include:

- *“There should be better marketing to the contractors, whether it's through the mail or through the wholesalers.”*
- *“I think they should increase the level of incentives and to make it much easier to apply for the incentives. More concise.”*
- *“If I did not use an energy star representative I would not know about the program. Need to get in touch more with the end user rather than the professional.”*
- *“The measurement and verification part of the program should be changed to be easier and more streamlined, because following up after the program deters people from going into it in the first place.”*
- *Customers “think that they get the money quicker from the utility companies, than NYSERDA. The utility company's approval process goes quicker because they walk you through it better.”*

Representative end-user comments include:

- *“Be sure that the instructions and explanations of the programs are in laymen's terms.”*
- *“Outreach to facilities managers so they are more aware of the programs.”*

CONCLUSIONS AND RECOMMENDATIONS

This research provides insights into the issues of interest to the Existing Facilities program manager:

- Satisfaction with program processes and timeliness
- Whether any program components constitute barriers to participation; especially, barriers that limit the number of performance-based projects and natural gas efficiency projects
- Value of participation
- Program value in light of the availability of utility incentives for nonresidential retrofits
- Service provider response to a new program feature in 2008 that enabled customers to directly apply to the program (the prior program accepted applications only from service providers)

5.1 SATISFACTION

Conclusion: Program satisfaction is high among both participating end users and service providers; although close to half of all surveyed service providers indicated some dissatisfaction with the turnaround time between application submittal and incentive receipt. Few contacts expressed dissatisfaction with M&V processes and several appreciated M&V because it assures project quality.

Recommendation: Because service providers seem to be the most affected by processing delays, focus on providing incentive application status updates to service providers. Consider providing automated status updates on projects to free up program staff resources for other purposes. Support service providers in setting appropriate expectations by publicizing the typical length of time for each stage of NYSERDA review.

5.2 BARRIERS

Conclusion: Among surveyed end users and service providers, awareness of gas incentives and understanding of performance-based incentives is moderate. Nearly one-quarter of participating end users and half of nonparticipating end users that use natural gas at their facilities did not know about the Existing Facilities gas savings incentives. Under two-thirds of nonparticipating service providers with awareness of the program describe themselves as confident in understanding the difference between performance-based and pre-qualified incentives. One participating service provider also reported lacking confidence in understanding the two incentive approaches, as did one-fifth of office end users.

Recommendation: Provide all participating end users and service providers, regardless of project type, with a marketing piece (letter or brochure) designed specifically to inform participants, in a simple, compelling way, of the variety of incentives available. Increase marketing to nonparticipant service providers, clearly describing the performance-based incentive approach.

5.3 VALUE OF PARTICIPATION

Conclusion: Although the financial incentives are a primary value of participation, both end users and service providers also value non-financial program elements, especially NYSERDA's reputation as a trustworthy source of information and a source of technical expertise.

Recommendation: Program branding through its marketing collateral, descriptive information, and application forms should explicitly, as well as subtly, convey NYSERDA's leadership in

energy efficiency and standards for assuring that project savings meet expectations. Continue to offer assistance with project development to end users and service providers.

5.4 MULTIPLE PROGRAMS IN THE MARKETPLACE

Conclusion: There is considerable confusion among participating end users and, to a lesser but still noteworthy degree, service providers over the existence of both utility programs and NYSERDA's Existing Facilities Program. Service providers appear to be encouraging "incentive shopping" among the programs available to their customers, to get them the best value. The comments of some service providers suggest clear program information is more readily obtained for Existing Facilities than for utility programs, yet the comments of some end users suggest that they found information on Existing Facilities to be confusing. Finally, many end users were unaware whether their utilities offered similar programs, suggesting that Existing Facilities currently benefits from low market awareness of these other programs.

Recommendation: Existing Facilities will benefit from program descriptions and application forms being simple and clear. Program staff might obtain utility program descriptions and application forms and compare Existing Facility materials with utility materials to appreciate what market actors see, identify potential areas for improvement, and discover opportunities to highlight Existing Facilities and NYSERDA value in a manner that compares favorably to utility program information. Finally, program staff might gain insight on the clarity of program materials simply by asking nontechnical staff at NYSERDA to provide feedback on the materials.

5.5 APPLICATIONS ACCEPTED FROM END USERS, AS WELL AS SERVICE PROVIDERS

Conclusion: Even though a 2008 program feature enabled end users to directly apply to the program instead of applying through service providers, program participation continues to be of importance to service providers' businesses. Service providers are as likely to have experienced improved relationships with NYSERDA as unchanged relationships; only a few reported a deterioration of their relationship with NYSERDA.

Recommendation: Program objectives should explicitly include providing service providers with excellent quality of service, including prompt responses, when interacting with them. Convey through words and actions NYSERDA's appreciation and gratitude for their support. This market stance becomes part of NYSERDA's brand.

APPENDIX A:

PARTICIPATING END-USER SURVEY

**NYSERDA - Existing Facilities Program MCA
EFP_MCASurvey_Participating_Host_Customers**

Final for CATI Programming

August 23, 2011

[ASK TO SPEAK WITH CONTACT_NAME] WHEN PERSON COMES TO THE PHONE OR IF YOU GET GATEKEEPER AND THEY ASK TO EXPLAIN THE PURPOSE OF THE CALL, READ:

Hello, my name is _____ and I am calling on behalf of Navigant Consulting. We are conducting a study sponsored by NYSERDA, the New York State Energy Research and Development Authority, about your organization's perceptions of energy efficiency and NYSERDA's related programs. We are seeking to understand the factors that lead organizations like yours to choose energy efficient options and how NYSERDA's programs have affected those decisions.

According to NYSERDA's records, your company has received at least one NYSERDA rebate for the installation of energy efficiency equipment within the past few years. Specifically, we have records of a [INSERT MEASURE_CATEGORY] project completed at [INSERT CUSTOMER_NAME; PROGRAMMER NOTE: SHOW CUSTOMER STREET1 ON SCREEN; INTERVIEWER READ ADDRESS IF NECESSARY] in [INSERT SEASON AND YEAR]. It's important that I talk to the facilities manager, energy manager, or another person who is most familiar with this project.

SCR1. Are you that person?

1. YES [GO TO INSTRUCTIONS BEFORE SCR3]
2. NO - Could you please give me the name and phone number of the person I should speak to, or someone who would know the proper person to speak to?

NAME: _____ PHONE: _____
3. DON'T REMEMBER PROJECT [GO TO INSTRUCTIONS BEFORE SCR2]
96. REFUSED - - Thank you very much for your time. Goodbye. [TERMINATE]
97. DON'T KNOW [PROBE TO ESTABLISH IF PERSON HAS ENOUGH FAMILIARITY WITH PROJECT TO COMPLETE SURVEY]

[ASK SCR2 IF SCR1=3 OR 97 AND MULT_PROJ =1;

IF MULT_PROJ=0, THANK AND TERMINATE]

SCR2. According to NYSERDA's records, your company has received NYSERDA incentives for other projects or facilities. Is there another efficiency project with which you are more familiar that we could discuss?

1. YES (SPECIFY _____)

[INTERVIEWER SHOULD RECORD PROJECT DETAILS (LOCATION, TYPE, YEAR) AND SAY “THANK YOU FOR YOUR TIME. WE MAY BE CONTACTING YOU AGAIN TO DISCUSS THIS PROJECT SOON. GOODBYE]

- 2. NO – Thank you very much for your time. Goodbye. [TERMINATE]
- 96. REFUSED– Thank you very much for your time. Goodbye [TERMINATE]
- 97. DON’T KNOW – Thank you very much for your time. Goodbye. [TERMINATE]

[ASK SCR3 IF SCR1=1 YES]

SCR3. I’d like to ask you some questions. This will take about 20 minutes and will greatly help NYSERDA tailor its energy efficiency programs to better serve New York energy consumers. Your responses will be completely confidential. Can we start?

- 1. YES
- 2. NO - When is a good time to callback? _____)
- 96. REFUSED - Thank you very much for your time. Goodbye.

[INTERVIEWER NOTE: IF THE ‘NO’ FEELS LIKE A REFUSAL - STATE THE FOLLOWING]

NYSERDA is trying to determine how to improve its energy efficiency programs, and as an organization, NYSERDA believes that feedback from energy customers is an important part of making these improvements. Feedback from you/your organization would greatly help in this effort. With this in mind, may we continue?

Organization Background

First, I have a few background questions about your company.

- OB1. How would you describe the type of [business/organization] this is? [IF SECTOR = COLLEGE OR HOSPITAL, SAY “ORGANIZATION”; IF SECTOR= BIG BOX OR OFFICE, SAY “BUSINESS”; DO NOT READ CHOICES]
- 1. HOSPITAL OR HEALTH CARE ORGANIZATION
- 2. RETAILER
- 3. FINANCIAL INSTITUTION (E.G., BANK, INSURANCE, ETC.)
- 4. PROFESSIONAL SERVICES FIRM (E.G., CONSULTING FIRM, ENGINEERING FIRM, ETC.)
- 5. COLLEGE OR UNIVERSITY
- 6. REAL ESTATE DEVELOPER OR PROPERTY MANAGEMENT FIRM
- 95. OTHER (SPECIFY _____)
- 96. REFUSED
- 97. DON’T KNOW

OB2. How long have you been with the organization? Would you say...[READ]

1. Less than 1 year
2. 1 year to less than 3 years
3. 3 years to less than 5 years
4. 5 years or more
96. REFUSED
97. DON'T KNOW

OB3. What is your current title in the organization? Are you the...[READ]

1. Energy Manager
2. Facilities Manager
3. Chief Operating Officer (COO) or Vice President of Operations
4. President, CEO, or CFO
5. Vice President
6. Maintenance Manager
7. PROPERTY MANAGER
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

Project Facility Background Questions

Now I have a few questions about the facility affected by the project I mentioned.

PF1. For the [MEASURE_CATEGORY] project at [CUSTOMER_NAME], what type of building did that project primarily affect? [DO NOT READ CHOICES. CODE ALL THAT APPLY]

1. WAREHOUSE OR STORAGE FACILITY
2. MAINTENANCE BUILDING
3. BANK
4. OFFICE BUILDING
5. PARKING GARAGE
6. CLASSROOMS
7. DORMITORIES
8. CAFETERIA/DINING FACILITY
9. LABORATORIES

- 10. LIBRARY OR MUSEUM
- 11. MIXED USE BUILDING
- 12. GYMNASIUM/SWIMMING POOL/RECREATIONAL FACILITY
- 13. GROCERY STORE/SUPERMARKET
- 14. RETAIL STORE
- 15. HOSPITAL OR OTHER HEALTH TREATMENT
- 16. OTHER LIVING QUARTERS (E.G., NURSING HOME)
- 95. OTHER (SPECIFY _____)
- 96. REFUSED
- 97. DON'T KNOW

PF2. What is that building's approximate square footage? Is it...[READ]

- 1. Less than 2,000 square feet
- 2. 2,001 to less than 5,000 square feet
- 3. 5,000 to less than 10,000 square feet
- 4. 10,000 to less than 20,000 square feet
- 5. 20,000 to less than 50,000 square feet
- 6. 50,000 to less than 100,000 square feet
- 7. 100,000 square feet or more
- 96. REFUSED
- 97. DON'T KNOW

PF3. Do you own or lease this space?

- 1. LEASE/RENT
- 2. OWN
- 95. OTHER (VOL)
- 96. REFUSED
- 97. DON'T KNOW

[ASK PF4 IF PF3=1; ELSE SKIP TO PF5]

PF4. Do you pay your energy bill directly to your utility, or is it included in your lease payments?

- 1. DIRECTLY TO UTILITY
- 2. INCLUDED IN LEASE PAYMENT

95. OTHER (SPECIFY _____)

96. REFUSED

97. DON'T KNOW

For the next two questions, I'd like you to think only about electrical energy use in the facility we have been discussing. For now, please ignore any equipment that uses natural gas.

PF5. I'd like to know what types of equipment in that facility are responsible for the greatest amount of electricity use. For each of the following equipment categories, please indicate if it is a major user of electricity, a minor user of electricity, or not a use of electricity in the facility.

- a) Lighting, including lamps, ballasts and controls
- b) Heating, Ventilation, or Air Conditioning equipment and controls
- c) Process equipment or machinery
- d) Motors, variable speed drives, or pumps
- e) Compressed air systems
- f) Refrigeration and cold storage equipment
- g) Water heating equipment
- h) Office electronics (e.g., computers, servers, copiers, printers)
- i) Other specialized equipment (e.g., hospital equipment, laboratory equipment)

1. MAJOR USER

2. MINOR USER

3. NOT A USER

96. REFUSED

97. DON'T KNOW

[ASK PF6 FOR EACH PF5=1 "MAJOR USER", ELSE SKIP TO PS1]

PF6. When do you tend to replace [INSERT ITEM FROM PF5] equipment? Would you say you replace it...[READ LIST, CODE ALL THAT APPLY]

- 1. To upgrade to more efficient equipment
- 2. Because specific incentives or rebates are offered
- 3. During major renovations, or
- 4. Only when it breaks or burns out

96. REFUSED

97. DON'T KNOW

Project-Specific Questions

Now I'd like to ask some specific questions about the project itself.

PS1. In what year did your organization complete the [MEASURE_CATEGORY] project at [CUSTOMER_NAME] with NYSERDA?

1. 2008
2. 2009
3. 2010
4. 2011
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

PS2. I'd like to ask about the factors that your organization considered when deciding whether to move forward with this particular project. For each of the following factors, please tell me if it was a major factor, a minor factor, or not a factor in your consideration of this project. First, [INSERT ITEM], was this a major, minor or not a factor?

- a) Needed to repair or replace existing equipment or systems
 - b) Wanted to upgrade to more energy efficiency equipment
 - c) It was part of a larger construction or remodeling project
 - d) Availability of incentives from NYSERDA
 - e) Corporate sustainability or environmental priorities
 - f) Financial considerations
 - g) Improving the comfort or productivity of your employees
 - h) [IF SECTOR = HOSPITAL] Improving the experience of your patients
 - i) [IF SECTOR = COLLEGE] Improving the experience of your students
 - j) [IF SECTOR = BIG BOX OR OFFICE] Improving the experience of your customers
 - k) [IF INDICATOR = DOWNSTATE] New York City's recent building benchmarking requirement
1. MAJOR FACTOR
 2. MINOR FACTOR
 3. NOT A FACTOR
 96. REFUSED
 97. DON'T KNOW

[IF MORE THAN ONE ITEM IN PS2=1 'MAJOR FACTOR', ASK PS3, ELSE SKIP TO PS4;
PROGRAMMER: IF ONLY ONE ITEM IN PS2=1 'MAJOR', AUTOFILL FOR PS3]

PS3. Which of these major factors would you say was the most important factor your organization considered when deciding to move forward with this project? [PROGRAMMER: SHOW LIST OF ITEMS FROM PS2 THAT WERE CODED MAJOR; ACCEPT ONLY ONE ANSWER.]

1. Needed to repair or replace existing equipment or systems
2. Wanted to upgrade to more energy efficiency equipment
3. It was part of a larger construction or remodeling project
4. Availability of incentives from NYSERDA
5. Corporate sustainability or environmental priorities
6. Financial considerations
7. Improving the comfort or productivity of your employees
8. Improving the experience of your patients
9. Improving the experience of your students
10. Improving the experience of your customers
11. New York City's recent building benchmarking requirement
96. REFUSED
97. DON'T KNOW

[ASK IF PS3=6; ELSE SKIP TO PS7]

PS4. For each of the following financial factors, please tell me if it was a major factor, a minor factor, or not a factor in your consideration of the [MEASURE_CATEGORY] project at [CUSTOMER_NAME]. First, was [INSERT ITEM] a major, minor, or not a factor?

- a) Reducing operating costs
 - b) Increasing productivity
 - c) Availability of internal funding or capital budget
 - d) Availability of other outside funding
 - e) Meeting company financial requirements such as rate of return on investment or payback period
1. MAJOR FACTOR
 2. MINOR FACTOR
 3. NOT A FACTOR
 96. REFUSED
 97. DON'T KNOW

PS5. Is the project meeting the financial metrics you established for it?

