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National Grid

Process Evaluation Plans for the
Downstate New York Commercial and
Industrial Energy Efficiency Programs

September 7, 2010



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Downstate New York Commercial and
Industrial Energy Efficiency Programs

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TABLE OF CONTENTS

1.	Introduction	1
1.1	Background	1
1.2	Process Evaluation Approach	2
1.3	Evaluation Team	2
1.4	Evaluation Plan Organization	3
2.	Downstate Commercial and Industrial Programs evaluation Plan	4
2.1	Program Description	4
2.2	Overview of Approach	5
2.3	Task 1. Start-Up Meeting and Program Documentation Review	5
2.4	Task 2. Logic Model, Final Evaluation Plans, and Tracking System Review	5
2.5	Task 3: Sampling Methodology	7
2.6	Task 4: Data Collection	8
2.7	Analysis	11
2.8	Communication and Reporting	12
2.9	Schedule of Deliverables	14
2.10	Budget	14



1. INTRODUCTION

This document presents the process evaluation plans for two National Grid downstate commercial/industrial (C/I) programs approved in 2010 in New York State. The two downstate programs will be evaluated in one coordinated study to maximize cost efficiencies. The downstate study will include:

- Commercial Energy Efficiency Programs
- Industrial Programs

This process evaluation plan and individual program logic models will be finalized based on the individual study start-up meetings and program manager interviews, scheduled to begin in September 2010.

1.1 BACKGROUND

National Grid is an international electricity and gas company and one of the largest investor-owned energy companies in the world. National Grid plays a vital role in delivering gas and electricity to millions of people across Great Britain and the northeastern US. In the US, National Grid distributes electricity to nearly five million customers in Massachusetts, New Hampshire, New York, and Rhode Island. Owing 4,000 megawatts of electricity generation, it is the largest power producer in New York State—carrying power to over one million customers on Long Island and supplying around a quarter of New York City’s electricity needs. National Grid is also the largest distributor of natural gas in the northeastern US, delivering gas to 3.4 million customers in New York, Massachusetts, New Hampshire, and Rhode Island.

National Grid is offering energy efficiency programs to its customers throughout its New York State service territories. These programs cover both electric and gas energy efficiency measures in upstate New York and are limited to natural gas energy efficiency measures in the New York City and Long Island portions of the Company’s service territory. Ratepayer funds support these programs, which focus on reducing energy consumption.

To support the successful planning, implementation, and refinement of National Grid’s New York Energy Efficiency programs, National Grid hired Tetra Tech (formerly PA Consulting Group’s Market Analytics) in September 2009 to conduct process evaluations of all of its New York energy efficiency programs. Since not all programs were approved at the same time, the process evaluations have been staggered.

The New York Public Service Commission (Commission) issued an Order establishing an electric and natural gas Energy Efficiency Portfolio Standard (EPS). The EPS established targets for energy efficiency, similar to the existing Renewable Portfolio Standard, and other programs, intended to reverse the pattern of increasing energy use in New York. The Order called for the creation of an Evaluation Advisory Group (EAG). The EAG advises the Commission and Department of Public Service (DPS) Staff in the development of statewide evaluation standards and protocols, program evaluation plans, and other critical evaluation and reporting issues. National Grid and the Tetra Tech team will work closely with the EAG, Commission, and DPS throughout the process evaluations. To facilitate oversight of evaluation activities, DPS staff are invited to participate in the bi-weekly progress conference calls and review evaluation plans, survey instruments, and draft and final reports.



