

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

*Kirkpatrick, D. *Techniques for Evaluating Training Programs*. Journal for the American Society of Training Directors, 13. 21-26, (1959b).

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 completion
- Annual Reports
 - Summarize evaluation progress and findings from work completed in the prior year