



# Why Evaluation?



What Do  
We All Want?

1

2

# What Do We All Want?

Energy efficiency  
programs that save  
customers energy  
& money





What Do  
We All Want?

To be trustworthy  
stewards of  
customer money

1

2



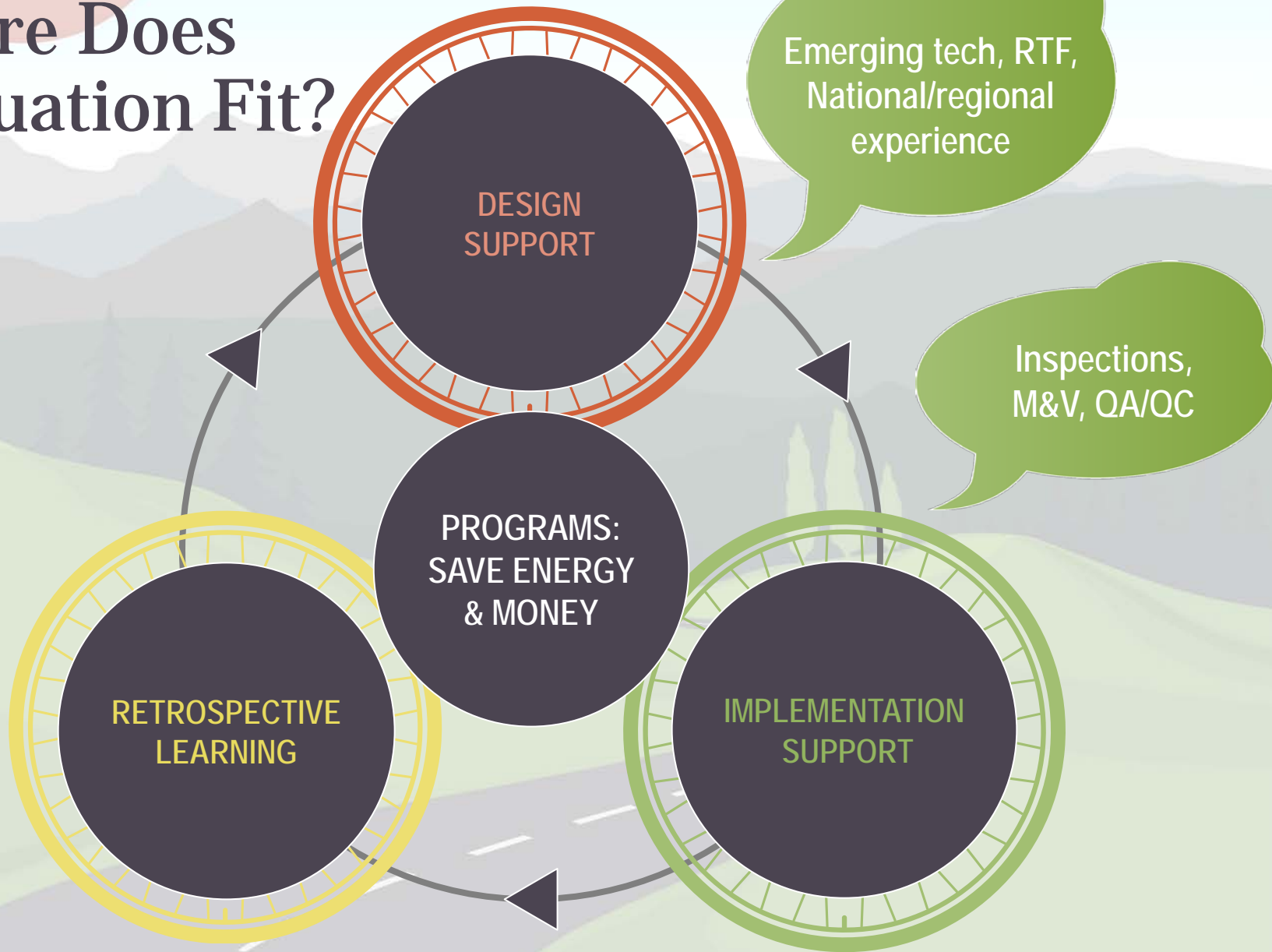
Programs are like  
Professional  
Cyclists

