

APPENDICES

Appendices

APPENDIX A

Data Collection Instruments

Appendix A

CONAUG WEB-SURVEY INSTRUMENT

This survey is being conducted by Research Into Action, an independent program evaluation firm. You may be assured of complete confidentiality. The evaluator will ensure that your responses will never be linked with you or your utility in any information disclosed to BPA or made public.

BPA will use the information derived from this survey to learn from Con Aug experiences as they plan the post-2006 bilateral contracts that will succeed Con Aug.

The survey should take about 15 minutes.

Click "next" below to begin.

If you do not directly represent a utility, please try to answer from the perspective of the utilities you work with. If you cannot provide an answer, leave all fields blank.

1. Please estimate the portion (in percent) of your energy sales to each market sector:
 - % Residential
 - % Commercial
 - % Industrial
 - % Agricultural
 - (must sum to 100%)

2. Please estimate the portion (in percent) of your total conservation efforts represented by your conservation work with:
 - % own efforts
 - % Con Aug
 - % C & RD
 - (must sum to 100%)

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3. Would you say that your total load is...
 - ...growing
 - ...shrinking
 - ...staying the same
 - don't know
 - not applicable

4. How many full-time equivalent staff (full-time would be 40 hrs/wk) do you have working on conservation programs?

5. Which of the following opportunities offered under Con Aug do you have experience with? (multiple responses allowed)
 - Limited Standard Offer for Lighting (LSO)
 - Expanded Standard Offer for Lighting (ESO)
 - Expanded Standard Offer Plus (ESO+)
 - Invitation to Reduce Load through Conservation (IRLC)
 - Energy Star Homes NW
 - C&I Standard Offer
 - Water and Waste-Water Energy Tune-up (BacGen)

Please indicate how much you agree with each of the following statements (1-strongly disagree, 2, 3-neither disagree nor agree, 4, 5-strongly agree, don't know/not applicable)

6. Bonneville has provided sufficient information for our utility to understand Con Aug.

7. Participating in Con Aug makes economic sense for us.

8. Our ratepayers want conservation programs.

9. Participating in Con Aug mainly helps BPA not us.
10. Con Aug helps us do conservation we wouldn't otherwise be able to do.
11. We are busy implementing C & RD products so we don't have time to participate in Con Aug.
12. The processes for implementing projects in Con Aug are very labor intensive for us.

Please indicate how much you agree with each of the following statements:

13. I am confident that Con Aug-qualified conservation measures result in a reduced load.
14. The measures qualifying for the ESO and ESO+ standard offers are available in my area.
15. Con Aug should include some newer energy-efficiency technologies in standard offers.
16. The M&V requirement of 100% inspection for ESO and ESO+ projects is reasonable.
17. The M&V requirements for custom projects are difficult for our utility to meet.
18. BPA provides sufficient engineering support to do the M&V for custom projects.

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19. Uncertainty about how M&V results will affect incentives is a deterrent to our commercial and industrial customers' participation

Please indicate how much you agree with each of the following statements:

20. It is easy to tell what types of custom projects BPA is interested in funding under Con Aug.
21. Con Aug standard offers should allow substitutions of equipment with equivalent savings.
22. Con Aug contracts are so specific it's hard to deliver programs that will meet every specification.
23. The way BPA interprets exhibits to purchase of conservation agreements (PCAs) is usually fair and reasonable.
24. It's pretty easy to work with BPA to amend exhibits to purchase of conservation agreements (PCAs).
25. We would do more projects if we did not need to provide so much project documentation before we have agreement from BPA for a budget amount.
26. Getting a custom project approved requires too much work.
27. BPA's decision-making process for approving or rejecting custom project proposals is efficient.

Please indicate how much you agree with each of the following statements:

28. Con Aug's policies regarding reimbursements for administrative expenses work pretty well for us.
29. When incentives cover less than 20% of a project's incremental cost it's very likely participants would have done the project on their own without an incentive.
30. Our customers are very likely to install projects with less than a 1 year payback on their own without an incentive.
31. It is impossible to get our customers to agree to repay conservation incentives if they change to another energy provider.
32. The decrement requirement makes it hard because we don't want to give up access to any BPA power.
33. The decrement requirement strongly discourages utilities from participating in Con Aug.