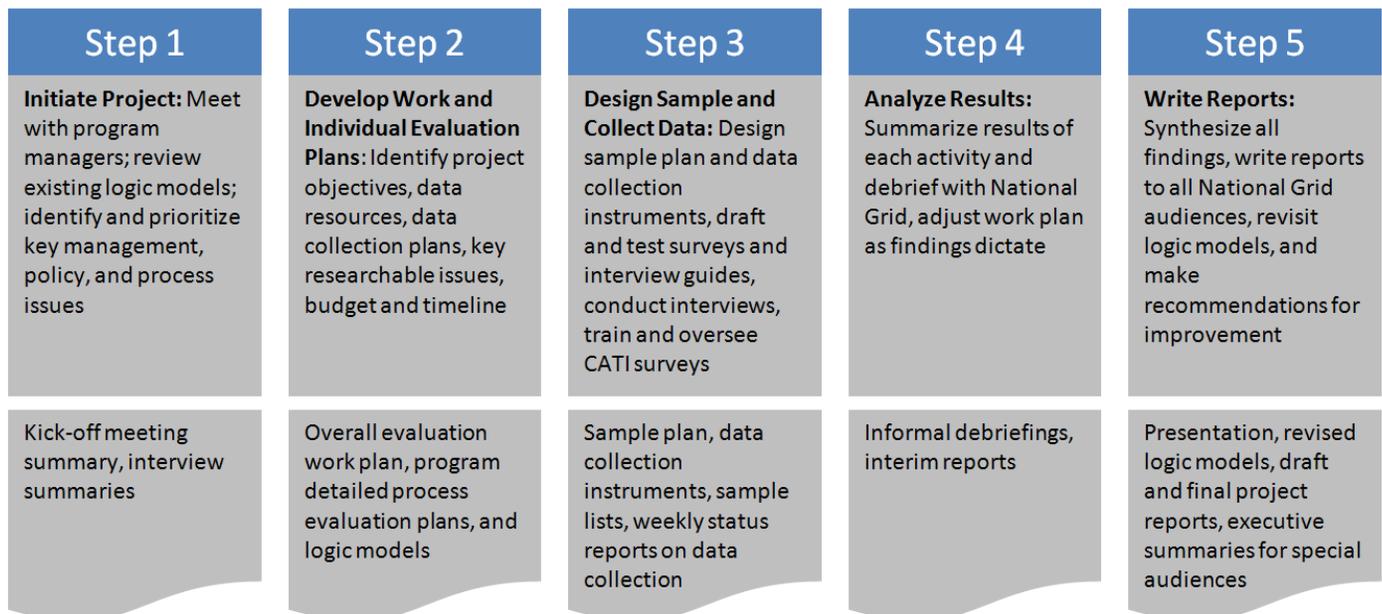
1.2 PROCESS EVALUATION APPROACH

A process evaluation is defined as “a systematic assessment of an energy efficiency program for the purposes of documenting program operations at the time of the examination, and identifying and recommending improvements to increase the program’s efficiency or effectiveness for acquiring energy resources while maintaining high levels of participant satisfaction” (National Action Plan for Energy Efficiency 2007: B-4). The process evaluation of the New York Energy Efficiency programs will:

- Systematically review the programs
- Regularly provide feedback on the programs’ progress and performance
- Openly recognize what is working well with the programs and identify program design issues (including cost-effectiveness issues) and barriers to delivery
- Clearly outline actionable recommendations for program improvements

Following this model, the scope of work is defined by discrete, systematic steps that inform the evaluation. Figure 1-1 depicts the general steps for the process evaluation of each program and the deliverables associated with each step, which are described in more detail in each of the program’s evaluation plans.

Figure 1-1. Process Evaluation Steps



1.3 EVALUATION TEAM

Pam Rathbun is the project manager of the process evaluation of the New York energy efficiency programs and will serve as the main point of communication for National Grid. In addition to regular communication and reporting activities to National Grid, she will be responsible for ensuring that all deliverables and activities stay on schedule. Pam will also lead the coordination of the process evaluation activities across the various programs. This



1. Introduction. . .

will ensure that participant and market actor surveys are consistent in their questions to the extent possible and are conducted on a timely basis. Carol Sabo will lead the evaluation of the downstate commercial and industrial programs.

1.4 EVALUATION PLAN ORGANIZATION

The remaining sections in this plan detail our proposed evaluation tasks, key researchable issues, scope of work, schedule of deliverables, and evaluation budgets for the evaluation of the downstate commercial and industrial programs.



2. DOWNSTATE COMMERCIAL AND INDUSTRIAL PROGRAMS EVALUATION PLAN

This section presents the process evaluation plan for the downstate commercial and industrial programs. These programs will be evaluated jointly to maximize efficiencies and resources. The programs include:

- Commercial Energy Efficiency Programs
- Industrial Programs

2.1 PROGRAM DESCRIPTION

The two programs target the non-residential customers in Brooklyn Union Gas Company and KeySpan Gas East Company's service areas, both of which d/b/a National Grid. Implementation plans were filed in late 2009 for the 2010 and 2011 program years. Based on the descriptions in those plans, the programs target customer in different gas consumption categories, but there is significant overlap in the two programs.

