

CT-1A-R: Retrofits: Recipient of TA, Workshops, Training for Residential Sector

OMB Control No. 1910-5170

Note that this survey instrument will be used for programs where the program database includes participant information but does not include information on the specific projects completed. This includes sample points that fall under the following sub-categories: “Generalized Workshop or Demonstration,” “Targeted Training or Certification,” or “Technical Assistance” under two BPAC categories: (1) Building Retrofits and (2) Loans and Grants.

DATABASE VARIABLES

&INTERVIEWER NAME name of the caller
 &CONTACT contact name from program database
 &SPONSOR organization that sponsored the effort being researched
 &PROGRAM program name
 &DATE dates of workshop, demonstration, training funded by SEP
 &APPOINT date/time to call back
 &NAME person to call back
 &PHONE extension or phone number to call back

&WORKSHOP/DEMONSTRATION/TRAINING Name of workshop, demonstration, or training
 & TECHNICAL ASSISTANCE Name of technical assistance

&BPAC Will indicate the specific-BPAC for sample

NOTE THAT OTHER VARIABLES ARE SHOWN IN THE DOCUMENT AS THEY ARE CREATED

INTRODUCTION AND FINDING CORRECT RESPONDENT

INITIAL. Hello, this is &INTERVIEWER NAME calling on behalf of the United States Department of Energy from Opinion Dynamics Corporation.

May I please speak with &CONTACT, [IF CONTACT NAME AVAILABLE]?

[IF NEEDED] This is not a sales call.

[IF NEEDED] This is a fact-finding survey only, authorized by the U. S. Department of Energy which wants to understand how you used the information provided through the [&WORKSHOP/TRAINING/DEMONSTRATION; &TECHNICAL ASSISTANCE].

[No, that person is not available right now]	1	[GO TO APPOINT]
[Unable to refer someone who can help]	2	[GO TO APPOINT]
[Yes, that would be me]	3	[GO TO PURPOSE]
[Yes, let me transfer you to _____]	4	[GO TO INTRO3:s]

[No, that is the wrong person]	5	[GO TO INITIAL]
[No, other reason (specify)]	6	[GO TO APPOINT]
[Don't Know]	97	[GO TO APPOINT]
[Refused]	98	[GO TO APPOINT]

APPOINT. When would be a good day and time for us to call back?

		RECORD, CONTACT NAME, DAY OF THE WEEK, TIME OF DAY AND DATE TO CALL BACK CALL BACK AT AGREED TIME
[Don't Know]	-97	THANK & TERMINATE; ASSIGN REFUSED AND REMOVE FROM CALL ORDER
[Refused]	-98	END CALL; KEEP CONTACT IN REGULAR CALL ORDER

INTRO. On &DATE, you [attended a &WORKSHOP/TRAINING/DEMONSTRATION]/[received &TECHNICAL ASSISTANCE] offered by &SPONSOR. In an effort to determine what actions you may have taken as a result of participating, we ask that you complete this brief survey. Your input will help &SPONSOR understand the effects of their past efforts. The survey should take no more than 50 minutes for you to complete. The responses you provide will be combined with those of many other individuals and will not be linked to you or your organization in any way.

The U.S. Department of Energy (DOE) would like to inform each individual that the information requested here is being solicited under the statutory authority of Title III of the Energy Policy and Conservation Act of 1975, as amended, which authorizes DOE to administer the State Energy Program (SEP). This information is being sought as part of a national evaluation of SEP, the purpose of which is to reliably quantify Program accomplishments and help inform decisions on future operations. The sole use of the information collected will be for an analysis of national-level Program impacts. Disclosure of this information is voluntary and there will be no adverse effects associated with not providing all or any part of the requested information.

SCREENER

S1. Do you recall [attending the &WORKSHOP/DEMONSTRATION/TRAINING/CERTIFICATION] /[receiving &TECHNICAL ASSISTANCE] on &DATE?

[Yes]	1	[GO TO R11]
[No]	2	[THANK AND TERMINATE]
[Don't know]	98	[THANK AND TERMINATE]
[Refused]	99	[THANK AND TERMINATE]

RESPONDENT INFO: ROLE IN THE PROJECT

AC1. Which of the following best describes where you intended to apply the information you received? **[READ CATEGORIES]**

NOTE: IF THE ANSWER IS "SOMEWHERE ELSE", SPECIFY THEN PROBE FOR WHICH OF THE FIVE CLASSIFICATIONS BEST DESCRIBES THEM.

At my home	1	[GO TO NEXT Q]
At the facility(ies) my business occupies	2	[GO TO ALTERNATIVE NON-RES SURVEY/TERMINATE]
At the facility(ies) my business manages (e.g. Property managers)	3	[GO TO ALTERNATIVE NON-RES SURVEY/TERMINATE]
In facilities occupied or managed by customers to whom I provide services (e.g. Architects, engineering firms, contractors, code inspectors)	4	[TERMINATE]
In the classroom where I teach	5	[TERMINATE]
Somewhere else: Specify _____	6	[GO TO NEXT Q]

RESPONDENT TYPE DEFINED FOR DISPOSITION

- [CLASSIFY AC1=1 AS REU (RESIDENTIAL END-USE CUSTOMER)]
- [CLASSIFY AC1=2, 3 AS CEU (COMMERCIAL END-USE CUSTOMER)]
- [CLASSIFY AC1= 4 AS MA (MARKET ACTOR)]
- [CLASSIFY AC1=5 AS TEA (TEACHER)]
- [CLASSIFY AC1=6 AS DEFAULT TO TARGETED POPULATION]

INITIAL INVENTORY

VN1. Since &DATE, have you installed any equipment or made any behavioral changes to your home in any of the following areas? **[READ LIST IN THE GRID. MARK ALL THAT APPLY]**

a. Dishwasher	1	[GO TO NEXT Q]
b. Clotheswasher	2	[GO TO NEXT Q]
c. Refrigerator	3	[GO TO NEXT Q]
d. Lighting	4	[GO TO NEXT Q]
e. Cooling	5	[GO TO NEXT Q]
f. Heating	6	[GO TO NEXT Q]
g. Hot water	7	[GO TO NEXT Q]
h. Duct test	8	[GO TO NEXT Q]
i. Insulation	9	[GO TO NEXT Q]
j. Showerhead	10	[GO TO NEXT Q]
k. Aerator	11	[GO TO NEXT Q]
f. Any other changes?	12	[GO TO NEXT Q]

V1b. Was this project done to an existing &HOMETYPE or was it part of a new construction project?

[Existing/retrofit]	1	[GO TO OP1]
[New construction]	2	[THANK AND TERMINATE]
[Don't know]	-97	[GO TO OP1]
[Refused]	-98	[GO TO OP1]

EFFECT OF OTHER PROGRAMS

OP1 In completing the project[s] that you just discussed, did you make use of financial support such as incentives or loans offered by sponsors, such as, local utilities, industry associations, or government agencies? For this question we are not interested in commercial offers such as rebate and incentive packages from manufacturers, vendors, or retailers.

[YES]	1	[ASK OP2]
[NO]	2	[GO TO OP4]
[DON'T KNOW]	-97	[GO TO OP4]
[REFUSED]	-98	[GO TO OP4]

OP2. Which organization[s] sponsored the [those] program[s]?

State/ State Energy Office	1	[GOTO OP3]
Other, Specify	2	[GOTO OP3]
	[RECORD RESPONSE]	
[DON'T KNOW]	-97	[GOTO OP3]
[REFUSED]	-98	[GOTO OP3]

OP3. Did the [&WORKSHOP/DEMONSTRATION/TRAINING][&TECHNICAL ASSISTANCE] inform you about the assistance and support that you received?

[Yes]	1	[GO TO NEXT SECTION]
[No]	2	[GO TO OP4]
[Don't know]	98	[GO TO OP4]
[Refused]	99	[GO TO OP4]

OP4. Did the [&WORKSHOP/DEMONSTRATION/TRAINING][&TECHNICAL ASSISTANCE] provide you with any options for assistance and support?

[Yes]	1	[GO TO NEXT SECTION]
[No]	2	[GO TO NEXT SECTION]
[Don't know]	98	[GO TO NEXT SECTION]
[Refused]	99	[GO TO NEXT SECTION]

DETERMINE APPROPRIATE END-USE BATTERIES

DETERMINED BASED ON VN1.

[RECORD VERIFIED MEASURES FOR MEASURE SPECIFIC QUESTIONS BELOW. RESPONDENTS WILL ONLY BE ASKED MEASURE SPECIFIC QUESTIONS FOR MEASURE GROUPS CONFIRMED]

- [&DISHWASHER]
- [&CLOTHESWASHER]
- [&REFRIGERATOR]
- [&LIGHTING]
- [&COOLING]
- [&HEATING]
- [&HOTWATER]
- [&DUCTTEST]
- [&INSULATION]
- [&SHOWERHEAD]
- [&AERATOR]
- [&OTHER]

ASK IF MULTIPLE MEASURES

MM1. You indicated that you made changes across a number of areas. Which ones would you say resulted in the most energy savings?