- 1. YES
- 2. NO
- 96. REFUSED
- 97. DON'T KNOW

[ASK IF PS5=NO; ELSE SKIP TO PS7]

PS6. What do you think has prevented the project from achieving expected financial results?

- 1. [RECORD VERBATIM]
- 96. REFUSED
- 97. DON'T KNOW

PS7. Now I'm going to read a list of potential funding sources for energy efficiency projects. For each one, please tell me if it was a very important source of funding, a somewhat important source, or not an important source of funding for the project we have been discussing. First, [INSERT ITEM]; was this a very important, somewhat important, or not an important source of funding?

- a) Capital budget/Cash
 - b) Loans
 - c) Tax credits
 - d) Performance contract
 - e) NYSERDA incentives
 - f) Utility incentives
 - g) Energy Efficiency Conservation Block Grant (EECBG)
- 1. VERY IMPORTANT
 - 2. SOMEWHAT IMPORTANT
 - 3. NOT AN IMPORTANT SOURCE
 - 96. REFUSED
 - 97. DON'T KNOW

[ASK PS8 IF MORE THAN ONE ITEM IN PS7=1 VERY IMPORTANT, ELSE SKIP TO PS9;

PROGRAMMER: IF ONLY ONE ITEM IN PS7=1 VERY IMPORTANT, AUTOFILL FOR PS8]

PS8. Which of these VERY important sources of funding was the most important in securing approval to implement the project? [PROGRAMMER: SHOW ITEMS FROM PS7 THAT WERE ANSWERED 1 - VERY IMPORTANT; ACCEPT ONLY ONE ANSWER.]

- 1. Capital budget/Cash

2. Loans
3. Tax credits
4. Performance contract
5. NYSERDA incentives
6. Utility incentives
7. Energy Efficiency Conservation Block Grant (EECBG)
96. REFUSED
97. DON'T KNOW

PS9. For this energy efficiency project, did you hire any outside companies during the identification, design, or installation of the project?

1. YES
2. NO
96. REFUSED
97. DON'T KNOW

[ASK IF PS9=1 YES; ELSE SKIP TO OD1]

PS10. Please indicate if you worked directly with any of the following types of companies during this project. If a company was a subcontractor to the firm you worked directly with, please answer "no" for the subcontracting company. Did you work directly with an...

- a) Energy efficiency consulting firm
 - b) Engineering or design firm
 - c) Installation contractor (such as a lighting or HVAC contractor)
 - d) Equipment supplier
1. YES
 2. NO
 96. REFUSED
 97. DON'T KNOW

[ASK FOR EACH PS10 a)-d)=1 YES; ELSE SKIP TO OD1]

PS11. I'm going to read a list of services that the [INSERT COMPANY TYPE FROM PS10 might have provided for the project. To the best of your knowledge, please tell me whether or not that company performed each of the following services for this project. If the company hired a

subcontractor to provide a particular service, please just tell me that First, did the [INSERT COMPANY TYPE FROM PS10] provide...[INSERT SERVICE]

1. Energy audit services
2. Project design and engineering
3. Coordination of NYSERDA incentives
4. Performance contracting
5. Other financing assistance
6. Equipment installation
7. Monitoring and verification
8. Operations and maintenance
1. YES
2. NO
3. SUBCONTRACTOR
96. REFUSED
97. DON'T KNOW

Organizational Decision-Making Questions

Now I'd like to ask a few questions about how your organization thinks about energy efficiency projects overall, beyond the project we have been discussing.

OD1. Who in your organization makes the final decision to move forward with an energy efficiency project? [DO NOT READ. PROBE TO CODE.]

1. COMPANY OWNER/BOARD OF DIRECTORS/GOVERNING BODY
2. PRESIDENT/CHIEF EXECUTIVE OFFICER/CHIEF FINANCIAL OFFICER
3. CHIEF OPERATING OFFICER OR VICE PRESIDENT OF OPERATIONS
4. FACILITIES OR ENERGY MANAGER
5. BUILDING OWNER/PROPERTY MANAGEMENT FIRM
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

OD2. Who else needs to review or approve the decision to undertake the project? [DO NOT READ. PROBE TO CODE.]

1. COMPANY OWNER/BOARD OF DIRECTORS/GOVERNING BODY
2. PRESIDENT/CHIEF EXECUTIVE OFFICER/CHIEF FINANCIAL OFFICER

3. CHIEF OPERATING OFFICER OR VICE PRESIDENT OF OPERATIONS
 4. FACILITIES OR ENERGY MANAGER
 5. BUILDING OWNER/PROPERTY MANAGEMENT FIRM
 94. NO ONE ELSE
 95. OTHER (SPECIFY _____)
 96. REFUSED
 97. DON'T KNOW
- OD3. I'm going to read you a list of potential barriers to your organization implementing energy efficiency projects or purchasing high efficiency equipment. For each one, please tell me if it is a major barrier, a minor barrier, or not a barrier. First, [INSERT ITEM], is this a major, minor, or not a barrier?
- a) Concerns about the performance or reliability of energy efficient equipment
 - b) Concerns about the upfront costs of energy efficient equipment
 - c) Uncertainty around projected energy savings
 - d) Lack of internal capital or funding
 - e) Lack of outside capital or funding
 - f) Concerns about the economy
 - g) Failure to meet your organization's financial requirements (such as return on investment or payback period)
 - h) Competition with other priorities within the organization
 - i) [SKIP IF PF3=2] Division of costs and benefits between the building owner and tenant
 - j) Lack of staff available to evaluate or oversee project
 - k) Concerns about the downtime needed to complete the project
1. MAJOR BARRIER
 2. MINOR BARRIER
 3. NOT A BARRIER
 96. REFUSED
 97. DON'T KNOW

[ASK OD4 IF MORE THAN ONE 'MAJOR' IN OD3A-OD3K, ELSE SKIP TO OD5; PROGRAMMER: IF ONLY ONE ITEM IN OD3=1 'MAJOR', AUTOFILL FOR OD4]

- OD4. Which of these major barriers would you say is the greatest barrier to energy efficiency investments for your organization? [PROGRAMMER: SHOW ALL ITEMS FROM OD3 THAT WERE ANSWERED 'MAJOR'; ACCEPT ONLY ONE ANSWER.]

1. Concerns about the performance or reliability of energy efficient equipment
 2. Concerns about the upfront costs of energy efficient equipment
 3. Uncertainty around projected energy savings
 4. Lack of internal capital or funding
 5. Lack of outside capital or funding
 6. Concerns about the economy
 7. Failure to meet your organization's financial requirements (such as return on investment or payback period)
 8. Competition with other priorities within the organization
 9. Division of costs and benefits between the building owner and tenant
 10. Lack of staff available to evaluate or oversee project
 11. Concerns about the downtime needed to complete the project
 96. REFUSED
 97. DON'T KNOW
- OD5. Since the economic downturn began in 2008, would you say your organization's investment in energy efficiency has increased, decreased, or stayed the same?
1. INCREASED
 2. DECREASED
 3. STAYED THE SAME
 96. REFUSED
 97. DON'T KNOW
- OD6. For your organization, how important is it for service providers to offer financing options to help pay for energy efficiency projects? Would you say very important, somewhat important, not too important, or not important at all?
1. VERY IMPORTANT
 2. SOMEWHAT IMPORTANT
 3. NOT TOO IMPORTANT
 4. NOT IMPORTANT AT ALL
 96. REFUSED
 97. DON'T KNOW

Existing Facilities Program Experience

Thank you for your help so far. I have one more set of questions about NYSERDA's Existing Facilities Program, which provided the incentive for the project we were discussing earlier.

- EF1. I'm going to read a list of possible influences that might have encouraged you to participate in NYSERDA's Existing Facilities Program. For each, please indicate if it was a major influence, a minor influence, or not an influence in your organization's decision to pursue a NYSERDA Existing Facilities Program incentive. First, [INSERT ITEM], was this a major, minor, or not an influence?
- a) Contact with NYSERDA staff or outreach contractors
 - b) Information on NYSERDA's website
 - c) Previous experience with NYSERDA programs
 - d) Alignment of NYSERDA's incentives with the type of equipment required for your project
 - e) The dollar value of the NYSERDA incentive
 - f) NYSERDA's requirement for measurement and verification of energy savings
 - g) Discussions with a consultant or contractor working on your project
 - h) Discussions from an equipment manufacturer or vendor
 - i) Information from a trade association to which your organization belongs
- 1. MAJOR INFLUENCE
 - 2. MINOR INFLUENCE
 - 3. NOT AN INFLUENCE
 - 96. REFUSED
 - 97. DON'T KNOW
- EF2. Now I'd like you to tell me how much you agree or disagree with each of the following statements about your experience with the Existing Facilities Program. First, [INSERT ITEM] do you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree with this statement.
- a) I could understand the application requirements and process
 - b) I was not satisfied with my communications with program staff
 - c) When I needed help, NYSERDA or its representatives helped me
 - d) The inspection of my equipment did not go smoothly
 - e) The M&V activities to measure and verify project savings did go smoothly
 - f) I was not satisfied with the time from when I submitted the application to when I received the incentive check
- 1. STRONGLY AGREE

- 2. AGREE
- 3. NEITHER AGREE NOR DISAGREE
- 4. DISAGREE
- 5. STRONGLY DISAGREE
- 96. REFUSED
- 97. DON'T KNOW
- 99. NOT APPLICABLE

[ASK IF EF2 e) = 4 OR 5 (DISAGREE OR STRONGLY DISAGREE), ELSE SKIP TO EF4]

EF3. Would you please tell me what aspect of the M&V activities did not go smoothly.

1. [RECORD VERBATIM]

96. REFUSED

97. DON'T KNOW

EF4. Now I would like to understand which aspects of the NYSERDA program your organization considered to be of value for this project. I'm going to read a list of statements describing potential benefits of participating in the Existing Facilities Program. For each one, please tell me if it was a primary benefit, a secondary benefit, or not a benefit of participating. First, [INSERT ITEM], was this a primary, secondary, or not a benefit?

a) The financial incentive NYSERDA provided

b) NYSERDA was a trustworthy and independent source of information about energy efficiency options

c) NYSERDA staff and its contractors were available to provide support for our project

d) NYSERDA helped ensure we implemented a quality project

1. PRIMARY BENEFIT

2. SECONDARY BENEFIT

3. NOT A BENEFIT

96. REFUSED

97. DON'T KNOW

EF5. Are there any other primary benefits of the program that I did not mention?

1. YES

2. NO

96. REFUSED

97. DON'T KNOW

[ASK EF6 IF EF5=1 YES; ELSE SKIP TO EF7]

EF6. What are those benefits?

1. [RECORD VERBATIM]

96. REFUSED

97. DON'T KNOW

EF7. As you may know, the Existing Facilities Program offers energy efficient equipment incentives for both pre-qualified measures and for performance-based measures. How confident are you that you understand the differences between these two approaches to applying for incentives? Would you say you are very confident, somewhat confident, not too confident, or not confident at all?

1. VERY CONFIDENT

2. SOMEWHAT CONFIDENT

3. NOT TOO CONFIDENT

4. NOT CONFIDENT AT ALL

96. REFUSED

97. DON'T KNOW

EF8. To the best of your knowledge, does your utility company offer incentives for efficient equipment identical to the equipment you installed under your NYSERDA Existing Facilities Program incentive?

1. YES

2. NO

96. REFUSED

97. DON'T KNOW

[ASK IF EF8=1 YES; ELSE SKIP TO EF12]

EF9. Did you contact your utility company, or access its website, to learn about its incentive offerings?

1. YES

2. NO

96. REFUSED

97. DON'T KNOW

EF10. How much confusion do you think there is in the marketplace about the difference between NYSERDA's Existing Facilities Program and your utility company's incentive program? Would you say there is considerable confusion, a little confusion, or not much confusion?

1. CONSIDERABLE CONFUSION

- 2. A LITTLE CONFUSION
- 3. NOT MUCH CONFUSION
- 96. REFUSED
- 97. DON'T KNOW

[ASK EF11 IF EF10= 1 OR 2; ELSE SKIP]

EF11. Could you briefly explain what you think is confusing to the marketplace?

EF12. Does your facility use natural gas?

- 1. YES
- 2. NO
- 96. REFUSED
- 97. DON'T KNOW

[ASK EF13 IF EF12=1 YES; ELSE SKIP]

EF13. Before today, were you aware that the Existing Facilities Program offers incentives for efficient gas equipment, as well as efficient electric equipment?

- 1. YES
- 2. NO
- 96. REFUSED
- 97. DON'T KNOW

EF14. What changes, if any, do you recommend that NYSERDA's Existing Facility Program make to better serve the market in the future?

Closing

Those are all the questions I have today. I'd like to thank you again for your time and participation. The information you provided is very useful for this program evaluation.

APPENDIX B:

PARTICIPATING SERVICE PROVIDER SURVEY

NYSERDA – Existing Facilities Program MCA

EFM_MCASurvey_Participating_Host_Contractors

Final Version

August 8, 2011

[ASK TO SPEAK WITH CONTACT_1_NAME, OR IF THIS PERSON IS UNAVAILABLE AND THERE IS INFORMATION, ASK FOR CONTACT_2_NAME], THEN READ:

Hello, my name is _____, and I am calling on behalf of Navigant Consulting. We are conducting a study sponsored by NYSERDA, the New York State Energy Research and Development Authority, to better understand the current market for energy efficiency retrofits in New York’s commercial sector. We are interested in gathering your input as one of the firms offering energy efficiency services. The survey is intended to inform NYSERDA’s energy efficiency incentive programs, and any responses you provide will be kept confidential.

According to NYSERDA’s records, your company has participated in at least one energy efficiency retrofit project within the past few years that received an incentive through NYSERDA’s Existing Facilities Program. Specifically, their records show that you were involved in a project for [CUSTOMER NAME]. It’s important that I talk to someone in your company who worked on this or other projects that received an incentive through NYSERDA’s Existing Facilities program.

SCR1. Are you that person?

1. YES [GO TO SCR2]
2. NO - Could you please give me the name and phone number of the person I should speak to, or someone who would know the proper person to speak to, who would be well qualified to ask about the factors that influence customers’ decisions about pursuing energy efficiency projects?

NAME: _____ PHONE: _____

96. REFUSED – Thank you very much for your time. Goodbye. [TERMINATE]

97. DON’T KNOW – If you have been active in your business at least 5 years, you likely are someone whose opinions we would value – may we continue?

SCR2. I’d like to ask you some questions. This will take about 20 minutes and will greatly help NYSERDA tailor its commercial sector energy efficiency programs to better serve New York energy consumers. Your responses will be completely confidential. Can we start?

1. YES
2. NO – when is a good time to callback? _____

96. REFUSED - Thank you very much for your time. Goodbye. [TERMINATE]

[INTERVIEWER NOTE: IF THE ‘NO’ FEELS LIKE A REFUSAL, SAY “NYSERDA IS TRYING TO DETERMINE HOW TO IMPROVE ITS ENERGY EFFICIENCY PROGRAMS, AND AS AN ORGANIZATION NYSERDA BELIEVES THAT FEEDBACK FROM ENERGY CONTRACTORS IS AN IMPORTANT PART OF MAKING THESE IMPROVEMENTS. FEEDBACK FROM YOU/YOUR ORGANIZATION WOULD GREATLY HELP IN THIS EFFORT. WITH THIS IN MIND, MAY WE CONTINUE?”]

Company Background

Please note that we will be focusing on the commercial and institutional sectors; industrial and manufacturing customers are not included in this survey.

First, I have a few background questions about your company.