The Order approving the programs specified that the Commercial Energy Efficiency Programs target commercial and small industrial customers using less than 12,000 dekatherms annually while the Industrial Programs target industrial facilities that use more than 12,000 dekatherms. The Companies filed a Petition for Reconsideration that the limit be lowered from 12,000 dekatherms to 7,000 dekatherms but the Commission has not yet acted on that Petition.

A combination of internal program staff and external contractors will be used to promote energy efficiency in the Commercial Energy Efficiency Programs and Industrial Programs that include the following approaches:

- Upgraded efficiency in design of new construction projects
- Envelope measures in existing buildings
- Controls and operating systems in existing buildings
- Efficiency improvements of existing industrial processes
- Support for efficiency in expansions of existing industrial facilities.

Both programs offer rebates for prescriptive measures that include programmable thermostats, boiler reset controls, building shell insulation, pipe and duct insulation, and window installation (when cost-effective). Industrial processes would typically be covered under the Industrial Program even if the customer is not classified as Industrial. The Commercial Energy Efficiency Programs also provide rebates for prescriptive measures that target food service businesses and other key customer groups. In addition, there are financial incentives available for both programs for custom measures with a limit of 50 percent of installed cost capped at a total cost.

Depending on the size of the customer and the nature of the custom project, technical support with financial assistance is available. Technical support varies by program but may take the form of customized energy audits, engineering scoping studies, full engineering



2. Downstate Commercial and Industrial Programs evaluation Plan. . .

feasibility studies, or other technical studies. Referrals to other programs are an important component of both programs.

2.2 OVERVIEW OF APPROACH

As part of the process evaluations of the programs, we will complete six main tasks.

- Task 1: Start-up meeting and program documentation review
- Task 2: Logic model, final evaluation plans, and tracking system review
- Task 3: Sampling methodology
- Task 4: Data collection
- Task 5: Analysis
- Task 6: Communication and reporting.

2.3 TASK 1. START-UP MEETING AND PROGRAM DOCUMENTATION REVIEW

A teleconference will be held in September 2010 with program managers and National Grid evaluation staff. Prior to this meeting, Tetra Tech will review any new program-related materials and documentation. Tetra Tech will continue to review available documentation, including program materials and marketing collateral, as documents are identified and become available.

2.4 TASK 2. LOGIC MODEL, FINAL EVALUATION PLANS, AND TRACKING SYSTEM REVIEW

This task will confirm the design of the programs and develop the final evaluation plan based on that design and key researchable issues. The task will include program staff interviews to facilitate that process along with a review of the data being collected to support the evaluation plan.

2.4.1 Program Managers and Implementation Staff Interviews

Approximately 12-15 interviews will be conducted with program managers and implementation team members. These interviews will include the two National Grid program managers, account managers, marketing communications and training staff, accounting staff, regulatory policy staff, external technical trainers, tracking system and database managers, QA/QC staff, evaluation manager, and other key staff.

These interviews will review and update the list of key researchable issues identified during the start-up meeting and inform the customer survey design. The interviews will identify stated program goals and objectives, assess the effectiveness of the programs' operations relative to the defined program goals and objectives, capture program processes and flows, and explore ways to implement the programs more cost-effectively. The interview results will also be compared to program documentation to identify any areas where operations or priorities are not fully consistent with the program goals or where operational inefficiencies exist. This will form the basis to explore further in the evaluation any warranted recommendations on how the program management, organizational structure, operations,



2. Downstate Commercial and Industrial Programs evaluation Plan. . .

budget, or other practices should be modified or clarified. The interviews will also be used to finalize program logic models. We will also review the program application forms and tracking system data and make recommendations for any improvements to support evaluation activities.

2.4.2 Logic Model Development

The information collected from the program staff interviews, the start-up meeting, and program documentation will be used to develop the final logic model for each program. A program logic model is a visual representation of the program's theory¹ that illustrates a set of interrelated program activities that combine to produce a variety of outputs that lead to key short-, mid- and long-term outcomes. A program logic model can lead to a cost-effective determination of program effectiveness.