NOTE: DEFAULT TO HVAC, LIGHTING ACTION, INSERT BY LEVEL OF ENERGY SAVINGS

	Rank 1	Rank2	Rank 3	DK/REF
Dishwasher				
Clotheswasher				
Refrigerator				
Lighting				
Cooling				
Heating				
Hotwater				
Duct test				
Insulation				
Showerhead				
Aerator				
Other: Specify (Probe to see if INSTALLATION or change in BEHAVIOR)				

REASSIGN TO MAX 2

- [&DISHWASHER]**
- [&CLOTHESWASHER]**
- [&REFRIGERATOR]**
- [&LIGHTING]**
- [&COOLING]**
- [&HEATING]**
- [&HOTWATER]**
- [&DUCTTEST]**
- [&INSULATION]**
- [&SHOWERHEAD]**
- [&AERATOR]**
- [&OTHER]**

Note that all end-use specific sections use questions from the building retrofit survey effort.

DISHWASHER

[IF &DISHWASHER = TRUE]

I'd like to discuss the energy efficient dishwasher you installed.

DW1 When did you install your new energy efficient dishwasher?

INSERT DATE MM/YYYY		[GO TO DW2b]
Don't Know	-97	[GO TO DW3]
Refused	-98	[GO TO DW3]

DW2a Did your dishwasher replace an existing dishwasher?

Yes	1	[GO TO DW2b]
No	2	[GO TO DW3]
Don't Know	-97	[GO TO DW3]
Refused	-98	[GO TO DW3]

DW2b How old was your old dishwasher?

[Less than 1 yr]	1	[GO TO DW2c]
[1-5 yrs]	2	[GO TO DW2c]
[5-10 yrs]	3	[GO TO DW2c]
[More than 10 yrs]	4	[GO TO DW2c]
[Don't Know]	-97	[GO TO DW2c]
[Refused]	-98	[GO TO DW2c]

DW2c Was the old dishwasher working or not working?

Working	1	[GO TO DW2d]
Not working	2	[GO TO DW3]
[Don't Know]	-97	[GO TO DW3]
[Refused]	-98	[GO TO DW3]

DW2d Was the old dish washer in good, fair, or poor working condition?

Good	1	[GO TO DW3]
Fair	2	[GO TO DW3]
Poor	3	[GO TO DW3]
[Don't Know]	-97	[GO TO DW3]
[Refused]	-98	[GO TO DW3]

DW3 How many dishwasher loads do you do on average each week with your new dishwasher?

RECORD NUMBER OF LOADS	# ____	[GO TO DW4]
Don't Know	-97	[GO TO DW4]
Refused	-98	[GO TO DW4]

[IF DW2a <> YES, GO TO CW1]

DW4 Would you say that this is more, the same, or less loads per week than you did with your old dishwasher?

[More]	1	[GO TO DW5]
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[The same]	2	[GO TO ATR1a]
[Less]	3	[GO TO DW5]
Don't Know	-97	[GO TO ATR1a]
Refused	-98	[GO TO ATR1a]

DW5 How many [more/less] loads do you now?

RECORD NUMBER OF LOADS	#	[GO TO DW5]
[Don't know]	-97	[GO TO DW5]
[Refused]	-98	[GO TO DW5]

DW5. When did you make this change?

MONTH	_____	[GO TO ATR1a]
YEAR	_____	[GO TO ATR1a]
[Don't know]	98	[GO TO ATR1a]
[Refused]	99	[GO TO ATR1a]

DISHWASHER /ATTRIBUTION

[ASK IF OP1=1]

ATR1a. For the dishwasher you installed, what percentage of the total costs of the project were covered by the financial support that you received?

	ATR1	
Measure type	% of Total	
Dishwasher		[GO TO CW1]
[Don't know]		
[Refused]		

CLOTHES WASHER BATTERY

[IF & CLOTHESWASHER = TRUE]

I'd like to discuss the energy efficient clothes washer you installed.

CW1 When did you install your new energy efficient clothes washer?

INSERT DATE MM/YYYY		[GO TO CW2a]
Don't Know	-97	[GO TO CW2a]
Refused	-98	[GO TO CW2a]

CW2a Did your clothes washer replace an existing clothes washer?

Yes	1	[GO TO CW2b]
No	2	[GO TO CW3]

Don't Know	-97	[GO TO CW3]
Refused	-98	[GO TO CW3]

CW2b How old was your old clothes washer?

[Less than 1 yr]	1	[GO TO CW2c]
[1-5 yrs]	2	[GO TO CW2c]
[5-10 yrs]	3	[GO TO CW2c]
[More than 10 yrs]	4	[GO TO CW2c]
[Don't Know]	-97	[GO TO CW2c]
[Refused]	-98	[GO TO CW2c]

CW2c Was the old clothes washer working or not working?

Working	1	[GO TO CW2d]
Not working	2	[GO TO CW3]
[Don't Know]	-97	[GO TO CW3]
[Refused]	-98	[GO TO CW3]

CW2d Was the old clothes washer in good, fair, or poor working condition?

Good	1	[GO TO CW3]
Fair	2	[GO TO CW3]
Poor	3	[GO TO CW3]
[Don't Know]	-97	[GO TO CW3]
[Refused]	-98	[GO TO CW3]

CW3 How many loads of wash do you do on average each week with your new clothes washer?

RECORD NUMBER OF LOADS	# ___	[GO TO CW4a]
[Don't know]	-97	[GO TO CW4a]
[Refused]	-98	[GO TO CW4a]

[IF CW2a <> YES, GO TO CW5]

CW4a Would you say that this is more, the same, or less loads per week than you did with your old clothes washer?

[More]	1	[GO TO CW4b]
[The same]	2	[GO TO CW5]
[Less]	3	[GO TO CW4b]
[Don't Know]	-97	[GO TO CW5]
[Refused]	-98	[GO TO CW5]

CW4b How many [more/less] loads do you now?

RECORD NUMBER OF LOADS	# ___	[GO TO CW9]
[Don't know]	-97	[GO TO CW9]

[Refused]	-98	[GO TO CW9]
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CW9. When did you make this change?

MONTH	_____	[GO TO ATR1b]
YEAR	_____	[GO TO ATR1b]
[Don't know]	98	[GO TO ATR1b]
[Refused]	99	[GO TO ATR1b]

CLOTHES WASHER /ATTRIBUTION

[ASK IF OP1=1]

ATR1b. For the clothes washer you installed, what percentage of the total costs of the project were covered by the financial support that you received?

	ATR1	
Measure type	% of Total	
Clothes washer		[GO TO CW5]
[Don't know]		[GO TO CW5]
[Refused]		[GO TO CW5]

CLOTHES WASHER - OTHER

IF CLOTHESWASHER

CW5 Do you have a clothes dryer?

[Yes]	1	[GO TO CW9]
[No]	2	[GO TO R0]
[Don't Know]	-97	[GO TO R0]
[Refused]	-98	[GO TO R0]

CW8 What type of fuel does your clothes dryer use? (If unsure read 1, 2)

Electricity	1	[GO TO R0]
Natural Gas	2	[GO TO R0]
Other (SPECIFY)	4	[GO TO R0]
[Don't Know]	-97	[GO TO R0]
[Refused]	-98	[GO TO R0]

REFRIGERATOR BATTERY

I'd like to discuss the energy efficient refrigerator you installed.

R0 When did you install your new energy efficient refrigerator?

INSERT DATE MM/YYYY		[GO TO R1]
Don't Know	-97	[GO TO R1]
Refused	-98	[GO TO R1]

R1 Where is the Freezer located (mounted) on the refrigerator?

Freezer is on the bottom of the refrigerator	1	[GO TO R2a]
Freezer is on the top of the refrigerator	2	[GO TO R2a]
Freezer is on the side of the refrigerator	3	[GO TO R2a]
Refrigerator does not have an attached freezer	4	[GO TO R2a]
[Don't Know]	-97	[GO TO R2a]
[Refused]	-98	[GO TO R2a]

R2a Does your new refrigerator have a through the door ice machine?

[Yes]	1	[GO TO R2b]
[No]	2	[GO TO R2b]
[Don't Know]	-97	[GO TO R2b]
[Refused]	-98	[GO TO R2b]

R2b Does your new refrigerator have automatic defrost, partial automatic defrost, or manual defrost?

Automatic Defrost	1	[GO TO R3]
Partial Automatic Defrost	2	[GO TO R3]
Manual Defrost	3	[GO TO R3]
[Don't Know]	-97	[GO TO R3]
[Refused]	-98	[GO TO R3]

R3 Is this refrigerator plugged in and running ... (Read list)

All the time	1	[GO TO R3b]
For special occasions only	2	[GO TO R3b]
During certain months of the year only, or	3	[GO TO R3b]
Never plugged in or running	4	[GO TO R3b]
[Don't Know]	-97	[GO TO R3b]
[Refused]	-98	[GO TO R3b]

R3b Is this refrigerator compact, standard size, or oversized?