Please indicate how much you agree with each of the following statements:

34. The length of time to which the decrement applies is not clear.

Please indicate whether these statements are true or false. If you aren't sure, please do not guess, mark "don't know."

35. The decrement applies until the end of the power sales agreement.
 - TRUE
 - FALSE
 - Don't know

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36. The decrement applies until net requirements are calculated again and applied.
- TRUE
 - FALSE
 - Don't know
37. The exact time period the decrement applies to can be negotiated between BPA and the utility.
- TRUE
 - FALSE
 - Don't know
38. The decrement can be taken in increments as small as 1/12 aMW.
- TRUE
 - FALSE
 - Don't know

The incentive levels offered under Con Aug in 2004 and 2005 are between 12¢ and 16¢ per kWh. Are there conservation opportunities that can be acquired in your area at the current incentive levels for each sector?

39. Residential
- Yes
 - No
 - Don't know
40. Commercial
- Yes
 - No
 - Don't know

41. Industrial
- Yes
 - No
 - Don't know

42. Agricultural
- Yes
 - No
 - Don't know

If any of 39-42 are no, ask: What is the minimum incentive level (in cents per kWh) you believe would be required in order to acquire conservation in your utility area for each sector?

43. __¢/kWh Residential

44. __¢/kWh Commercial

45. __¢/kWh Industrial

46. __¢/kWh Agricultural

47. Con Aug incentive levels have changed over the course of the Con Aug program. Do feel you understand why?
- Yes
 - No
 - Don't know

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If 47 is Yes, ask:

48. Please briefly explain your understanding of why BPA has changed Con Aug incentive levels. (open)

Please indicate how useful each of the following tools has been in implementing Con Aug at your utility. If you have no experience with the tool please mark "N/A". (1-not at all useful, 2, 3, 4, 5-very useful, N/A)

49. ESO+ Sample Contract
50. Measure Changes List (explaining changes to program)
51. Lighting Rebate Verification Report (for ESO+ or ESO)
52. Drop-down Wattage Reduction Tool (for ESO+ or ESO)
53. ESO Equipment Specifications Document
54. Glossary of Terms

BPA is open to creating additional tools. Please indicate which type of tools you need. (1-not at all needed, 2, 3, 4, 5-very much needed, N/A)

55. Ready-made brochures that can include your logo.
56. Application forms and other tools for working with end users.
57. Workshops on specific implementation or technical topics.

58. Tools or checklists to assist in verification.
59. Training on how to do verification.
60. Are there specific suggestions you have for workshops tools or other assistance BPA could offer that would help you in implementing Con Aug projects? Please use this space for suggestions. (open)
61. Considering all of your experiences working with Con Aug please name two things about the program you would say are working well. (open)
62. And again considering all of your experiences working with Con Aug please name two things about the program you would say have not been working well. (open)
63. The evaluation contractor would like to interview a sample of respondents to this survey. Any information provided in interviews will also be kept strictly confidential. May the evaluator contact you for this purpose?
 - Yes
 - No
64. If it's OK for the evaluator to call you please enter the best number to reach you at during normal business hours (otherwise leave blank). Also please feel free to specify the best times to call. (open)

You have completed all of the questions.

Thank you so much for taking the time to provide your input. Your efforts are very much appreciated.

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CONAUG UTILITY IN-DEPTH INTERVIEW GUIDE

1. Has your utility participated in ConAug?

Non-Participants:

2. (If not) Why not?
3. Is there anything that could be changed in the program which would increase the likelihood of your utility participating (be as specific as possible)?
4. (If someone else is making the decision): Who would be the best person to talk to at your utility about how the calculations or decision-making process behind your decision not to participate?
5. What energy efficiency activities are supported without ConAug funds?
Are there any activities you would like to do but are not doing?
Why are you not using Con Aug funds for these activities (if not covered above)?