Logic models can be linked to performance indicators in order to provide on-going feedback to program managers. The models flow top to bottom and are typically organized according to five basic categories:

- **Program resources:** Financial, staffing, and infrastructure resources that support the activity
- **Program activities:** Overarching activities that describe what the program is doing. Examples include marketing, rebate processing, etc.
- **Outputs:** Metrics resulting from the activities. These tend to be measurable “bean counting” results (e.g., provide outreach events at 5 community fairs)
- **Short- to medium-term outcomes:** Expected outcomes resulting from program activities, with goals attached to those outcomes when possible. Examples include: target energy savings, recruitment into the program, etc.
- **Long-term outcomes:** Ideal, sustainable outcomes resulting from program activities, such as “all eligible customers participate in program” and “increase customer awareness of program offerings.”

Short-, medium-, and long-term outcomes tend to detail program outcomes at a high level and capture market effects. National Grid requested that the outcomes detailed within the logic model be more concrete. Therefore, the logic models include two outcome categories: short-term outcomes and program cycle outcomes. The short-term outcomes are the stepping-stone(s) to the program cycle outcomes, which are tied to program cycle goals (e.g., energy savings, cost per MWh, etc.).

Stepping across the activities enumerated in the logic model indicates an approximate ‘flow’ in the sequence of activities. For example, the logic models begin with the program infrastructure and end with the activity that results in direct energy savings. In each column, the resources needed are specified above each activity. Then, the direct outputs of the activity are enumerated. The outcomes are causally linked to the various outputs in each

¹ A program's theory articulates what the program is designed to accomplish and through what means.



2. Downstate Commercial and Industrial Programs evaluation Plan. . .

column of the logic model. In other words, it is expected that the specified output (e.g., installed measures) will result in the specified outcome (e.g., energy savings)

It is important to note that a variety of external influences can also influence the program's outcomes. External influences include City, State and Federal Codes and Standards (existing and evolving), NYSERDA's New York Energy \$martSM programs, other New York utility programs, EPA/DOE ENERGY STAR® national and regional program activities, the American Reinvestment and Recovery Act (ARRA) stimulus activities, equipment and technology options (current and evolving), political and economic factors, inflation, and the prices of oil, electricity and natural gas.

The program logic models will be updated based on evaluation findings and submitted with the final report. In addition to an updated logic model, the final report will contain a work flow chart that visually depicts program processes.

2.4.3 Assessment of Data Tracking Mechanisms and Data Collection Procedures

A key function of the tracking system is to capture information mandated by the Commission as necessary for program implementation and evaluation. Tetra Tech will review the requirements that National Grid is directed to meet as well as their ability to adhere to those requirements. Tetra Tech will document barriers to adhering to requirements where they are not met.

Additionally, the tracking database will capture information necessary for data collection activities related to evaluation efforts. The Tetra Tech team will conduct an analysis of the tracking database to identify whether the information required for the process (and impact) evaluation is being collected and tracked. The review will also be used to inform the customer sample design.

2.5 TASK 3: SAMPLING METHODOLOGY

We will sample participant and nonparticipants to achieve the minimum standard of 90 percent confidence within ± 10 percent precision for the Commercial Energy Efficiency Programs and Industrial Program for each of the two Companies. If participation rates are less than 70, we will attempt to survey a census of customers.

National Grid will provide a list of participating customers and participating trade allies to the evaluation team from which Tetra Tech will select the sample based on customer and trade ally segments. Tetra Tech will submit a request with the specification of the data to pull.

Customer identifying information for nonparticipants cannot be released by the New York utilities². Therefore, we are proposing two sampling approaches for the nonparticipant survey. The first is to select those who have received technical assistance but decided not to move forward with the project. In that case, we would include the trade allies who provided technical support. Depending on the number of customers that fall into this category, we may contact a census of these nonparticipants because of the importance of understanding

² New York Department of Public Service Energy Efficiency Program Information Reporting Manual, June 29, 2009, pages A-4 and A-5.



2. Downstate Commercial and Industrial Programs evaluation Plan. . .

barriers to participating in the program. The second category of nonparticipants will be a random sample of commercial and industrial customers purchased from Survey Sampling Inc. or Dunn and Bradstreet, using zip code to identify National Grid customers and screen for customers who have not participated in the program.