# Evaluation is Part of the Support Staff



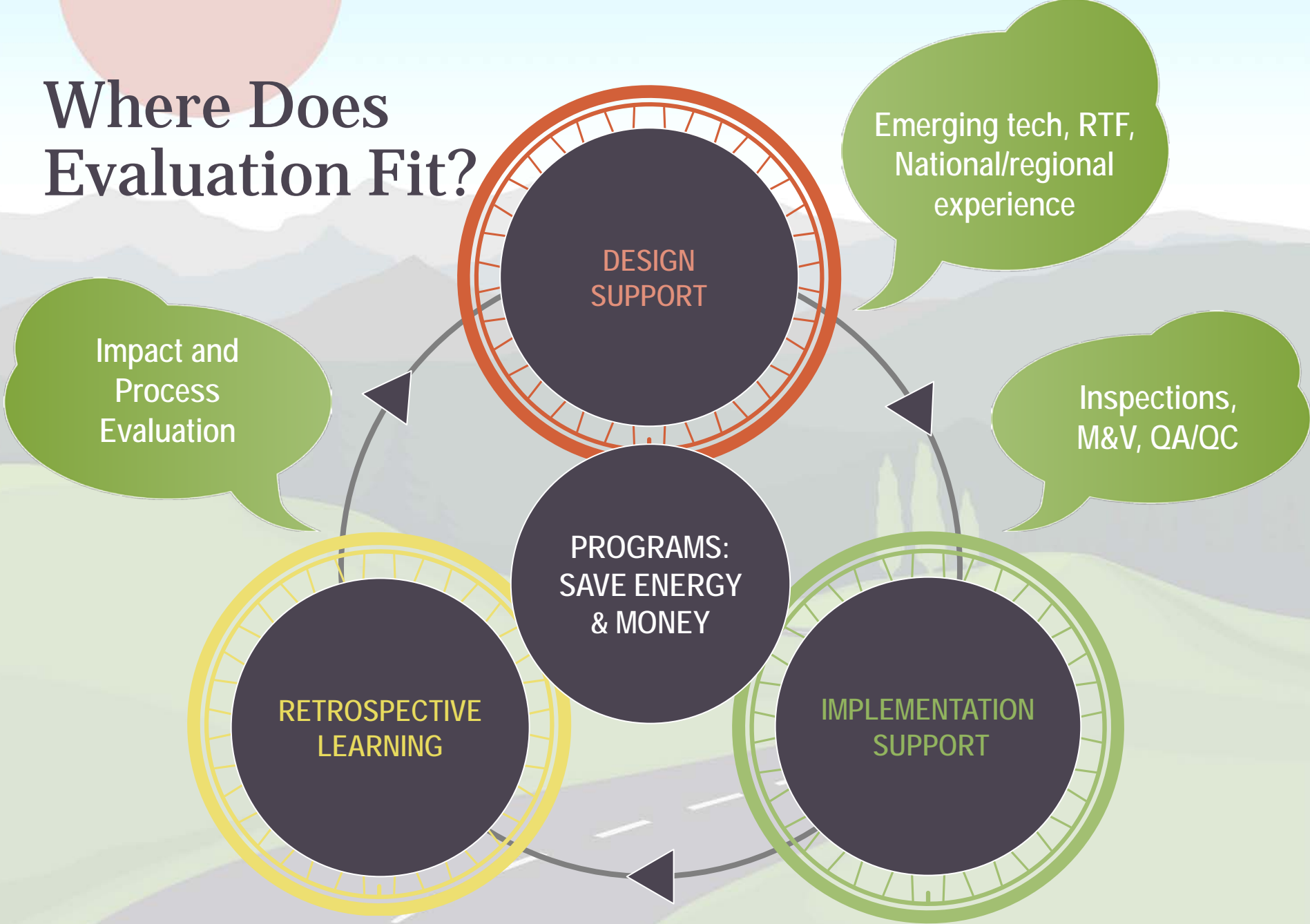


# Where Does Evaluation Fit?





# Where Does Evaluation Fit?





# Evaluation Purpose



# What Did We Achieve?

Evaluation objectively and retrospectively documents and measures the effects of a program in order to determine how well it met the intended outcomes.



---

# How Do We Improve?

Evaluations help us understand why those effects occurred and identify ways to improve current and future programs.