CB1. I'd like to understand your company's role in providing energy efficiency solutions to customers. For each of the following services, please tell me if your company directly offers the service or not. If you primarily subcontract with or partner with another firm to offer a particular service, please just tell me that as well. Does your company offer... [READ]

- a. Energy audits
 - b. Project design and engineering
 - c. Coordination of NYSERDA incentives
 - d. Performance contracting
 - e. Other financing assistance
 - f. Equipment installation
 - g. Monitoring and verification
 - h. Operations and maintenance
1. YES
 2. NO
 3. SUBCONTRACT
 4. PARTNER
 96. REFUSED
 97. DON'T KNOW

CB2. Approximately how many full time employees does your company employ at all of its locations in New York State? Would you say... [READ]

1. Ten or fewer
2. More than 10 but less than 50
3. 50 or more
96. REFUSED

97. DON'T KNOW
- CB3. For how many years has your company been doing business in the state of New York? Would you say... [READ]
1. Two years or less
 2. More than two but less than five years
 3. Five years or more
96. REFUSED
97. DON'T KNOW
- CB4. Do you primarily serve downstate New York (the 5 boroughs of New York City plus the Westchester area) or upstate New York?
1. DOWNSTATE
 2. UPSTATE
 3. BOTH (VOL)
96. REFUSED
97. DON'T KNOW
- CB5. Does your company offer any services that are unrelated to energy efficiency?
1. YES
 2. NO
96. REFUSED
97. DON'T KNOW
- [ASK CB6 IF CB5=1 YES; ELSE SKIP TO CB8]
- CB6. For how many years has your company been providing energy efficiency services in New York? Would you say... [READ]
1. Two years or less
 2. More than two but less than five years
 3. Five years or more
96. REFUSED
97. DON'T KNOW
- CB7. Approximately what percentage of your in-state revenue is related to energy efficiency projects versus other activities? Would you say... [READ]
1. Less than 25%
 2. 25 % to less than 50%

- 3. 50% to less than 75%
 - 4. 75% or more
 - 96. REFUSED
 - 97. DON'T KNOW
- CB8. Does your company work with gas equipment, or is your focus electric-only?
- 1. ELECTRIC-ONLY
 - 2. GAS-ONLY
 - 3. BOTH
 - 96. REFUSED
 - 97. DON'T KNOW
- CB9. What is your title in the company? Are you the... [READ]
- 1. Project manager
 - 2. Project engineer
 - 3. CEO/CFO/President
 - 4. Vice President
 - 5. Owner
 - 6. Business development or sales person
 - 95. OTHER (SPECIFY _____)
 - 96. REFUSED
 - 97. DON'T KNOW
- CB10. For how many years have you been with the company? Would you say... [READ]
- 1. Two years or less
 - 2. More than two but less than five years
 - 3. Five years or more
 - 96. REFUSED
 - 97. DON'T KNOW

Approach to EE Market

Next, I'd like to ask some questions about the types of energy efficiency projects your company works on and about your interactions with customers.

- EE1. In the past three years, has your company begun offering any services related to energy efficiency retrofits that you did not previously provide?

1. YES
2. NO
96. REFUSED
97. DON'T KNOW

[ASK EE2 IF EE1=1 YES; ELSE SKIP TO EE4]

EE2. What new services have you begun offering? [DO NOT READ. CODE ALL THAT APPLY]

1. ENERGY AUDITS
2. PROJECT DESIGN AND ENGINEERING
3. COORDINATION OF NYSERDA INCENTIVES
4. PERFORMANCE CONTRACTING
5. OTHER FINANCING ASSISTANCE
6. EQUIPMENT INSTALLATION
7. MONITORING AND VERIFICATION
8. OPERATIONS AND MAINTENANCE
9. COMMISSIONING OR RETRO-COMMISSIONING SERVICES
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

EE3. What led you to offer these services? [DO NOT READ. CHECK ALL THAT APPLY]

1. WE ACQUIRED ANOTHER FIRM THAT OFFERED THESE SERVICES
2. WE WERE ACQUIRED BY ANOTHER FIRM THAT OFFERED THESE SERVICES
3. CUSTOMER DEMAND
4. WANTED TO OFFER A MORE COMPLETE SUITE OF SERVICES TO OUR CUSTOMERS
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

EE4. In the past three years, has your company stopped offering any services related to energy efficiency retrofits that you previously provided?

1. YES
2. NO

96. REFUSED

97. DON'T KNOW

[ASK EE5 IF EE4=YES; ELSE SKIP TO EE7]

EE5. What services have you stopped offering? [DO NOT READ. CODE ALL THAT APPLY]

1. ENERGY AUDITS
2. PROJECT DESIGN AND ENGINEERING
3. COORDINATION OF NYSERDA INCENTIVES
4. PERFORMANCE CONTRACTING
5. OTHER FINANCING ASSISTANCE
6. EQUIPMENT INSTALLATION
7. MONITORING AND VERIFICATION
8. OPERATIONS AND MAINTENANCE
9. COMMISSIONING OR RETRO-COMMISSIONING SERVICES
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

EE6. What led you to stop offering these services? [DO NOT READ. CHECK ALL THAT APPLY]

1. MARKET OPPORTUNITY DISSOLVED
2. WE WERE LOSING MONEY ON IT
3. IT WAS TOO COMPLICATED
4. WE WANTED TO FOCUS ON OUR CORE COMPETENCIES
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

EE7. Do you focus your energy efficiency retrofit business on specific customer market sectors or buildings types?

1. YES
2. NO
96. REFUSED
97. DON'T KNOW

[ASK EE8 IF EE7=1 YES; ELSE SKIP TO EE9]

EE8. What sectors or building types do you focus on? [DO NOT READ. CHECK ALL THAT APPLY]

1. COLLEGES AND UNIVERSITIES
2. HOSPITALS AND HEALTH CARE FACILITIES
3. OFFICE BUILDINGS/COMMERCIAL REAL ESTATE/TENANT IMPROVEMENTS
4. LARGE RETAIL/BIG BOX STORES
5. STATE AND LOCAL GOVERNMENT
6. K-12 OR SECONDARY SCHOOLS
7. HOSPITALITY
8. INDUSTRIAL AND MANUFACTURING
9. MUNICIPAL WATER AND WASTEWATER FACILITIES
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

EE9. Do you focus your energy efficiency retrofit business on specific types of equipment?

1. YES
2. NO
96. REFUSED
97. DON'T KNOW

[ASK EE10 IF EE9=1 YES; ELSE SKIP TO EE11]

EE10. I'm going to read you a list of equipment categories. For each one, please tell me if it is a major focus, a minor focus, or not a focus for your company? First, [INSERT ITEM], is this a major factor, minor factor, or not a factor?

- a) Lighting, including lamps, ballasts and controls
- b) Heating, Ventilation, or Air Conditioning equipment and controls
- c) Process equipment or machinery
- d) Motors, variable speed drives, or pumps
- e) Compressed air systems
- f) Refrigeration and cold storage equipment
- g) Building Management Systems
 1. MAJOR FOCUS
 2. MINOR FOCUS

3. NOT A FOCUS

96. REFUSED

97. DON'T KNOW

EE11. How does your firm market energy efficiency retrofit services to potential customers? [SELECT ALL THAT APPLY, DO NOT READ]

1. MARKET USING NYSERDA NAME

2. MARKET SERVICES TO EXISTING CUSTOMERS/CLIENTS

3. DON'T MARKET, RESPOND TO CUSTOMER/CLIENT INQUIRIES

4. MARKET BASED ON EXPECTED BENEFITS

5. WORD OF MOUTH

6. REFERRALS

7. ORGANIZED NETWORKING (CONFERENCES, TRADE SHOWS)

8. WEBSITE, MATERIALS

9. DIRECT MARKETING/IN PERSON MARKETING

95. OTHER (SPECIFY _____)

96. REFUSED

97. DON'T KNOW

Market Drivers and Barriers

Now I'd like to ask you a few questions about what you perceive as your customers' primary motivations and challenges when considering energy efficiency options.

MD1. First, I'd like to ask about the factors you see influencing your customers' decisions to implement energy efficiency retrofits or purchase energy efficient equipment. For each of the following factors, please tell me if it is a major factor, a minor factor, or not a factor in your customers' consideration of a retrofit project. First, [INSERT ITEM], is this a major, minor or not a factor?

a) Needed to repair or replace existing equipment or systems

b) Wanted to upgrade to more energy efficiency equipment

c) It was part of a larger construction or remodeling project

d) Availability of incentives from NYSERDA

e) Corporate sustainability or environmental priorities

f) Financial considerations

g) Improving the comfort or productivity of their employees

h) Improving the experience of their customers (patients, students, etc.)

- i) [IF INDICATOR= DOWNSTATE] New York City's recent building benchmarking requirement
 - 1. MAJOR FACTOR
 - 2. MINOR FACTOR
 - 3. NOT A FACTOR
 - 96. REFUSED
 - 97. DON'T KNOW

[IF MORE THAN ONE ITEM IN MD1=1 'MAJOR FACTOR', ASK MD2, ELSE SKIP TO MD3; PROGRAMMER: IF ONLY ONE ITEM IN MD1=1 'MAJOR', AUTOFILL FOR MD2]

MD2. Which of these major factors would you say is the most important factor your customers considered when deciding to move forward with a retrofit project? [SHOW LIST OF ITEMS FROM MD1 THAT WERE ANSWERED 'MAJOR'; ACCEPT ONLY ONE ANSWER.]

- 1. Needed to repair or replace existing equipment or systems
- 2. Wanted to upgrade to more energy efficiency equipment
- 3. It was part of a larger construction or remodeling project
- 4. Availability of incentives from NYSERDA
- 5. Corporate sustainability or environmental priorities
- 6. Financial considerations
- 7. Improving the comfort or productivity of their employees
- 8. Improving the experience of their customers (patients, students, etc.)
- 9. [IF INDICATOR= DOWNSTATE] New York City's recent building benchmarking requirement
- 96. REFUSED
- 97. DON'T KNOW

[ASK MD3 IF MD2=6, ELSE SKIP TO MD4]

MD3. For each of the following financial factors, please tell me if it is a major factor, a minor factor, or not a factor in your customers' consideration of retrofit projects.

- a) Reducing operating costs
- b) Increasing productivity
- c) Availability of internal funding or capital budget
- d) Availability of other outside funding
- e) Meeting company financial requirements such as rate of return on investment or payback period

1. MAJOR FACTOR
2. MINOR FACTOR
3. NOT A FACTOR
96. REFUSED
97. DON'T KNOW

MD4. Now I'd like to ask about barriers to retrofit projects for your customers. I'm going to read you a list of factors. For each one please tell me if you think it is a major barrier, minor barrier or not a barrier for your customers when they consider implementing energy efficiency projects or purchasing high efficiency equipment.

- a) Concerns about the performance or reliability of energy efficient equipment
- b) Concerns about the upfront costs of energy efficient equipment
- c) Uncertainty around projected energy savings
- d) Lack of internal capital or funding
- e) Lack of outside capital or funding
- f) Concerns about the economy
- g) Failure to meet their organization's financial requirements (such as return on investment or payback period)
- h) Competition with other priorities within the customer's organization
- i) Division of costs and benefits between the building owner and tenant
- j) Lack of staff available to evaluate or oversee project
- k) Concerns about the downtime needed to complete the project

1. MAJOR BARRIER
2. MINOR BARRIER
3. NOT A BARRIER
96. REFUSED
97. DON'T KNOW

[IF MORE THAN ONE ITEM IN MD4=1 'MAJOR BARRIER', ASK MD5, ELSE SKIP TO PE1;
PROGRAMMER: IF ONLY ONE ITEM IN MD4=1 'MAJOR', AUTOFILL FOR MD5]

MD5. Which of these major factors would you say is the greatest barrier to energy efficiency investments for your customers? [SHOW LIST OF MAJOR FACTORS FROM MD4; ACCEPT ONLY ONE ANSWER.]

1. Concerns about the performance or reliability of energy efficient equipment
2. Concerns about the upfront costs of energy efficient equipment

3. Uncertainty around projected energy savings
4. Lack of internal capital or funding
5. Lack of outside capital or funding
6. Concerns about the economy
7. Failure to meet their organization's financial requirements (such as return on investment or payback period)
8. Competition with other priorities within the customer's organization
9. Division of costs and benefits between the building owner and tenant
10. Lack of staff available to evaluate or oversee project
11. Concerns about the downtime needed to complete the project
96. REFUSED
97. DON'T KNOW

Project Economics and Performance Contracting

These next few questions relate to how your customers pay for energy efficient projects and services.

PE1. I'm interested in the possible effects of the economic downturn on different customers' investment in energy efficiency retrofits. For each of the following market sectors, please indicate if customers' investment in energy efficiency retrofit projects has increased, decreased, or stayed the same since the beginning of the economic downturn in 2008. If you don't work with or are unfamiliar with a particular customer market segment, please respond, "I don't know."

- a) Colleges and Universities
 - b) Hospitals and Health Care Facilities
 - c) Office Buildings and Commercial Real Estate
 - d) Large Retail Chains, such as Big Box or Department Stores
1. INCREASED
 2. DECREASED
 3. STAYED THE SAME
 96. REFUSED
 97. DON'T KNOW

PE2. Does your company offer financing assistance to customers for energy efficiency retrofit projects, either directly or through a third-party organization?

1. YES
2. NO
96. REFUSED

97. DON'T KNOW

[ASK PE3 IF PE2=1; ELSE SKIP TO PE6]

PE3. On average, how important is this financial assistance to potential customers' willingness to implement energy efficiency projects or purchase energy efficient equipment? Would you say... [READ]

- 1) Very important.
- 2) Somewhat important,
- 3) Not too important,
- 4) Not important at all
- 5) DEPENDS ON CUSTOMER (VOL)
- 96) REFUSED
- 97) DON'T KNOW

PE4. I'm interested in what type of financing you offer. Do you... [READ]

- a) Offer performance contracting or ESCO services?
- b) Use an internal fund to provide loans to customers?
- c) Partner with a bank or other third-party to provide loans to customers?
- d) Other
 1. YES
 2. NO
96. REFUSED
97. DON'T KNOW

[ASK PE5 IF PE4a=1 YES; ELSE SKIP TO PE6]

PE5. I'd like to ask a little more about performance contracting. For each of the following market sectors please tell me if customers' willingness to enter into a performance contract for a retrofit project has increased, decreased, or stayed the same over the past three years. If you don't work with or are unfamiliar with a particular customer sector, please just tell me that.

- a) Colleges and Universities
- b) Hospitals and Health Care Facilities
- c) Office Buildings/Commercial Real Estate
- d) Large Retail Chains, such as Big Box or Department Stores
 1. INCREASED
 2. DECREASED

3. STAYED THE SAME

96. REFUSED

97. DON'T KNOW

PE6. How often do you guarantee a certain level of energy savings to your customers? Would you say... [READ]

a) Always

b) Often

c) Sometimes

d) Rarely

e) Never

96. REFUSED

97. DON'T KNOW

Existing Facilities Program and Project Experience

This next set of questions relates specifically to NYSERDA's Existing Facilities Program, also known as EFP, for commercial and institutional sector energy users.

EF1. The Existing Facilities Program offers energy efficient equipment incentives for both pre-qualified measures and for performance-based measures. How confident are you that you understand the differences between these two approaches to applying for incentives? Would you say you are... [READ]

1. Very confident

2. Somewhat confident

3. Not too confident

4. Not confident at all

96. REFUSED

97. DON'T KNOW

EF2. Do you include information about NYSERDA's EFP program in your marketing materials and outreach efforts?

1. YES

2. NO

96. REFUSED

97. DON'T KNOW

EF3. I'm interested in how the availability of incentives from NYSERDA's Existing Facilities Program has affected your business. Would you say that the availability of these incentives has... [READ]

1. Had a positive effect on your business
 2. Had a negative effect on your business
 3. Not greatly affected your business
96. REFUSED

97. DON'T KNOW

EF4. How important is the availability of NYSERDA incentives in your customers' decisions to implement energy efficiency measures? Would you say... [READ]

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

96. REFUSED

97. DON'T KNOW

EF5. Now I'd like to ask about the degree to which the energy efficiency retrofit projects your company completes take advantage of various incentives. For each of the following types of incentives, please tell me approximately what percent of retrofit projects that your company has completed in New York State in the past three years used that type of incentive:

- a) NYSERDA Pre-Qualified Incentives
- b) NYSERDA Performance-Based Incentives
- c) Incentives from a utility company's energy efficiency program

d) No incentive

1. LESS THAN 25%
2. 25 % TO LESS THAN 50%
3. 50% TO LESS THAN 75%
4. 75% OR MORE

96. REFUSED

97. DON'T KNOW

[ASK EF6 IF EF5d = 3 OR 4; ELSE SKIP TO EF8]

EF6. I'm going to read you a list of possible reasons why energy efficiency retrofit projects might not use an incentive. For each one, please tell me if it is a primary reason, a secondary reason, or not a reason why your company's energy efficiency retrofit projects might not use an incentive.