2.6 TASK 4: DATA COLLECTION

Program manager and implementation staff interviews conducted in Task 2 are a major component of the evaluation effort and will be conducted with 12 to 15 different staff in total for the two programs. In addition, the plan includes interviews of 20 participating and nonparticipating trade allies that will influence the success and uptake of the program. Finally, surveys of participating customers and nonparticipating customers will be key in understanding what features of the program are working well and where improvements are needed. Table 2-1 summarizes the key data collection activities and timeline.

Table 2-1. Summary Table of Data Collection and Timeline

Data Collection Activity	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Task 2. Program staff interviews (12-15)	■	■					
Task 4. Trade ally and technical service suppliers interviews (20)		■	■				
Task 4. Participant surveys (280)			■	■	■		
Task 4. Nonparticipant surveys (100)			■	■	■		

2.6.1 Key Researchable Issues

Table 2-2 prioritizes preliminary key researchable evaluation issues based on a review of the programs' documentation. The researchable issues are stated broadly to incorporate issues identified by the Evaluation Team. These researchable issues will be refined and revised as needed using information gathered during in-depth interviews with program staff and trade allies, and in developing program logic models. This matrix provides an overview of the issues the Evaluation Team will address throughout the course of the evaluation; activities that support addressing the questions; and initial prioritization of these questions.



2. Downstate Commercial and Industrial Programs evaluation Plan. . .

Table 2-2. Researchable Issues and Prioritization

Researchable Question	Activity to Support the Question	Initial Priority
Customer Awareness and Marketing		
How effective is the program marketing? What activities are most effective in providing program information? What are the differences by customer group/program (small/medium commercial vs. large industrial customers, government vs. non-government)	<ul style="list-style-type: none"> • Program staff interviews • Trade ally interviews • Participant surveys 	High
How do participants most commonly hear about, and become involved in, the program? What marketing and outreach efforts are most successful in generating customer leads? Does the overlap with other internal and external programs help or hinder the success of these programs?	<ul style="list-style-type: none"> • Participant survey • Program staff interviews 	Med
Program Administration, Processes and Resources		
How effective is the collaboration between all parties (i.e., National Grid, account managers, energy efficiency consultants, contractors, vendors, etc.)?	<ul style="list-style-type: none"> • Program staff interviews • Trade ally interviews 	Med
Is the training to staff and trade allies sufficient? If not, what additional training and education support can be provided?	<ul style="list-style-type: none"> • Program staff interviews • Trade ally interviews 	Med
Do program manager and trade allies feel they have sufficient staffing resources to deliver the program? What additional information or resources are needed?	<ul style="list-style-type: none"> • Program staff interviews • Trade ally interviews 	Med
Trade Ally Participation		
Are there any internal or external barriers to trade allies effectively delivering the program? Are program requirements clearly understood and correctly implemented?	<ul style="list-style-type: none"> • Program staff interviews • Trade ally interviews 	High
Ease of Participation		
What are the characteristics of the participating customer population and how does that compare to the eligible population? Are there any groups not reached by the program that also have financial and efficiency needs?	<ul style="list-style-type: none"> • Program staff interviews • Trade ally interviews • Participant survey • Nonparticipant survey • Program tracking analysis 	High