---



---

~~Gotcha!~~

Evaluations are not  
to find  
and point out mistakes

---

# But, Evaluations aren't Perfect

*They can be (or seem)...*



Too long

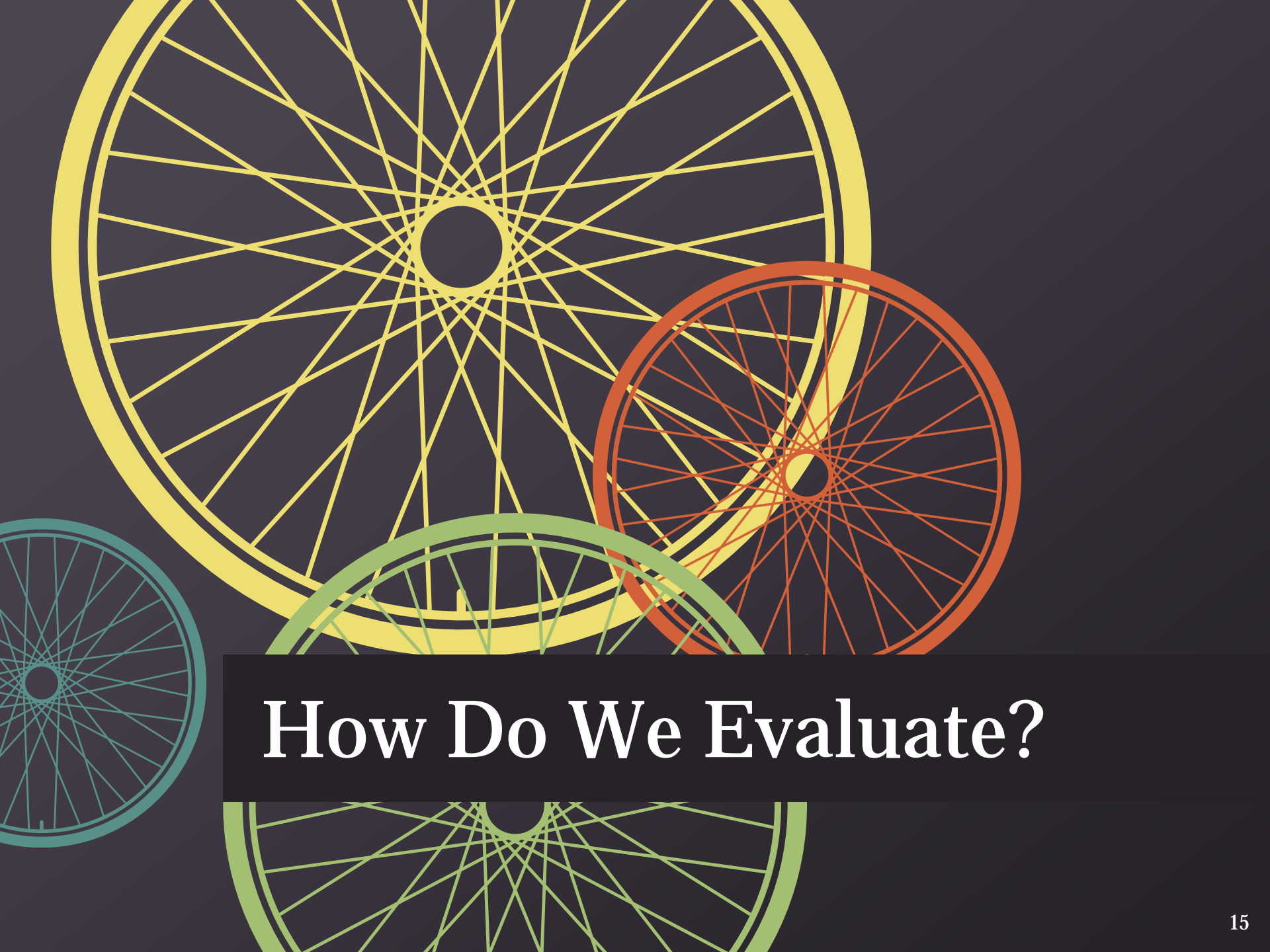
Too much work,  
precision

Irrelevant

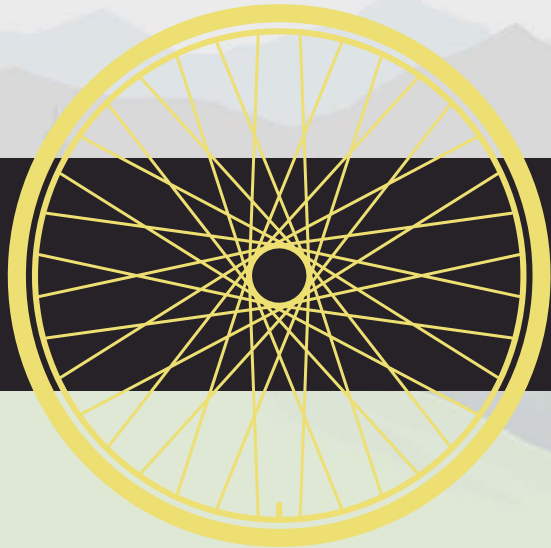
Poorly communicated

Not actionable

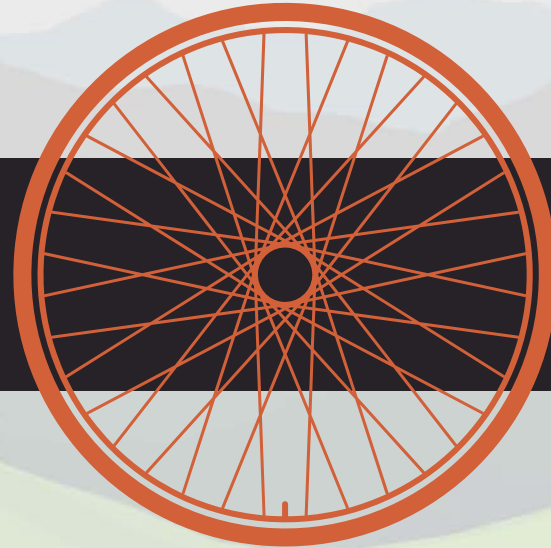




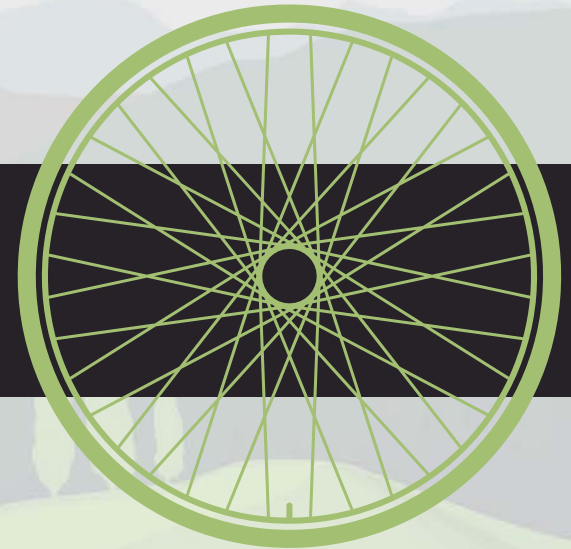
# How Do We Evaluate?