[Compact]	1	[GO TO R4]
[Standard]	2	[GO TO R4]
[Oversized]	3	[GO TO R4]
[Don't Know]	-97	[GO TO R4]
[Refused]	-98	[GO TO R4]

R4 Did the new refrigerator replace an existing refrigerator?

Yes	1	[GO TO R5]
No	2	[GO TO ATR1c]
Don't know	-8	[GO TO ATR1c]
Refused	-9	[GO TO ATR1c]

R5 Where was the Freezer located (mounted) on the old refrigerator?

Freezer was on the bottom of the refrigerator	1	[GO TO R6a]
Freezer was on the top of the refrigerator	2	[GO TO R6a]
Freezer was on the side of the refrigerator	3	[GO TO R6a]
Refrigerator did not have an attached freezer	4	[GO TO R6a]
[Don't Know]	-97	[GO TO R6a]
[Refused]	-98	[GO TO R6a]

R6a Did your old refrigerator have a through the door ice machine?

[Yes]	1	[GO TO R6b]
[No]	2	[GO TO R6b]
[Don't Know]	-97	[GO TO R6b]
[Refused]	-98	[GO TO R6b]

R6b Did the old refrigerator have automatic defrost, partial automatic defrost, or manual defrost?

Automatic Defrost	1	[GO TO R7]
Partial Automatic Defrost	2	[GO TO R7]
Manual Defrost	3	[GO TO R7]
[Don't Know]	-97	[GO TO R7]
[Refused]	-98	[GO TO R7]

R6c How old was your old refrigerator?

[Less than 1 yr]	1	[GO TO R7]
[1-5 yrs]	2	[GO TO R7]
[5-10 yrs]	3	[GO TO R7]
[More than 10 yrs]	4	[GO TO R7]
[Don't Know]	-97	[GO TO R7]
[Refused]	-98	[GO TO R7]

R7 How did you dispose of your old refrigerator?
 (CLARIFY IF NEEDED TO FIT LIST BELOW. FOR EXAMPLE: Did you give it away or sell it?)

Still have it	1	[GO TO R8]
Took it to a recycler or scrap dealer	1	[GO TO R9]
Took it to the landfill or threw it away	2	[GO TO R9]
Sold it to a friend, acquaintance or relative	3	[GO TO R9]
Sold it on Craigslist/other Internet site (e.g., eBay)	4	[GO TO R9]
Sold it to a used refrigerator / freezer dealer	5	[GO TO R9]
Sold it via garage sale, estate sale, or newspaper ad	6	[GO TO R9]

Sold it when you moved to new occupant	7	[GO TO R9]
Hired someone to pick it up (for junking or dumping)	8	[GO TO R9]
Utility program hauled it away	9	[GO TO R9]
Traded it for a replacement unit	10	[GO TO R9]
Dealer I bought a new one from took it away	11	[GO TO R9]
Gave it away	12	[GO TO R9]
Left it behind when moved (for new occupant)	13	[GO TO R9]
Other (<i>SPECIFY</i>)	14	[GO TO R9]
[Don't know]	-97	[GO TO R9]
[Refused]	-98	[GO TO R9]

R8 Was the old refrigerator plugged in and running ... (Read list)

All the time	1	[GO TO R9]
For special occasions only	2	[GO TO R9]
During certain months of the year only, or	3	[GO TO R9]
Never plugged in or running	4	[GO TO R9]
[Don't Know]	-97	[GO TO R9]
[Refused]	-98	[GO TO R9]

R9. When did you make this change?

MONTH	_____	[GO TO ATR1c]
YEAR	_____	[GO TO ATR1c]
[Don't know]	98	[GO TO ATR1c]
[Refused]	99	[GO TO ATR1c]

REFRIGERATOR /ATTRIBUTION

[ASK IF OP1=1]

ATR1c. For the refrigerator you installed, what percentage of the total costs of the project were covered by the financial support that you received?

	ATR1	
Measure type	% of Total	
Refrigerator		[GO TO HW1]
[Don't know]		[GO TO HW1]
[Refused]		[GO TO HW1]

HOT WATER HEATER BATTERY

IF &HOTWATER = TRUE

I'd like to discuss the new hot water heater you installed.

HW1 When did you install your new hot water heater?

INSERT DATE MM/YYYY		[GO TO HW2]
Don't Know	-97	[GO TO HW2]
Refused	-98	[GO TO HW2]

HW2 What type of fuel does your [IF &HOTWATER = TRUE: "new"] water heater use? (If Don't Know, prompt and read answers)

[Electricity]	1	[GO TO HW3]
[Natural Gas]	2	[GO TO HW3]
[Propane]	3	[GO TO HW3]
[Solar (sun)]	4	[GO TO HW3]
[Other (SPECIFY)]	5	[GO TO HW3]
[Don't Know]	-97	[GO TO HW3]
[Refused]	-98	[GO TO HW3]

[IF & HOTWATER = TRUE, ELSE SKIP TO HW7]

HW3 What type of fuel did your previous water heater use?

[Electricity]	1	[GO TO HW4]
[Natural Gas]	2	[GO TO HW4]
[Propane]	3	[GO TO HW4]
[Solar (sun)]	4	[GO TO HW4]
Other (SPECIFY)	5	[GO TO HW4]
[Don't Know]	-97	[GO TO HW4]
[Refused]	-98	[GO TO HW4]

HW4 Is your water heater a traditional storage tank water heater or is it a tankless or on-demand type water heater? [If unsure ask] Does your water heater store water?

[Traditional storage tank]	1	[GO TO HW7]
[Tankless/on-demand]	2	[GO TO HW7]
Other (SPECIFY)	3	[GO TO HW7]
Don't Know	-97	[GO TO HW7]
Refused	-98	[GO TO HW7]

HW7 What temperature is your hot water heater set for?

RECORD TEMPERATURE	#__	[GO TO HW9]
[Don't know]	-97	[GO TO HW8]
[Refused]	-98	[GO TO HW8]

HW8 Is your water heater set at a... (Read All)

Low temperature: 100-120 degrees F?	1	[GO TO HW9]
Medium temperature: 125-140 F?	2	[GO TO HW9]
High temperature: 145-160 F?	3	[GO TO HW9]
[Don't know]	-97	[GO TO HW9]
[Refused]	-98	[GO TO HW9]

[IF &CLOTHESWASHER = FALSE AND &HOTWATER = TRUE, ELSE SKIP TO DUCT TESTING]

HW9 Do you have a clothes washer?

[Yes]	1	[GO TO HW10]
[No]	2	[GO TO HW11]
[Don't Know]	-97	[GO TO HW11]
[Refused]	-98	[GO TO HW11]

HW10 Do you always, sometimes, or never wash your clothes in warm or hot water?

[Always]	1	[GO TO HW11]
[Sometimes]	2	[GO TO HW11]
[Never]	3	[GO TO HW11]
[Don't Know]	-8	[GO TO HW11]
[Refused]	-9	[GO TO HW11]

[IF &DISHWASHER = TRUE, GO TO DT1]

HW11 Do you have a dishwasher?

[Yes]	1	[GO TO HW12]
[No]	2	[GO TO HW12]
[Don't Know]	-97	[GO TO HW12]
[Refused]	-98	[GO TO HW12]

HW12. When did you install the new hot water heater?

MONTH	_____	[GO TO ATR1d]
YEAR	_____	[GO TO ATR1d]
[Don't know]	98	[GO TO ATR1d]
[Refused]	99	[GO TO ATR1d]

HOT WATER HEATER /ATTRIBUTION

[ASK IF OP1=1]

ATR1d. For the hot water heater you installed, what percentage of the total costs of the project were covered by the financial support that you received?

	ATR1	
Measure type	% of Total	
Hot water heater		[GO TO DT0]
[Don't know]		[GO TO DT0]
[Refused]		[GO TO DT0]

DUCT TESTING BATTERY

[IF & DUCTTEST = TRUE]

DT0 When did you install your new energy efficient HVAC?

INSERT DATE MM/YYYY		[GO TO DT1]
Don't Know	-97	[GO TO DT1]
Refused	-98	[GO TO DT1]

DT1 I'd like to ask you some questions about your heating and air conditioning systems.

What type of heating system do you use to heat your home?

Furnace	1	[GO TO DT2]
Heat Pump	2	[GO TO DT2]
Something else	3	[GO TO DT2]
[Don't Know]	-97	[GO TO DT2]
[Refused]	-98	[GO TO DT2]

DT2 Was this heating equipment installed new along with the duct testing or was it existing equipment?

New	1	[GO TO DT4]
Existing	2	[GO TO DT4]
[Don't Know]	-97	[GO TO DT4]
[Refused]	-98	[GO TO DT4]

DT4 Do you have a central air conditioning system in your home?