- a) You were unsure whether the installed equipment qualified
- b) You thought the incentives were insufficient

- c) You thought the program requirements were unattractive
- d) You applied for incentives, but the projects did not meet the requirements
- e) Your customers did not wish to use NYSERDA or utility company funds

- 1. PRIMARY REASON
- 2. SECONDARY REASON
- 3. NOT A REASON
- 96. REFUSED
- 97. DON'T KNOW

[ASK EF7 IF EF6c = 1 OR 2; ELSE SKIP TO EF8]

EF7. What specific program requirements do you find to be unattractive?

- 1. [RECORD VERBATIM]
- 96. REFUSED
- 97. DON'T KNOW

EF8. Have any of the utility companies that serve your customers in New York State contacted you about their incentive programs for commercial customers?

- 1. YES
- 2. NO
- 96. REFUSED
- 97. DON'T KNOW

EF9. How much confusion do you think there is in the marketplace about the difference between NYSERDA's Existing Facilities Program and utility companies' incentive programs? Would you say there is considerable confusion, a little confusion, or not much confusion?

- 1. CONSIDERABLE CONFUSION
- 2. A LITTLE CONFUSION
- 3. NOT MUCH CONFUSION
- 96. REFUSED
- 97. DON'T KNOW

[ASK EF10 IF EF9 = 1 OR 2; ELSE SKIP TO EF11]

EF10. Could you briefly explain what is confusing to the marketplace?

[ASK EF11 IF CB8 = 2 OR 3; ELSE SKIP TO EF12]

EF11. Before today, were you aware that the Existing Facilities Program offers incentives for efficient gas equipment, as well as efficient electric equipment?

1. YES
2. NO
3. NOT RELEVANT TO RESPONDENT (THEY DON'T SELL GAS EQUIPMENT)
96. REFUSED
97. DON'T KNOW

EF12. Next, I'd like you to tell me how much you agree or disagree with each of the following statements about your experiences with various parts of NYSERDA's Existing Facilities Program. [INSERT STATEMENT]. Do you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree with this statement.

- a) I could understand the application requirements and process
- b) I was not satisfied with my communications with program staff
- c) When I needed help, NYSERDA or its representatives helped me
- d) NYSERDA inspections have not gone smoothly
- e) The M&V activities to measure and verify project savings have gone smoothly
- f) I was not satisfied with the time from when the application was submitted to when the incentive check was received

1. STRONGLY AGREE
2. AGREE
3. NEITHER AGREE NOR DISAGREE
4. DISAGREE
5. STRONGLY DISAGREE
96. REFUSED
97. DON'T KNOW
99. NOT APPLICABLE

[ASK EF13 IF EF12e = 4 OR 5 (DISAGREE OR STRONGLY DISAGREE), ELSE SKIP TO EF14]

EF13. Please explain what aspect of the M&V activities did not go smoothly.

1. [RECORD VERBATIM]
96. REFUSED
97. DON'T KNOW

EF14. Now I would like to understand which aspects of the NYSERDA program your organization considers to be of value. I'm going to read a list of statements describing potential benefits of participating in the Existing Facilities Program. For each one, please tell me if it was a primary benefit, a secondary benefit, or not a benefit of participating.

- a) The financial incentives NYSERDA provides
- b) NYSERDA is a trustworthy and independent source of information about energy efficiency options
- c) NYSERDA staff and its contractors are available to provide support for projects
- d) NYSERDA helps ensure we implement quality projects

1. PRIMARY BENEFIT

2. SECONDARY BENEFIT

3. NOT A BENEFIT

96. REFUSED

97. DON'T KNOW

EF15. Are there any other primary benefits of the program that I did not mention?

1. YES

2. NO

96. REFUSED

97. DON'T KNOW

[ASK EF16 IF EF15=1 YES; ELSE SKIP TO EF17]

EF16. What are those benefits?

1. [RECORD VERBATIM]

96. REFUSED

97. DON'T KNOW

EF17. For how many years have you been using Existing Facilities Program incentives, or those of its predecessor, the Enhanced Commercial and Industrial Performance Program (ECIPP), for your customers' projects? Would you say... [READ]

1. 2 years or less

2. More than 2 but less than 5 years

3. 5 years or more

96. REFUSED

97. DON'T KNOW

[ASK EF18 IF EF17 = 2 OR 3; ELSE SKIP TO INSTRUCTIONS PRIOR TO CC1]

EF18. In terms of completing the program applications, would you say they are ... [READ]

1. Easier to complete than before
2. Harder to complete than before, or
3. About the same?

96. REFUSED

97. DON'T KNOW

EF19. Thinking about NYSERDA staff's interactions with firms like yours, would you say they have... [READ]

1. Improved over time
2. Worsened over time, or
3. Stayed about the same?

96. REFUSED

97. DON'T KNOW

[ASK EF20 IF EF19=2; ELSE SKIP TO EF21]

EF20. Could you please explain what about the interactions has worsened?

1. [RECORD VERBATIM]

96. DON'T KNOW

97. REFUSED

EF21. What is your perception of how NYSERDA currently values the participation of firms like yours? Would you say NYSERDA values your participation... [READ]

1. More than 2 years ago
2. Less than 2 years ago
3. About the same as 2 years ago

96. REFUSED

97. DON'T KNOW

[ASK EF22 IF EF21=2; ELSE SKIP TO INSTRUCTIONS BEFORE CC1]

EF22. Could you please explain why you perceive that NYSERDA values your participation less?

1. [RECORD VERBATIM]

96. REFUSED

97. DON'T KNOW

Closing

Thank you so much for your time today. Before we close, I have one final question.

CC1. What, if any, changes should NYSERDA's Existing Facility Program make to better serve the market in the future?

Those are all the questions I have today. I'd like to thank you again for your time and participation.

APPENDIX C:

NONPARTICIPATING END-USER SURVEY

**NYSERDA - Existing Facilities Program MCA
EFP_MCASurvey_Nonparticipating_Host_Customers**

Final Version

November 15, 2011

College Introduction

[READ IF SECTOR = COLLEGE]

Hello. [ASK TO SPEAK WITH FACILITIES MANAGER / DIRECTOR OF FACILITIES/DIRECTOR OF BUILDINGS AND GROUNDS. RECORD NAME AND PHONE NUMBER.]

My name is _____ and I am calling on behalf of Navigant Consulting. We are conducting a study sponsored by the New York State Energy Research and Development Authority, also known as NYSERDA, about energy efficiency and related incentive programs available in New York State. We are seeking to understand the factors that higher education institutions like yours consider when making decisions about energy use and efficiency.

Hospital Introduction

[READ IF SECTOR = HOSPITAL]

Hello. [ASK TO SPEAK WITH FACILITIES MANAGER / DIRECTOR OF FACILITIES/ DIRECTOR OF BUILDINGS AND GROUNDS. RECORD NAME AND PHONE NUMBER.]

My name is _____ and I am calling on behalf of Navigant Consulting. We are conducting a study sponsored by the New York State Energy Research and Development Authority, also known as NYSERDA, about energy efficiency and related incentive programs available in New York State. We are seeking to understand the factors that hospitals and health care facilities like yours consider when making decisions about energy use and efficiency.

Office Introduction for Tenants and Owner-Occupiers

[READ IF SECTOR = OFFICE AND OFFBTYPE = TENANT OR OWNER OCCUPIER]

Hello. My name is _____ and I am calling on behalf of Navigant Consulting. We are conducting a study sponsored by the New York State Energy Research and Development Authority, also known as NYSERDA, about energy efficiency and related incentive programs available in New York State. We are seeking to understand the factors that organizations like yours consider when making decisions about energy use and efficiency.

Office Introduction for Property Managers/Developers

[READ IF SECTOR = OFFICE AND OFFBTYPE = PROPERTY MANAGER/DEVELOPER]

Hello. My name is _____ and I am calling on behalf of Navigant Consulting. We are conducting a study sponsored by the New York State Energy Research and Development Authority, also known as NYSERDA, about energy efficiency and related incentive programs available in New York State. We are seeking to understand the factors that property management organizations like yours consider when making decisions about energy use and efficiency in the properties you own or manage.

General Retail Introduction

[READ IF SECTOR = RETAIL AND CALL IS TO STORE FROM SAMPLE]

Hello. [IF NO CONTACT NAME, ASK TO SPEAK WITH THE STORE MANAGER.]

My name is _____ and I am calling on behalf of Navigant Consulting. We are conducting a study sponsored by the New York State Energy Research and Development Authority, also known as NYSERDA, about energy efficiency and related incentive programs available in New York State. We are seeking to understand the factors that retail stores like yours consider when making decisions about energy use and efficiency.

Corporate-Level Retail Introduction

[READ IF SECTOR = RETAIL AND CALL IS TO CORPORATE-LEVEL CONTACT]

Hello. [ASK TO SPEAK WITH CONTACT LISTED.]

My name is _____ and I am calling on behalf of Navigant Consulting. We are conducting a study sponsored by the New York State Energy Research and Development Authority, also known as NYSERDA, about energy efficiency and related incentive programs available in New York State. We are seeking to understand the factors that larger retail stores like yours consider when making decisions about energy use and efficiency.

General Screeners

[INSERTS FOR SC1]

- IF SECTOR = COLLEGE, USE “COLLEGES, UNIVERSITIES, AND INSTITUTIONS OF HIGHER EDUCATION”
- IF SECTOR = HOSPITAL, USE “HOSPITALS AND HEALTH CARE FACILITIES”
- IF SECTOR = RETAIL, USE “RETAIL STORES”
- IF SECTOR = OFFICE AND OFFBTYPE = TENANT OR OWNER OCCUPIER, USE “OFFICES OR OFFICE BUILDINGS”
- IF SECTOR = OFFICE AND OFFBTYPE = PROPERTY MANAGER/DEVELOPER, USE “OFFICE BUILDING PROPERTY MANAGERS AND REAL ESTATE DEVELOPERS”

SC1: As part of this study, we are contacting a sample of [INSERT] in New York State. Can you confirm that I’ve reached such an organization?

1. YES
2. NO [THANK AND TERMINATE]
96. REFUSED [THANK AND TERMINATE]

97. DON'T KNOW [THANK AND TERMINATE]

SC2: Are you the appropriate person to discuss issues regarding energy-related capital improvements for this organization?

1. YES [GO TO INSTRUCTIONS BEFORE SC3]
2. NO - Who at your organization can best speak about energy-related capital improvements?

[RECORD THE NAME, TITLE, AND PHONE NUMBER OF THE NEW CONTACT PERSON. THEN FOLLOW UP WITH HIM OR HER.]

96. REFUSED [THANK AND TERMINATE]

97. DON'T KNOW - If you oversee facility operations and are involved in the decision-making process for energy-related improvement projects, we would like to speak to you.

[READ IF NECESSARY: AS AN INDEPENDENT RESEARCH FIRM, WE DO NOT INTEND TO REPORT YOUR RESPONSES IN ANY WAY THAT WOULD REVEAL YOUR IDENTITY OR THE IDENTITY OF YOUR ORGANIZATION. IF YOU HAVE QUESTIONS, YOU CAN CONTACT NYSERDA'S PROJECT MANAGER FOR EVALUATION, TODD FRENCH AT 518-862-1090, EXT. 3212, OR BY EMAIL AT GTF@NYSERDA.ORG]

[ASK SC3 IF SECTOR=HOSPITAL OR SECTOR=COLLEGE; ELSE SKIP TO SC4]

SC3: Part of our study focuses specifically on [Healthcare/Educational] facilities that meet certain characteristics. Would you describe your organization as...[READ]

1. Occupying a portion of a building from which you rent or lease space, or
2. Occupying an entire building or several buildings?
3. REFUSED [THANK AND TERMINATE]
4. DON'T KNOW [THANK AND TERMINATE]

[IF SC3= 1, THANK AND TERMINATE - I'm afraid that is not the type of facility we are looking for. Thank you for your time.]

SC4: Great! I'd like to ask you some questions. This will take about 20 minutes and will greatly help NYSERDA tailor its energy efficiency programs to better serve New York energy consumers. Your responses will be completely confidential. Can we start?

1. YES
 2. NO - When is a good time to callback? [RECORD CALLBACK TIME]
96. REFUSED - Thank you very much for your time. Goodbye. [TERMINATE]

[INTERVIEWER NOTE- IF THE RESPONDENT SEEMS RELUCTANT, STATE THE FOLLOWING: "NYSERDA IS TRYING TO DETERMINE HOW TO IMPROVE ITS ENERGY EFFICIENCY PROGRAMS, AND AS AN ORGANIZATION NYSERDA BELIEVES THAT FEEDBACK FROM ENERGY CUSTOMERS IS AN IMPORTANT PART OF MAKING THESE IMPROVEMENTS. FEEDBACK FROM YOU/YOUR ORGANIZATION WOULD GREATLY HELP IN THIS EFFORT. WITH THIS IN MIND, MAY WE CONTINUE?"]

Participation Screeners

When responding to questions please use your best judgment or give your best estimates. If you don't know how to respond, just say so.

PS1. To the best of your knowledge, has your organization participated in any NYSERDA or New York Energy \$martSM programs in the past three years? [READ IF NECESSARY: NYSERDA stands for New York State Energy Research and Development Authority]

1. YES
2. NO [SKIP TO INSTRUCTIONS BEFORE OFF1]
96. REFUSED [SKIP TO INSTRUCTIONS BEFORE OFF1]
97. DON'T KNOW [SKIP TO INSTRUCTIONS BEFORE OFF1]

PS2. Which NYSERDA Programs has your organization participated in? [DO NOT READ. MARK ALL THAT APPLY]

1. FLEX TECH (FLEXIBLE TECHNICAL ASSISTANCE)
2. NEW CONSTRUCTION PROGRAM (NCP)
3. EXISTING FACILITIES PROGRAM (EFP) [THANK AND TERMINATE]
4. INDUSTRIAL PROCESS EFFICIENCY (IPE)
5. ENHANCED COMMERCIAL & INDUSTRIAL PERFORMANCE PROGRAM (ECIPP)
6. BUSINESS PARTNERS
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

PS3. To the best of your knowledge, has your organization received an incentive from NYSERDA's Existing Facilities Program in the past three years?

1. YES [THANK AND TERMINATE]
2. NO
96. DON'T KNOW
97. REFUSED

Property Manager Geographic Classification

[ASK OFF1 IF OFFBTYPE=PROPERTY MANAGER/DEVELOPER, ELSE SKIP TO OB1]

OFF1. Of the office building properties that your organization manages in New York State, would you say that the majority are in downstate New York (the 5 boroughs of New York City plus the Westchester area), or in upstate New York?