**In partnership  
with our  
stakeholders**



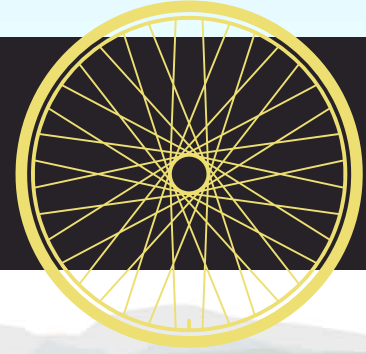
**Efficiently**



**Using best  
practices**



# Partnership



Input on needs & strategies



Transparency on plans, protocols, deliverables

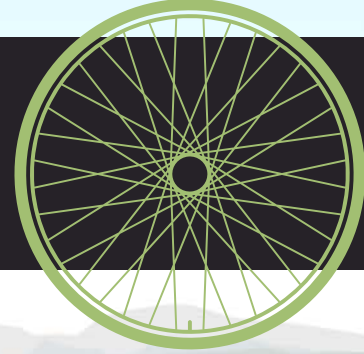


Support utility needs: customer communication, enable oversamples

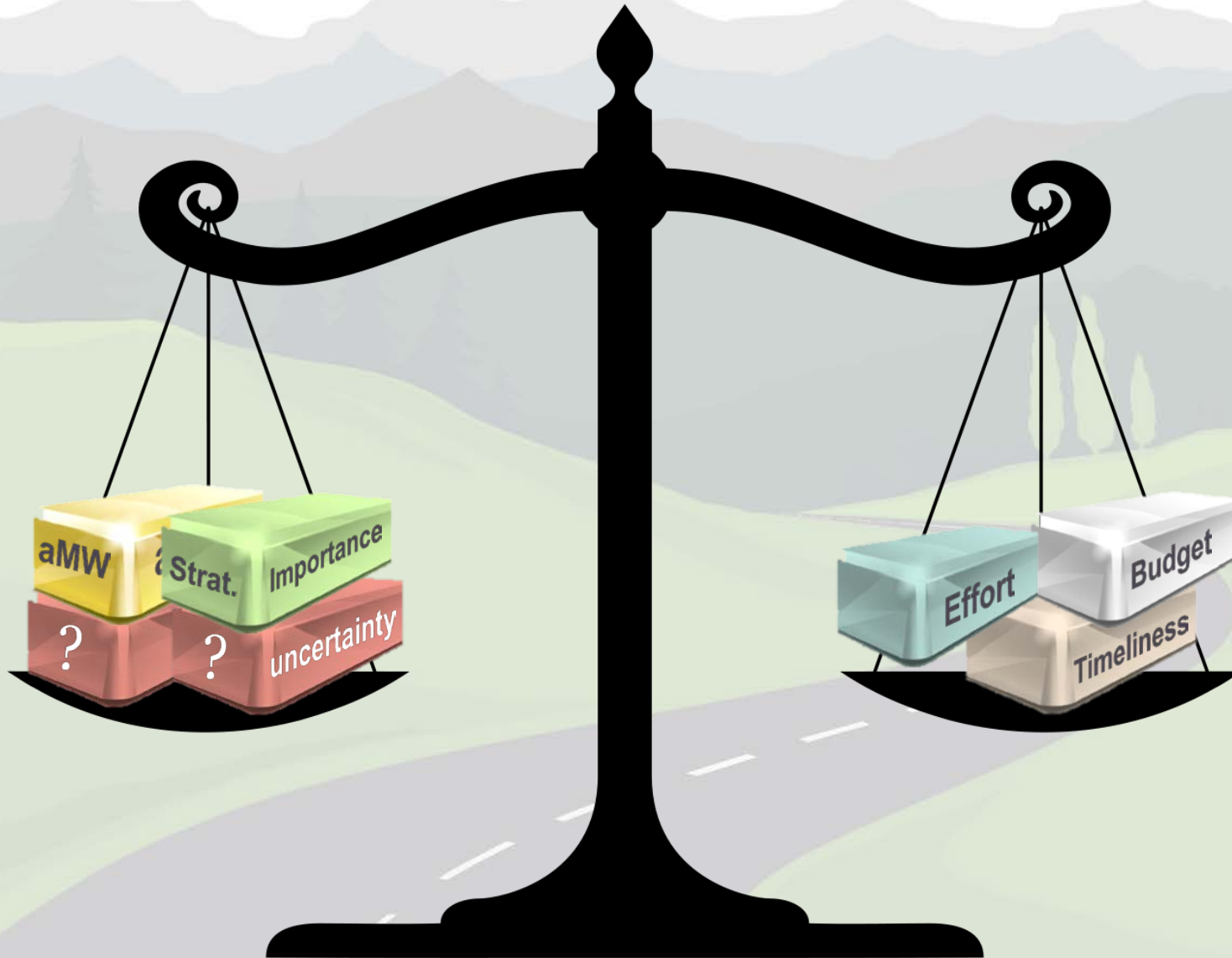
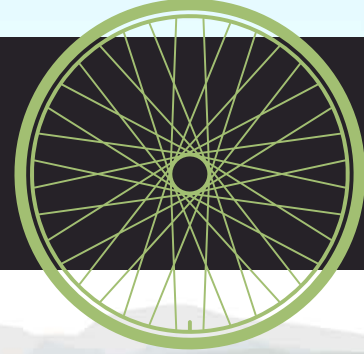


