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Public Service Commission of Wisconsin
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February 13, 2015

Ms. Sandra J. Paske
Secretary to the Commission
Public Service Commission of Wisconsin
Post Office Box 7854
Madison, WI 53707-7854

Dear Ms. Paske:

Re: We Energies Voluntary Programs. Docket No. 6630-GF-136

Enclosed is the process evaluation for the We Energies 2014-2015 Electric and Natural Gas Energy Efficiency Portfolio filed as PSC Ref# 186557. The Voluntary Program was approved in PSC order Ref# 189938 with the stipulation that We Energies shall work with Commission staff to develop a program evaluation plan for the Residential Assistance Program. The program evaluator has completed the attached report in accordance with the previously approved plan which was filed as PSC Ref# 194006.

If you have any questions concerning this project, please contact Joan Voissem, at 414-221-5424.

Sincerely,

James A. Schubilske
Vice President
State Regulatory Affairs

Enclosure

DNV·GL

PROCESS EVALUATION

Residential Assistance Program

We Energies

February 6, 2015

Table of Contents

1 EXECUTIVE SUMMARY 1
1.1 Interim Report Recommendations 1
1.2 Final Report Recommendations 2

2 INTRODUCTION 5

3 METHODS 6
3.1 Stakeholder In-Depth Interviews 6
3.2 Trade Ally In-Depth Interviews 7
3.3 Program Benchmarking and Cost Analysis 7

4 RESULTS 8
4.1 Program Overview 8
4.2 Program Delivery Review 10
4.2.1 Trade Ally Training and Communication 10
4.2.2 Customer Intake 10
4.2.3 Pre-Audit 11
4.2.4 Work 12
4.2.5 Post-Audit 12
4.2.6 Invoicing and Reporting 12
4.3 Program Integration with Existing Weatherization Programs 13
4.4 Customer Satisfaction 13
4.5 Results and Responses to the Interim Report 15
4.6 Program Performance Benchmarks 17

5 CONCLUSIONS 19

6 REFERENCES 21

APPENDIX A. PROGRAM LOGIC MODEL 22

APPENDIX B. PROCESS FLOW DIAGRAM 23

APPENDIX C. STAKEHOLDER INTERVIEW GUIDE 24

APPENDIX D. TRADE ALLY INTERVIEW GUIDE 28

ABOUT DNV GL 33

1 EXECUTIVE SUMMARY

This report presents the final results of DNV GL's evaluation of the We Energies Residential Assistance Program (RAP). The overarching objectives of this evaluation are to ensure that the RAP program is operating as designed and to identify potential areas for improvement that will enhance the effectiveness and performance of the program. DNV GL evaluated the program based on a review of program documents and databases and in-depth interviews with stakeholders and trade allies.

RAP is designed to provide weatherization services to We Energies natural gas homeowners in Milwaukee, Racine, and Waukesha counties who participate in the Wisconsin Home Energy Assistance Program (WHEAP)[1] through a partnership with Focus on Energy (Focus). Through RAP, We Energies seeks to assist customers who face financial barriers to lower their energy use by paying for the weatherization costs not covered through Focus. While the RAP program is not a new program, We Energies has changed its delivery mechanism from a turnkey program to one managed internally. The energy savings resulting from this program will be credited to Focus, and We Energies is not planning to estimate or claim savings for the non-Focus measures installed through RAP.[2]

Overall, we found that RAP achieved high energy savings per household, trade allies were very satisfied with the program, and the program met customer expectations. We Energies established a savings goal of 56,250 therms and a participation goal of 150 dwellings per year (We Energies 2014). Average RAP savings, 457 therms/household, exceeded the implied program household savings goal of 375 therms/household, calculated by dividing the savings goal by the participation goal. Trade allies were very satisfied with the integration between Focus and RAP, the communication processes between We Energies and trade allies, and the program overall. Ninety-four percent of respondents to the We Energies customer survey indicated that the program met or exceeded their expectations.

1.1 Interim Report Recommendations

In the interim evaluation report delivered June 2014, DNV GL made a number of specific recommendations to improve the effectiveness of the program.

- **Carbon monoxide (CO) safety.** According to the trade allies in the first round of in-depth interviews (spring 2014), some of the participating homes may be in danger of carbon monoxide poisoning, which was not addressed by the program.
    - *Recommendations:* Trade allies should provide a written report to We Energies and Focus when a CO safety concern is identified and a document should be provided to program participants identifying the safety issues and what needs to be done to resolve them. Additionally, We Energies should provide funding or partner with other agencies to replace unsafe equipment or to mitigate the CO poisoning risk through ventilation improvement.
    - *Result:* Trade allies are required by Focus to submit a combustion safety notification form signed by the homeowner if a CO safety issue is identified and may be required to submit the form to We Energies as well in 2015. We Energies now pays for the installation of CO detectors which will be reported on the customer site evaluation form that is currently under development.

[1] WHEAP requires the household to be at or below 60% of the state median income.

[2] We Energies is aware that the decision not to claim additional program savings will negatively impact the cost effectiveness of the program.

- **Other safety issues** Trade allies reported a few instances where the home had a situation that would make participation infeasible, such as knob and tube wiring or unusual furnace configurations.
    - *Recommendation:* DNV GL recommended that trade allies give customers a written document listing the issues identified, why they are not able to proceed, and what customers should do to rectify the issues.
    - *Result:* We Energies is developing a customer evaluation report which will include a list of items to be installed and what cannot be completed by the program and why. The current plan is to have the customer sign the form after the initial audit and again after the work is completed.
- **Overlap with Wisconsin State Weatherization Assistance Program (WisWAP).** At the time of the interim report, trade allies were reporting overlap with WisWAP.
    - *Recommendation:* DNV GL had not yet conducted an in-depth interview with WisWAP at the time of the interim report. Consequently, no immediate recommendations were provided.
    - *Result:* We Energies now regularly communicates with WisWAP to prevent overlap within the current program year.
- **Participant reports.** Each of the three trade allies provides a different report of the audit results to participants.
    - *Recommendation:* DNV GL recommended that We Energies establish a standard guideline that includes itemized invoices and measure costs
    - *Result:* The new customer evaluation report currently under development is expected to be the standard reporting form for customers.

1.2 Final Report Recommendations

Since the interim report, DNV GL conducted in-depth interviews with two Focus representatives, a WisWAP representative, the new RAP manager, and second round interviews with the three trade allies. Additionally, we reviewed the year end program cost, energy savings, and customer survey data. Based on this new information, we developed a number of additional recommendations.

- **Initial customer contact.** Trade allies were unable to contact some customers who were selected for RAP. Trade allies typically call multiple times and then stop by the home to attempt to contact the customer. To strengthen the initial customer recognition of the connection between RAP and We Energies, DNV GL recommends the following:
    - Consider providing trade allies with materials that clearly identifies their association with We Energies, RAP, and Focus (i.e. vehicle magnets, badges, etc.).
    - Consider directing customers to call We Energies customer service, a number they have likely called before, for further information about the program if they have any questions or concerns. Consider including information about why they were specifically selected for the program (LIP or EIP participant, referred by a specific agency, etc.).

- **Weatherization needs assessment.** While RAP resolved the immediate program overlap issue with WisWAP, in which the same household was scheduled to go through both programs in the same year, some customers identified to participate in RAP later in the year lived in new homes (less than 5 years old)[3] or had their home weatherized within the last five years. Past weatherization does not necessarily indicate that no new significant energy savings could be achieved from the homes, so those homes are (reasonably) not excluded from RAP. DNV GL recommends the following actions:
    - Consider implementing a standard operating policy that either includes an initial walk through or begins with a full initial audit. If possible, include a question about the house age and past weatherization during We Energies low income program enrolment.
    - Continue to monitor the frequency and severity of longer term (within 1-5 years) overlap and consider ways to reduce the burden on trade allies to determine how to deal with homes with some previous weatherization.
    - Discuss potential methods to address overlap concerns with trade allies. Some trade allies conduct an initial walk through prior to scheduling a full audit.
    - Continue to communicate regularly with WisWAP.
- **Trade ally reporting to RAP.** Based on the trade ally interviews, the types of reporting documentation required by RAP may be unclear. For instance, some trade allies submit photos of everything installed and some only submit photos of mechanical work.
    - DNV GL recommends that We Energies consider the types of work to document with photos as part of the larger discussion of reporting standardization.
    - Continue to develop a consistent customer reporting form to use in 2015.
    - Continue to work closely with Focus to maintain the integrated program documentation process.
- **RAP goals.** While RAP did not reach the 2014 participant and energy savings goals, which may have been due to the initial ramp-up period and a We Energies staff transition mid-year, the program exceeded its implied therms savings goals per household.
    - DNV GL recommends that We Energies consider setting an energy savings per household goal (an implied goal in this evaluation) rather than a total savings goal to meet the overarching goal of facilitating Focus participation and house weatherization for low income customers.
    - Consider providing a few more specific measure types within the RAP database, such as 1) forced air or boiler replacement rather than HVAC, and 2) attic, sidewall, and foundation insulation rather than shell insulation. This could also potentially be done through invoice analysis to limit additional data entry requirements.