2. Downstate Commercial and Industrial Programs evaluation Plan. . .



Researchable Question	Activity to Support the Question	Initial Priority
What barriers exist for customers' participation in the program?	<ul style="list-style-type: none"> • Program staff interviews • Participant survey • Nonparticipant survey 	High
Program Satisfaction		
How is the program working? How could it be improved? What enhancements are needed in the design and delivery of the program?	<ul style="list-style-type: none"> • Program staff interviews • Trade ally interviews • Participant survey • Nonparticipant survey 	High
Are customers and trade allies satisfied with the program? What do they believe could be offered to improve program services?	<ul style="list-style-type: none"> • Trade ally interviews • Participant survey 	High
Customer Characteristics and Decision Making Processes		
Which measures have been installed and what type of equipment did it replace? How are they accepted and valued by the customer?	<ul style="list-style-type: none"> • Participant survey 	High
Do measures remain installed and, if not, why not?	<ul style="list-style-type: none"> • Participant survey 	High
Did the technical assistance provide information which prompted important energy savings projects? How important was the technical assistance in their decision to participate? The program incentive?	<ul style="list-style-type: none"> • Participant survey 	Med
Does participation affect participants' perception of the utility and, if so, how?	<ul style="list-style-type: none"> • Participant survey 	Low
Why do customers decide not to install measures after receiving technical assistance?	<ul style="list-style-type: none"> • Nonparticipant survey 	High
Program Performance Indicators		
Is the program delivering the intended benefits to participants and are they achieving planned energy impacts? Is the referrals process working effectively in identifying appropriate customers for other programs?	<ul style="list-style-type: none"> • Program staff interviews • Trade ally interviews • Participant survey 	High
Is the appropriate information being collected to support future evaluation activities (i.e., impact evaluation)?	<ul style="list-style-type: none"> • Program staff interviews • Tracking system review 	High
Are program goals set appropriately?	<ul style="list-style-type: none"> • Program staff interviews 	Med
Will the program be on target to reach its savings and spending goals? Why or why not?	<ul style="list-style-type: none"> • Program staff interviews 	Med
Are there differences in participation by technology? If so, what is driving those differences?	<ul style="list-style-type: none"> • Participant survey • Trade ally interviews 	



2. Downstate Commercial and Industrial Programs evaluation Plan. . .

2.6.2 Participating and Nonparticipating Trade Ally and Technical Support Interviews

The evaluation staff will interview both participating and nonparticipating equipment vendors, contractors, and engineering firms offering design services and technical support. The primary objective of the 20 interviews with trade allies is to identify what resources are needed for them to conduct business practices that contribute to the program’s energy savings goals, and if there are changes in the program design that could increase participation. These surveys will collect data on program awareness, factors affecting participation, satisfaction with the program, and identify barriers to vendor participation.

2.6.3 Participating and Nonparticipating Customer Surveys

As shown in Table 2-3, this evaluation will include 280 quantitative surveys with 70 participating customers in each of the two programs in both of the two company territories. The surveys will capture customer perceptions of and experiences with the program, satisfaction with and effectiveness of the program, awareness and attitudes of energy efficiency and conservation, and participation in other utility and non-utility programs. The participating customer survey will begin with a sample of the early participants in 2010 but also capture later participants in 2011 to allow for any changes in the program procedures.

Table 2-3. Proposed Number of Completed Participant Surveys

Program	Brooklyn Union Gas Company	KeySpan Gas East Company
Commercial Energy Efficiency	70	70
Industrial	70	70

The Tetra Tech team will also conduct quantitative surveys of 100 customers who did not participate in the program. These surveys will contact a mix of customers who received technical assistance but did not participate further, and customers who have not heard of the program, to identify market barriers that could be addressed in program design. Like the participant survey, the nonparticipant survey will also elicit awareness and previous participation of programs, energy efficiency and conservation awareness, and energy conservation behaviors.

2.7 ANALYSIS

We will conduct data analysis throughout the study as different data collection activities are completed. Results from the analysis will inform findings and recommendations at the program, sector (commercial and industrial), and project type (prescriptive, custom, technical assistance). These findings will be communicated to National Grid at regular intervals.

We will analyze qualitative data from in-depth interviews with program managers and implementation staff by thoroughly reviewing interview transcripts and notes for consistent themes and significant, but perhaps less frequently stated, views. Qualitative data can be examined systematically (e.g., question by question within a spreadsheet) when we have a relatively large number of interviews from people representing like programs. Our analysis of the qualitative interview data will help us assess the effectiveness of the programs’ operations relative to the defined program goals and objectives, capture program processes and flows, and suggest ways to implement the programs more cost-effectively.



2. Downstate Commercial and Industrial Programs evaluation Plan. . .

We will use methods appropriate for the analysis of quantitative data with customers to examine survey responses. We will conduct descriptive analysis (e.g., frequency distributions, measures of central tendency and variation, and cross-tabulations) to examine differences in program awareness, factors affecting participation, and experiences with the program. Investigating differences between participants and nonparticipants can yield valuable information on the segments of the target population that are successfully being reached and how they differ from those that are not yet being served. Our analysis will be guided by the researchable issues identified for each program.