Provide valuable information

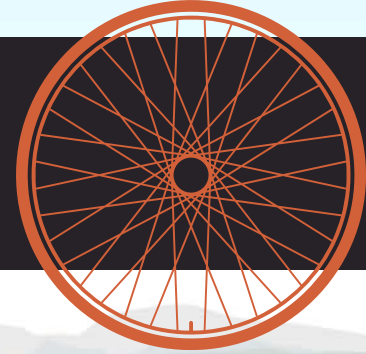
# Tailored



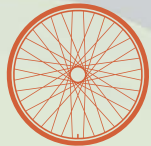
# Balanced



# Using Best Practices



Evaluation industry best practices



RTF Guidelines, Uniform Methods  
Project & more



Other national/regional evaluations



# QSSI Impact Evaluation Policies

# Drivers

Industry Best  
practice, Power Act,  
RTF Guidelines,  
Implementation  
Manual



# Focus

Savings reliability  
with independent verification

Also, improving  
programs



# Coverage

Impact evaluation covers programmatic, reportable savings, including self-funded

4-year planning cycle, some evaluation annually





# Impact Evaluation

Balances objectives of coverage, research needs, timely feedback and cost /effort of the evaluation.

Strives to minimize time between measure completion and impact evaluation

Maximize coordination with COTRs and transparency with stakeholders

Customers required to participate if sampled

## Generally follow RTF Guidelines on Impact Evaluation

Exception: 4 year cycle instead of 3 year cycle

Cover 80% of savings in portfolio; strive for 90%.

Across multiple years.

Minimum confidence/precision of 90/10 (portfolio), 80/20 (domain);  
Strive for 90/5 (portfolio), 90/10 (domain).

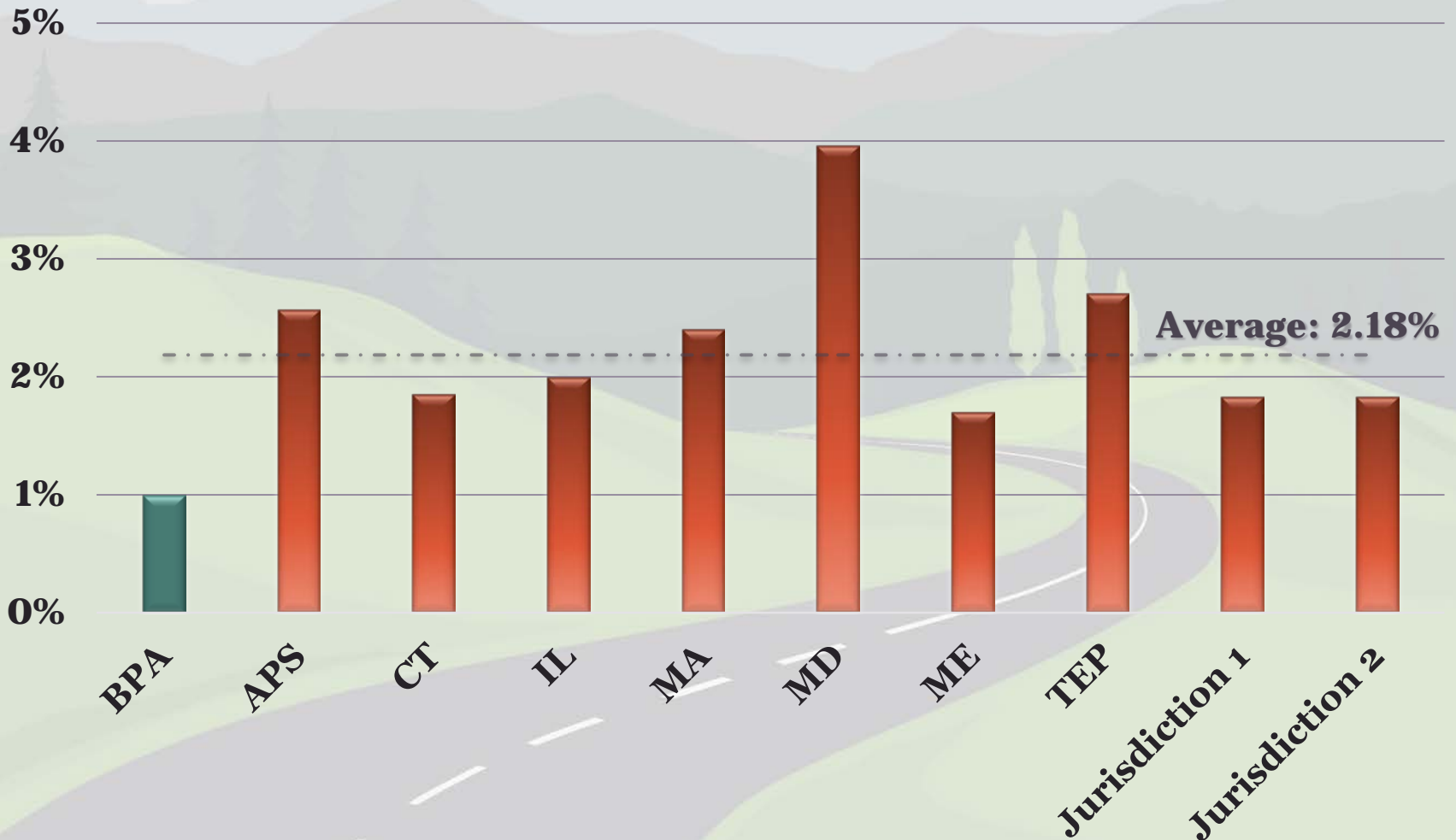
**Evaluation reports include: evaluated savings, cost-effectiveness and realization rates**