1. DOWNSTATE

- 2. UPSTATE
- 96. REFUSED
- 97. DON'T KNOW

Organization Background

OB1. First, I have a few background questions about your organization and its facilities. How long have you been with the organization? Would you say...[READ]

- 1. Less than 1 year
- 2. 1 year to less than 3 years
- 3. 3 years to less than 5 years
- 4. 5 years or more
- 96. REFUSED
- 97. DON'T KNOW

OB2. What is your current title in the organization? Are you the...[READ]

- 1. Energy Manager
- 2. Facilities Manager
- 3. Chief Operating Officer (COO) or VP Operations
- 4. President, CEO, or CFO
- 5. Vice President
- 6. Maintenance Manager
- 7. DIRECTOR OR VP OF FACILITIES
- 95. OTHER (SPECIFY _____)
- 96. REFUSED
- 97. DON'T KNOW

OB3. How many individual buildings or facilities do you oversee? Would you say...[READ]

[IF CLARIFICATION REQUESTED, READ: BY OVERSEE, WE MEAN THAT YOU ARE RESPONSIBLE FOR OPERATIONS AT THE BUILDING OR FACILITY OR YOU ARE INVOLVED IN CAPITAL IMPROVEMENT DECISION-MAKING FOR THAT BUILDING OF FACILITY]

- 1. 1 building
- 2. 2 to 4 buildings
- 3. 5 to 10 buildings
- 4. More than 10 buildings

- 5. LESS THAN 1 BUILDING (VOL)
 - 96. REFUSED
 - 97. DON'T KNOW
- OB4. Please describe the different types of facilities that you oversee or are directly involved with making capital improvements decisions for. [DO NOT READ CHOICES. CODE ALL THAT APPLY]
- 1. WAREHOUSE OR STORAGE FACILITY
 - 2. MAINTENANCE BUILDING
 - 3. BANK
 - 4. OFFICE BUILDING
 - 5. PARKING GARAGE
 - 6. CLASSROOMS
 - 7. DORMITORIES
 - 8. CAFETERIA/DINING FACILITY
 - 9. LABORATORIES
 - 10. LIBRARY OR MUSEUM
 - 11. MIXED USE BUILDING
 - 12. GYMNASIUM/SWIMMING POOL/RECREATIONAL FACILITY
 - 13. GROCERY STORE/SUPERMARKET
 - 14. RETAIL STORE
 - 15. HOSPITAL OR OTHER HEALTH TREATMENT
 - 16. OTHER LIVING QUARTERS (E.G., NURSING HOME)
 - 95. OTHER (SPECIFY _____)
 - 96. REFUSED
 - 97. DON'T KNOW
- OB5. Are there other facilities in your organization that are someone else's responsibility to oversee?
- 1. YES
 - 2. NO
 - 96. REFUSED
 - 97. DON'T KNOW

[IF OFFBTYPE=PROPERTY MANAGER/DEVELOPER, SKIP TO INSTRUCTIONS BEFORE OB8]

- OB6. Do you own or lease the majority of the buildings in your organization?
1. LEASE/RENT
 2. OWN [SKIP TO OB8]
 95. OTHER (VOL) [SKIP TO INSTRUCTIONS BEFORE OFF1]
 96. REFUSED [SKIP TO INSTRUCTIONS BEFORE OFF1]
 97. DON'T KNOW [SKIP TO INSTRUCTIONS BEFORE OFF1]
- OB7. Do you pay your energy bill directly to your utility, or is it included in your lease payments?
1. DIRECTLY TO UTILITY
 2. INCLUDED IN LEASE PAYMENT
 95. OTHER (SPECIFY _____)
 96. DON'T KNOW
 97. REFUSE

For the next two questions, I'd like you to think only about electrical energy use in your facilities. Please ignore any equipment that uses natural gas.

- OB8. I'd like to know what types of equipment in your [IF OB3=1 OR 5, SAY "FACILITY"; ELSE SAY "FACILITIES"] are responsible for the greatest amount of electricity use. For each of the following equipment categories, please indicate if it is a major user of electricity, a minor user of electricity, or not a user of electricity in your [IF OB3=1 OR 5, SAY "FACILITY"; ELSE SAY "FACILITIES"].
- A. Lighting, including lamps, ballasts and controls
 - B. Heating, Ventilation, or Air Conditioning equipment and controls
 - C. Process equipment or machinery
 - D. Motors, variable speed drives, or pumps
 - E. Compressed air systems
 - F. Refrigeration and cold storage equipment
 - G. Water heating equipment
 - H. Office electronics (e.g., computers, servers, copiers, printers)
 - I. Other specialized equipment (e.g., hospital equipment, laboratory equipment)
 1. MAJOR USER
 2. MINOR USER
 3. NOT A USER
 96. REFUSED

97. DON'T KNOW

[ASK OB9 FOR EACH OB8a-i = 1 "MAJOR USER", ELSE SKIP TO OB10]

OB9. When do you tend to replace [INSERT ITEM FROM OB8] equipment? Would you say you replace it...[READ LIST, CODE ALL THAT APPLY]

1. To upgrade to more efficient equipment
2. Because specific incentives or rebates are offered
3. During major renovations, or
4. Only when it breaks or burns out

96. REFUSED

97. DON'T KNOW

OB10. In the past three years, have you completed any energy efficiency projects or installed any high-efficiency equipment in the [IF OB3=1 OR 5, SAY "FACILITY"; ELSE SAY "FACILITIES"] you oversee?

1. YES
2. NO [SKIP TO OB12]
96. REFUSED [SKIP TO OB12]
97. DON'T KNOW [SKIP TO OB12]

OB11. I'd like to better understand the types of energy efficiency projects or high-efficiency equipment you installed in [IF SECTOR=OFFICE, SAY "YOUR OFFICE OR OFFICE FACILITIES"; ELSE SAY "THESE FACILITIES"]. From the following list, please indicate if that project or projects included equipment from each category. Did your projects include...

- A. Lighting, including lamps, ballasts and controls
- B. Heating, Ventilation, or Air Conditioning equipment and controls
- C. Process equipment or machinery
- D. Motors, variable speed drives, or pumps
- E. Compressed air systems
- F. Refrigeration and cold storage equipment
- G. Water heating equipment
- H. Office electronics (e.g., computers, servers, copiers, printers)
- I. Other specialized equipment (e.g., hospital equipment, laboratory equipment)
- J. Building/Energy Management Systems
- K. Retro-commissioning or Building Energy Optimization (BEOP)

1. YES

- 2. NO
- 96. REFUSED
- 97. DON'T KNOW

OB12. Looking forward over the next three years, which types of energy efficiency improvements or equipment replacements do you think could provide your organization with the greatest energy savings? For each of the following potential improvements, please tell me if it has major potential for energy savings, minor potential for energy savings, or no potential for energy savings.

- A. Lighting, including lamps, ballasts and controls
- B. Heating, Ventilation, or Air Conditioning equipment and controls
- C. Process equipment or machinery
- D. Motors, variable speed drives, or pumps
- E. Compressed air systems
- F. Refrigeration and cold storage equipment
- G. Water heating equipment
- H. Office electronics (e.g., computers, servers, copiers, printers)
- I. Other specialized equipment (e.g., hospital equipment, laboratory equipment)
- J. Building/Energy Management Systems
- K. Retro-commissioning or Building Energy Optimization (BEOP)
 - 1. MAJOR POTENTIAL
 - 2. MINOR POTENTIAL
 - 3. NO POTENTIAL
 - 96. REFUSED
 - 97. DON'T KNOW

OB13. From the list I just read, is your organization currently considering implementing any of these types of energy efficiency improvement projects or installing any high-efficiency equipment in the facilities you oversee in the next two to three years?

- 1. YES
- 2. NO [ELSE SKIP TO OD1]
- 96. REFUSED [ELSE SKIP TO OD1]
- 97. DON'T KNOW [ELSE SKIP TO OD1]

OB14. In which energy efficient categories are you considering implementing energy efficiency projects or installing high-efficiency equipment? From the following list, please indicate if the projects you

are considering include equipment from each category. Do your potential efficiency retrofit projects include...

- A. Lighting, including lamps, ballasts and controls
- B. Heating, Ventilation, or Air Conditioning equipment and controls
- C. Process equipment or machinery
- D. Motors, variable speed drives, or pumps
- E. Compressed air systems
- F. Refrigeration and cold storage equipment
- G. Water heating equipment
- H. Office electronics (e.g., computers, servers, copiers, printers)
- I. Other specialized equipment (e.g., hospital equipment, laboratory equipment)
- J. Building/Energy Management Systems
- K. Retro-commissioning or Building Energy Optimization (BEOP)
 - 1. YES
 - 2. NO
 - 96. REFUSED
 - 97. DON'T KNOW

Organizational Decision-Making

Now I'd like to ask a few questions about how your organization thinks about capital improvement projects in general.

- OD1. I'm going to read you a list of sources that may provide ideas for capital improvements within your organization and I'd like you to tell me for each one, if it is a primary, secondary, or not a source of ideas for capital improvement projects in your organization. First... [INSERT ITEMS]: ROTATE ITEMS [READ IF NECESSARY: Is this a primary, secondary, or not a source of ideas for capital improvement projects in your organization?]
- A. Senior management of the organization
 - B. Facilities manager
 - C. Outside consultants, audits, or reports
 - D. Suppliers or contractors
 - 1. PRIMARY SOURCE
 - 2. SECONDARY SOURCE
 - 3. NOT A SOURCE
 - 96. REFUSED

97. DON'T KNOW

[ASK OD2 IF NO OD1a-d = 1 "PRIMARY"; ELSE SKIP to OD3]

OD2. Who is a primary source of ideas for capital improvements in your organization? [READ IF NECESSARY: YOU INDICATED THAT NONE OF THE SOURCES I LISTED WAS A PRIMARY SOURCE OF IDEAS FOR CAPITAL IMPROVEMENTS.]

1. [RECORD VERBATIM]

2. NO ONE

96. REFUSED

97. DON'T KNOW

OD3. Who in your organization makes the final decision to move forward with a capital improvements project? [DO NOT READ. PROBE TO CODE.]

1. COMPANY OWNER/BOARD OF DIRECTORS/GOVERNING BODY

2. PRESIDENT/CHIEF EXECUTIVE OFFICER/CHIEF FINANCIAL OFFICER

3. CHIEF OPERATING OFFICER OR VICE PRESIDENT OF OPERATIONS

4. FACILITIES OR ENERGY MANAGER

5. BUILDING OWNER/PROPERTY MANAGEMENT FIRM

95. OTHER (SPECIFY _____)

96. REFUSED

97. DON'T KNOW

OD4. Who else needs to review or approve the decision to undertake the project? [DO NOT READ. PROBE TO CODE.]

1. COMPANY OWNER/BOARD OF DIRECTORS/GOVERNING BODY

2. PRESIDENT/CHIEF EXECUTIVE OFFICER/CHIEF FINANCIAL OFFICER

3. CHIEF OPERATING OFFICER OR VICE PRESIDENT OF OPERATIONS

4. FACILITIES OR ENERGY MANAGER

5. BUILDING OWNER/PROPERTY MANAGEMENT FIRM

94. NO ONE ELSE

95. OTHER (SPECIFY _____)

96. REFUSED

97. DON'T KNOW

Now I'd like to talk about capital investments in energy efficiency projects specifically.

- OD5. In general, how important are energy efficiency opportunities to your organization when considering capital improvement projects? Would you say they are very important, somewhat important, not very important or not at all important?
1. VERY IMPORTANT
 2. SOMEWHAT IMPORTANT
 3. NOT VERY IMPORTANT
 4. NOT AT ALL IMPORTANT
96. REFUSED
97. DON'T KNOW
- OD6. Would you say the importance of energy efficiency opportunities to your organization has increased, decreased, or stayed the same the past three years?
1. INCREASED
 2. DECREASED
 3. STAYED THE SAME
96. REFUSED
97. DON'T KNOW
- OD7. What about your peers in New York State? Would you say the importance of energy efficiency opportunities to other organizations like yours has increased, decreased, or stayed the same the past three years?
1. INCREASED
 2. DECREASED
 3. STAYED THE SAME
96. REFUSED
97. DON'T KNOW
- OD8. Now I'd like to ask about the factors that your organization considers when deciding whether to move forward with an energy efficiency project. For each of the following factors, please rate it as a major factor, a minor factor, or not a factor in your consideration of the project. First, [INSERT ITEM], was this a major, minor, or not a factor?
- A. Needed to repair or replace existing equipment or systems
 - B. Wanted to upgrade to more energy efficiency equipment
 - C. It was part of a larger construction or remodeling project
 - D. Availability of incentives from NYSERDA or a utility company
 - E. Organizational sustainability or environmental priorities
 - F. Financial considerations

- G. Improving the comfort or productivity of your employees
- H. [IF SECTOR = HOSPITAL] Improving the comfort or experience of your patients
- I. [IF SECTOR = COLLEGE] Improving the comfort or experience of your students
- J. [IF SECTOR = RETAIL OR OFFICE] Improving the comfort or experience of your customers
- K. [IF INDICATOR=DOWNSTATE OR OFFBTYPE=PROPERTY MANAGER/DEVELOPER] New York City's recent building benchmarking requirement
 - 1. MAJOR FACTOR
 - 2. MINOR FACTOR
 - 3. NOT A FACTOR
 - 96. REFUSED
 - 97. DON'T KNOW

[IF MORE THAN ONE ITEM IN OD8=1 'MAJOR FACTOR', ASK OD9, ELSE SKIP TO INSTRUCTIONS BEFORE OD12; PROGRAMMER: IF ONLY ONE ITEM IN OD8=1 'MAJOR', AUTOFILL ANSWER FOR OD9]

- OD9. Which of these major factors would you say is the most important factor your organization considers when deciding to move forward with an energy efficiency project? [PROGRAMMER: SHOW LIST OF ITEMS FROM OD8 THAT WERE CODED MAJOR; ACCEPT ONLY ONE ANSWER].
- 1. Needed to repair or replace existing equipment or systems
 - 2. Wanted to upgrade to more energy efficiency equipment
 - 3. It was part of a larger construction or remodeling project
 - 4. Availability of incentives from NYSERDA or a utility company
 - 5. Corporate sustainability or environmental priorities
 - 6. Financial considerations
 - 7. Improving the comfort or productivity of your employees
 - 8. Improving the comfort or experience of your patients
 - 9. Improving the comfort or experience of your students
 - 10. Improving the comfort or experience of your customers
 - 11. New York City's recent building benchmarking requirement
 - 96. REFUSED
 - 97. DON'T KNOW

[ASK OD10 IF OD9=6, ELSE SKIP TO INSTRUCTIONS BEFORE OD12]

OD10. For each of the following financial factors, please tell me if it is a major factor, a minor factor, or not a factor in your consideration of an energy efficiency project. First, was [INSERT ITEM] a major, minor, or not a factor?

- A. Reducing operating costs
- B. Increasing productivity
- C. Availability of internal funding or capital budget
- D. Availability of other outside funding
- E. Meeting company financial requirements such as rate of return on investment or payback period
 - 1. MAJOR FACTOR
 - 2. MINOR FACTOR
 - 3. NOT A FACTOR
 - 96. REFUSED
 - 97. DON'T KNOW

[ASK OD11 IF OD10E=1 MAJOR FACTOR, ELSE SKIP TO OD12]

OD11. In general, what is the payback threshold your organization uses before deciding to proceed with a major capital investment?

- 1. [RECORD MONTHS]
- 2. [RECORD YEARS]
- 96. REFUSED
- 97. DON'T KNOW

[ASK OD12 IF OB13=1 (CONSIDERING EE PROJECT); ELSE SKIP TO OD14]

OD12. Now I'm going to read a list of potential funding sources for the energy efficiency projects your organization is currently considering. For each, please indicate if it represents a very important source of funding, a somewhat important source of funding, or not an important source of funding for that project or projects. First, [INSERT ITEM], is this a very important, somewhat important, or not important source of funding?

- A. Capital budget/Cash
- B. Loans
- C. Tax credits
- D. Performance contract
- E. NYSERDA incentives
- F. Utility incentives
- G. Energy Efficiency Conservation Block Grant (EECBG)

1. VERY IMPORTANT
2. SOMEWHAT IMPORTANT
3. NOT IMPORTANT
96. REFUSED
97. DON'T KNOW

[IF MORE THAN ONE ITEM IN OD12=1 'VERY IMPORTANT', ASK OD13, ELSE SKIP TO OD14;
PROGRAMMER: IF ONLY ONE ITEM IN OD12=1, AUTOFILL ANSWER FOR OD13]

OD13. Which of these VERY important sources of funding would you say is most important in securing approval to implement a project? [PROGRAMMER: SHOW LIST OF ITEMS FROM OD12 THAT WERE CODED 1; ACCEPT ONLY ONE ANSWER].