Yes	1	[GO TO DT5]
No	2	[GO TO DT6]
[Don't Know]	-97	[GO TO DT6]
[Refused]	-98	[GO TO DT6]

DT5 Was this cooling equipment installed new along with the duct testing or was it existing equipment?

New	1	[GO TO DT6]
Existing	2	[GO TO DT6]

[Don't Know]	-97	[GO TO DT6]
[Refused]	-98	[GO TO DT6]

DT6. When did you make this change?

MONTH	_____	[GO TO ATR1e]
YEAR	_____	[GO TO ATR1e]
[Don't know]	98	[GO TO ATR1e]
[Refused]	99	[GO TO ATR1e]

DUCT TESTING /ATTRIBUTION

[ASK IF OP1=1]

ATR1e. For the duct testing you installed, what percentage of the total costs of the project were covered by the financial support that you received?

	ATR1	
Measure type	% of Total	
Duct testing		[GO TO LI1]
[Don't know]		[GO TO LI1]
[Refused]		[GO TO LI1]

LIGHTING

[IF &LIGHTING = TRUE]

Now we would like to discuss the lighting equipment that you installed.

LI1 When did you install the lighting equipment?

INSERT DATE MM/YYYY		[GO TO LI2a]
Don't Know	-97	[GO TO LI2a]
Refused	-98	[GO TO LI2a]

LI2a. Which of the following types of lighting equipment, if any, did you install? [IF DON'T KNOW, ATTEMPT TO GET CONTACT INFORMATION OF PERSON WHO DOES.]

LI2num. Approximately how many lighting fixtures did you install?

RESPONSE GRID FOR LI2 SERIES OF QUESTIONS

	&LI_TECH	LI2a Tech Inst	LI2num # Install
	<i>Lamps & Fixtures</i>		
1	&WATT Compact Fluorescent Bulbs		
2	&WATT Compact Fluorescent, Hardwire		
3	&WATT LED bulbs		
4	&WATT LED Overhead Fixtures		
5	Other Fixtures (Specify_____)		

LI2d I am going to read a list of rooms in your home. Please tell me the number of [\[READ IN TECHNOLOGY INDICATED IN LI2\]](#) installed in these rooms.

Living/family room	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Dining room	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Den/Office	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Kitchen	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Bedrooms	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Bathrooms	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Closets	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Hallways	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Attic	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Basement	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Garage	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Yard/Outside	#__	[GO TO LI2A FOR NEXT &LI_TECH]
Other (specify)	#__	[GO TO LI2A FOR NEXT &LI_TECH]

[ASK FOR EACH LIGHTING EQUIPMENT VERIFIED]

LI3 What was the wattage of the lighting that this [\[READ IN TECHNOLOGY INDICATED IN LI2\]](#) replaced?

ENTER WATTAGE	__	[GO TO LI3 FOR NEXT &LI_TECH]
[Don't Know]	-97	[GO TO LI3 FOR NEXT &LI_TECH]
[Refused]	-98	[GO TO LI3 FOR NEXT &LI_TECH]

LI14. When did you make the lighting changes?

MONTH	_____	[GO TO ATR1f]
YEAR	_____	[GO TO ATR1f]
[Don't know]	98	[GO TO ATR1f]
[Refused]	99	[GO TO ATR1f]

LIGHTING /ATTRIBUTION

[ASK IF OP1=1]

ATR1f. For the lighting equipment you installed, what percentage of the total costs of the project were covered by the financial support that you received?

	ATR1	
Measure type	% of Total	
Lighting equipment		[GOT TO CL-N0]
[Don't know]		[GOT TO CL-N0]
[Refused]		[GOT TO CL-N0]

COOLING EQUIPMENT BATTERY

[IF & COOLING = TRUE]

Now we would like to discuss the cooling equipment that you installed.

CL-N0. When did you install the cooling equipment?

INSERT DATE MM/YYYY		[GO TO CL-N1]
Don't Know	-97	[GO TO CL-N1]
Refused	-98	[GO TO CL-N1]

CL-N1. What types of cooling equipment did you install? [ALLOW MULTIPLE ANSWERS]

Evaporative coolers (swamp coolers)	1	[GO TO CL-N2]
Central air conditioner	2	[GO TO CL-N2]
Heat pump		[GO TO CL-N2]
Window/Wall Units	3	[GO TO CL-N2]
[Other (Specify_____)]	77	[GO TO CL-N2]
[Don't Know]	- 97	[ATTEMPT TO GET CONTACT INFORMATION OF PERSON WHO KNOWS. THEN NEXT SECTION]
[Refused]	- 98	[GO TO NEXT SECTION]

CL-N2. How many units did you install?

RECORD NUMBER		[GO TO CL-N4]
Don't know	97	[GO TO CL-N4]
Refused	98	[GO TO CL-N4]

CL-N4. What was the efficiency rating of the units that you installed? **[RECORD FOR ALL UNITS INSTALLED.]**

RECORD EFFICIENCY NUMBER		[GO TO NEXT CL-N1]
RECORD EFFICIENCY UNIT (EER, SEER, KW/TON)		[GO TO NEXT CL-N1]
Don't know	-97	[GO TO NEXT CL-N1]
Refused	-98	[GO TO NEXT CL-N1]

RESPONSE GRID FOR CL-N1 TO CL-N4

	ITEM	CL-N1	CL-N2	CL-N4 Number	CL-N4 Units
1	Evaporative coolers (swamp coolers)				
2	Central air conditioner				
3	Heat pump				
4	Window/Wall Units				
77	Other (Specify)				

[ASK CL8a THROUGH CL8f FOR EACH MEASURE IDENTIFIED IN CL1 AND CL-N1]

Next, I'd like to ask you a few questions about the equipment that was removed and replaced when you installed the new cooling equipment.

CL8a. What types of cooling equipment, if any, were replaced when installing the new unit? **[SELECT ALL THAT APPLY]**

SELECT EQUIPMENT TYPE		[RECORD AS &C_TECH_REM] [GO TO CL8b]
None	77	[GO TO CL9]
[Don't Know]	-97	[GO TO CL8a FOR NEXT &C_TECH]
[Refused]...	-98	[GO TO CL8a FOR NEXT &C_TECH]

CL8b. How many units were removed?

RECORD NUMBER	_____	[GO TO CL8d]
Don't know	-97	[GO TO CL8d]
Refused	-98	[GO TO CL8d]

CL8d. Generally, how would you describe the condition of the unit that was removed and replaced? Was it...

Inoperable (broken)	1	[GO TO CL8e]
Poor condition	2	[GO TO CL8e]
Fair condition	3	[GO TO CL8e]
Good condition	4	[GO TO CL8e]
[Don't know]	-97	[GO TO CL8e]
[Refused]	-98	[GO TO CL8e]

CL8e. What was the efficiency rating of the removed unit?

RECORD EFFICIENCY NUMBER		[GO TO NEXT CL8a]
RECORD EFFICIENCY UNIT (EER, SEER, KW/TON)		[GO TO NEXT CL8a]
[Don't know]	-97	[GO TO CL8f]
[Refused]	-98	[GO TO CL8f]

CL8f. On average, how old was the unit that was removed and replaced? Would you say...

Less than 5 years old	1	[GO TO NEXT CL8a]
Between 5 and 10 years old	2	[GO TO NEXT CL8a]
10 to 20 years old	3	[GO TO NEXT CL8a]
more than 20 years old	4	[GO TO NEXT CL8a]
[Don't know]	-97	[GO TO NEXT CL8a]
[Refused]	-98	[GO TO NEXT CL8a]

CL9. Did you install a programmable thermostat at your home?

[Yes]	1	[GOTO CL10]
[No]	2	[GOTO CL10]
[No, already had one]	3	[GOTO CL10]
[Don't know]	-97	[GOTO CL10]
[Refused]	98	[GOTO CL10]

RESPONSE GRID FOR COOLING-REMOVED

		CL8a	CL8b	CL8d	CL8e Number	CL8e Units	CL8f	CL9
0	No A/C Removed		skip	skip	skip	skip	skip	skip
1	Evaporative coolers (swamp coolers)							
2	Central air conditioner							
3	Heat pump							
4	Window/Wall Units							
77	Other (Specify)							

CL10. When did you make these changes?

MONTH	_____	[GO TO ATR1g]
YEAR	_____	[GO TO ATR1g]
[Don't know]	98	[GO TO ATR1g]
[Refused]	99	[GO TO ATR1g]

COOLING EQUIPMENT /ATTRIBUTION

[ASK IF OP1=1]

ATR1g. For the cooling equipment you installed, what percentage of the total costs of the project were covered by the financial support that you received?

	ATR1	
Measure type	% of Total	
Cooling equipment		[GO TO HT-N0]
[Don't know]		[GO TO HT-N0]

[Refused]		[GO TO HT-N0]
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HEATING EQUIPMENT BATTERY

[IF &HEATING = TRUE]

Now we would like to discuss the heating equipment that you installed.