DNV GL found that RAP performed very well and was able to successfully address a significant customer need by directing weatherization projects toward high energy using customers who have trouble paying for their energy use and by partially funding the work. RAP achieved high average savings per participant (457

[3] Trade allies indicated that new homes tended to be fully weatherized Habitat for Humanity built homes.

therms/household) when compared with the RAP program goal of 375 therms/household. All three trade allies were very satisfied with the integration between Focus and RAP, the communication processes between We Energies and trade allies, and with the overall program. RAP had very high customer satisfaction; 94% of respondents to the We Energies customer survey said that the program met or exceeded their expectations. While not all of the initial program benchmarks were met (total energy savings and total participant goals were not met), as a whole, the program met its goals for therm savings per household and enabled customers with limited income to participate in weatherization programs, thereby reducing their energy use and increasing their ability to pay their energy bill.

2 INTRODUCTION

RAP is available to natural gas homeowners living in Milwaukee, Racine, and Waukesha counties whose annual incomes are below 80% of the state median income. Most participants were selected through the We Energies Low Income Pilot (LIP) or Early Identification Program (EIP), which requires participants to accept weatherization services to reduce their energy costs and increase their ability to pay their energy bills, and have a household income below 60% of the state median income[4]. The intent of RAP is to address the financial barriers that customers may encounter in other programs while maximizing home energy savings opportunities. RAP provides energy efficiency services to households in conjunction with the services of Focus on Energy's (Focus) Assisted Home Performance with Energy Star (AHPwES)[5] and Enhanced Rewards (ER) programs. While AHPwES offers incentives for air sealing and insulation measures and ER offers incentives for high efficiency heating, the balance of measure costs are borne by the participants. RAP pays the remaining costs for Focus measures and covers the full cost of other measures (such as water heaters, exhaust fans, and weather stripping) that are not eligible for AHPwES or ER incentives but that increase household energy efficiency and improve household health and safety.

The specific RAP evaluation objectives are shown in Table 2-1. This report documents how the program is performing in its first year of implementation based on; the review of program documents and databases, and in-depth interviews with five We Energies staff, all three trade allies, three Focus representatives and a Wisconsin State Weatherization Assistance Program representative.

Table 2-1: Evaluation Objectives

Objective
Benchmark the program against stated program goals.
Confirm that program materials and processes promote effective and efficient implementation.
Determine whether the program serves the needs of eligible customers.
Confirm We Energies' visibility as program sponsor.
Provide timely feedback with actionable recommendations.
Work with Focus on Energy evaluators to reduce evaluation burden.

[4] To qualify for the LIP and EIP program, customers must participate in the Wisconsin Home Energy Assistance (WHEAP) program which requires the household to be at or below 60% of the state median income.

[5] The official program name is Home Performance with Energy Star Program, Reward Level 2, but it is still often referred to as Assisted Home Performance with Energy Star.

3 METHODS

The final RAP evaluation includes a qualitative and quantitative assessment of the RAP program. Evaluating a program that has significantly changed the implementation process requires examination from the perspective of each key stakeholder. Furthermore, the performance of the program was benchmarked to its planning goals and to the performance of relevant programs, such as AHPwES and ER. Table 3-1 summarizes the key tasks that were performed in this study. Data were collected through program stakeholder and trade ally in-depth interviews, the Focus SPECTRUM database, and the RAP database.

Table 3-1. Summary of RAP Evaluation Tasks

Task
Task 1: Review Program Materials *Task 1.1: Review Customer Touch Point Materials* *Task 1.2: Review Contractor Training and Communications Protocols and QA/QC Monitoring* *Task 1.3: Review We Energies' Reports to/from Focus on Energy* *Task 1.4: Review We Energies' RAP Regulatory Reports* *Task 1.5: Review Program Databases*
Task 2: Develop Program Logic Models
Task 3: Document Program Flow
Task 4: Collect Data *Task 4.1: In-depth Interviews with Program Stakeholders* *Task 4.2: In-depth Interviews with Trade Allies* Task 5: Benchmark Program Performance
Task 6: Report *Task 6.1: Monthly Status Reporting* *Task 6.2: Evaluation Reporting*

3.1 Stakeholder In-Depth Interviews

DNV GL gathered information about RAP implementation, the interactions across programs, and data collection through program stakeholder in-depth interviews between May 2014 and January 2015 as presented in Table 3-2. The interview guide can be found in Appendix C. We conducted interviews tailored for each stakeholder depending on their areas of expertise and level of interaction with RAP.

Table 3-2. Completed Stakeholder In-Depth Interviews

Stakeholder	Interview
We Energies	
RAP Program Manager (former)	May 2014
RAP Program Manager (new)	January 2015
Low Income Program Manager	May 2014
Low Income Coordinator	May 2014
Customer Programs Manager	May 2014
Focus on Energy	
Residential and Enhanced Rewards Managers (CleaResult)	November 2014
Home Performance with Energy Star Regional Manager (Conservation Services)	May 2014
WisWAP	
Home Energy Plus Program Director	November 2014

3.2 Trade Ally In-Depth Interviews

DNV GL conducted two rounds of trade ally interviews, the first round in spring 2014 and the second round at the end of 2014 and the beginning of 2015 (Table 3-3). Through these interviews, DNV GL gathered information about the implementation process, the interactions across weatherization programs, communication between We Energies and trade allies, as well as satisfaction with different program components. The trade ally interview guide is included in Appendix D.

Table 3-3: Completed Trade Allies In-Depth Interviews

Trade Allies	First Interview	Second Interview
INTEC	April 2014	January 2015
Quality Insulation Installers	May 2014	January 2015
Weatherization Services, LLC	May 2014	December 2014

3.3 Program Benchmarking and Cost Analysis

We Energies provided DNV GL with preliminary data from the Focus SPECTRUM database for the We Energies territory 2014 program year, a copy of the RAP database, and their customer survey results. We used a combination of data from the SPECTRUM database and the RAP database to calculate the RAP benchmarks (Table 3-4). Four projects partially funded through Focus in 2014 were not yet entered into the SPECTRUM database at the time of this report; consequently, no savings estimates were available for those entries. DNV GL calculated the AHPwES and ER comparative benchmarks using only SPECTRUM data from the We Energies territory.

Table 3-4: RAP Benchmark Calculation Sources

Data	SPECTRUM Database	RAP Database
RAP Homes		X
We Energies Funding		X
Focus Incentives	X	X
RAP Savings	X	

Gas savings were only available for measures partially funded through Focus and no energy savings estimates were available for home weatherization funded only through RAP (13 homes, 13% of RAP projects). DNV GL calculated program savings, savings per participant, program dollars per therm saved for the entire program and for the entire program excluding projects with pending savings (four projects not yet in the SPECTRUM database), and for only the projects that received both Focus and RAP funding.

DNV GL compared the RAP savings with the other AHPwES and ER savings within the We Energies territory (without RAP projects) and with the 2013 state wide AHPwES and ER savings (The Cadmus Group, Inc. 2014).

