



Integrating Evaluation Data Collection with Program Implementation to Make Better Programs AND Better Evaluations

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Introduction

We want evaluation to be

- Timely
- Relevant
- Accurate
- Actionable
- Unobtrusive

Introduction

However ...

What we want	What we often get
Timely	Sometimes done well after the fact – too late to have an significant impact
Relevant	Disconnected from program operations
Accurate	Respondents cannot remember salient details leading to inaccurate results.
Actionable	Discussions of theories and metrics not what is broken and how to fix it
Unobtrusive	Disrupts, slows down, interferes...

The Solution: IDC

Integrated Data Collection:

Integrate evaluation data collection within program implementation activities.

That means treating evaluation as part of the team, not as an afterthought or nuisance.

Integrated Data Collection

- Integrated data collection ensures program design and implementation efforts support accurate and timely evaluation results
 - Collect data when it is most cost-effective to do so
 - Collect data when it is most likely it will be accurate
 - Avoid lost opportunities
 - Provide timely feedback and course correction indicators
- Integrated data collection can become a program management tool

How and Why

Collect data when it is most cost-effective to do so

- Program application form better than post-participation survey
- Field installation form better than evaluation field visits
- Get nameplate data from AC equipment when installing load control devices

How and Why

Collect data when it is most likely to be accurate

- Survey participants immediately after training rather than weeks or months later
- Get information on old equipment before it is gone to support the baseline
- Support program attribution

How and Why

Avoid lost opportunities

- Get baseline data on the pre-existing equipment before it is gone.
- As participants, staff or contractors are calculating savings, record key inputs and assumptions (size, quantity, efficiency, etc.)
- When participants call to drop out, be prepared to ask a few “why?” questions.

How and Why

Provide timely feedback and course correction indicators

- Send a process survey out with the rebate check
- Define questions the call center asks of callers on load control days
- Hand out a mail-back exit survey after training

Planning IDC

- Develop a joint understanding of why IDC is important
- Collaborate at the beginning on data collection needs
- Arrive at a clear understanding of essential data elements, how they are collected, and how they are stored and managed
- Collaborate on ongoing data collection activities such as mail back surveys
- Work with both the evaluator and the implementation contractor to define performance metrics

Planning IDC

- Integrate data collection into the implementation process
 - Plan for “evaluation grade” data collection during the program design phase
 - Design program implementation collateral with evaluation in mind
 - Set up tracking systems at the front end to facilitate evaluation
- Collect essential data for each project, e.g.:
 - Measure quantity, capacity, efficiency
 - Facility type and square footage
 - HVAC system type
- Strive to get the best data you can on:
 - Baseline conditions
 - Measure and projects costs

IDC Points of Contact

- Telephone recruiting scripts
- Promotional return postcards
- Application form
- Post-training hand-out survey
- Direct install field data collection form
- On-line audit forms
- Scripts for call center staff
- Survey sent with rebate check
- Web opt-out or override form
- Field M&V protocols

When is IDC NOT useful

- Too few participants
- No regular points of interaction with market actors
- No appropriate points in processes to insert surveys or data collection
- Program and implementation contractors are not committed to the concept of IDC

Challenges

- Getting evaluation incorporated in the processes early
- Over-burdening participants
- Maintaining an arms-length relationship and objectivity
- Teaching to the test
- Evolution of programs and goals

Closing Thoughts

- Fight against the tendency to think ‘If I don’t need it to do my immediate job, it is superfluous’
- View data collection as an integral part of the process of implementing a program, not as something to be done with the minimal effort necessary to meet high-level reporting requirements
- Recognize that evaluation can be a tool for better ongoing program management
- **Get evaluation involved early!**

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