# Process Evaluation

TBD: Next on QSSI list

# Evaluation Spending

**% of Total EE Program Budget (2015)**



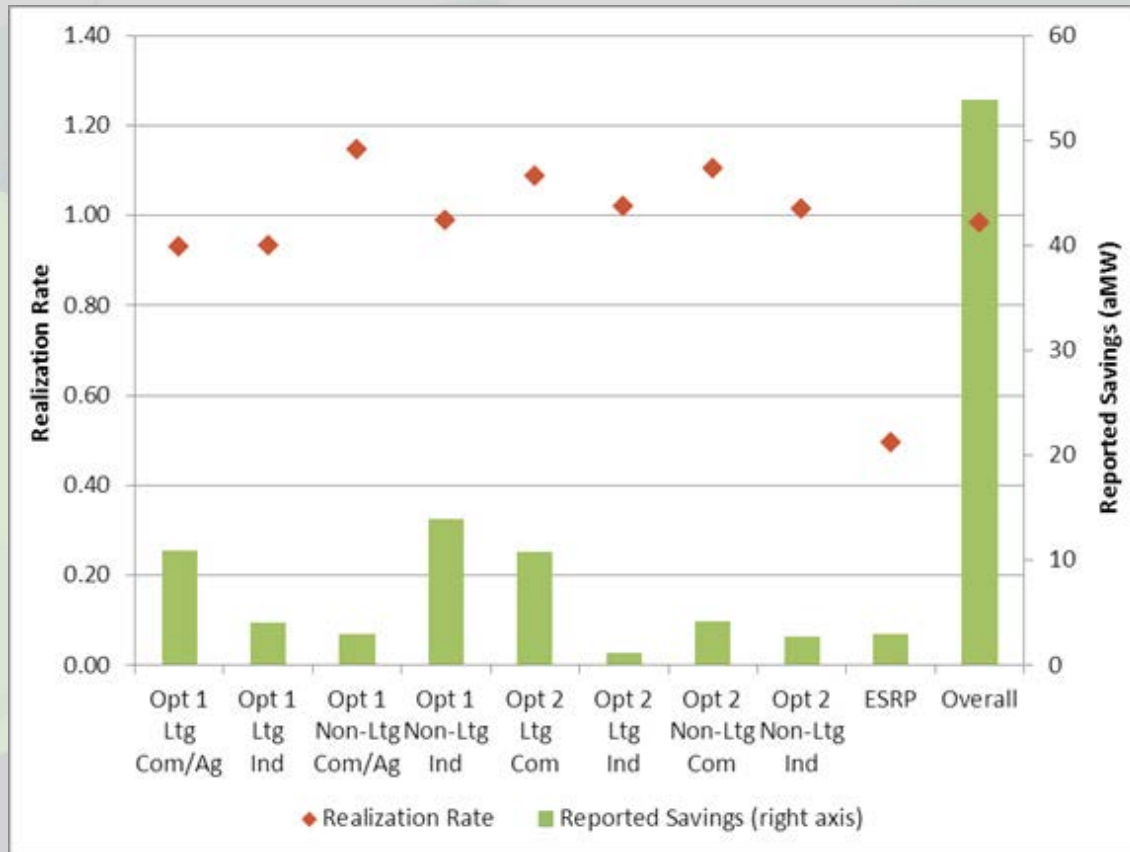


# Benefits & Examples

# Validation & Credibility



# Site-specific evaluation verified the great work by BPA, programs and utilities



# Avoiding Criticism



## THE WALL STREET JOURNAL.

MONDAY, SEPTEMBER 29, 2008 - VOL. CCLII NO. 76

\*\*\*\*\* \$2.00

Last week: DAX 11143.15 ▼245.31 -2.2% NASDAQ 2283.34 ▼4.0% NIKKEI 11893.24 ▼0.2% DJ STOXX 50 2722.07 ▼3.1% 30-YR TREASURY ▼15/32, yield 3.827% OIL \$106.09 ▲\$4.14 EURO \$1.4613 YEN 104.15

### What's News—

Business & Finance World-Wide

The Bush administration and Congress agreed on a tentative deal to authorize the biggest banking rescue in U.S. history...