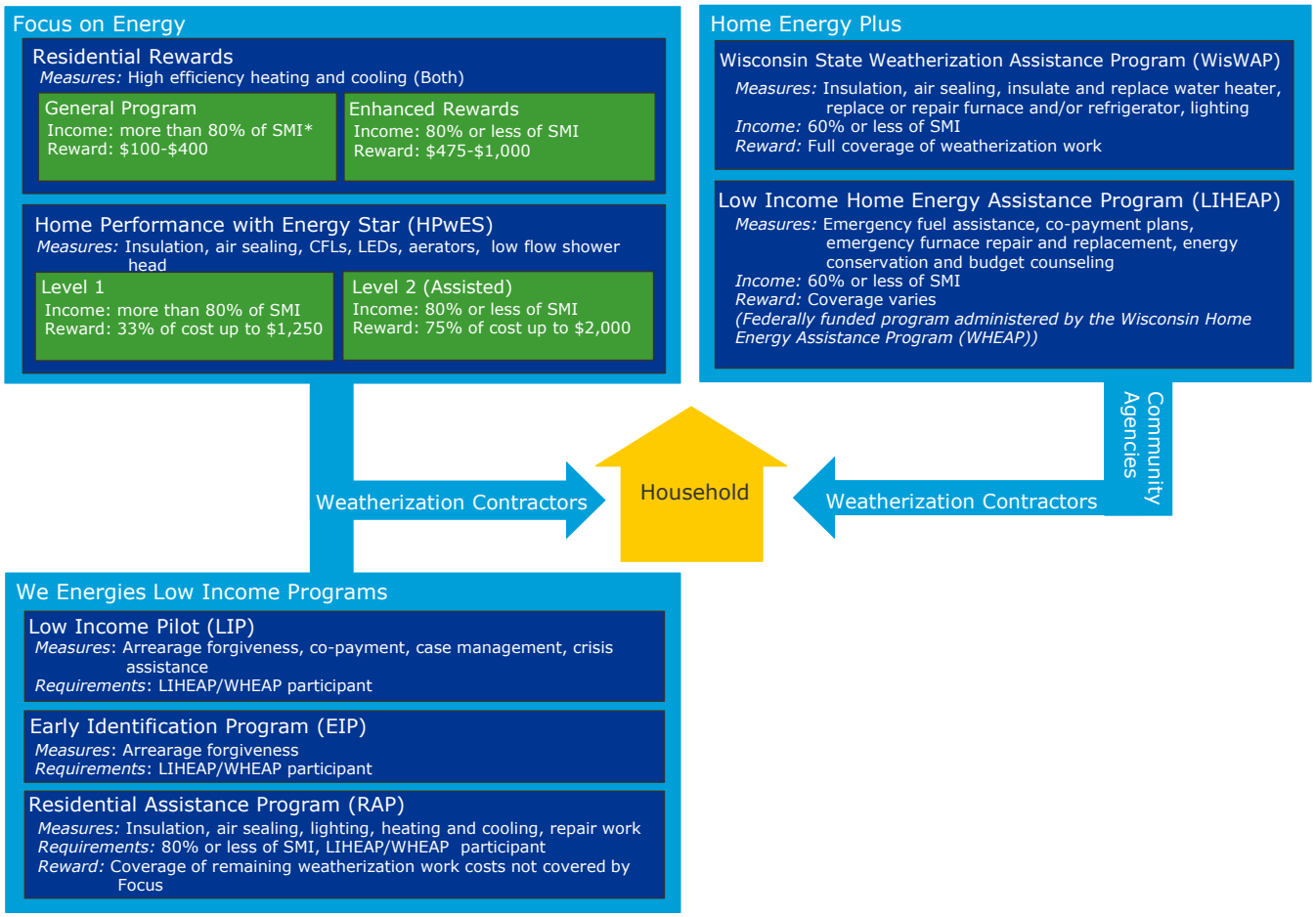
4 RESULTS

The results section begins with an overview of the program and then follows the steps in the implementation process from trade ally training through project completion. Then DNV GL addresses RAP communication and integration with other weatherization programs, followed by customer satisfaction, recommendations from the interim report, and program benchmarking.

4.1 Program Overview

The RAP program fits within a number of other programs meant to serve homeowners with incomes below the statewide median, as presented in Figure 4-1. The Wisconsin Division of Energy Services provides energy assistance and weatherization under the umbrella of Home Energy Plus, which includes the Wisconsin State Weatherization Assistance Program (WisWAP) and the federally funded Low Income Home Energy Assistance Program (LIHEAP) which is administered by the Wisconsin Home Energy Assistance Program (WHEAP). In order to be eligible for LIP or EIP, the household must be WHEAP qualified. Most RAP participants were already participants in either the LIP or EIP programs, but other gas customers who are WHEAP qualified may also be referred to RAP by local weatherization agencies.

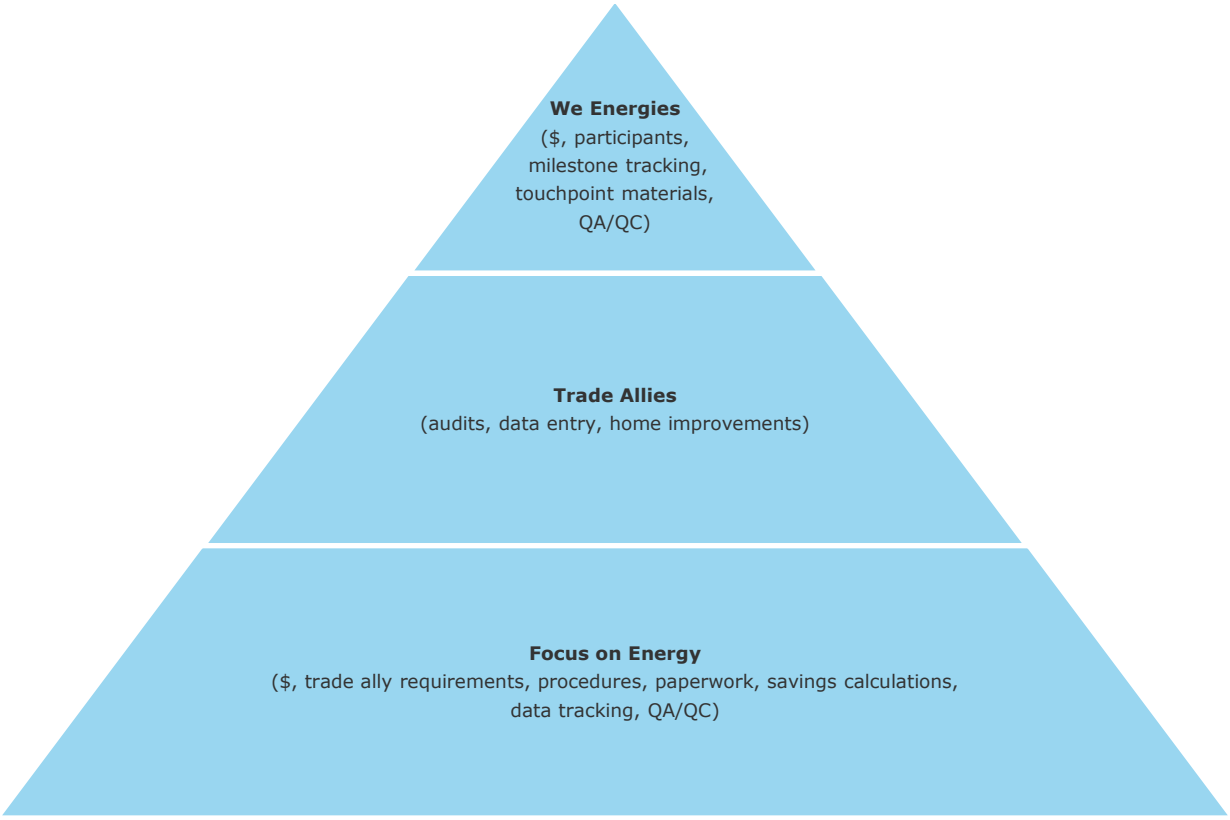
Figure 4-1. Weatherization and Payment Assistance Programs



*State median income (SMI)

The RAP program is designed to be a funding mechanism applied to the existing Focus programs with minimal administrative burden, leveraging the existing infrastructure provided by the Focus programs. Focus provides; initial rebates, trade ally requirements, procedures, paperwork, savings calculations, data tracking and quality control. We Energies provides the RAP trade allies (all of whom are participating Focus trade allies) with milestone tracking tools and customer touch-point materials, identifies the participants, funds improvements above and beyond the Focus rebates[6] and provides some additional quality control. Trade allies are the lynchpin of the program, providing; audits, data entry to both Focus and We Energies tracking systems and implementation of the identified home improvements. Figure 4-2 illustrates this program design. We also provide a more detailed logic model in Appendix A.

Figure 4-2: RAP Program Design



A diagram illustrating program process flow is provided in Appendix B. The basic flow proceeds along the following sequence:

1. We Energies identifies participants out of their existing Low Income Pilot (LIP) program and Early Identification Program (EIP). The LIP and EIP programs include customers who are WHEAP eligible and who have difficulty paying their utility bills.
2. We Energies assigns an equal number of participants to each of the three trade allies and provides customer contact information to the trade ally. We Energies sends a welcome letter to the customer that includes trade ally contact information.

[6] Up to $10,000 for single family homes and $15,000 for multifamily homes.

3. The trade ally contacts the customer and arranges a home visit to complete the initial audit.
4. After the audit, the trade ally enters the relevant data into the Focus EM Homes software.[7] This software estimates savings for the recommended set of improvements. EM Homes also automatically populates the Focus tracking database, SPECTRUM.
5. If the project involves unusual measures or exceeds We Energies' cost thresholds, the trade ally communicates with We Energies to get approval to proceed with the project.
6. The trade ally installs the measures.
7. Most of the audit is repeated after the measures are installed to confirm effectiveness and safety (carbon monoxide levels).
8. The trade ally invoices Focus and We Energies for their respective components of the work completed.

4.2 Program Delivery Review

Through the program delivery review, DNV GL presents the in-depth interview results of the process flow review, from trade ally training through project completion.

