

REAL TIME EVALUATION: OPPORTUNITIES AND TRADE-OFFS

Moderator: Caroline Chen, StatWizards LLC

Leaving the Rearview Mirror Behind: Assessing the Effectiveness of a Concurrent Impact Evaluation Process

Nick Collins, ERS
Betsy Ricker, ERS
Cheryl Glanton, NYSERDA
Carley Murray, NYSERDA

Strategic Uses of Ongoing Fast Feedback Customer Satisfaction Studies

Jill Steiner, Cadmus Group
Joseph Forcillo, Consumers Energy

Learning from Public Health: Embedded Evaluation and its Applications to Energy Efficiency

Courtney E. Henderson, ILLUME Advising
Anne Dougherty, ILLUME Advising

SESSION SUMMARY:

This session will exam why real time evaluation has been so elusive and difficult to implement, while the concept and benefit seem so logical and obvious. What are the barriers to prevent implementation? What can we do to overcome these barriers? What are the planning and implementation requirements? What are the necessary tradeoffs for this kind implementation? What are the necessary organizational and policy support to implement real time evaluations? What can we learn from other industries to push real time evaluation practice further?

In this session, we will take a look at two different examples of real time evaluations plus a broader discussion on lessons learned from the Public Health industry:

1. This first paper, “Leaving the Rearview Mirror Behind”, assesses the effectiveness of the concurrent evaluation process through the lens of a recently completed impact evaluation of NYSERDA’s Industrial and Process Efficiency program. In general, projects chosen for this process have large preliminary savings estimates and complicated baselines. This often means the selected projects have the highest risk of differences between projected and realized savings. The concurrent review process seeks to reduce this risk by including evaluator input on key issues throughout the project life cycle – from incentive commitment to final reported savings. Concurrent evaluation also benefits the program and evaluation process by requiring fewer touch points for the customers while improving engineering rigor and quality. In-depth collaboration and careful planning are required to implement this type of real-time evaluation.
2. The second paper, “Strategic Uses of Ongoing Fast Feedback Customer Satisfaction Studies”, is about complementary evaluation work designed to provide timely program operational feedback. In 2013, Consumers Energy instituted an ongoing customer satisfaction survey process in its residential energy efficiency portfolio. This process reports on customer perceptions within a month of participation and has led to the development of a key early warning system and a platform for dialogue between evaluators, program managers, and implementation contractors. This approach has identified systemic program issues, process breakdowns, and customer priorities related to participation. These system and process improvements are occurring on a granular, operational level and are improving program

results within program cycles instead of on an annual or longer cycle. This kind of real time evaluation is not a substitute of more detailed program impact evaluation but is designed to provide rapid and real time feedback to improve program operations.

3. The final paper, “Learning from Public Health”, is designed to examine best practices from a different but relevant industry. This paper begins by presenting an overview of evaluation theories, frameworks, and best practices from public health. Then, the authors reviewed specific examples and associated lessons learned. In the last section, the paper discusses potential applications of these models to energy programs. The authors are urging the energy industry to adopt standardized evaluation approaches and to be open to explore new evaluation models. The authors are challenging the wisdom of keeping the evaluators at arm-length from the program, while yearning for real time evaluation results.