All survey data will be cleaned to ensure all responses receive valid numeric codes and verify that missing values represent logically skipped (not applicable) survey questions. We will provide National Grid with cleaned data files in the Company's preferred file format, along with codebooks and user guides which clearly describe the file format and data

2.8 COMMUNICATION AND REPORTING

Tetra Tech will provide reports and presentations throughout the evaluation period. Our reporting will consist of several types:

- a. Status reports to support bi-weekly conference calls
- b. Interim findings and discussions
- c. Weekly response rate reports during data collection
- d. Preliminary results presentation
- e. Draft report, draft final report, and final report.

Tetra Tech will participate in the bi-weekly project update teleconferences for the programs with National Grid and DPS staff. Prior to each teleconference, Tetra Tech will provide a brief status report to guide the discussion. This status report will summarize progress to-date, tasks for the next reporting period, outstanding data needs or questions to be resolved, major decisions regarding evaluation activities, and any other items for review. As the evaluation matures, the frequency of these meetings may decrease.

We recognize it is critical to communicate feedback immediately to key stakeholders including program planning and delivery staff, and implementation contractors. Our approach is to provide interim findings and schedule periodic results meetings, in person or via teleconference/web, as soon as data are summarized and preliminary findings are available. This allows key stakeholders the opportunity to discuss problem areas and possible solutions, and it allows program staff to make implementation adjustments in a timely manner.

Although National Grid staff will have seen the interim findings after completing the various activities, it is important for the Tetra Tech team to discuss the complete set of high-level results before we complete the draft report for the program. These discussions are particularly valuable in developing final recommendations for program changes that consider factors such as resource requirements to make those changes. At the same time, these open discussions are conducted in the context of not compromising the objectiveness of the evaluation. In some cases, the discussion may dictate the need for some additional analysis to support findings.



2. Downstate Commercial and Industrial Programs evaluation Plan. . .

The draft report will include the highlights of the previous interim reports to present a complete summary of program results. The final report structure will be as follows:

1. Table of Contents, including a list of figures and tables
2. Executive Summary
 - a. Overview of the Program
 - b. Methodology
 - c. Key Results
 - d. Recommendations
 - e. Summary and conclusions
3. Introduction
 - a. Program Background
 - i. Program description
 - ii. Program objectives
 - iii. Program logic model
 - iv. Program achievements
 - b. Evaluation Methodology
 - i. Sampling design
 - ii. Data collection activities
4. Process Evaluation Findings
 - a. Summary of Key Findings
 - b. Program Satisfaction
 - c. Ease of Participation
 - d. Customer Awareness and Marketing
 - e. Customer Characteristics and Decision Making Processes
 - f. Trade Ally Participation
 - g. Program Administration, Processes, and Resources
 - h. Program Saturation
5. Recommendations
6. Summary and conclusions
7. Appendices: Supporting technical appendices including data collection instruments

Along with the final report and a high-level presentation, we will develop an Executive Summary appropriate for submittal to regulators. The draft Executive Summary will be submitted to National Grid two weeks prior to the report deadline. In addition to review by Company evaluation manager and other staff, we understand that the draft report, the draft final report, and the final report may be reviewed by the DPS and/or outside consultants before finalizing.



2.9 SCHEDULE OF DELIVERABLES

Table 2-4 lists the deliverables that will be produced as part of the joint Commercial Energy Efficient Programs and Industrial Program process evaluations and the timeline for delivery.

Table 2-4. Key Deliverables

Deliverable	Date of delivery
Program staff interview guide	September 2010
Detailed evaluation plan and program logic model	October 2010
Trade ally interview guides	October 2010
Program and trade ally interviews interim results memo	November 2010
Field participant and nonparticipant surveys	November 2010
Participant and nonparticipant survey interim results memo	February 2011
Preliminary results meeting	March 2011
Drafts and final program evaluation report	April 2011

2.10 BUDGET

The budget for the Commercial Energy Efficiency Programs and Industrial Program process evaluation is \$119,981. This budget includes evaluation activities that will occur in 2010 and the first half of 2011. The budget, per task, is seen in Table 2-5 below.

Table 2-5. Budget by Task

Task	Budget
Logic model, final evaluation plans, tracking system review	\$20,966
Sample development	\$2,881
Data collection	\$67,564
Analysis	\$13,468
Reporting	\$15,102
Total	\$119,981