HT-N0. When did you install the heating equipment?

INSERT DATE MM/YYYY		[GO TO HT-N1]
Don't Know	-97	[GO TO HT-N1]
Refused	-98	[GO TO HT-N1]

HT-N1. What types of heating equipment did you install? [ALLOW MULTIPLE ANSWERS]

Natural Gas Boiler	1	[GO TO HT-N4]
Wood Pellet Boiler	2	[GO TO HT-N4]
Furnace	3	[GO TO HT-N4]
Heat pump	4	[GO TO HT-N4]
Other (Specify)	77	[GO TO HT-N4]
[Don't Know]	-97	ATTEMPT TO GET CONTACT INFORMATION OF PERSON WHO DOES KNOW. [THEN GO TO NEXT SECTION]
[Refused]	-98	[GO TO NEXT SECTION]

HT-N4. What was the efficiency rating of the units that you installed? [RECORD FOR ALL UNITS INSTALLED THROUGH &PROGRAM.]

RECORD EFFICIENCY NUMBER		[GO TO HT-N7]
RECORD EFFICIENCY UNIT (AFUE, Thermal efficiency, specify other)		[GO TO HT-N7]
Don't know	-97	[GO TO HT-N7]
Refused	-98	[GO TO HT-N7]

HT-N7 What fuel does the unit use?

Natural Gas	1	[GO TO HT1 FOR NEXT &H_TECH]
Electric	2	[GO TO HT1 FOR NEXT &H_TECH]
Propane	3	[GO TO HT1 FOR NEXT &H_TECH]
Wood	4	[GO TO HT1 FOR NEXT &H_TECH]
Solar	5	[GO TO HT1 FOR NEXT &H_TECH]
Other	6	[GO TO HT1 FOR NEXT &H_TECH]

RESPONSE GRID FOR HEATING

	ITEM	HT-N1	HT-N4 Number	HT-N4 Units
1	Natural Gas Boiler			
2	Wood Pellet Boiler			
3	Furnace			
74	Heat pump			
77	Other (Specify)			

[ASK HT8a THROUGH HT8f FOR EACH MEASURE IDENTIFIED IN HT1 AND HT-N1]

Next, I'd like to ask you a few questions about the equipment that was removed and replaced when you installed the new heating equipment.

HT8a. What types of heating equipment, if any, were replaced when installing the new unit? **[SELECT ALL THAT APPLY]**

Natural Gas Boiler	1	[GO TO RECORD AS &H_TECH_REM]
Wood Pellet Boiler	2	[GO TO RECORD AS &H_TECH_REM]
Furnace	3	[GO TO RECORD AS &H_TECH_REM]
Heat pump	4	[GO TO RECORD AS &H_TECH_REM]
None	5	[GO TO HT9]
[Don't Know]	-97	[GO TO HT8a FOR NEXT &H_TECH]
[Refused]...	-98	[GO TO HT8a FOR NEXT &H_TECH]

[ASK HT8b THROUGH HT8f FOR EACH MEASURE IDENTIFIED IN HT8a]

HT8d. Generally, how would you describe the condition of unit that was removed and replaced? Was it...

Inoperable (broken)	1	[GO TO HT8e]
Poor condition	2	[GO TO HT8e]
Fair condition	3	[GO TO HT8e]
Good condition	4	[GO TO HT8e]
[Don't know]	-97	[GO TO HT8e]
[Refused]	-98	[GO TO HT8e]

HT8e. What was the efficiency rating of the removed unit?

RECORD EFFICIENCY NUMBER		[GO TO NEXT HT8a]
RECORD EFFICIENCY UNIT (EER, SEER, KW/TON)		[GO TO NEXT HT8a]
[Don't know]	-97	[GO TO HT8f]
[Refused]	-98	[GO TO HT8f]

HT8f. On average, how old was the unit that was removed and replaced? Would you say...

Less than 5 years old	1	[GO TO NEXT HT8a]
Between 5 and 10 years old	2	[GO TO NEXT HT8a]
10 to 20 years old	3	[GO TO NEXT HT8a]
more than 20 years old	4	[GO TO NEXT HT8a]
[Don't know]	-97	[GO TO NEXT HT8a]
[Refused]	-98	[GO TO NEXT HT8a]

HT9 Did you install a programmable thermostat at your home?

[Yes]	1	[GO TO HT10]
[No]	2	[GO TO HT10]
[Don't know]	97	[GO TO HT10]
[Refused]	98	[GO TO HT10]

RESPONSE GRID FOR HEATING REMOVED

		HT8a	HT8d	HT8e Number	HT8e Units	HT8f	HT9
0	No heating Removed		skip	skip	skip	skip	skip
1	Natural Gas Boiler						
2	Wood Pellet Boiler						
3	Furnace						
4	Heat pump						
77	Other (Specify)						

HT10. When did you make these changes?

MONTH	_____	[GO TO ATR1h]
YEAR	_____	[GO TO ATR1h]
[Don't know]	98	[GO TO ATR1h]
[Refused]	99	[GO TO ATR1h]

HEATING EQUIPMENT /ATTRIBUTION

[ASK IF OP1=1]

ATR1h. For the heating equipment you installed, what percentage of the total costs of the project were covered by the financial support that you received?

	ATR1	
Measure type	% of Total	
Heating Equipment		[GO TO RR1R]
[Don't know]		[GO TO RR1R]
[Refused]		[GO TO RR1R]

INSULATION

[ASK IF &INSULATION = TRUE]

Now we would like to discuss the insulation that you installed.

RR1R When did you install the insulation?

INSERT DATE MM/YYYY		[GO TO RR4R]
Don't Know	-97	[GO TO RR4R]
Refused	-98	[GO TO RR4R]

RR4R Did you add insulation in the walls, the attic or ceiling or both?

Wall Only	1	[GO TO RR4R1a]
Attic or Ceiling Only	2	[GO TO RR4R2a]
Both	3	[GO TO RR4R1a]
[Don't know]	-97	[GO TO I3_9]
[Refused]	-98	[GO TO I3_9]

RR4R1A Did you have some insulation in the walls before adding this insulation?

Yes	1	[GO TO RR4R1b]
No	2	[GO TO RR4R1c]
[Don't know]	-97	[GO TO RR4R1c]
[Refused]	-98	[GO TO RR4R1c]

RR4R1B What was the R value or number of inches of the wall insulation previously?

ENTER R VALUE	__	[GO TO RR4R1c]
ENTER INCHES	__	[GO TO RR4R1c]
[Don't know]	-97	[GO TO RR4R1c]
[Refused]	-98	[GO TO RR4R1c]

RR4R1C What is the current R value or number of inches of the wall insulation?

ENTER R VALUE	__	[GO TO RR4R1d]
ENTER INCHES	__	[GO TO RR4R1d]
[Don't know]	-97	[GO TO RR4R1d]
[Refused]	-98	[GO TO RR4R1d]

RR4R1D And how many square feet of walls did you insulate?

SQUARE FOOTAGE OF WALLS INSULATED	__	[GO TO RR4R2a]
[Don't know]	-97	[GO TO RR4R1e]
[Refused]	-98	[GO TO RR4R1e]

RR4R1E How many rooms were insulated?

SQUARE FOOTAGE OF WALLS INSULATED	__	[GO TO RR4R2a]
[Don't know]	-97	[GO TO RR4R2a]
[Refused]	-98	[GO TO RR4R2a]

RR4R2A [ASK IF RR4R = 2 OR 3] Did you have insulation in the attic or ceilings before adding this insulation?

Yes	1	[GO TO RR4R2aa]
No	2	[GO TO RR4R2c]
[Don't know]	-97	[GO TO RR4R2c]
[Refused]	-98	[GO TO RR4R2c]

RR4R2AA Did you replace or add to the existing insulation?

Replace	1	[GO TO RR4R2b]
Add to	2	[GO TO RR4R2b]
[Don't know]	-97	[GO TO RR4R2b]
[Refused]	-98	[GO TO RR4R2b]

RR4R2B How many square feet of the attic or ceiling were previously insulated?

ENTER SQUARE FOOTAGE	__	[GO TO RR4R2b1]
[Don't know]	-97	[GO TO RR4R2b1]
[Refused]	-98	[GO TO RR4R2b1]

RR4R2B1 With how many inches of insulation was the attic previously insulated?

ENTER INCHES	__	[GO TO RR4R2c]
[Don't know]	-97	[GO TO RR4R2c]
[Refused]	-98	[GO TO RR4R2c]

RR4R2C How many square feet of the attic or ceiling is now insulated?

ENTER SQUARE FOOTAGE	__	[GO TO RR4R3]
[Don't know]	-97	[GO TO RR4R3]
[Refused]	-98	[GO TO RR4R3]

RR4R2C1 With how many inches of insulation is now in the attic?

ENTER INCHES	__	[GO TO ATR1i]
[Don't know]	-97	[GO TO ATR1i]
[Refused]	-98	[GO TO ATR1i]

RR4R3. When did you make these changes?