1. Capital budget/cash
2. Loans
3. Tax credits
4. Performance contract
5. NYSERDA incentives
6. Utility incentives
7. Energy Efficiency Conservation Block Grant (EECBG)
96. REFUSED
97. DON'T KNOW

OD14. For your organization, how important is it for energy efficiency service providers to offer financing options to help pay for energy efficiency projects? Would you say...[READ]

1. Very important,
2. Somewhat important,
3. Somewhat unimportant, or
4. Not important at all
96. REFUSED
97. DON'T KNOW

OD15. I'm going to read you a list of potential barriers to your organization implementing energy efficiency projects or purchasing high efficiency equipment. For each one, please tell me if it is a major barrier, a minor barrier, or not a barrier. First, [INSERT ITEM], is this a major, minor, or not a barrier?

- A. Concerns about the performance or reliability of energy efficient equipment
- B. Concerns about the upfront costs of energy efficient equipment

- C. Uncertainty around projected energy savings
- D. Lack of internal capital or funding
- E. Lack of outside capital or funding
- F. Concerns about the economy
- G. Failure to meet your organization's financial requirements (such as return on investment or payback period)
- H. Competition with other priorities within the organization
- I. [SKIP IF OB6=2 "OWN"] Division of costs and benefits between the building owner and tenant
- J. Lack of staff available to evaluate or oversee project
- K. Concerns about the down-time needed to complete the project
 - 1. MAJOR BARRIER
 - 2. MINOR BARRIER
 - 3. NOT A BARRIER
 - 96. REFUSED
 - 97. DON'T KNOW

[IF MORE THAN ONE ITEM IN OD15=1 'MAJOR BARRIER', ASK OD16, ELSE SKIP TO OD17; PROGRAMMER: IF ONLY ONE ITEM IN OD15=1, AUTOFILL ANSWER FOR OD16]

OD16. Which of these major barriers would you say is the greatest barrier to energy efficiency investments for your organization? [PROGRAMMER: SHOW LIST OF ITEMS FROM OD15 THAT WERE CODED MAJOR; ACCEPT ONLY ONE ANSWER].

- 1. Concerns about the performance or reliability of energy efficient equipment
- 2. Concerns about the upfront costs of energy efficient equipment
- 3. Uncertainty around projected energy savings
- 4. Lack of internal capital or funding
- 5. Lack of outside capital or funding
- 6. Concerns about the economy
- 7. Failure to meet your organization's financial requirements (such as return on investment or payback period)
- 8. Competition with other priorities within the organization
- 9. Division of costs and benefits between the building owner and tenant
- 10. Lack of staff available to evaluate or oversee project
- 11. Concerns about the down-time needed to complete the project

- 96. REFUSED
- 97. DON'T KNOW
- OD17. Since the economic downturn began in 2008, would you say your organization's investment in energy efficiency has increased, decreased, or stayed the same?
 - 1. INCREASED
 - 2. DECREASED
 - 3. STAYED THE SAME
- 96. REFUSED
- 97. DON'T KNOW
- OD18. I'm curious about your organization's perceptions regarding the availability of qualified energy efficiency service providers and contractors in the market. Would you say there are many well-qualified companies, a few well-qualified firms, or not enough well-qualified companies providing energy efficiency products and services?
 - 1. MANY
 - 2. A FEW
 - 3. NOT ENOUGH
- 96. REFUSED
- 97. DON'T KNOW

Existing Facilities Program Experience

Thank you for your help so far. I have one more set of questions.

- EF1. Before today, had you heard of NYSERDA's Existing Facilities Program, also called EFP, which provides incentives for qualifying energy efficiency equipment?
 - 1. YES
 - 2. NO [SKIP TO EF7]
 - 96. REFUSED [SKIP TO EF7]
 - 97. DON'T KNOW [SKIP TO EF7]
- EF2. NYSERDA's Existing Facilities Program offers energy efficient equipment incentives for both pre-qualified measures and for performance-based measures. How confident are you that you understand the differences between these two approaches to applying for incentives? Would you say you are...[READ]
 - 1. Very confident
 - 2. Somewhat confident
 - 3. Not very confident

- 4. Not confident at all
 - 96. REFUSED
 - 97. DON'T KNOW
- EF3. Have you or your staff visited NYSERDA's Existing Facilities Program website?
- 1. YES
 - 2. NO
 - 96. REFUSED
 - 97. DON'T KNOW
- EF4. Have you or your staff contacted any of NYSERDA's program representatives?
- 1. YES
 - 2. NO
 - 96. REFUSED
 - 97. DON'T KNOW
- EF5. I'm curious why your organization has not applied for incentives from the NYSERDA Existing Facilities Program. I'm going to read you a list of possible reasons and for each one please tell me if it is a primary reason, a secondary reason, or not a reason why your organization has not applied for a NYSERDA EFP incentive.
- A. You were not aware of the program
 - B. You didn't think about the program
 - C. You have not installed any qualifying energy efficient equipment
 - D. You were unsure whether installed equipment qualified
 - E. You thought the incentives were insufficient
 - F. You thought the program requirements were unattractive
 - G. [ASK IF EF3=1 OR EF4=1] You had an unsatisfactory experience learning about the program from the website or program representatives
 - 1. PRIMARY REASON
 - 2. SECONDARY REASON
 - 3. NOT A REASON
 - 96. REFUSED
 - 97. DON'T KNOW

EF6. What improvements, if any, could NYSERDA make to its Existing Facilities Program to better serve your needs?

EF7. To the best of your knowledge, does the utility company or companies serving your [IF OB3=1 OR 5, SAY "FACILITY"; ELSE SAY "FACILITIES"] offer incentives for efficient equipment?

- 1. YES
- 2. NO [SKIP TO EF13]
- 96. REFUSED [SKIP TO EF13]
- 97. DON'T KNOW [SKIP TO EF13]

EF8. Did you contact your utility company, or access its website, to learn about its incentive offerings?

- 1. YES
- 2. NO
- 3. THE UTILITY COMPANY CONTACTED ME
- 96. REFUSED
- 97. DON'T KNOW

EF9. Have you applied to that utility's incentive program for any energy efficient projects or equipment?

- 1. YES [SKIP TO INSTRUCTIONS BEFORE EF11]
- 2. NO
- 96. REFUSED [SKIP TO INSTRUCTIONS BEFORE EF11]
- 97. DON'T KNOW [SKIP TO INSTRUCTIONS BEFORE EF11]

EF10. Do you plan to apply to that utility's incentive program for energy efficient projects or equipment purchases?

- 1. YES
- 2. NO
- 3. MAYBE
- 96. REFUSED
- 97. DON'T KNOW

[ASK EF11 IF BOTH EF1=1 AND EF7=1, ELSE SKIP TO EF13]

EF11. How much confusion do you think there is in the marketplace about the difference between NYSERDA's Existing Facilities Program and your utility company's incentive program? Would you say there is considerable confusion, a little confusion, or not much confusion?

- 1. CONSIDERABLE CONFUSION

2. A LITTLE CONFUSION
 3. NOT MUCH CONFUSION [SKIP TO EF13]
 96. REFUSED [SKIP TO EF13]
 97. DON'T KNOW [SKIP TO EF13]
- EF12. Could you briefly explain what is confusing to the marketplace?
- EF13. [IF OB3=1 OR 5, SAY "DOES YOUR FACILITY"; ELSE SAY "DO ANY OF YOUR FACILITIES"] use natural gas?
1. YES
 2. NO [SKIP TO CLOSING]
 96. REFUSED [SKIP TO CLOSING]
 97. DON'T KNOW [SKIP TO CLOSING]
- EF14. Before today, were you aware that NYSERDA's Existing Facilities Program offers incentives for efficient gas equipment, as well as efficient electric equipment?
1. YES
 2. NO
 96. REFUSED
 97. DON'T KNOW

Closing

Ok. Those are all the questions I have today. I'd like to thank you again for your time and participation.

APPENDIX D:

NONPARTICIPATING SERVICE PROVIDER SURVEY

NYSERDA – Existing Facilities Program MCA

EFP_MCASurvey_Nonparticipating_Host_Contractors

Final for Programming

November 16, 2011

Intro_1: Hello, my name is _____, and I am calling on behalf of Navigant Consulting. We are conducting a study sponsored by NYSERDA, the New York State Energy Research and Development Authority, to better understand the current market for energy efficiency retrofits in New York State's commercial and institutional sectors. We are interested in gathering your input as one of the firms offering energy efficiency products or services. The survey is intended to inform NYSERDA's energy efficiency incentive programs, and any responses you provide will be kept confidential.

Screener

SCR1. I would like to confirm that I have reached a company that provides services or equipment to building owners and occupants in New York State who wish to complete energy efficiency retrofit projects, such as lighting or heating and cooling equipment upgrades. Is that correct?

1. YES
2. NO – Thank you for your time. For this study, we are speaking with firms that provide energy retrofit services or equipment in New York State. Have a nice day. [TERMINATE]
96. REFUSED – Thank you for your time. [TERMINATE]
97. DON'T KNOW – Is there another person I can speak with who would be familiar with the kinds of services or equipment your company offers? [RECORD NAME AND CONTACT INFORMATION]

SCR2. Does your company provide energy retrofit services or equipment to commercial or institutional customers?

1. YES
2. NO – Thank you for your time. For this study, we are focusing only on the commercial and institutional sectors. Have a nice day. [TERMINATE]
96. REFUSED – Thank you for your time. [TERMINATE]
97. DON'T KNOW – Is there another person I can speak with who would be familiar with the customers your company serves? [RECORD NAME AND CONTACT INFORMATION]

SCR3. It's important that I talk to someone in your company who is familiar with the factors influencing your commercial and institutional sector customers' decisions to pursue energy efficiency retrofits. Are you that person?

1. YES
2. NO - Could you please give me the name and phone number of the person I should speak to, or someone who would know the proper person to speak to, who would be well-qualified to ask about the factors that influence customers' decisions about pursuing energy efficiency projects? [RECORD NAME AND CONTACT INFORMATION]
96. REFUSED – Thank you very much for your time. Goodbye [TERMINATE]
97. DON'T KNOW - If you have been active in your business at least 5 years, you likely are someone whose opinions we would value – may we continue? [IF YES, CODE AS 1; IF NO, CODE AS 2]

SCR4. I'd like to ask you some questions. This will take about 20-25 minutes and will greatly help NYSERDA tailor its commercial sector energy efficiency programs to better serve New York energy consumers. Your responses will be completely confidential. Can we start?

1. YES
2. NO – When is a good time to call back?
96. REFUSED - Thank you very much for your time. Goodbye. [TERMINATE]

[INTERVIEWER NOTE: IF THE 'NO' FEELS LIKE A REFUSAL - STATE THE FOLLOWING: "NYSERDA IS TRYING TO DETERMINE HOW TO IMPROVE ITS EXISTING FACILITIES PROGRAM AND SEEKING INPUT FROM SERVICE PROVIDERS AND OTHER TRADE ALLIES IS AN IMPORTANT PART OF MAKING THESE IMPROVEMENTS. WITH THIS IN MIND, IT WOULD BE A BIG HELP IF WE COULD GET INPUT FROM YOUR ORGANIZATION. MAY WE CONTINUE?"]

Participation Screeners

- PS1. To the best of your knowledge, has your company participated in any NYSERDA or New York Energy \$martSM programs in the past three years? [READ IF NECESSARY: NYSERDA is the New York State Energy Research and Development Authority]
1. YES
 2. NO [SKIP TO CB1]
 96. REFUSED [SKIP TO CB1]
 97. DON'T KNOW [SKIP TO CB1]
- PS2. Which NYSERDA Programs has your organization participated in? [DO NOT READ. MARK ALL THAT APPLY.]
1. FLEX TECH (FLEXIBLE TECHNICAL ASSISTANCE)
 2. NEW CONSTRUCTION PROGRAM (NCP)
 3. EXISTING FACILITIES PROGRAM (EFP)
 4. INDUSTRIAL PROCESS EFFICIENCY (IPE)
 5. ENHANCED COMMERCIAL & INDUSTRIAL PERFORMANCE PROGRAM (ECIPP)

- 6. BUSINESS PARTNERS
- 95. OTHER (SPECIFY _____)
- 96. REFUSED
- 97. DON'T KNOW

[IF PS2=03 EXISTING FACILITIES PROGRAM, SAY “FOR THIS STUDY, WE ARE TRYING TO SPEAK WITH FIRMS THAT HAVE NOT PARTICIPATED IN THE EXISTING FACILITIES PROGRAM. THANK YOU FOR YOUR TIME AND HAVE A GOOD DAY” THEN TERMINATE].

PS3. To the best of your knowledge, has your organization completed any energy efficiency retrofit projects in the past three years that received an incentive from NYSERDA’s Existing Facilities Program?

- 1. YES [SAY “FOR THIS STUDY, WE ARE TRYING TO SPEAK WITH FIRMS THAT HAVE NOT PARTICIPATED IN THE EXISTING FACILITIES PROGRAM. THANK YOU FOR YOUR TIME AND HAVE A GOOD DAY”, THEN TERMINATE] -
- 2. NO
- 96. REFUSED
- 97. DON'T KNOW

Company Background

Please note that we will be focusing on the commercial and institutional sectors; any projects for industrial, manufacturing, or residential customers are not included in this survey.

First, I have a few background questions about your company.

CB1. I’d like to understand your company’s role in providing energy efficiency solutions to customers. For each of the following services, please tell me if your company directly offers the service or not. If you primarily subcontract with or partner with another firm to offer a particular service, please just tell me that as well. Does your company offer... [READ]

- a. Energy audits
 - b. Project design and engineering
 - c. Coordination of NYSERDA incentives
 - d. Performance contracting
 - e. Other financing assistance
 - f. Equipment installation
 - g. Monitoring and verification
 - h. Operations and maintenance
- 1. YES
 - 2. NO

- 3. SUBCONTRACT
- 4. PARTNER
- 96. REFUSED
- 97. DON'T KNOW

CB2. Approximately how many full time employees does your company employ at all of its locations in New York State? Would you say... [READ]

- 1. Ten or fewer
- 2. More than 10 but less than 50
- 3. 50 or more
- 4. Or None
- 96. REFUSED
- 97. DON'T KNOW

CB3. For how many years has your company been doing business and working on projects in the state of New York? Would you say... [READ]

- 1. Two years or less
- 2. More than two but less than five years
- 3. Five years or more
- 96. REFUSED
- 97. DON'T KNOW

CB4. Of the retrofit work that your company completes in New York State, do you perform more than half of that work in downstate New York (the 5 boroughs of New York City plus the Westchester area)?

- 1. YES
- 2. NO
- 96. REFUSED
- 97. DON'T KNOW

CB5. Does your company offer any services that are unrelated to energy efficiency?

- 1. YES
- 2. NO [SKIP TO CB8]
- 96. REFUSED [SKIP TO CB8]
- 97. DON'T KNOW [SKIP TO CB8]

- CB6. For how many years has your company been providing energy efficiency services in New York?
Would you say... [READ]
1. Two years or less
 2. More than two but less than five years
 3. Five years or more
96. REFUSED
97. DON'T KNOW
- CB7. Approximately what percentage of your in-state revenue is related to energy efficiency projects versus other activities? Would you say... [READ]
1. Less than 25%
 2. 25 % to less than 50%
 3. 50% to less than 75%
 4. 75% or more
96. REFUSED
97. DON'T KNOW
- CB8. Does your company work with gas equipment, or is your focus electric-only?
1. ELECTRIC-ONLY
 2. GAS-ONLY
 3. BOTH
96. REFUSED
97. DON'T KNOW
- CB9. What is your title in the company? Are you the... [READ]
1. Project manager
 2. Project engineer
 3. CEO/CFO/President
 4. Vice President
 5. Owner
 6. Business development or sales person
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

CB10. For how many years have you been with the company? Would you say... [READ]

1. Two years or less
2. More than two but less than five years
3. Five years or more
96. REFUSED
97. DON'T KNOW

Approach to EE Market

Next, I'd like to ask some questions about the types of energy efficiency projects your company works on and about your interactions with customers.

EE1. In the past three years, has your company begun offering any services related to energy efficiency retrofits that you did not previously provide?

