Evaluation & Behavior Retreat: Framing the Needed Action for Net-to-Gross (NET ASSESSMENT)

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CEE Winter Program Meeting
San Diego, CA
January 26, 2011

Agenda

- Introductions and quick presentation
- Group Work Framework
  - First Exercise – Challenges
  - Short Break (10 to 15 minutes)
  - Second Exercise – Opportunities
- Recommendations for CEE Evaluation & Behavior Committee's to facilitate needed change

Retreat Purpose

- Synergy between evaluation & behavior committee
- Explore opportunities to work collaboratively on **credible** methods to assess programs/portfolios net impacts
- **CREDIBLE** – what do I mean?
- Information Sharing
- Determine CEE's role -> Facilitating committee work

Upfront and Obvious

- Clear that not all programs view net assessment through the same lens
- Different DRIVERS for net assessment
  - Incentive driven
  - Regulation requirements
  - Forecasts
  - Market transformation
- Policy, practice, regulation inconsistency

Upfront and Obvious

- Net assessment needs to change
- Environment consisting of aggressive targets
- Policy & Regulation surrounding NTG has severe implications (free riders everywhere!)
- Counterfactual evaluation
- What's it's real need/purpose?
  - Comparisons to other industries
  - Creative approaches needed

Upfront and Obvious

- To meet aggressive targets, transaction based programs don't work
- Programs/Portfolios must explore market interventions that can:
  - Reach more market segments
  - Encourage integrated measures
  - Increase customer outreach – education/awareness
  - Engage customers over multi-year efforts
  - Influence markets – manufactures, retailers
  - Engage in regional / national efforts
- Where's the **credit**?

Upfront… but maybe NOT so obvious

- Different programs have different drivers
- Programs DO have a common need/purpose

As evaluators, are there ways to credibly determine the impacts of our programs?

- How to rightfully account for:
  - Spill over
  - Market effects
  - Persistence
  - Behavior-based effects
  - Free-riders who aren't free-riders

First Group Exercise

Mission: Allotted Time 15 minutes

- Group is your table
- Use definitions provided for consistency
- Pick one scribe and one speaker
- Use **one** flash card (one side) **per challenge**:
  - Challenges regarding ways to **ADD back savings** to net assessment
  - STAR success stories! Use one side if you have an effective way of adding back savings **ADDING back to savings**

First Group Exercise Discussion

Breakout Discussion (25 minutes)

- Share challenges or working processes
- Facilitators collection & twist
- Twist explained – Voting needed
  - Collected cards will be used for future committee work
- Parking lot

Retreat Break

Allotted Time (15 minutes)

Second Group Exercise & Discussion

Mission (allotted time 20 mins):

- Pass your remaining flashcards to the next table/group
- Pick one scribe and one speaker
- On opposite side of each flashcard note:

1 Innovative opportunities to overcome identified challenges

2. Remember – credible and policy free!

Discussion (20 minutes)

Last Flashcard

Help us help you

CEE Mission Is To Help Members Work Together Towards Improvement & Progress

- How can CEE's Evaluation & Behavior Committee help address the challenges and opportunities regarding net savings assessment?
- How can CEE staff play a role in facilitating this work?
- Please turn in this flashcard before leaving – we want to hear from you!

Next Steps

- If you haven't already, consider joining the Evaluation Committee or the Behavior Committee, please email us at hforster@cee1.org or kashby@cee1.org to join
- Stay tuned for meetings scheduled regarding your feedback
- Thank you for your participation – safe travels home