MONTH	_____	[GO TO ATR1i]
YEAR	_____	[GO TO ATR1i]
[Don't know]	98	[GO TO ATR1i]
[Refused]	99	[GO TO ATR1i]

INSULATION /ATTRIBUTION

[ASK IF OP1=1]

ATR1i. For the insulation you installed, what percentage of the total costs of the project were supported by the financial support that you received?

	ATR1	
Measure type	% of Total	
Insulation		[GO TO I1_X]
[Don't know]		[GO TO I1_X]
[Refused]		[GO TO I1_X]

SHOWERHEAD AND FAUCET AERATORS

[IF &SHOWERHEAD = TRUE]

Now we would like to discuss the showerheads and faucet aerators that you installed.

I1_X When did you install the showerheads?

INSERT DATE MM/YYYY		[GO TO I3_X]
Don't Know	-97	[GO TO I3_X]
Refused	-98	[GO TO I3_X]

I3_X How many showerheads did you install?

ENTER NUMBER OF SHOWERHEADS	__	[GO TO I3_9]
[Don't know]	-97	[GO TO I3_9]
[Refused]	-98	[GO TO I3_9]

I3_9 Where was the showerhead installed? (REPEAT I3_9 to I3_12 FOR ALL SHOWERHEADS IN I3_X)

Main shower (only one shower)	1	[GO TO I3_11]
Master bathroom shower	2	[GO TO I3_11]
Guest shower	3	[GO TO I3_11]
Outdoor shower	4	[GO TO I3_11]
Other (SPECIFY)	5	[GO TO I3_11]
[Don't know]	-97	[GO TO I3_11]
[Refused]	-98	[GO TO I3_11]

I3_11 How many times does the shower get used per day?

1	1	[GO TO I3_12]
2	2	[GO TO I3_12]
3	3	[GO TO I3_12]
More than 3	4	[GO TO I3_12]
[Don't know]	-97	[GO TO I3_12]
[Refused]	-98	[GO TO I3_12]

I3_12 What would you say is the typical shower length in minutes?

1-5 minutes	1	[GO TO NEXT SHOWERHEAD OR I3_13 IF NO MORE SHOWERHEADS]
5-10 minutes	2	[GO TO NEXT SHOWERHEAD OR I3_13 IF NO MORE SHOWERHEADS]
10-15 minutes	3	[GO TO NEXT SHOWERHEAD OR I3_13 IF NO MORE SHOWERHEADS]
15-20 minutes	4	[GO TO NEXT SHOWERHEAD OR I3_13 IF NO MORE SHOWERHEADS]
More than 20 minutes	5	[GO TO NEXT SHOWERHEAD OR I3_13 IF NO MORE SHOWERHEADS]
[Don't know]	-97	[GO TO NEXT SHOWERHEAD OR I3_13 IF NO MORE SHOWERHEADS]
[Refused]	-98	[GO TO NEXT SHOWERHEAD OR I3_13 IF NO MORE SHOWERHEADS]

I3_X When did you install the faucet aerators?

INSERT DATE MM/YYYY		[GO TO I3_13]
Don't Know	-97	[GO TO I3_13]
Refused	-98	[GO TO I3_13]

I3_13 How many faucet aerators were installed?

ENTER NUMBER OF AERATORS	__	[GO TO I3_13_X]
[Don't know]	-97	[GO TO I3_13_X]
[Refused]	-98	[GO TO I3_13_X]

I3_13_X Where was the faucet aerator installed (Probe if needed. i.e. kitchen, bathroom)? **(REPEAT FOR EACH AERATOR IN I3_13)**

Kitchen	1	[GO TO NEXT AERATOR OR ATR1j]
Bathroom	2	[GO TO NEXT AERATOR OR ATR1j]
Laundry	3	[GO TO NEXT AERATOR OR ATR1j]
Other (SPECIFY)	4	[GO TO NEXT AERATOR OR ATR1j]
[Don't know]	-97	[GO TO NEXT AERATOR OR ATR1j]
[Refused]	-98	[GO TO NEXT AERATOR OR ATR1j]

SHOWERHEADS/FAUCET /ATTRIBUTION

[ASK IF OP1=1]

ATR1j. For the [showerhead IF &SHOWERHEAD=TRUE and faucet aerator IF &AERATOR=TRUE] you installed, what percentage of the total costs of the project were supported by the financial support that you received?

	ATR1	
Measure type	% of Total	
Showerhead		[GO TO OE2a]
Faucet Aerator		[GO TO OE2a]
[Don't know]		[GO TO OE2a]
[Refused]		[GO TO OE2a]

OTHER EQUIPMENT BATTERY

[IF & OTHER = TRUE]

OE2. Did you [install any other kinds of energy efficiency measures IF INSTALLATION/ make changes to your energy savings practices [IF BEHAVIOR CHANGE]?

Yes	1	[GO TO OE2b]
No	2	[GO TO NEXT SECTION]
[Refused]	-98	[GO TO NEXT SECTION]
[Don't Know]	-97	[GO TO NEXT SECTION]

OE2a. I first want to ask about behavior changes, what kinds of changes did you make to your energy savings practices [IF BEHAVIOR CHANGE]? **[OPEN END]**
[PROBE FOR DESCRIPTION PRE AND POST – including equipment effected, AND FREQUENCY OF ACTION]

OE2b. Which kinds of [additional measures did you install [IF INSTALLATION]?

[ASK IF NEW MEASURE INSTALLED OTHER=&INSTALLATION]

OE2c. **[FOR EACH MEASURE]** How many of the measures were used to replace existing units?

OE2d. **[FOR EACH MEASURE TYPE MENTIONED.]** When [was this measure installed IF INSTALLATION/ when did you change this practice IF BEHAVIOR CHANGE]?

RESPONSE GRID FOR OE1 AND OE2 SERIES

	OE_TECH	OE2a/b Tech Inst/ Practice changed	OE2c # replacing existing construction	OE2d. When installed/ changed
1	Specify:			
2	Specify:			
3	Specify:			
4	Specify:			
5	Specify:			
6	Specify:			

[FOR EACH MEASURE TYPE REPORTED IN OE1 AND OE2 where OE2c> 0, ASK OE3]

OE3. What types of equipment were replaced when installing the new measure?

SPECIFY	_____	[GO TO OE3a]
Don't know	-97	[GO TO OE3 FOR NEXT &OE_TECH]
Refused	-98	[GO TO OE3 FOR NEXT &OE_TECH]

[FOR EACH EQUIPMENT TYPE REPLACED, ASK OE3a]

OE3a. Did you remove the same amount of units as you installed through the project?

Yes	1	[GO TO OE3d]
No	2	[GO TO OE3b]
Refused]	-98	[GO TO OE3d]
[Don't Know]	-97	[GO TO OE3d]

OE3b. Did you remove more or less units than you installed through the project?

More	1	[GO TO OE3c]
Fewer	2	[GO TO OE3c]
[Refused]	-98	[GO TO OE3d]
[Don't Know]	-97	[GO TO OE3d]

OE3c. How much more/less new units did you install?

[ENTER NUMBER]	_____	[GO TO OE3d]
Don't know	-97	[GO TO OE3d]
Refused	-98	[GO TO OE3d]

OE3d. What was the condition of the removed equipment?

Inoperable (broken)	1	[GO TO OE3e]
Poor condition	2	[GO TO OE3e]
Fair condition	3	[GO TO OE3e]
Good condition	4	[GO TO OE3e]
Refused	-98	[GO TO OE3e]
Don't know	-97	[GO TO OE3e]

OE3e. How old was the removed equipment?

Less than 5 years old	1	[GO TO OE3 FOR NEXT &OE_TECH]
Between 5 and 10 years old	2	[GO TO OE3 FOR NEXT &OE_TECH]
10 to 20 years old	3	[GO TO OE3 FOR NEXT &OE_TECH]
More than 20 years old	4	[GO TO OE3 FOR NEXT &OE_TECH]
Refused	-98	[GO TO OE3 FOR NEXT &OE_TECH]
Don't know	-97	[GO TO OE3 FOR NEXT &OE_TECH]

RESPONSE GRID OE3

	OE3	OE3a Remove same amount	OE3b Remove more or less	OE3c Amount removed	OE3d Condition removed equip	OE3d Age removed equip
1	Specify:					
2	Specify:					
3	Specify:					
4	Specify:					
5	Specify:					
6	Specify:					

OE3f. When did you make these changes?

MONTH	_____	[GO TO ATR1k]
YEAR	_____	[GO TO ATR1k]
[Don't know]	98	[GO TO ATR1k]

[Refused]	99	[GO TO ATR1k]
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OTHER MEASURES/PRACTICES/ATTRIBUTION

[ASK IF OP1=1 & OTHER MEASURES = &INSTALLATION]

ATR1k. For the measures you installed, what percentage of the total costs of the project were covered by the financial support that you received?