1. YES
2. NO [SKIP TO EE4]
96. REFUSED [SKIP TO EE4]
97. DON'T KNOW [SKIP TO EE4]

EE2. What new services have you begun offering? [DO NOT READ. CODE ALL THAT APPLY]

1. ENERGY AUDITS
2. PROJECT DESIGN AND ENGINEERING
3. COORDINATION OF NYSERDA INCENTIVES
4. PERFORMANCE CONTRACTING
5. OTHER FINANCING ASSISTANCE
6. EQUIPMENT INSTALLATION
7. MONITORING AND VERIFICATION
8. OPERATIONS AND MAINTENANCE
9. COMMISSIONING OR RETRO-COMMISSIONING SERVICES
95. OTHER (SPECIFY _____)
96. REFUSED
97. DON'T KNOW

EE3. What led you to offer these services? [DO NOT READ. CHECK ALL THAT APPLY]

1. WE ACQUIRED ANOTHER FIRM THAT OFFERED THESE SERVICES
2. WE WERE ACQUIRED BY ANOTHER FIRM THAT OFFERED THESE SERVICES

3. CUSTOMER DEMAND
 4. WANTED TO OFFER A MORE COMPLETE SUITE OF SERVICES TO OUR CUSTOMERS
 95. OTHER (SPECIFY _____)
 96. REFUSED
 97. DON'T KNOW
- EE4. In the past three years, has your company stopped offering any services related to energy efficiency retrofits that you previously provided?
1. YES
 2. NO [SKIP TO EE7]
 96. REFUSED [SKIP TO EE7]
 97. DON'T KNOW [SKIP TO EE7]
- EE5. What services have you stopped offering? [DO NOT READ. CODE ALL THAT APPLY]
1. ENERGY AUDITS
 2. PROJECT DESIGN AND ENGINEERING
 3. COORDINATION OF NYSERDA INCENTIVES
 4. PERFORMANCE CONTRACTING
 5. OTHER FINANCING ASSISTANCE
 6. EQUIPMENT INSTALLATION
 7. MONITORING AND VERIFICATION
 8. OPERATIONS AND MAINTENANCE
 9. COMMISSIONING OR RETRO-COMMISSIONING SERVICES
 95. OTHER (SPECIFY _____)
 96. REFUSED
 97. DON'T KNOW
- EE6. What led you to stop offering these services? [DO NOT READ. CHECK ALL THAT APPLY]
1. MARKET OPPORTUNITY DISSOLVED
 2. WE WERE LOSING MONEY ON IT
 3. IT WAS TOO COMPLICATED
 4. WE WANTED TO FOCUS ON OUR CORE COMPETENCIES

- 95. OTHER (SPECIFY _____)
 - 96. REFUSED
 - 97. DON'T KNOW
- EE7. Do you focus your energy efficiency retrofit business on specific customer market sectors or buildings types?
- 1. YES
 - 2. NO [SKIP TO EE9]
 - 96. REFUSED [SKIP TO EE9]
 - 97. DON'T KNOW [SKIP TO EE9]
- EE8. What sectors or building types do you focus on? [DO NOT READ. CHECK ALL THAT APPLY]
- 1. COLLEGES AND UNIVERSITIES
 - 2. HOSPITALS AND HEALTH CARE FACILITIES
 - 3. OFFICE BUILDINGS/COMMERCIAL REAL ESTATE/TENANT IMPROVEMENTS
 - 4. LARGE RETAIL/BIG BOX STORES
 - 5. STATE AND LOCAL GOVERNMENT
 - 6. K-12 OR SECONDARY SCHOOLS
 - 7. HOSPITALITY
 - 8. INDUSTRIAL AND MANUFACTURING
 - 9. MUNICIPAL WATER AND WASTEWATER FACILITIES
 - 95. OTHER (SPECIFY _____)
 - 96. REFUSED
 - 97. DON'T KNOW
- EE9. Do you focus your energy efficiency retrofit business on specific types of equipment?
- 1. YES
 - 2. NO [SKIP TO EE11]
 - 96. REFUSED[SKIP TO EE11]
 - 97. DON'T KNOW [SKIP TO EE11]
- EE10. I'm going to read you a list of equipment categories. For each one, please tell me if it is a major focus, a minor focus, or not a focus for your company?
- a) Lighting, including lamps, ballasts and controls
 - b) Heating, Ventilation, or Air Conditioning equipment and controls

- c) Process equipment or machinery
 - d) Motors, variable speed drives, or pumps
 - e) Compressed air systems
 - f) Refrigeration and cold storage equipment
 - g) Building Management Systems
 - 1. MAJOR FOCUS
 - 2. MINOR FOCUS
 - 3. NOT A FOCUS
 - 96. REFUSED
 - 97. DON'T KNOW
- EE11. How does your firm market energy efficiency retrofit services to potential customers? [SELECT ALL THAT APPLY, DO NOT READ]
- 1. MARKET USING NYSERDA NAME
 - 2. MARKET SERVICES TO EXISTING CUSTOMERS/CLIENTS
 - 3. DON'T MARKET, RESPOND TO CUSTOMER/CLIENT INQUIRIES
 - 4. MARKET BASED ON EXPECTED BENEFITS
 - 5. WORD OF MOUTH
 - 6. REFERRALS
 - 7. ORGANIZED NETWORKING (CONFERENCES, TRADE SHOWS)
 - 8. WEBSITE, MATERIALS
 - 9. DIRECT MARKETING/IN PERSON MARKETING
 - 95. OTHER (SPECIFY _____)
 - 96. REFUSED
 - 97. DON'T KNOW

Market Drivers and Barriers

Now I'd like to ask you a few questions about what you perceive as your customers' primary motivations and challenges when considering energy efficiency options.

MD1. First, I'd like to ask about the factors you see influencing your customers' decisions to implement energy efficiency retrofits or purchase energy efficient equipment. For each of the following factors, please tell me if it is a major factor, a minor factor, or not a factor in your customers' consideration of a retrofit project. First, [INSERT ITEM], is this a major, minor or not a factor?

- a) Need to repair or replace existing equipment or systems

- b) Want to upgrade to more energy efficiency equipment
 - c) It is part of a larger construction or remodeling project
 - d) Availability of incentives from NYSERDA
 - e) Corporate sustainability or environmental priorities
 - f) Financial considerations
 - g) Improving the comfort or productivity of their employees
 - h) Improving the experience of their customers (patients, students, etc.)
 - i) New York City's recent building benchmarking requirement
1. MAJOR FACTOR
 2. MINOR FACTOR
 3. NOT A FACTOR
 96. REFUSED
 97. DON'T KNOW

[IF MORE THAN ONE ITEM IN MD1=1 'MAJOR FACTOR', ASK MD2, ELSE SKIP TO INSTRUCTIONS BEFORE MD3; PROGRAMMER: IF ONLY ONE ITEM IN MD1=1 'MAJOR', AUTOFILL FOR MD2]

MD2. Which of these major factors would you say is the most important factor your customers considered when deciding to move forward with a retrofit project? [SHOW LIST OF ITEMS FROM MD1 THAT WERE ANSWERED 1 'MAJOR'; ACCEPT ONLY ONE ANSWER.]

1. Need to repair or replace existing equipment or systems
2. Want to upgrade to more energy efficiency equipment
3. It is part of a larger construction or remodeling project
4. Availability of incentives from NYSERDA
5. Corporate sustainability or environmental priorities
6. Financial considerations
7. Improving the comfort or productivity of their employees
8. Improving the experience of their customers (patients, students, etc.)
9. New York City's recent building benchmarking requirement
96. REFUSED
97. DON'T KNOW

[ASK MD3 IF MD2=6, ELSE SKIP TO MD4]

MD3. For each of the following financial factors, please tell me if it is a major factor, a minor factor, or not a factor in your customers' consideration of retrofit projects.

- a) Reducing operating costs
- b) Increasing productivity
- c) Availability of internal funding or capital budget
- d) Availability of other outside funding
- e) Meeting company financial requirements such as rate of return on investment or payback period

- 1. MAJOR FACTOR
- 2. MINOR FACTOR
- 3. NOT A FACTOR
- 96. REFUSED
- 97. DON'T KNOW

MD4. Now I'd like to ask about barriers to retrofit projects for your customers. I'm going to read you a list of factors. For each one please tell me if you think it is a major barrier, minor barrier or not a barrier for your customers when they consider implementing energy efficiency projects or purchasing high efficiency equipment. First, [INSERT ITEM], is this a major, minor, or not a barrier?

- a) Concerns about the performance or reliability of energy efficient equipment
- b) Concerns about the upfront costs of energy efficient equipment
- c) Uncertainty around projected energy savings
- d) Lack of internal capital or funding
- e) Lack of outside capital or funding
- f) Concerns about the economy
- g) Failure to meet their organization's financial requirements (such as return on investment or payback period)
- h) Competition with other priorities within the customer's organization
- i) Division of costs and benefits between the building owner and tenant
- j) Lack of staff available to evaluate or oversee project
- k) Concerns about the down-time needed to complete the project

- 1. MAJOR BARRIER
- 2. MINOR BARRIER
- 3. NOT A BARRIER

96. REFUSED

97. DON'T KNOW

[IF MORE THAN ONE ITEM IN MD4=1 'MAJOR BARRIER', ASK MD5, ELSE SKIP TO PE1;
PROGRAMMER: IF ONLY ONE ITEM IN MD4=1 'MAJOR', AUTOFILL FOR MD5]

MD5. Which of these major factors would you say is the greatest barrier to energy efficiency investments for your customers? [SHOW LIST OF MAJOR FACTORS FROM MD4; ACCEPT ONLY ONE ANSWER.]

1. Concerns about the performance or reliability of energy efficient equipment
2. Concerns about the upfront costs of energy efficient equipment
3. Uncertainty around projected energy savings
4. Lack of internal capital or funding
5. Lack of outside capital or funding
6. Concerns about the economy
7. Failure to meet their organization's financial requirements (such as return on investment or payback period)
8. Competition with other priorities within the customer's organization
9. Division of costs and benefits between the building owner and tenant
10. Lack of staff available to evaluate or oversee project
11. Concerns about the down-time needed to complete the project

96. REFUSED

97. DON'T KNOW

Project Economics and Performance Contracting

These next few questions relate to how your customers pay for energy efficient projects and services.

PE1. I'm interested in the effects of the economic downturn on different customers' willingness to invest in energy efficiency retrofits. For each of the following market sectors, please indicate if customers' investment in energy efficiency retrofit projects has increased, decreased, or stayed the same since the beginning of the economic downturn. If you don't work with or are unfamiliar with a particular customer market segment, please respond "I don't know."

- a) Colleges and Universities
- b) Hospitals and Health Care Facilities
- c) Office Buildings and Commercial Real Estate
- d) Large Retail Chains, such as Big Box or Department Stores

1. INCREASED

- 2. DECREASED
- 3. STAYED THE SAME
- 96. REFUSED
- 97. DON'T KNOW

PE2. Does your company offer financing assistance to customers for energy efficiency retrofit projects, either directly or through a third-party organization?

- 1. YES
- 2. NO [SKIP TO PE6]
- 96. REFUSED [SKIP TO PE6]
- 97. DON'T KNOW [SKIP TO PE6]

PE3. On average, how important is this financial assistance to potential customers' willingness to implement energy efficiency projects or purchase energy efficient equipment? Would you say... [READ]

- 1. Very important.
- 2. Somewhat important,
- 3. Not too important,
- 4. Not important at all
- 5. DEPENDS ON CUSTOMER (VOL)
- 96. REFUSED
- 97. DON'T KNOW

PE4. I'm interested in what type of financing you offer. Do you...[READ]

- a) Offer performance contracting or ESCO services?
- b) Use an internal fund to provide loans to customers?
- c) Partner with a bank or other third-party to provide loans to customers?
- d) Offer other financing? (SPECIFY _____)
 - 1. YES
 - 2. NO
 - 96. REFUSED
 - 97. DON'T KNOW

[ASK PE5 IF PE4a=1 YES; ELSE SKIP TO PE6]

PE5. I'd like to ask a little more about performance contracting. For each of the following market sectors please indicate, to the best of your knowledge, if customers' willingness to enter into a

performance contract for a retrofit project has increased, decreased, or stayed the same over the past three years. If you don't work with or are unfamiliar with a particular customer sector, please respond "I don't know."

- a) Colleges and Universities
 - b) Hospitals and Health Care Facilities
 - c) Office Buildings/Commercial Real Estate
 - d) Large Retail Chains, such as Big Box or Department Stores
- 1. INCREASED
 - 2. DECREASED
 - 3. STAYED THE SAME
 - 96. REFUSED
 - 97. DON'T KNOW

PE6. How often to you guarantee a certain level of energy savings to your customers? Would you say...
[READ]

- 1. Always
- 2. Often
- 3. Only sometimes
- 4. Rarely
- 5. Never
- 96. REFUSED
- 97. DON'T KNOW

Existing Facilities Program and Project Experience

This next set of questions relates specifically to NYSERDA's Existing Facilities Program, also known as EFP, for commercial sector energy users.

EF1. Before today, had you heard of NYSERDA's Existing Facilities Program?

- 1. YES
- 2. NO [ELSE SKIP TO EF7]
- 96. REFUSED [ELSE SKIP TO EF7]
- 97. DON'T KNOW [ELSE SKIP TO EF7]

EF2. The Existing Facilities Program offers energy efficient equipment incentives for both pre-qualified measures and for performance-based measures. How confident are you that you understand the differences between these two approaches to applying for incentives? Would you say you are...[READ]

1. Very confident
 2. Somewhat confident
 3. Not very confident
 4. Not confident at all
 96. REFUSED
 97. DON'T KNOW
- EF3. Have you or your staff visited NYSERDA's Existing Facilities' program website?
1. YES
 2. NO
 96. REFUSED
 97. DON'T KNOW
- EF4. Have you or your staff contacted any of NYSERDA's program representatives?
1. YES
 2. NO
 96. REFUSED
 97. DON'T KNOW
- EF5. I'm curious why your company has not applied to the NYSERDA Existing Facilities program for customers' projects. I'm going to read you a list of possible reasons why you might not have applied for incentives. For each statement, please tell me if it is a primary reason, a secondary reason, or not a reason why your company has not applied to the Existing Facilities program. First, [INSERT ITEM]. Is this a primary reason, secondary reason, or not a reason?
- a) You have not installed qualifying energy efficient equipment
 - b) You were unsure whether installed equipment qualified
 - c) You thought the incentives were insufficient
 - d) You thought the program requirements were unattractive
 - e) You applied for incentives, but the projects did not meet the requirements
 - f) Your customers did not wish to use incentive funds
 - g) [ASK ONLY IF EF3 OR EF4 = 1 YES] Had an unsatisfactory experience learning about the program from the website or program representatives
 1. PRIMARY REASON

- 2. SECONDARY REASON
- 3. NOT A REASON
- 96. REFUSED
- 97. DON'T KNOW

[ASK IF CB8 = 2 OR 3; ELSE SKIP TO EF7]

EF6. Before today, were you aware that the Existing Facilities Program offers incentives for efficient gas equipment, as well as efficient electric equipment?

- 1. YES
- 2. NO
- 3. NOT RELEVANT TO RESPONDENT (THEY DON'T SELL GAS EQUIPMENT)
- 96. REFUSED
- 97. DON'T KNOW

EF7. Before today, were you aware that utility companies in New York State offer incentives for qualifying energy efficient equipment?

- 1. YES
- 2. NO [SKIP TO INSTRUCTIONS BEFORE CC1]
- 96. REFUSED [SKIP TO INSTRUCTIONS BEFORE CC1]
- 97. DON'T KNOW [SKIP TO INSTRUCTIONS BEFORE CC1]

EF8. Have any of the utility companies that serve your customers contacted you about their incentive programs for commercial customers?

- 1. YES
- 2. NO
- 96. REFUSED
- 97. DON'T KNOW

EF9. Approximately what percentage of energy efficiency retrofit projects that your company completes in New York State use utility incentives for qualifying energy efficient equipment? Would you say... [READ]

- 1. Less than 25%
- 2. 25 % to less than 50%
- 3. 50% to less than 75% [SKIP TO INSTRUCTIONS BEFORE EF11]
- 4. 75% or more [SKIP TO INSTRUCTIONS BEFORE EF11]
- 96. REFUSED [SKIP TO INSTRUCTIONS BEFORE EF11]

97. DON'T KNOW [SKIP TO INSTRUCTIONS BEFORE EF11]

EF10. I'm curious why so few projects use an incentive. I'm going to read you a list of possible reasons. For each one, please tell me if it is a primary reason, a secondary reason, or not a reason why retrofit projects might fail to use an incentive. First, [INSERT ITEM]: is this a primary reason, secondary reason, or not a reason?

