Green Jobs-Green New York Evaluation Operating Plan

May 26, 2010

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Evaluation Mandate

• Evaluation will focus on overall effectiveness, progress, and outcomes related to the Program
• Reported results shall include but not be limited to:
  – Key findings,
  – Calculated energy savings, to the extent possible, and
  – Recommendations for program improvement and expansion
• Evaluation budget up to 5% of total GJGNY funding
Overarching Evaluation Goals

• Conduct credible and transparent evaluations
  – Conform to industry standards and best practices
  – Meet acceptable sampling precision while reducing bias
  – Clearly report what was done and how

• Provide timely information regarding program
  – NYSERDA program staff and managers
  – GJGNY Advisory Council
  – New York State Legislature
  – Other stakeholders
Evaluation Implementation

• NYSERDA Energy Analysis staff manage and oversee the work of independent, expert evaluation contractors

• Evaluation contractor role includes:
  – Portfolio- and program-level evaluation planning
  – Evaluation design and implementation
  – Detailed evaluation reporting and presentations
  – Assistance with implementing evaluation recommendations
  – Regular progress reporting to NYSERDA evaluation staff
Market Characterization and Assessment (MCA)

• Objectives
  – Develop comprehensive understanding of current and emerging markets
  – Provide baseline information to enable NYSERDA to define, deliver, and evaluate programs
  – Track changes over time on market indicators likely to be impacted by the program

• Approach
  – Logic models
  – Secondary and primary data collection
Process Evaluation

• Objectives
  – Review program oversight and operations
  – Gauge customer satisfaction
  – Provide recommendations for program and process improvements and efficiency

• Approach
  – Primary data collection with program staff, program delivery contractors, program customers, trade allies, and other key stakeholders
  – Sometimes conducted in conjunction with MCA studies
Impact Evaluation

• Objectives
  – Determine energy and non-energy (e.g., jobs, environmental) impacts that are attributable to the programs
  – Compare program outcomes to program goals
  – Assess cost-effectiveness of programs

• Approach
  – Deemed savings, on site measurement and verification, and large-scale analysis of utility consumption data
  – Customer and market actor surveys
GJGNY Program Evaluation Specifics

• Phased evaluation planning
  – Preliminary plans
  – Detailed plans

• Evaluation coordination with SBC, EEPS and other programs
  – Efficiency of implementation
  – Dealing with attribution
Financing Program Evaluation

• Program theory and logic model
• MCA Evaluation
  – Awareness and understanding of GJGNY loan offerings
  – Influence of the GJGNY financing options on customer decision making
• Process Evaluation
  – Customer satisfaction with GJGNY program interaction/assistance
  – Customer response to, and interest in, GJGNY finance options/rates
  – Effectiveness of the GJGNY financing in fostering greater energy efficiency measure installations
• Impact Evaluation
  – TBD depending on whether customers partake in other program offerings
Workforce Development (WFD) Program Evaluation

• Program theory and logic model
• Process and MCA evaluation
  – Kirkpatrick’s four levels of evaluation for assessing training effectiveness*
    • Response of the trainee to the training
    • What was learned
    • Performance in the workplace
    • Effects of the training on the workplace
• Energy impact evaluation not planned
• Evaluation closely coordinated with EEPS WFD Program

Small Biz/NFP, Multifamily and Small Homes Program Evaluation

- Program theory and logic model
- MCA Evaluation
  - Assess customer awareness/understanding of GJGNY, and decision making
  - Identify and characterize critical market actors
- Process Evaluation
  - Customer satisfaction with GJGNY program interaction/assistance
  - Effectiveness of contractor accreditation and capacity/infrastructure building
  - Effectiveness and benefits of the aggregator pilot
  - Comparison of energy audit approaches
- Impact Evaluation
  - Coordinated with other end-use customer incentive programs, as needed
  - Could include engineering reviews, on site metering and monitoring, billing analysis and participant/non-participant surveys
Outreach and Marketing Evaluation

• Program theory and logic model
• Process and MCA evaluations to assess issues such as:
  – Customer satisfaction
  – Effectiveness of CBO, expeditor, and aggregation program models
    • Reaching new populations
    • Moving projects to implementation
    • Facilitating a higher level of implementation
    • Facilitating fair and open process for contractors/coordinators/business partners
  – Ability to develop alliances and expand program activity
• Energy impact evaluation not planned
Schedule and Reporting

• 2010 Evaluation Activities
  – Detailed evaluation work plans and schedules
  – Program logic models

• Detailed Evaluation Contractor Reports
  – Methodology, key results, recommendations, summary and conclusions
  – Publicly available upon upon completion

• Annual Reports
  – Summarize evaluation progress and findings from work completed in the prior year