4.2.1 Trade Ally Training and Communication

Contractor training, tools, and communication protocols are intuitive and adequate. At its core, the program is a funding mechanism on top of the Focus programs. As such, the only additional information/training required of the trade allies is how to use the tracking tool to communicate with We Energies. DNV GL attended the training offered to contractors by We Energies in December 2013. We also reviewed the customer-level Excel sheet used by trade allies to track progress through program milestones and the We Energies master database that compiles the customer-level sheets. The master database is automated to produce summary tables and program metrics. All program stakeholders expressed satisfaction with these tools and the trade allies reported that they were easy to use.

Trade allies are very satisfied with We Energies communication and responsiveness. Trade allies expressed satisfaction with the level of We Energies staff responsiveness when there are questions or concerns about the program or individual projects. Additionally, the trade allies were satisfied with the frequency of meetings as program changes were implemented.

4.2.2 Customer Intake

Trade allies were not able to contact some customers selected to participate in RAP. Trade allies were unable to contact some customers who were selected for RAP. Trade allies call multiple times and then stop by the home to attempt to contact the customer. One trade ally indicated that they are unable to contact the customer up to 25% of the time. One trade ally suggested that providing additional We Energies branding, such as vehicle magnets or identification badges may improve response rates by assuring customers that the trade allies are associated with an official legitimate program.

Recommendation: Consider providing trade allies with materials that clearly identifies their association with We Energies, RAP, and Focus (i.e. vehicle magnets, badges, etc.).

[7] This step is skipped when a weatherization project receives no Focus funding.

Improving the program welcome letter may help to improve the response rate. DNV GL reviewed the participant welcome letter. The letter is short, to the point, identifies the trade ally assigned to the customer and emphasizes the free home improvements. However, all trade allies indicated that only one or two customers called all year after receiving the letter. While not having customers call is not necessarily a concern, providing further information in the welcome letter indicating how the customer was selected and directing customers to a familiar customer service number may reduce potential concerns about whether the offer is legitimate and reduce the number of contact attempts needed.

Recommendations: Consider directing customers to call We Energies customer service, a number they have likely called before, for further information about the program if they have any questions or concerns. Consider including information about why they were specifically selected for the program (LIP or EIP participant, referred by a specific agency, etc.).

Trade allies are generally satisfied with the number of leads received and projects completed. In the second round of interviews, one trade ally indicated that they received on average 5-8 leads per month and completed 5-6 audits per month. Another trade ally indicated that they initially received 6 leads per month but the number had dropped off to 2 per month in November and December and they completed an average of 4-5 audits per month. The trade allies received the number of leads that they expected and are much happier with the number of projects completed now that many overlap issues have been eliminated; however, they also indicated that they could also complete more projects if the program were expanded.

Some homes may have issues that prevent participation. Trade allies reported a few instances where the home had a situation that would make participation infeasible. One home had knob and tube wiring, which would have required rewiring the entire home, which the RAP program does not cover. Another home had an unusual dual furnace configuration along with a fuse box that would have been too expensive to upgrade. A few homes had roofs needing replacement prior to the addition of attic insulation. The new customer reporting form that We Energies is developing for 2015 should formalize the communication process when issues preventing participation are found.

4.2.3 Pre-Audit

One trade ally schedules an initial walk through of the home to determine whether work is needed prior to conducting an initial audit, while the other two trade allies always conduct an initial audit. Some participants are unsure whether their home has been weatherized and even when the house has been weatherized there may be more work needed. All three trade allies indicated that some level of prior weatherization should not automatically exclude RAP participation, but two trade allies said that new houses (built within the last 5-7 years) tended to have very few weatherization opportunities. Trade allies have taken different approaches for dealing with prior weatherization. In the first round of interviews, one trade ally indicated that they did an initial walk through before a full audit to determine whether there was work to be done; however, by the second round of interviews they had switched to full audits to provide a clearer picture of the level of weatherization. Another trade ally transitioned in the opposite direction, by recently implementing a policy of conducting a brief initial walk through (10-15 minutes) prior to scheduling a full audit.

Recommendations: Consider implementing a standard operating policy that either includes an initial walk through or begins with a full initial audit. If possible, include a question about the house age and past weatherization during LIP or EIP intake.

Each of the three trade allies provides different audit reports to the customers. One trade ally began providing the Focus EM Homes energy report. Another provides a scope of work that lists measures to install without costs. The third said they provide reports to customers only upon customer request.

Recommendation: Continue to develop the consistent reporting form which We Energies plans to begin using in 2015.

4.2.4 Work

Two trade allies reported during the first round of interviews that they have encountered customers with older stoves that they considered carbon monoxide (CO) risks. All three trade allies indicated that they take safety very seriously and conduct CO testing on all of the combustion equipment in the home. If there is a concern about CO levels that will not be addressed by the RAP or AHPwES improvements, the trade allies contact We Energies with a mitigation plan. During the second round of interviews, the trade allies said that We Energies and AHPwES are working together to further incorporate CO and fire alarm safety checks and mitigation into the standard practices.

Recommendation: DNV GL recommends that the program continue to treat carbon monoxide safety with the utmost seriousness and to continue to work with Focus to ensure that CO safety concerns are consistently tested, reported, and addressed.

4.2.5 Post-Audit

Two of the trade allies have begun conducting the post-audit immediately following work completion to remove the scheduling burden for customers. Trade allies have found that incorporating the final audit into the end of the installation process has eliminated issues with scheduling an additional appointment with the homeowner, thereby saving the homeowner and trade ally time.

4.2.6 Invoicing and Reporting

All trade allies expressed satisfaction with the We Energies invoicing and reporting process. Trade allies submit their invoice, a copy of the Focus AHPwES certificate of completion, and photographs of the completed work online. The trade allies indicated that they were very satisfied with the We Energies invoicing process and particularly appreciated that they could track the process and are notified when the check will be cut. There was some variation in the type of work for which trade allies submit photos. One trade ally only submits photos of mechanical work, another trade ally submits photos of all work completed, and another trade ally takes pictures of all work and all readings (blower door, CO monitor, etc.).

Recommendation: Consider what types of work to document with photographs and clarify the policy with trade allies.

Trade allies indicated that the We Energies RAP reporting process was complementary to the Focus requirements. The trade allies submit many of the same forms to We Energies that are required by Focus with the exception of photographs of the work completed. All trade allies were satisfied with the process and felt that it was not burdensome.

Recommendation: Continue to work closely with Focus to maintain the integrated program documentation process.

4.3 Program Integration with Existing Weatherization Programs

WisWAP is not experiencing problematic overlap with RAP. Based on the WisWAP interview conducted, WisWAP is not experiencing any overlap issues with RAP. We Energies sends WisWAP weatherization agencies a list of households participating in its LIP indicating whether or not the homes have been weatherized. Then, the agencies know whether or not they should partner with We Energies on a project and they can prioritize those households.

Recommendation: No new recommendations at this time. Continue to communicate regularly with WisWAP.

The program has met needs that could not be addressed by other currently available weatherization programs. Trade allies indicated that they were asked to partner with WisWAP for a couple of jobs where WisWAP was unable to provide a particular service. Additionally, RAP was able to provide assistance for customers who had previously gone through a weatherization program (and could not receive assistance from the same program again) but were in need of additional assistance such as furnace replacement.

RAP trade allies have had some issues with WisWAP overlap, however, the number and severity of the overlap has decreased over the year. One trade ally indicated that between 15 and 20% of the RAP leads they received had already been weatherized within the last 5 years. Some homeowners were not sure whether their home was weatherized and even if the home had been weatherized, there may be additional work that RAP could complete to further reduce energy usage since households with high energy usage are focused upon.

Recommendation: Continue to monitor the frequency and severity of overlap and consider ways to reduce the burden on trade allies to determine how to deal with homes with some previous weatherization.

4.4 Customer Satisfaction

Customers are highly satisfied with the program. Overall, 94% of respondents to the We Energies customer survey said that the program met or exceeded their expectations (Table 4-1). Trade allies reported similar levels of customer satisfaction through the in-depth interviews.

Table 4-1: Overall RAP Customer Satisfaction

Customer Response	Count	Percent
Exceed your expectations	15	45%
Meet your expectations	16	48%
Fall below your expectations	2	6%
Total	33	100%
Note: One of the customers who indicated that the program fell below his/her expectations was happy with what s/he received but was unhappy with the timing for receiving a replacement furnace and the other customer was unhappy because the contractor did not build a new room in the attic.		

Customers were also satisfied with the trade allies, and the weatherization work they received, and the information provided. Customers were also highly satisfied with the trade allies (Table 4-2); for each question about the trade allies, over 90% of customers were satisfied or very satisfied and 97% were satisfied overall.