	ATR1	
Measure type	% of Total	
Other		[GO TO DA0]
[Don't know]		[GO TO DA0]
[Refused]		[GO TO DA0]

DIRECT ATTRIBUTION

Now, I'd like to ask you a few questions about the effect that the [&WORKSHOP/DEMONSTRATION/TRAINING/ [&TECHNICAL ASSISTANCE] had on your organization's decision to undertake the project we have been discussing.

[FOR EACH MEASURE GROUP COVERED ABOVE REPEAT DAT0 SERIES]

DAT0. Without the &SPONSOR [&WORKSHOP/DEMONSTRATION/TRAINING/&TECHNICAL ASSISTANCE], would you say the likelihood of [installing / performing] the &ACTION was... [READ LIST]

RESPONSE	DAT0_MID1	DAT0_MID2	DAT0_MID3	DAT0_MID4
Very likely	1	1	1	1
Somewhat likely	2	2	2	2
Not very likely	3	3	3	3
Or very unlikely	4	4	4	4
[Don't know]	-97	-97	-97	-97
[Refused]	-98	-98	-98	-98

TIMING

ASK TIMING QUESTIONS ONLY FOR MEASURES WHERE DAT0 = 1 OR 2 (VERY LIKELY OR SOMEWHAT LIKELY TO HAVE IMPLEMENTED IN THE ABSENCE OF THE PROGRAM).

AT11a. I'd like to know about the effect, if any, that [&WORKSHOP/DEMONSTRATION/TRAINING or &TECHNICALASSISTANCE] had on the timing of your project. Without attending the [&WORKSHOP/DEMONSTRATION/TRAINING or &TECHNICALASSISTANCE], would you have implemented &MEASURE at the same time as you actually did through the project, earlier than you did, later than you did ... or would you not have installed the measure at all?

RESPONSE	DAT0_MID1	DAT0_MID2	DAT0_MID3	DAT0_MID4
Same time	1	1	1	1
Earlier	2	2	2	2
Later	3	3	3	3
Would never have installed	4	4	4	4
[Don't know]	-97	-97	-97	-97
[Refused]	-98	-98	-98	-98

[IF DAT1a ≠ LATER, SKIP]

AT11b. Approximately how many months later?
 [Try to get a number. Try bracketing if necessary by beginning with more or less than four years later.]

	DAT1b_&MEASURE
[RECORD # OF MONTHS]	_____
[Don't know]	-97

EFFICIENCY

This section applies for any measure where there is a standard efficiency option. For example, variable frequency drives do not have a “standard efficiency” option, so you should skip this section for VFDs even though installing a VFD will result in energy savings. Heat recovery, lighting controls, and steam trap replacement also fall into this category. Circle “5” not applicable for the measure in the table below and skip to DAT3.

ASK EFFICIENCY QUESTIONS ONLY FOR MEASURES WHERE DAT0 = 1 OR 2 (VERY LIKELY OR SOMEWHAT LIKELY TO HAVE IMPLEMENTED IN THE ABSENCE OF THE PROGRAM.

AE1a. Without the [&WORKSHOP/DEMONSTRATION/TRAINING or &TECHNICALASSISTANCE] would you have installed &MEASURE of the exact same energy efficiency as t the equipment you installed you installed, or would you have installed lower efficiency, or higher efficiency equipment?

RESPONSE	DAT0_MID1	DAT0_MID2	DAT0_MID3	DAT0_MID4
Same	1	1	1	1
Lower	2 [ASK AE2b]	2 [ASK AE2b]	2 [ASK AE2b]	2 [ASK AE2b]
Higher	3	3	3	3
[Not applicable]	-88	-88	-88	-88
[Don't know]	-97	-97	-97	-97
[Refused]	-98	-98	-98	-98

AE1b. Why do you say that? [RECORD VERBATIM]: _____

[IF AE1a ≠ LOWER, SKIP TO AQ1.]

AE2. Without the [&WORKSHOP/DEMONSTRATION/TRAINING or &TECHNICALASSISTANCE], would you have installed <measure> that was:

RESPONSE	DAT0_MID1	DAT0_MID2	DAT0_MID3	DAT0_MID4
Standard efficiency or according to code	1	1	1	1

Slightly higher than standard efficiency	2	2	2	2
Between standard efficiency and the efficiency that was installed	3	3	3	3
Slightly lower than the high efficiency that was installed	4	4	4	4
[Don't know]	-97	-97	-97	-97
[Refused]	-98	-98	-98	-98

QUANTITY

ASK QUANTITY QUESTIONS ONLY FOR MEASURES WHERE DAT0 = 1 OR 2 (VERY LIKELY OR SOMEWHAT LIKELY TO HAVE IMPLEMENTED IN THE ABSENCE OF THE PROGRAM.

Finally, I'd like to know about the effect, if any, that your participation in the [&WORKSHOP/DEMONSTRATION/TRAINING or &TECHNICALASSISTANCE] had on the scale of the project you completed.

AQ1a. Without the support from [&WORKSHOP/DEMONSTRATION/TRAINING or &TECHNICALASSISTANCE] would you have installed more or/a larger sized <measure>, less, about the same amount, or would you not have installed any quantity of the measure at all?

RESPONSE	DAT0_MID1	DAT0_MID2	DAT0_MID3	DAT0_MID4
Same amount	1	1	1	1
Less or smaller	2 [READ AQ3a]	2 [READ AQ3a]	2 [READ AQ3a]	2 [READ AQ3a]
More or larger	3 [READ AQ3a]	3 [READ AQ3a]	3 [READ AQ3a]	3 [READ AQ3a]
Would not have installed any	4	4	4	4
[Not Applicable]	5	5	5	5
[Don't know]	-97	-97	-97	-97
[Refused]	-98	-98	-98	-98

AQ1b. Why do you say that? **[RECORD VERBATIM]** _____

[IF AQ1 = SAME or NOT INSTALLED ANY, SKIP TO OP5]

AQ3a. By what percentage do you think you increased or decreased the amount of <&MEASURE installed?

Calculate percent: $\text{abs}([\text{amount installed}] / [\text{amount would have installed}]) - 100\%$

The response can be greater or less than 100 percent. Two examples:

- Example 1. Organization installed 8, but would have installed 2 without the program. Change is 300 percent.
- Example 2. Organization installed 4, would have installed 3 without the program. Change is 33 percent.

Record a positive % even if they decreased the amount that they installed.

- Example 3. Organization installed 8 but would have installed 10 w/out the program. Change is 20 percent.
- Example 4. Organization installed 4 but would have installed 6 without the program. Change is 33 percent.

RESPONSE	DAT0_MID1	DAT0_MID2	DAT0_MID3	DAT0_MID4
[RECORD %]	_____ %	_____ %	_____ %	_____ %
Don't know	-97	-97	-97	-97
Refused	-98	-98	-98	-98

OVERALL INFLUENCE CHECK IF RECEIVED FUNDING FROM ANY SOURCE

This battery has been shortened from the retrofit survey given that this survey is for an information or technical assistance effort that does not offer incentives. Will just be used to over context to overall attribution.

[ASK ONLY IF OP1=1]

OP9. In your opinion, was the &SPONSOR's [&WORKSHOP/DEMONSTRATION/TRAINING/ &TECHNICAL ASSISTANCE], more important in encouraging and enabling [your organization] to carry out the energy efficiency project we have been discussing; was the rebate more important; or were they both equally important?

SEP PA &WORKSHOP/DEMONSTRATION/TRAINING/&TRAINING	1
Rebate	2
Both equally important	3
[Don't know]	-97
[Refused]	-98

OP10 Why do you say that?

[RECORD VERBATIM] _____

ATTRIBUTION – MARKET CONTEXT

TRAINING OBJECTIVES

TO1. The [&WORKSHOP/DEMONSTRATION/TRAINING/ &TECHNICAL ASSISTANCE], was designed to achieve the following objectives: &USE COURSE SPECIFIC BELOW.

NOTE: WE WILL PROVIDE COURSE SPECIFICS BASED UPON A REVIEW OF CURRICULA, PARTICIPANT DATABASES AND INPUTS FROM INSTRUCTOR SURVEY DATA.

[INSERT TWO SENTENCE OR LESS DESCRIPTIONS OF EACH SPECIFIC EFFORT]

TO2. Prior to taking this course, had you searched for courses with similar curricula content?

[Yes]	1	[GO TO TO3]
[No]	2	[GO TO KA1]
[Don't know]	98	[GO TO KA1]
[Refused]	99	[GO TO KA1]

T03. Using a scale of 1 to 10 where 1 is no courses available and 10 is many courses available, how would you rate the availability of courses with similar curricula prior to &DATE?