Participants:

6. For those who use ConAug to support additional activities, what type of activities does ConAug enable you to do that would not happen otherwise?
7. What do you consider to be the differences between oversight by Bonneville, monitoring and verification? (Note to interviewer: Bonneville does oversight on a sample of projects, monitoring and verification activities are done by the utilities – we need to know how they view both of these activities)

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8. Have your M&V activities ever been used to adjust an incentive to a customer?
9. Have you talked with anyone who has completed projects and M&V and faced a different result between the predicted savings and the verified savings? What did you hear?
10. Are there things about the M&V requirements that bother you?
11. What is your understanding about how oversight results are applied by Bonneville?
12. Tell me about some of the experiences you have had in getting agreement on a project exhibit to a PCA?
13. What have been your experiences implementing the projects after the exhibits are agreed to?
14. Thinking about the measure list for ESO or ESO+, what types of changes do you feel are necessary to make the program more attractive to you and your customers? (thinking in terms of incentives, measures, etc.)

Everyone:

15. ConAug has set parameters for incentives to avoid free riders. These include not funding projects with less than a one year payback or when incentives are less than 20% of the incremental cost of the efficient measure. How do these parameters affect your customers or their projects? What in this formula does and does not make sense to you when thinking of your customers.

16. The economics of ConAug seem to work for some utilities but not others. Why do you think this is the case?
17. Have you talked to anyone at BPA about the time period over which the decrement applies or about the manner in which the decrement can be scheduled?
18. What have you been told about the decrement?
19. Have you talked with anyone who has participated and faced having a decrement taken? What did they say?
20. What is your understanding of custom projects? Can you envision proposing custom projects to Bonneville?
21. Tell me about how you cover your administrative costs for implementing efficiency programs at your utility. How do you cover the costs of ConAug in particular?

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QUESTIONS FOR BPA CON AUG STAFF

1. What is your role in the program?
2. What is your overall view of the program?
 - a. What is working best?
 - b. What is not working?
 - c. What are the primary barriers to participation?
3. (Ask of Tim S. only:)
 - a. What are you hoping to learn about ConAug?
 - b. Do you want us to investigate how the Federal component is working? (Karen thought this was not necessary, but will defer to your opinion.)
4. Can you clarify for us the relationship between ConAug and C&RD?
5. What customers have been active and which ones have not?
 - a. To what do you attribute the interest and lack of interest?
6. We understand ConAug is comprised of several components. In your opinion, what is the most important component of ConAug? Why?

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- a. What comments have you heard from the region about the different components?
 - b. Is there higher interest in one component than others? To what do you attribute the interest and lack of interest?

7. What are the driving principles or objectives for the utility conservation agreements? The third party component? And the Federal portion of the program?

8. What is your understanding of how incentives are set for the utility conservation agreements and the third party agreements that are part of ConAug?
 - a. How do the incentive levels work in practice?
 - b. What comments have you had about incentives?
 - c. What comments have you had about ConAug's focus on incremental savings? Has this been a barrier?

9. What is your understanding of load decrement?
 - a. How does the load decrement aspect work?
 - b. How important is this requirement?

10. How about the specific templates and tools developed for the ConAug. How successful do you feel they have been in meeting your needs? Your customer's needs?
 - a. What comments have you had about them?

QUESTIONS FOR BPA CON AUG STAFF/EERS

1. What is your role in the program?
2. How do you market ConAug to your customers?
3. What are utilities' reactions to the program?
4. Do you feel you understand the details of the program well enough to overcome concerns or answer questions?
5. What customers have been active and which ones have not?
 - a. To what do you attribute the interest and lack of interest?
6. What is your overall view of the program?
 - a. What is working best?
 - b. What is not working?
 - c. What are the primary barriers to participation?
7. What is your understanding of how incentives are set for the utility conservation agreements and the third party agreements that are part of ConAug?
 - a. How do the incentive levels work in practice?

- b. What comments have you had about incentives?
 - c. What comments have you had about ConAug's focus on incremental savings? Has this been a barrier?
8. What is your understanding of load decrement?
- a. How does the load decrement work?
 - b. How important is this requirement to the utilities you work with?
9. How about the specific templates and tools developed for the ConAug. How successful do you feel they have been in meeting your needs? Your customer's needs?
- a. What comments have you had about them?



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