- a) Your firm was not aware incentives were available
- b) Have not installed qualifying energy efficient equipment
- c) Were unsure whether installed equipment qualified
- d) Thought the incentives were insufficient
- e) Thought the program requirements were unattractive
- f) You applied for incentives, but the projects did not meet the requirements
- g) Your customers did not wish to use incentive funds

- 1. PRIMARY REASON
- 2. SECONDARY REASON
- 3. NOT A REASON

96. REFUSED

97. DON'T KNOW

[ASK EF11 IF EF1 AND EF7 = YES; ELSE SKIP TO CC1]

EF11. How much confusion do you think there is in the marketplace about the difference between NYSERDA's Existing Facilities Program and utility companies' incentive programs? Would you say there is considerable confusion, a little confusion, or not much confusion?

- 1. CONSIDERABLE CONFUSION
- 2. A LITTLE CONFUSION
- 3. NOT MUCH CONFUSION [SKIP TO INSTRUCTIONS BEFORE CC1]

96. REFUSED [SKIP TO INSTRUCTIONS BEFORE CC1]

97. DON'T KNOW [SKIP TO INSTRUCTIONS BEFORE CC1]

EF12. Could you briefly explain what is confusing to the marketplace?

Closing

Thank you so much for your time today.

[ASK CC1 IF EF1=YES (HAVE HEARD OF EFP). ELSE SKIP TO CLOSING]

CC1. Before we close, I have one final question. What, if any, changes should NYSERDA's Existing Facility Program make to better serve the market in the future?

[READ TO ALL] Those are all the questions I have today. I'd like to thank you again for your time and participation. Have a nice day.

APPENDIX E:

PARTICIPATING END-USER SURVEY METHODOLOGY

September 1, 2011

Existing Facilities Program - Participating Host Customers Survey

The purpose of the Existing Facilities Program (EFP) Participating Host Customers Survey was to gain a greater understanding of the energy efficiency decision-making processes of organizations and businesses that recently completed a large retrofit project and received an incentive from the Existing Facilities Program. This survey was one of four market surveys conducted as part of a comprehensive study designed and managed by NYSERDA’s Market Characterization and Assessment Team. The Participating Host Customers survey asked respondents about their organization’s approach towards energy efficiency projects, their perception of market barriers and drivers, and their experience with a recent project that received a performance-based EFP incentive. The EFP Participating Host Customer Survey was managed by APPRISE. Interviews were conducted by Issues & Answers Network, Inc.

Sample

Target Population

The MCA team targeted organizations and businesses in New York State that received a performance-based EFP incentive and belonged to one of four commercial or institutional sectors. These four sectors were Offices, Health Care & Hospitals, Colleges & Universities, and Big Box Retail Stores.

Sample Frame

The sample frame for this study was assembled by Navigant using a current EFP project database. After excluding duplicate contacts and projects that did not include electric energy efficiency measures at non-industrial sites, Navigant identified 138 unique host customers. For organizations that had multiple projects, contact information and project information for the most recently completed project was selected.

Sample Selection

APPRISE checked the sample frame and removed 12 additional duplicates prior to fielding. The final sample selected included 126 organizations and is presented by sector and geographic region in Table E-1.

Table E-1: Final Sample by Sector and Region

Sector	Upstate	Downstate
Offices	21	43
Health Care & Hospitals	20	11
Retail Chain Stores	14	5
College and Universities	8	4
TOTAL	63	63

Advance E-mails

NYSERDA sent advance e-mails to potential respondents prior to the start of interviewing. The e-mail explained the study to the potential respondent, introduced the phone center that would be calling, provided NYSERA contact information if a potential respondent wanted to learn more about the survey effort, reassured potential respondents about maintaining the confidentiality of their responses, and recommended participation in the study.

Target Completes

The target number of completes was initially set at 67. Following the removal of duplicate cases, Navigant revised the target number to 66 completes. The final targets by sector and geographic region are presented in Table E-2.

Table E-2: Target Completes by Sector and Region

Sector	Upstate	Downstate
Offices	14	24
Health Care & Hospitals	12	5
Retail Chain Stores	2	3
College and Universities	5	1
Total	33	33

Data Collection

Overview of Data Collection Procedures

The EFP Participating Host Customer survey was administered as a telephone interview. Interviewers from Issues and Answers Network, Inc. conducted the survey using a computer-assisted telephone interview (CATI) survey instrument. The respondent was either the contact listed in the sample or someone else at the firm who was familiar with the specific project.

Survey Instrument

The survey instrument was designed by NYSERDA's Market Characterization and Assessment Team. APPRISE formatted the survey instrument for CATI programming. Four pretest interviews (1 for each target sector) were conducted by APPRISE staff to assess the clarity, consistency and skip pattern logic of the draft survey instrument. Changes as a result of this pretest effort were discussed with the Market Team and implemented where necessary.

Survey Administration

Interviewer training and initial calling began on June 15. All interviews were completed in English. Interviewers called during daytime weekday hours and were available on nights and weekends if the respondent wished to schedule a call-back for that time. Calls were rotated between the morning and afternoon on different days of the week. If the interviewer reached the named contact's voicemail, he or she left a message on first contact. After the first contact, the interviewer left a message every three days. The length of the survey averaged 21 minutes. Survey fielding ended on August 9, with 69 completed interviews. Each of the original group targets was met, and the Downstate Office group included three additional completes above the target number.

Sample Disposition and Survey Response Rate

Table E-3 shows the disposition of all sampled cases and provides the contact, cooperation, and overall response rates for this survey. The response rate estimates the fraction of all eligible respondents in the sample that were ultimately interviewed. The contact rate is the percentage of the working numbers where a request for an interview was made. The cooperation rate is the percentage of contact numbers where consent for an interview was not refused.⁸ The contact rate for the study was 62.5%, the cooperation rate was 92.0%, and the overall response rate was 55.2%.

Table E- 3: Survey Sample Disposition

		Number	Percent
Total Sample Used		126	100%
Excluded Sample	Not working/Unusable number	1	0.8%
Not Contacted	Respondent never available Answer Machine Call back/Left 800#	45	35.7%
Unknown Eligibility	No Answer/Busy	5	3.9%
Excluded Organizations	Not Eligible/Not Qualified	0	0.0%
Refused/ Break-off	Refused Break-off	6	4.8%
Completed Interview		69	54.8%
Contact rate⁹ (75/120=0.625)			62.5%
Cooperation rate¹⁰ (69/75= 0.92)			92.0%
Response rate¹¹ (69/120+(0.992*5)= 0.552)			55.2%

Table E-4 shows the eligibility status and the estimated eligibility rate (e) for the sample. The estimated eligibility rate is the proportion of eligible units among all units in the sample for which a definitive determination of status was obtained. The estimated eligibility rate is used in the calculation of the overall response rate.

⁸ These disposition codes and rate formulae are consistent with the standards of the American Association for Public Opinion Research (AAPOR). The contact, cooperation and response rates are the AAPOR #3 rates.

⁹ Contact rate= (Completes+refusals+break-offs)/(Completes+refusals+break-offs+not contacted)

¹⁰ Cooperation rate=Completes/(Completes+refusals+breakoffs)

¹¹ Response rate=Completes/[Completes+refusals+breakoffs+not contacted+ (e*(unknown eligibility))]. For this study, e=.992 (see Table E-4).

Of the total 126 pieces of sample used for the study, 121 pieces of sample had a definitive eligibility status (one was not eligible and 120 were eligible) and five were of unknown eligibility. Therefore, the estimated eligibility status for the study is $120/121 = 0.992 = 99.2\%$.

Table E-4: Sample Eligibility and Estimated Eligibility Rate

	Number	Percent
Total Sample	126	100%
Known Eligibility	121	96.0%
<i>Not Eligible</i>	1	0.8%
<i>Eligible</i>	120	95.2%
Unknown Eligibility	5	4.0%
Estimated Eligibility rate (e)	120/121=0.992	

Data Processing

Coding

The survey contained five open-end questions and eight other-specify/field code questions. A Policy Analyst at APPRISE reviewed each verbatim response and coded it into one of the pre-coded responses or developed a new code, where applicable. New codes were created for questions OB1, OB3, EF11, and EF14. Navigant Consulting provided the final coding check for the file. All additional codes are documented in the survey codebook.

Data Processing

The survey data were checked for consistency with the survey instrument. Data files were created in the following formats: SAS, SPSS, Stata, and Excel. All files were labeled with variable labels and value labels. Survey data codebooks were also created for this study and were distributed along with the data files.

Weighting

The data were not weighted.

APPENDIX F:

**PARTICIPATING SERVICE PROVIDER SURVEY
METHODOLOGY**

August 23, 2011

Existing Facilities Program - Participating Service Providers Survey

The purpose of the Existing Facilities Program (EFP) Participating Service Providers Survey was to interview energy efficiency service providers to gain a greater understanding of the current market for energy efficiency retrofit projects in New York State. This survey was one of four market surveys conducted as part of a comprehensive study designed and managed by NYSERDA’s Market Characterization and Assessment Team. The Participating Service Providers survey asked respondents about their firm’s approach towards the energy efficiency market, their perception of market barriers and drivers, and their experience with retrofit projects and the Existing Facilities program. While the survey referenced a recent Existing Facilities project that the firm had worked on, the survey did not ask specifically about their experience with any one particular project. The EFP Participating Service Providers Survey was managed by APPRISE. Interviews were conducted by Issues & Answers Network, Inc.

Sample

Target Population

The MCA Team targeted service providers that were third-party applicants associated with installed projects that received performance-based incentives through the Existing Facilities Program. This population includes firms that are located outside of New York State.

Sample Frame

The sample frame for this study was assembled by Navigant using a current EFP project database and included projects with electric energy efficiency measures at non-industrial sites that received performance-based incentives. Within this group, Navigant identified 57 service providers that were third-party project applicants. Each provider was categorized as either an upstate provider or a downstate provider based on where the majority of their affiliated projects were located. The sample frame included 27 downstate providers and 30 upstate providers.

Sample Selection

APPRISE checked the sample frame and removed one duplicate provider prior to fielding. The final sample selected is presented in Table F-1.

Table F-1: Final Sample Selected

Sample Selected	
Upstate	30
Downstate	26
Total	56

Advance E-mails

NYSERDA sent advance e-mails to potential respondents prior to the start of full-scale interviewing. The e-mail explained the study to the potential respondent, introduced the phone center that would be calling, provided NYSERDA contact information if a potential respondent wanted to learn more about the survey effort, reassured potential respondents about maintaining the confidentiality of their responses, and recommended participation in the study.

Target Completes

The target number of completes was initially 40 (21 upstate providers and 19 downstate providers). Following the removal of one duplicate downstate provider and the discovery that one downstate provider was no longer in business, Navigant revised the target number to 39 completes (21 upstate providers and 18 downstate providers).

Data Collection**Overview of Data Collection Procedures**

The EFP Participating Service Providers survey was administered as a telephone interview. Interviewers from Issues and Answers Network, Inc. conducted the survey using a computer-assisted telephone interview (CATI) survey instrument. The respondent was either the contact listed in the sample or someone else at the firm who worked on projects that received an incentive through the Existing Facilities program.

Survey Instrument

The survey instrument was designed by NYSERDA's Market Characterization and Assessment Team. APPRISE formatted the survey instrument for CATI programming. Three Pretest interviews were conducted by APPRISE staff to assess the clarity, consistency and skip pattern logic of the draft survey instrument. Changes as a result of this pretest effort were discussed with the Market Team and implemented where necessary. Two of the three pretests were included in the final data.

Survey Administration

Interviewer training and initial calling began on June 23. Advance e-mails were sent on June 24 and full-scale interviewing began on June 27, 2011. All interviews were completed in English. Interviewers called during daytime weekday hours and were available on nights and weekends if the respondent wished to schedule a call-back for that time. Calls were rotated between the morning and afternoon on different days of the week. If the interviewer reached the named contact's voicemail, he or she left a message on first contact. After the first contact, the interviewer left a message every three days. The length of the survey averaged 24 minutes. Survey fielding ended on August 1, 2011 with 39 completed interviews.

Sample Disposition and Survey Response Rate

Table F-2 shows the disposition of all sampled cases and provides the contact, cooperation, and overall response rates for this survey. The response rate estimates the fraction of all eligible respondents in the sample that were ultimately interviewed. The contact rate is the percentage of the working numbers where a request for an interview was made. The cooperation rate is the percentage of contact numbers where

consent for an interview was not refused.¹² The contact rate for the study was 76.5%, the cooperation rate was 100% and the overall response rate was 73.7%

Table F-2: Survey Sample Disposition

		Number	Percent
TOTAL SAMPLE USED		56	100%
Excluded Sample	Not working/Unusable number	0	0%
Not Contacted	Respondent never available Answer Machine Call back/Left 800#	12	21.5%
Unknown Eligibility	No Answer/Busy	2	3.6%
Excluded Service Providers	Not Eligible/Not Qualified/Over Quota	3	5.4%
Refused/ Break-off	Refused Break-off	0	0%
COMPLETED INTERVIEW		39	69.6%
Contact rate¹³ (39/51=0.765)			76.5%
Cooperation rate¹⁴ (39/39=1.0)			100%
Response rate¹⁵ (39/51+(0.944*2)= 0.737)			73.7%

Table F-3 shows the eligibility status and the estimated eligibility rate (e) for the sample. The estimated eligibility rate is the proportion of eligible units among all units in the sample for which a definitive determination of status was obtained. The estimated eligibility rate is used in the calculation of the overall response rate.

Of the total 56 pieces of sample used for the study, 54 pieces of sample had a definitive eligibility status (three were not eligible and 51 were eligible) and two were of unknown eligibility. Therefore, the estimated eligibility status for the study is $51/54 = 0.944 = 94.4\%$.

¹² These disposition codes and rate formulae are consistent with the standards of the American Association for Public Opinion Research (AAPOR). The contact, cooperation, and response rates are the AAPOR #3 rates.

¹³ Contact rate= (Completes+refusals+breakoffs)/(Completes+refusals+breakoffs+not contacted).

¹⁴ Cooperation rate=Completes/(Completes+refusals+breakoffs).

¹⁵ Response rate=Completes/[(Completes+refusals+breakoffs+not contacted+ (e*(unknown eligibility))]. For this study, e=.0.944 (see Table F-3).

Table F-3: Sample Eligibility and Estimated Eligibility Rate

	Number	Percent
TOTAL SAMPLE	56	100%
Known Eligibility	54	96.4%
<i>Not Eligible</i>	3	5.4%
<i>Eligible</i>	51	91.1%
Unknown Eligibility	2	3.6%
Estimated Eligibility rate (e)	51/54=0.944	

Data Processing

Coding

The survey contained seven open-end questions and eight other-specify/field code questions. A Policy Analyst at APPRISE reviewed each verbatim response and coded it into one of the pre-coded responses or developed a new code, where applicable. New codes were created for questions EF10 and CC1. Navigant Consulting provided the final coding check for the file. All additional codes are documented in the survey codebook.

Data Processing

The survey data were checked for consistency with the survey instrument. Data files were created in the following formats: SAS, SPSS, Stata, and Excel. All files were labeled with variable labels and value labels. Survey data codebooks were also created for this study and were distributed along with the data files.

Weighting

The data were not weighted.

APPENDIX G:

NONPARTICIPATING END-USER SURVEY METHODOLOGY

THE FINAL VERSION HAS NOT BEEN RECEIVED FROM MCA TEAM.

APPENDIX H:

**NONPARTICIPATING SERVICE PROVIDER SURVEY
METHODOLOGY**

THE FINAL VERSION HAS NOT BEEN RECEIVED FROM MCA TEAM.