McCain and Obama retold messages, back bailout plan. With the financial...

## Energy-Efficiency Programs 'Nudge' Consumers in the Wrong Direction



**AFTER THE MARATHON:** Treasury Secretary Paulson, center, House Speaker Pelosi and Senate Majority Leader Reid announcing the deal; the House is expected to vote on it Monday. Complete coverage starts on Page A2.

## The New York Times

NEW YORK, WEDNESDAY, MAY 7, 2014

© 2014 The New York Times

\$2.50

### NEW ABDUCTIONS DISTRESS NIGERIA; U.S. OFFERS HELP

#### NO GIRLS RESCUED YET

#### 11 Taken, Local Officials Say — Terror Group Is Suspected

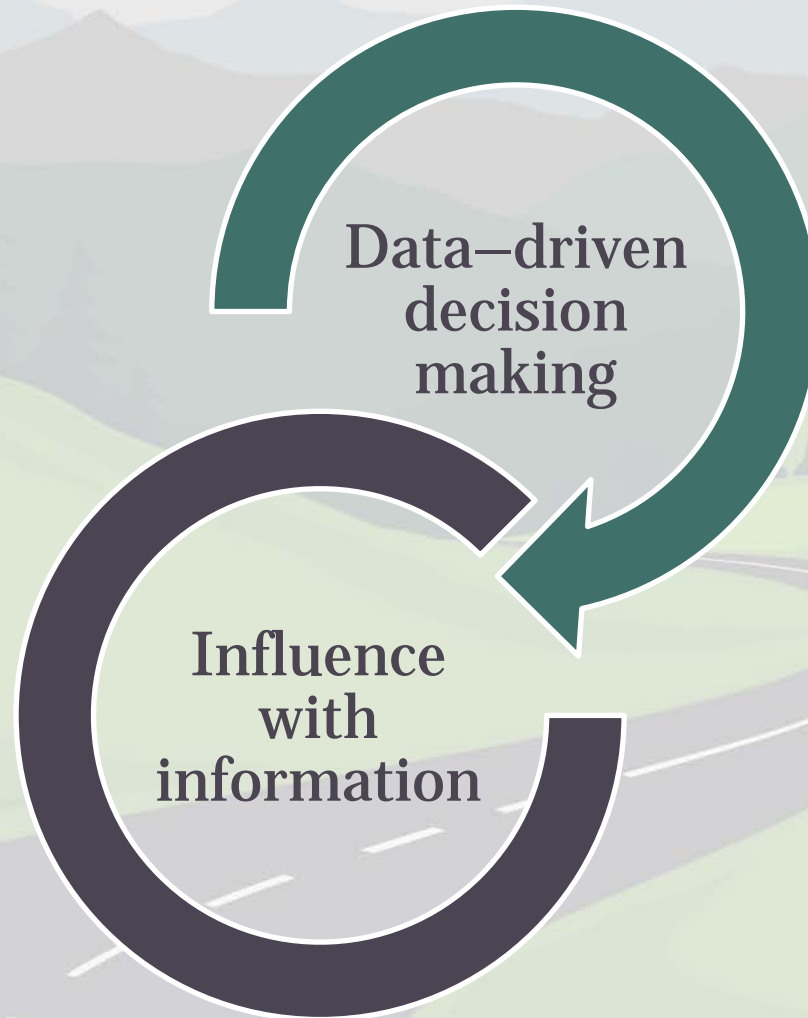
By ADAM NOSSETER  
ABUJA, Nigeria — A second kidnapping of schoolgirls in Nigeria's northeast by Islamist militants put new pressure on the country's troubled government, which had been hoping to showcase its emergence as Africa's largest economy this week but instead has been forced to confront its failure to contain a growing insurgency in its north.

## Climate Change Calls for Science, Not Hope





# Real, Actionable Data



## Site Specific Evaluation

- Simplified RTF lighting standard protocol
- Increased savings reporting by 20% for one utility

## OPower HERS Evaluations

- I-937 and BPA reporting for Clark and SCL
- Allows influence of RTF protocol

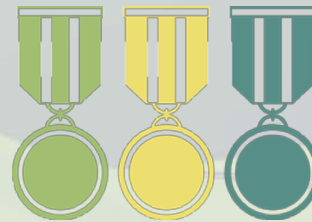
## Mail-by-Request study

- Informed installation rates

# Continuous Improvement

Answers to  
targeted or  
lingering  
questions

Insights into  
next steps,  
new  
directions



What wouldn't?