None Available	1	[GO TO KA1]
	2	[GO TO KA1]
	3	[GO TO KA1]
	4	[GO TO KA1]
	5	[GO TO KA1]
	6	[GO TO KA1]
	7	[GO TO KA1]
	8	[GO TO KA1]
	9	[GO TO KA1]
Many Available	10	[GO TO KA1]
Don't know	98	[GO TO KA1]
Refused	99	[GO TO KA1]

KNOWLEDGE AND AWARENESS EFFECTS

NOTE: IN THIS SECTION, WE IDENTIFY ANY CHANGES TO KNOWLEDGE AND AWARENESS AS A RESULT OF PARTICIPATION IN THE COURSE. NOTABLY, THIS SECTION WILL GATHER INFORMATION TO UNDERSTAND OTHER EFFECTS OF THE SEP TRAINING EFFORTS.

KA1. Did the [&WORKSHOP/DEMONSTRATION/TRAINING/ &TECHNICAL ASSISTANCE], provide you with any new information?

[Yes]	1	[GO TO KA2a]
[No]	2	[GO TO KA2a]
[Don't know]	98	[GO TO KA2a]
[Refused]	99	[GO TO KA2a]

KA2a. Using a scale of 1 to 10 where 1 is no knowledge and 10 is significant knowledge, how would you rate your level of knowledge regarding the [&WORKSHOP/DEMONSTRATION/TRAINING/ &TECHNICAL ASSISTANCE], objectives prior to your participation in &DATE?

No Knowledge	1	[GO TO KA2b]
	2	[GO TO KA2b]
	3	[GO TO KA2b]
	4	[GO TO KA2b]
	5	[GO TO KA2b]
	6	[GO TO KA2b]
	7	[GO TO KA2b]
	8	[GO TO KA2b]
	9	[GO TO KA2b]
Significant Knowledge	10	[GO TO KA2b]
Don't know	98	[GO TO KA2b]
Refused	99	[GO TO KA2b]

[SKIP IF KA1=2]

KA2b. On the same scale, how would you rate your [&WORKSHOP/DEMONSTRATION/TRAINING/ &TECHNICAL ASSISTANCE], objectives knowledge after your participation?

No Knowledge	1	[GO TO KA3]
	2	[GO TO KA3]
	3	[GO TO KA3]
	4	[GO TO KA3]
	5	[GO TO KA3]
	6	[GO TO KA3]
	7	[GO TO KA3]
	8	[GO TO KA3]
	9	[GO TO KA3]
Significant Knowledge	10	[GO TO KA3]
Don't know	98	[GO TO KA3]
Refused	99	[GO TO KA3]

KA3. Did the [&WORKSHOP/DEMONSTRATION/TRAINING/ &TECHNICAL ASSISTANCE] increase your awareness of ways to improve the energy efficiency at your &INSERT HOME, FACILITY, JOBS, CLASSROOM?

[Yes]	1	[GO TO KA4]
[No]	2	[GO TO KA4]
[Don't know]	98	[GO TO KA4]
[Refused]	99	[GO TO KA4]

KA4. Did your participation in the [&WORKSHOP/DEMONSTRATION/TRAINING/ &TECHNICAL ASSISTANCE], make you more likely to take energy saving actions?

[Yes]	1	[GO TO FIN1]
[No]	2	[GO TO FIN1]
[Don't know]	98	[GO TO FIN1]
[Refused]	99	[GO TO FIN1]

HOUSING AND DEMOGRAPHICS

Note that all the following questions are sourced from the Residential Building Retrofit Survey.

We are almost finished. I just have a few additional questions about your home to make sure we are getting a representative sample of participants.

D0. Is you're a home one of the following? [READ ALL]

Single Family Home	1	[GO TO D1]
Multifamily Unit	2	[GO TO D0a]
Condo/Town home	3	[GO TO D1]
Mobile Home	4	[GO TO D1]
Other: Specify	5	[GO TO D1]
[Don't know]	-97	[GO TO D1]
[Refused]	-98	[GO TO D1]

D0a About how many apartment units are located in the building at the property?

ENTER NUMBER OF UNITS	# __	[GO TO D0b]
[Don't know]	-97	[GO TO D0b]
[Refused]	-98	[GO TO D0b]

D0b What is the average apartment size in square feet?

ENTER SQUARE FOOTAGE	_____ sq. ft.	[GO TO D0c]
[Don't know]	-97	[GO TO D0c]
[Refused]	-98	[GO TO D0c]

D0c On average, how many full or half bathrooms do you have in each unit of your building? (PROBE: A full bathroom is one that has a sink with running water, and a toilet, and either a bathtub or shower. A half bathroom has either a toilet or a bathtub or a shower?)

ENTER NUMBER OF BATHROOMS	# _____	[GO TO D0d]
[Don't know]	-97	[GO TO D0d]
[Refused]	-98	[GO TO D0d]

D0d On average, how many bedrooms do you have in each unit of your building? (If a one-room efficiency, or studio apartment, bedrooms=0)

ENTER NUMBER OF BEDROOMS	# _____	[GO TO D0e]
[Don't know]	-97	[GO TO D0e]
[Refused]	-98	[GO TO D0e]

D0e On average, other than bedrooms and bathrooms, how many other rooms are there in each unit of your building? Do not count laundry rooms, foyers, unfinished storage spaces, porches, or garages.

ENTER NUMBER OF OTHER ROOMS	# _____	[GO TO D0f]
[Don't know]	-97	[GO TO END]
[Refused]	-98	[GO TO END]

D0f About when was this building first built?

Before 1970's	1	[GO TO D0g]
1970's	2	[GO TO D0g]
1980's	3	[GO TO D0g]
1990-94	4	[GO TO D0g]
1995-99	5	[GO TO D0g]
2000's	6	[GO TO D0g]
[Don't know]	-97	[GO TO D0g]
[Refused]	-98	[GO TO D0g]

D0g (IF NOT CONTAINED IN SAMPLE DATA) In what city is this building located?

ENTER CITY	_____	[GO TO ONSITE]
[Don't know]	-97	[GO TO ONSITE]
[Refused]	-98	[GO TO ONSITE]

D1 In what type of building do you live? (READ LIST IF NEEDED)

(PROBE FOR 'Condo': "How many units are in your building?")

A one-family home detached from any other house	1	[GO TO D2]
A one-family home attached to one or more houses	2	[GO TO D2]
A building with 2 apartments	3	[GO TO D2]
A building with 3 or 4 apartments	4	[GO TO D2]
A building with 5 or more apartments	5	[GO TO D2]
A mobile home	6	[GO TO D2]
Boat, RV, Van, etc.	7	[GO TO D2]
Other (SPECIFY)	8	[GO TO D2]
[Don't know]	-97	[GO TO D2]
[Refused]	-98	[GO TO D2]

D2 Including yourself, how many people currently live in your home year-round?

ENTER NUMBER OF PEOPLE	_____	[GO TO D3]
[Don't know]	-97	[GO TO D3]
[Refused]	-98	[GO TO D3]

D3 How many full or half bathrooms do you have in your home? (PROBE: A full bathroom is one that has a sink with running water, and a toilet, and either a bathtub or shower. A half bathroom has either a toilet or a bathtub or a shower?)

ENTER NUMBER OF BATHROOMS	# _____	[GO TO D4]
[Don't know]	-97	[GO TO D4]
[Refused]	-98	[GO TO D4]

D4 How many bedrooms do you have in your home? (If a one-room efficiency, or studio apartment, bedrooms=0)

ENTER NUMBER OF BEDROOMS	# _____	[GO TO D5]
[Don't know]	-97	[GO TO D5]
[Refused]	-98	[GO TO D5]

D5 Other than bedrooms and bathrooms, how many other rooms are there in your home? Do not count laundry rooms, foyers, unfinished storage spaces, porches, or garages.

ENTER NUMBER OF OTHER ROOMS	# _____	[GO TO D6]
[Don't know]	-97	[GO TO D6]
[Refused]	-98	[GO TO D6]

D6 How large is your home/building in square feet?

ENTER SQUARE FOOTAGE	_____ sq. ft.	[GO TO D7]
[Don't know]	-97	[GO TO D7]
[Refused]	-98	[GO TO D7]

D7 How many *floors* of living space are there in your home, NOT COUNTING unheated basements? Please answer only about *your home*, not the building as a whole]

1 floor	1	[GO TO D8]
2 floors	2	[GO TO D8]
3 floors	3	[GO TO D8]
More than 3 floors	4	[GO TO D8]
[Don't know]	-97	[GO TO D8]
[Refused]	-98	[GO TO D8]

D8 About when was this building first built?

Before 1970's	1	[GO TO D9]
1970's	2	[GO TO D9]
1980's	3	[GO TO D9]
1990-94	4	[GO TO D9]
1995-99	5	[GO TO D9]
2000's	6	[GO TO D9]
[Don't know]	-97	[GO TO D9]
[Refused]	-98	[GO TO D9]

D9 In what city is your home located?

ENTER CITY	_____	[GO TO ONSITE]
[Don't know]	-97	[GO TO ONSITE]
[Refused]	-98	[GO TO ONSITE]

END.	Those are all the questions I have for today. Thank you for your time and help in this important study.
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