Table 4-2: Customer Satisfaction with Trade Allies

Satisfaction	Courtesy	Quality	Information	Overall
Very Satisfied (9 and 10)	82%	67%	58%	68%
Satisfied (7 to 8)	12%	24%	33%	29%
Neutral (5 and 6)	3%	3%	6%	3%
Dissatisfied (3 and 4)	3%	0%	0%	0%
Very Dissatisfied (1 and 2)	0%	6%	3%	0%
Total	100%	100%	100%	100%
Note: The two customers who were very dissatisfied with the quality of the work were the same individuals who indicated that the program fell below their expectations. The customer who felt that not enough information about the work was provided was the customer who had concerns about the timing of their furnace replacement.				

Nearly 90% of respondents were aware of We Energies' role as a program sponsor. When asked who had sponsored the weatherization program, nearly two-thirds of the respondents volunteered We Energies (61%) (Table 4-3). Additionally, 69% of the customers who did not list We Energies as a program sponsor recognized We Energies' involvement when asked directly (Table 4-3). Across the two questions, 88% of respondents recognized We Energies as a program sponsor. Additionally, nearly half (45%) of respondents were aware that Focus on Energy was a program sponsor. Considering that RAP participation was likely the customer's first interaction with Focus, while We Energies had a number of touch points leading up to implementation, this is a positive result.

Table 4-3: We Energies Visibility as Program Sponsor

Response	We Energies Named as Program Sponsor		We Energies Involvement Remembered when Asked		Total	
	Count	Percent	Count	Percent	Count*	Percent
Yes	20	61%	9	69%	29	88%
No	13	39%	3	23%	3	9%
Don't know	NA	NA	1	8%	1	3%
Total Responses	33	100%	13	100%	33	100%
*The yes count includes a yes response to either question, as the second question was only asked if the customer did not list We Energies as a program sponsor. The no count includes only the responses to the second question when customers were asked directly about We Energies.						

A substantial share of survey respondents was also aware of We Energies' role in funding the program. Of the customers who recognized We Energies as a program sponsor through one of the two questions, 76% were aware that We Energies funded all or part of the weatherization work and an additional 10% recognized We Energies' involvement in the program recruitment process (Table 4-4).

Table 4-4: Customer Understanding of We Energies' Role with the Program

We Energies' Role	Count	Percent
We Energies paid for all or part of the work	22	76%
Customer contact/recruitment for the program	3	10%
None	1	3%
Don't Know	3	10%
Total Responses	29	100%

4.5 Results and Responses to the Interim Report

We Energies has been very responsive to evaluation recommendations. We Energies has either implemented or is planning to implement program changes based upon the interim report recommendations (Table 4-5). During this process, We Energies is working closely with trade allies and Focus to maintain cross-program coordination and to limit the amount of additional work required.

Table 4-5: Responses and Results Following the Interim Report

Area of Concern	Recommendation	Response/Result since the Interim Report
Old kitchen stoves that were considered carbon monoxide (CO) risks	DNV GL recommends that the program continue to treat carbon monoxide safety with the utmost seriousness. Trade allies should provide a written report separate from other documentation to both We Energies and Focus on Energy when they find a carbon monoxide risk. This report should provide details about the problem and any steps the trade allies took to mitigate it. Trade allies should also give customers a written document listing the safety issues identified, and what customers should do to rectify the safety issues. DNV GL also encourages We Energies to consider providing funding to mitigate the CO risks, such as replacing risky kitchen equipment. There may be community action agencies or other non-profit organizations willing to partner with the program and co-fund the improvements.	The program now requires that CO detectors be installed and a consistent process for documenting CO detector checks and a form for addressing CO issues is under development. Focus already requires trade allies to submit a combustion safety notification form signed by the homeowner if there is a CO concern. We Energies is considering requiring trade allies to submit the same form to RAP. Additionally, the draft *We Energies RAP Customer Site Evaluation Report* form that is under development for 2015 includes a line to record the number of CO detectors installed in the home.
Overlap with the Wisconsin Weatherization Assistance Program (WisWAP)	DNV GL will complete an interview with WisWAP staff to determine whether the RAP program is causing any issues with WisWAP. If issues are found, we will provide recommendations to remediate them.	WisWAP, as well as the trade allies, indicated that since cross program communication was improved, problematic overlap has been eliminated and cross program coordination to meet the needs of low income customers has increased.
Each trade ally provides a different audit report to RAP customers	Establish consistent customer reporting requirements for all three trade allies.	We Energies is in the process of designing the *We Energies RAP Customer Site Evaluation Report* form which would include a list of the items to be installed and if needed, a list of the work that cannot be completed and why. The customer will sign after the audit and upon job completion.
Payment timeliness	None at this time. These were very minor concerns that caused the trade allies to give a rating of 4 rather than 5 on the five-point satisfaction scale when we asked them specifically about payment timeliness.	During the second round of interviews, trade allies indicated that they were satisfied with the new invoicing system. The system is simple, they can track the payment steps, and receive notification when is check is going to be cut.
Issues that prevent home participation	DNV GL recommends that trade allies give customers a written document listing the issues identified, why they are not able to proceed, and what customers should do to rectify the issues.	Currently, trade allies inform customers about why they are unable to currently participate in the program. The draft *We Energies RAP Customer Site Evaluation Report* under development for 2015 includes a section for listing the work that cannot be completed and why.
Customer dissatisfaction (rare) due to windows	None at this time. If the trade allies report continued or increased dissatisfaction related to window replacement, consider providing trade allies with documentation that educates customers about the typical energy savings from window replacements and other measures that are covered.	Further information about measures that are or are not included in RAP will be included on the new *We Energies RAP Customer Site Evaluation Report* which is under development for 2015.

4.6 Program Performance Benchmarks

While We Energies' overall goal for RAP is to help customers overcome financial barriers to participation in weatherization programs while maximizing home energy savings, We Energies also set a number of specific benchmarks for the first year of the internally run RAP (Table 4-6). While many of the benchmarks include energy savings, those resulting from RAP will be credited to Focus. Additionally, all energy savings reported were estimated through Focus, therefore, only measures (Focus qualified HVAC, insulation, etc.) and projects that were partially funded through Focus had energy savings estimates.

Table 4-6: Program Goals

Goal Description	Goal Value
Trade ally satisfaction	No numeric goal
Participants served annually	150 dwellings per year
Participants served monthly	12.5 dwellings per month
Total program savings	56,250 therms savings
Average savings per participant	375 therms per dwelling
Program dollars per therm saved	No numeric goal
Source: (We Energies 2014)	

Most RAP projects were funded through both Focus and We Energies. The preliminary program cost and savings, broken down by projects receiving funding through Focus and We Energies or only We Energies and by whether estimated savings were pending or reported in the SPECTRUM database are presented in Table 4-7. While 13% of the RAP projects completed received no Focus funding, those projects also cost much less for We Energies ($2,031/project compared with $5,843/ project) when compared with programs funded through both Focus and We Energies.

Table 4-7: Program Cost and Savings

Segment of RAP Participants	Homes	Gas Savings (Therms)		Funding			
		Total	Avg. (therms /job)	We Energies	Focus*	Total	Avg. ($/job)
Focus + We Energies	86	43,377	504	$501,464	$ 190,352	$691,817	$8,044
We Energies only	13	NA	NA	$26,405	NA	$26,405	$2,031
*Focus + We Energies, savings reported**	*82*	*43,377*	*529*	*$479,171*	*$ 184,970*	*$664,140*	*$8,099*
*All RAP, excluding savings pending obs.**	*95*	*43,377*	*457*	*$505,625*	*$ 184,970*	*$690,595*	*$7,269*
All RAP	99	43,377	438	$ 527,919	$ 190,352	$718,271	$7,255

*Focus funding includes the Focus incentive amounts listed on the invoice submitted to We Energies for the four projects not yet in SPECTRUM.

Source for We Energies Funding and Number of Homes Served: RAP Database

Source for Focus Funding and Savings: Spectrum database (Jan. 21, 2015)

All three trade allies were very satisfied with the program, meeting the first program benchmarking goal. On a five-point scale, all three trade allies rated their satisfaction with the integration between Focus and RAP, the communication processes between We Energies and trade allies, participant satisfaction with the program, as well as trade ally satisfaction with the program as five (very satisfied) (Table 4-8). One trade ally rated their satisfaction with the implementation process a four, saying that they would always like more work, while the other two trade allies responded with a five.