What would  
really help?



Option 2  
utility M&V?



Process  
Evaluations  
(Simple  
Steps)

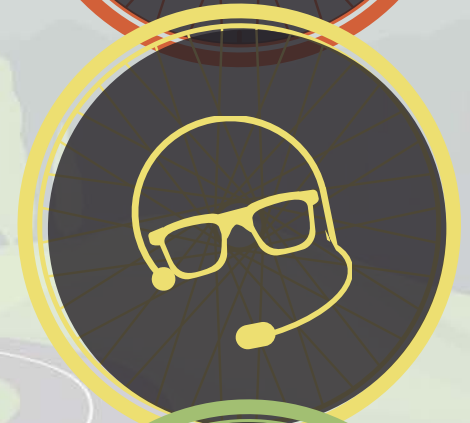
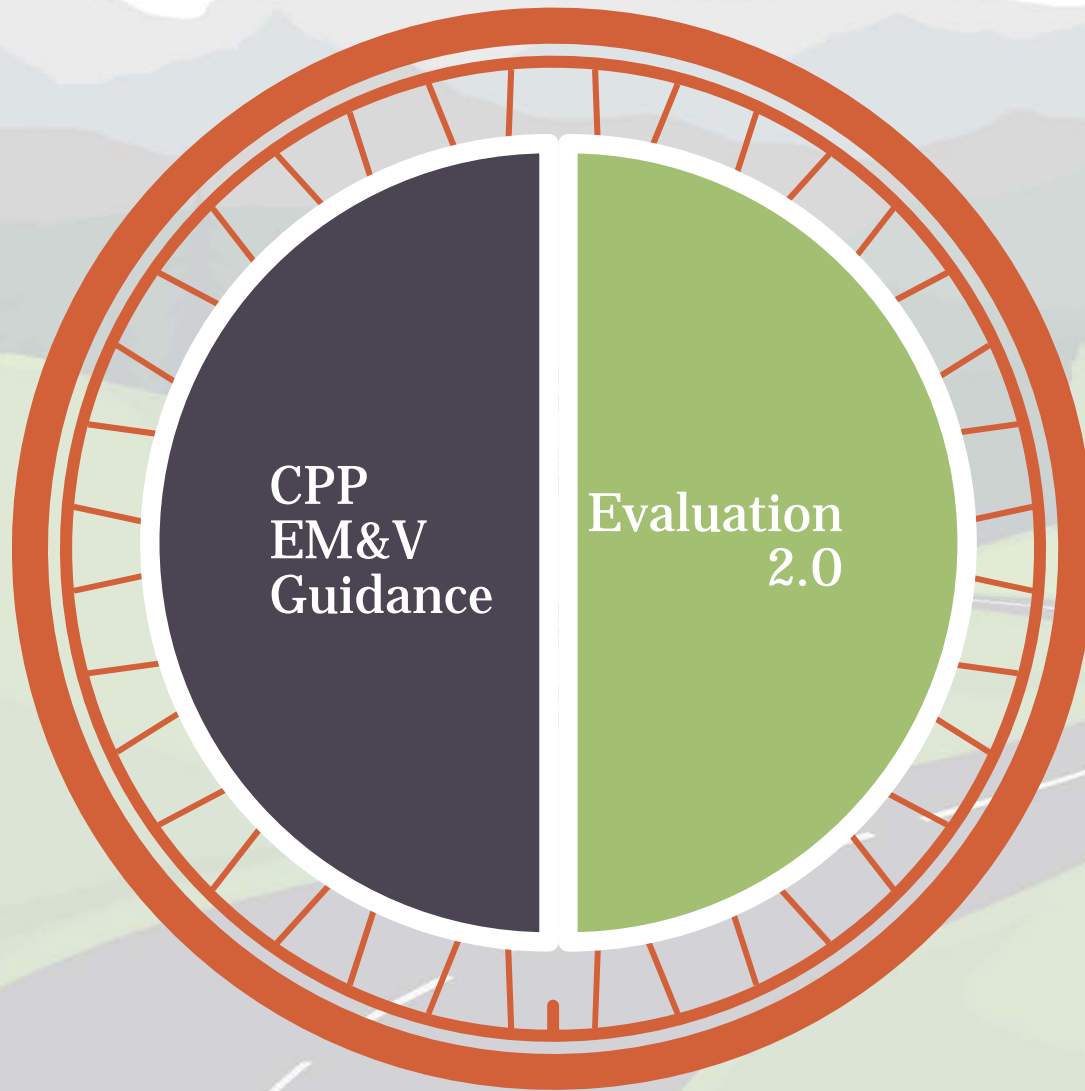


Documentation  
Practices?



Industrial  
SEM EM&V

# Preparing for the Future



# What Do We All Want?

Energy efficiency programs that save customers energy & money

To be trustworthy stewards of customer money

1

2

Evaluation  
Helps You Go  
Further & Get  
There Faster





[www.bpa.gov/goto/evaluation](http://www.bpa.gov/goto/evaluation)







**Thank You**