Table 4-8: Performance Benchmarking Metrics

Benchmark	RAP, 2014*	Focus in We Energies Territory, excluding RAP, 2014*			Wisconsin, 2013	
		AHPwES	ER	Both**	AHPwES	ER
Trade Ally Satisfaction (5 very satisfied and 1 very dissatisfied)	5	NA	NA	NA	NA	NA
Average Number of Participants - Monthly	8	20	76	94	48	109
Number of Participants - Annually	99	240	912	1,132	578	1,313
Total program gas savings (Therms)**	43,377	75,046	150,462	225,508	212,309	180,187
Gas savings per participant (Therms/household)**	457	313	165	199	367	137
Program dollars per therm saved ($/therm)**	$15.92	$ 6.49	$ 5.11	$ 5.57	$6.67	$6.68

*2014 RAP and SPECTRUM data were received January 21, 2015 from We Energies and are incomplete and unverified.

**Program savings only include measures that were partially or entirely funded by Focus, resulting in an underestimation of savings for RAP.

Note: While total savings and costs will equal the sum of AHPwES and ER, averages will not as they are influenced by the number of participants in each program.

Source for 2013 data: (The Cadmus Group, Inc. 2014)

The number of participants and consequently, the total savings were less than the initial program goals; however, the energy savings per household was higher than the program goal and the savings for other Focus participants. Ninety-nine households received RAP weatherization, achieving 43,377 therms of gas savings (Table 4-8). While the overall gas savings goals were not met based on the savings calculated through Focus, it is highly likely that the savings value underestimates total program savings as 13% of the RAP weatherized homes were not Focus funded and therefore no energy savings were calculated for those homes.

Even with some measures excluded from the energy savings estimate, the average energy savings per household was more than twice the average savings for AHPwES and ER in the We Energies territory. Though RAP installs more measures than Focus, those measures are not responsible for the higher RAP energy savings per household because the savings for those measures are not included in the calculation. The difference between Focus and RAP savings may be due to RAP participants installing more Focus-incented measures per household than a typical income qualified Focus participant would be able to install without the RAP money. Additionally, the difference in savings may be due to higher savings per measure for RAP which could be driven by house size, initial shell weatherization, or other underlying

factors. Because RAP targets high-energy-using homes, the RAP participants likely fall to the high end of the Focus on Energy savings distribution, resulting in a higher average savings per household than that for the Focus program.

Recommendation: Consider setting an energy savings per household goal rather than a total savings goal to meet the overarching goal of facilitating Focus participation and house weatherization for low income customers.

A number of measures installed through RAP are not partially funded through Focus and so the total savings underestimates the actual program savings. While the RAP database provides a good summary of the types of measures installed, Focus savings, and the total cost, further detail could provide greater insight into what the total program savings and benefits may be.

Recommendation: Consider providing a few more specific measure types within the RAP database, such as 1) forced air or boiler replacement rather than HVAC, and 2) attic, sidewall, and foundation insulation rather than shell insulation. This could also potentially be done through invoice analysis to limit additional data entry requirements.

The cost per therm saved for RAP cannot be directly compared with Focus because the Focus program cost does not include the balance paid by the participant and total RAP savings do not account for all of the actual savings achieved by the program. As AHPwES and ER did not cover the entire cost of the weatherization services included in Focus and the costs covered by the customers were not included in the data, the AHPwES and the ER costs per therm would be expected to be lower than RAP. Savings from measures fully funded by We Energies were also not included in the calculation, so it is not surprising that the cost per therm saved is higher for RAP.

5 CONCLUSIONS

While not all of the initial program benchmarks were met (total energy savings and total participant goals were not met), DNV GL found that RAP performed very well and was able to provide customers with access to much needed weatherization assistance. We did not conduct a cost benefits analysis of the program; however, a number of benefits were attained through the program:

- Achieve energy savings
- Reduce customer expenses and increase their ability to pay
- Improve household health, safety, and comfort.

RAP achieved high average savings per participant (457 therms/household) compared with the Focus AHPwES and ER programs in the We Energies territory (199 therms/household) and the program goal of 375 therms/household. While RAP did not meet the total participant or program savings goals, which may be due to the program ramp-up in the first quarter and the internal staff transition that occurred midyear, the households that were weatherized attained large savings, even when the additional measures funded by We Energies were not included in the total savings from the SPECTRUM database.

All three trade allies were very satisfied with the integration between Focus and RAP, the communication processes between We Energies and trade allies, and with the overall program. Trade allies indicated in both rounds of in-depth interviews that Focus and RAP worked well together and

required little to no additional work for them (paperwork, excess meetings, etc.). RAP reporting and invoicing requirements were complementary and potential programmatic changes were collaboratively discussed.

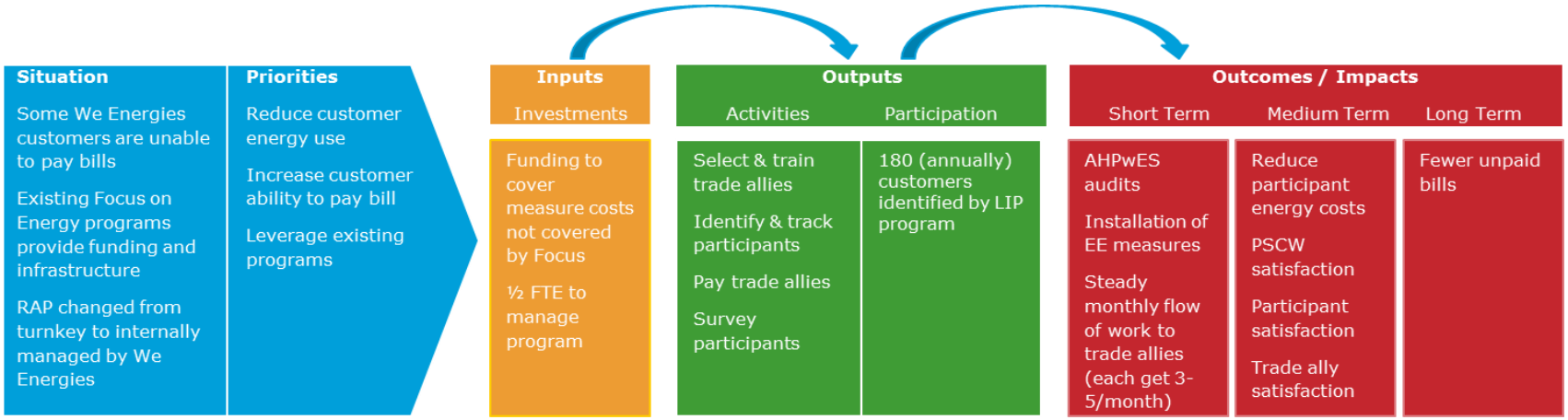
The program had very high customer satisfaction; 94% of respondents to the We Energies customer survey said that the program met or exceeded their expectations. Additionally, customers were satisfied with the trade allies, the weatherization work they received, and the information provided.

6 REFERENCES

We Energies Office of Regulatory Affairs and Policy, Natural Gas & Electric Energy Efficiency Portfolio: 2014 Semi Annual Report (January – June). Docket No. 6630-GF-136, Public Service Commission of Wisconsin No. 214217, (2014).

The Cadmus Group, Inc. "Focus on Energy Calendar Year 2013 Evaluation Report Volume II," May 15, 2014, https://focusonenergy.com/sites/default/files/FOC_XC_%20CY%2013%20Evaluation%20Report_Volume%20II.pdf.

APPENDIX A. PROGRAM LOGIC MODEL



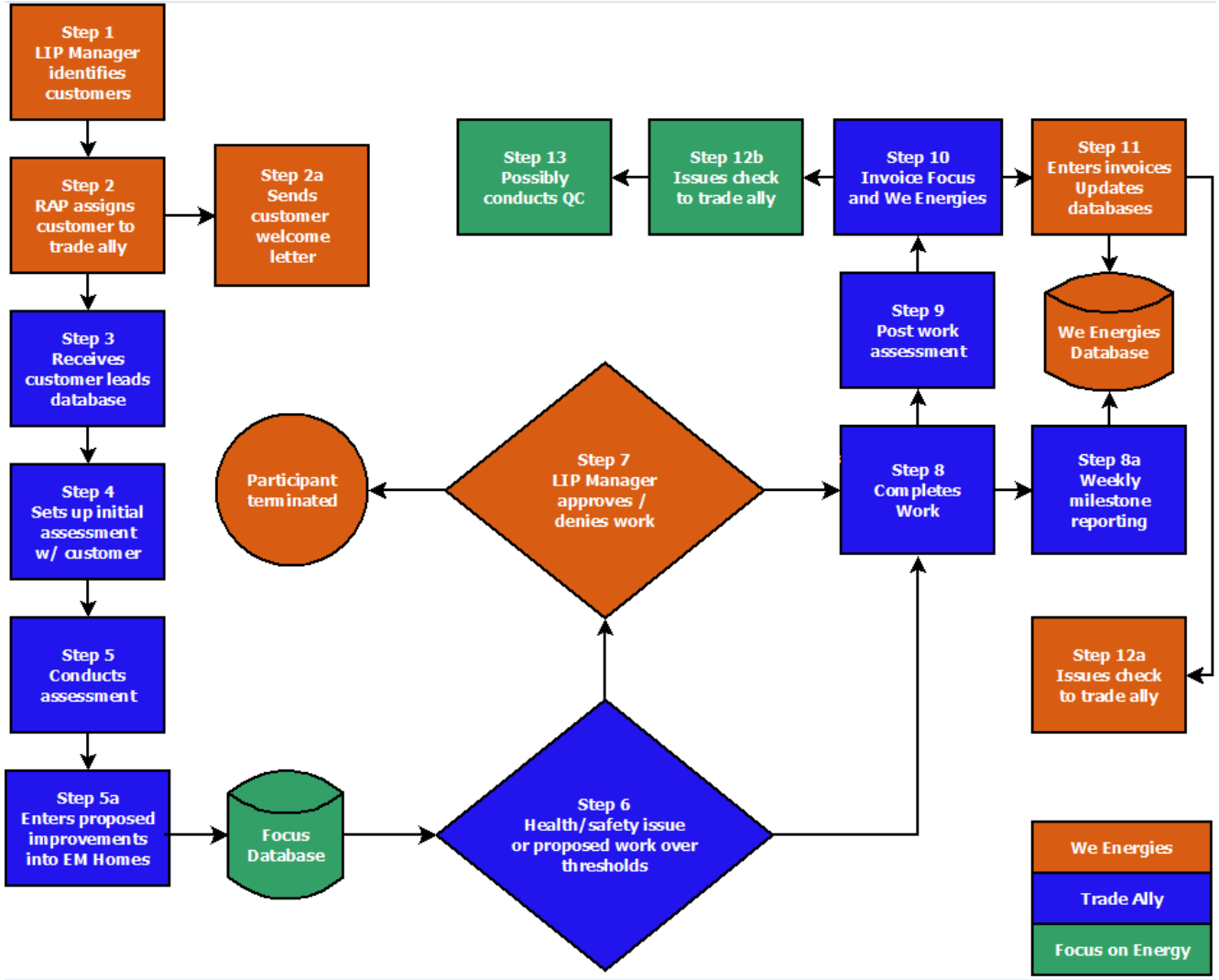
Assumptions

1. Customers are unable to fund the cost of energy efficiency improvements after receiving the Focus on Energy rebate.
2. Trade allies invest the time/energy to participate in the program.
3. Making efficiency improvements in customer houses will increase their ability to pay utility bills.
4. Internal management of program will increase transparency and not significantly increase cost.

Evaluation

1. Is the program meeting its goals?
2. Do program materials promote effective and efficient implementation?
3. Is the program serving the needs of the customers?
4. Is We Energies visible as the program sponsor?

APPENDIX B. PROCESS FLOW DIAGRAM



APPENDIX C. STAKEHOLDER INTERVIEW GUIDE

WE ENERGIES RESIDENTIAL ASSISTANCE PROGRAM STAKEHOLDER INTERVIEW GUIDE

Respondent Types

1. RAP Staff
3. Focus on Energy Staff
4. WisWAP Staff

Note to interviewer: Not all questions will apply to all stakeholders. As an interviewer, you will have to be aware of who you are talking to and ask the appropriate questions.

Respondent Name		Phone #	
Company Name		Date of Interview	

Respondent Basics (ALL)

1. What is your job title?
2. What is your role relevant to the Residential Assistance Program?

Participant Selection (RAP, Other We Staff)

3. How are participants selected into this program?
   - 3.1. Does We Energies select everyone?
   - 3.2. Can customers self-select into the program?
   - 3.3. What, if anything, do you do to make sure the participants qualify for the assisted Focus program?
     - 3.3.1. Do participants have to provide any documentation to demonstrate eligibility?
     - 3.3.2. What about the 80% state median income requirement from Focus?
   - 3.4. Low Income Pilot(LIP)
     - 3.4.1. What share of RAP participants are from the LIP?
     - 3.4.2. Who qualifies for LIP?
     - 3.4.3. What assistance is provided through LIP?
     - 3.4.4. Does LIP partner with any state or federal programs?
     - 3.4.5. About how many customers are in the LIP?
   - 3.5. Early Identification Program (EIP)
     - 3.5.1. What share of RAP participants are from the EIP?
     - 3.5.2. Who qualifies for EIP?
     - 3.5.3. What assistance is provided through EIP?
     - 3.5.4. Does EIP partner with any state or federal programs?
     - 3.5.5. About how many customers are in the EIP?
   - 3.6. In our interview in the spring, it was mentioned that community agencies could recommend that RAP weatherize specific customers' homes. Is that still the case?

3.6.1. How common is this?
3.6.2. Are there additional requirements to prove income qualification?

3.7. Are there other requirements for participation?
3.7.1. Gas or electric/both, etc.?

4. About how many participants are being identified each month?
   4.1. How does that compare to your expectations? High? Low? About right?
   4.2. [If high or low] What, if anything, do you think could be done to bring the number of identifications closer to your expectations?

5. About how many audits are being completed each month?
   5.1. How does that compare to your expectations? High? Low? About right?
   5.2. [If high or low] What, if anything, do you think could be done to bring the number of completes closer to your expectations?

6. From your perspective, how well is the participant selection process working?
   6.1. On a 1 to 5 scale, where 1 is very poorly and 5 is very well, what would you give it?
   6.2. Why do you say that?

We Energies RAP Program Tracking Database (RAP, Other We Staff)

7. Where does the database reside?

8. Who can enter and edit data?
   8.1. Extract data?
   8.2. Read data?

9. What procedures are used for data entry?

10. Do the trade allies each get their own specialized copy of the database?
    10.1. How often does We Energies provide them with a new version?

11. It is our understanding that the trade allies send edited versions of the database back to We Energies as a primary way of communicating program status. Is that correct?
    11.1. How often do they send you updated data?
    11.2. How is that process working, using a 1 to 5 scale where 1 is very poorly and 5 is very well.
    11.3. What, if anything, could be done to improve the process?

12. What data are entered into the database?
    12.1. Is there anywhere where you track specific measures?
    12.2. Is there anywhere where you track savings?
    12.3. How do you compute savings?
    12.4. Can we get a copy of the tracking and computation worksheets?

13. What, if any QA/QC processes are in place relevant to the tracking database?

13.1. Who is responsible for identifying and resolving issues?
13.2. How many person-hours per week would you estimate We Energies spends on data entry and database maintenance and support?

14. What are the systematic and ad hoc reporting capabilities?
    14.1. Who is responsible for generating the reports?
    14.2. Who receives the reports?
    14.3. How are they distributed?
    14.4. How often do you generate reports?
    14.5. How are they used?
    14.6. What decisions do they support?

15. From your perspective as a program stakeholder, how well is the tracking database meeting your needs?
    15.1. On a 1 to 5 scale, where 1 is very poorly and 5 is very well, what would you give it?
    15.2. Why do you say that?
    15.3. Are there any specific changes you'd like to see or that would better fit your needs?

Program Tracking Database (Focus on Energy)

16. What data are entered into the database?
    16.1. Do you enter We Energies funded measures as well?
    16.2. Is there anywhere where you track specific measures?
        16.2.1. Does this include measures funded by Focus AND those funded by We Energies?
    16.3. Is there anywhere where you track savings?
        16.3.1. Does this include measures funded by Focus AND those funded by We Energies?
    16.4. How do you compute savings?
    16.5. Can we get a copy of the tracking and computation worksheets?
        16.5.1. How?
        16.5.2. How long would it take to process the data request?

17. Who enters the data into the database?
    17.1. How do they get that info from the trade allies? Email? Hardcopy?

18. What, if any, QA/QC occurs for data entry?

Trade Allies (ALL)

19. What reports, if any, are the trade allies required to provide to you? (Some trade allies have mentioned photo reports)
    19.1. How do they provide it? Email? Hardcopy?
    19.2. How soon after they complete an audit are the reports due to you?
    19.3. What information are they required to provide on the report?
    19.4. Could we get an example of one of these reports?

20. What reports or documentation, if any, are the trade allies required to provide to RAP participants?

21. What is the procedure for QA/QC of the trade allies?
    21.1. Who is responsible?
    21.2. How often do they engage?

22. How is it going with the current set of Trade Allies?
    22.1. On a 1 to 5 scale, where 1 is very poorly and 5 is very well, what would you give it?
    22.2. Why do you say that?
    22.3. Any issues?
    22.4. If so, have they been resolved?
    22.5. If so, how?

23. Can you describe the invoicing process?
    23.1. Towards the end of last year, We Energies told us they were deploying a new system in 2014. Is that system in place yet?

Program Changes (ALL)

24. Have any program changes occurred yet?
    24.1. What are they?
    24.2. How does We Energies communicate program changes?

25. What are the procedures for identifying and gaining approval for eligible measures?

Reporting (ALL)

26. What coordination activities do you do with Focus on Energy / We Energies?
    26.1. How much of that is handled by We Energies and how much through the trade allies?

27. Is there any communication or coordination with WIS WAP?

28. Have there been any reports to or from Focus on Energy yet?
    28.1. Can we get a copy?
    28.2. How frequently does We Energies/Focus expect these reports will occur?

APPENDIX D. TRADE ALLY INTERVIEW GUIDE
WE ENERGIES RESIDENTIAL ASSISTANCE PROGRAM
STAKEHOLDER INTERVIEW GUIDE

Goals of the Interview

Trade allies are the primary customer touch-point and the main implementers of the program. We want to get a good idea of what they do, how, and when.

Respondent Name		Phone #	
Company Name		Date of Interview	

Program Understanding

1. Could you please describe to me your understanding of the purpose of the RAP program?

2. What interested you to participate in this program as a trade ally?
   2.1. What value are you getting out of the program?

3. What requirements do you have to meet to be able to participate in the program?
   3.1. From We Energies…
      3.1.1. Are there any specific training requirements?
   3.2. From Focus…
      3.2.1. Are there any specific training or retraining requirements?

Implementation Process

4. Will you describe the process of moving a customer through the program? Please start with the point at which you first become aware of a lead.

Initial Audit (pre-audit)

5. What is the process for scheduling the initial audit?

6. What information are you required to collect for AHPwES (Assisted Home Performance with Energy Star) and Enhanced Rewards during the initial audit visit?
   6.1. What, if any, additional information are you required to collect as part of the We Energies program?
   6.2. What, if any, additional, non-required information do you typically collect?

7. How many hours do you typically spend on site?
   7.1. How many hours do you typically spend doing office work before each audit?
   7.2. How many hours do you typically spend doing office work after each audit?

8. What information, if any, do you provide to participants during the initial audit visit?
   8.1. What *written* materials, if any, do you provide participants during the initial audit visit?
   8.2. Can we get a copy or example of those materials?
9. What, if any, QA/QC procedures exist for the pre-audit itself?

9.1. Who is responsible for implementing and overseeing the QA/QC?

10. What, if any, reporting do you provide to Focus at this point?

11. What, if any, reporting do you provide to We Energies at this point?
    11.1. Have you had any jobs yet that required pre-approval from We Energies?
    11.2. [IF YES] What was the process for that?
        11.2.1. From your perspective, how well did that process work?

Doing the Work

12. What work, if any, does your company do directly?

13. What work, if any, do you subcontract out?

14. How does this implementation process typically go?
    14.1. What challenges do you typically encounter?
    14.2. How do you overcome them?

15. What, if anything, could Focus or We Energies provide that would help with this stage of the program?

Post Audit

16. What auditing happens after the work is completed?
    16.1. Who performs those audits?

17. What, if any, challenges do you encounter during post audits?
    17.1. How do you overcome them?
    17.2. What, if anything, could Focus or We Energies provide that would help at this stage?

Invoicing

18. What are the invoicing procedures for Focus?
    18.1. How do you submit?
    18.2. How do you track?
    18.3. How satisfied are you with invoicing process? Please use a 1 to 5 scale where 1 is very unsatisfied and 5 is very satisfied.
        18.3.1. Why do you say that?
    18.4. How satisfied are you with the timeliness of payments? Please use a 1 to 5 scale where 1 is very unsatisfied and 5 is very satisfied.
        18.4.1. Why do you say that?
    18.5. What, if any, improvements would you recommend making to the Focus invoicing process?

19. What are the invoicing procedures for We Energies?
    19.1. How do you submit?
    19.2. How do you track?

19.3. How satisfied are you with invoicing process? Please use a 1 to 5 scale where 1 is very unsatisfied and 5 is very satisfied.
    19.3.1. Why do you say that?
19.4. How satisfied are you with the timeliness of payments? Please use a 1 to 5 scale where 1 is very unsatisfied and 5 is very satisfied.
    19.4.1. Why do you say that?
19.5. What, if any, improvements would you recommend making to the We Energies invoicing process?

20. Do you ever submit invoices to WisWAP?
    20.1. [IF YES] Please describe their invoicing process.
    20.2. [IF YES] How satisfied are you with the WisWAP process? Please use a 1 to 5 scale where 1 is very unsatisfied and 5 is very satisfied.
    20.3. [IF YES] Why do you say that?

Reporting

21. Do you provide any form of a report or final documentation to the **participants** at the end of the project? <Energy report, photo report, safety information etc.>
    21.1. Do you provide a written report?
    21.2. How do you deliver this report? Email? Hardcopy?
    21.3. At what point of the overall process do you typically provide the report?
    21.4. Do any of the programs, RAP, AHPwES, or Enhanced Rewards, require you to provide the customer with specific reports or information to the customer at the end of the project?
    21.5. What, if any, information do you provide above and beyond the specific program requirements?
    21.6. Can we get an example of one of your reports?
    21.7. How well would you say the participant reporting process works? Please use a 1 to 5 scale where 1 means very poorly and 5 means very well.
    21.8. What, if any, improvements would you recommend making to the participant reporting?

22. Are there any requirements for customers at the end of the project required either by the trade ally or one of the programs? (i.e. sign a form indicating the project was completed, participate in a class, etc.)

23. What are the requirements for providing a report to **Focus**?
    23.1. Do you provide a written report?
    23.2. How do you deliver this report? Email? Hardcopy?
    23.3. How soon after the audit is completely do you typically provide the report?
    23.4. What information are you required to provide to Focus?
    23.5. What, if any, information do you provide above and beyond the specific program requirements?
    23.6. How well would you say the Focus reporting process works? Please use a 1 to 5 scale where 1 means very poorly and 5 means very well.
    23.7. What, if any, improvements would you recommend making to the Focus reporting?

24. What are the requirements for providing a report to **We Energies**?
    - 24.1. Do you provide a written report?
    - 24.2. How do you deliver this report? Email? Hardcopy?
    - 24.3. How soon after the audit is completely do you typically provide the report?
    - 24.4. What information are you required to provide to We Energies?
    - 24.5. What, if any, information do you provide above and beyond the specific program requirements?
    - 24.6. How well would you say the We Energies reporting process works? Please use a 1 to 5 scale where 1 means very poorly and 5 means very well.
    - 24.7. What, if any, improvements would you recommend making to the We Energies reporting?

General Issues

25. Are there any points along the process where it is more or less difficult to get the customer through?
    - 25.1. What, if any, strategies have you found to help navigate those rocky parts?

26. How does the integration with the Focus AHPwES program and Enhanced Rewards with RAP work?
    - 26.1. What additional requirements does the RAP program have?
    - 26.2. How much additional effort is required for the RAP program? (Try to get answer in terms of the % of work that AHPwES requires… so are they doing 10%, 20%, etc more effort because of RAP)
    - 26.3. How is that going? Please use a 1 to 5 scale where 1 is very poorly and 5 is very well.
    - 26.4. What, if anything, could make the integration smoother?

27. We had heard in May that early on, the program had some instances where a house had already been served by WisWAP and it ended up being a wasted trip. Have you had any issues with this?

28. What are the communication and scheduling protocols with We Energies?
    - 28.1. Is the communication between We Energies and the TAs adequate?
    - 28.2. How satisfied are you with the communication processes? Please use a 1 to 5 scale where 1 is very unsatisfied and 5 is very satisfied.
    - 28.3. Why do you say that?
    - 28.4. What, if any, specific changes could make the information exchange work better for you?

Satisfaction

29. About how many leads are you getting from We Energies per month through the RAP program?
    - 29.1. How does that compare to your expectations? High? Low? About right?
    - 29.2. Has this changed over the year, or has the number been pretty consistent?

30. About how many audits are you completing per month for the RAP program?
    - 30.1. How does that compare to your expectations? High? Low? About right?
31. How satisfied are you with the implementation processes? Please use a 1 to 5 scale where 1 is very unsatisfied and 5 is very satisfied.
    - 31.1. Why do you say that?

31.2. What changes, if any, to the implementation processes would make the program better for the TAs?

32. How satisfied do you think participants are with the program? Please use a 1 to 5 scale where 1 is very unsatisfied and 5 is very satisfied.
    32.1. Why do you say that?
    32.2. What changes, if any, to the program as a whole would make the program better for participants?

33. As a trade ally, how satisfied are *you* with the program as a whole? Please use a 1 to 5 scale where 1 is very unsatisfied and 5 is very satisfied.
    33.1. Why do you say that?
    33.2. What changes, if any, to the program as a whole would make the program better for the TAs?

34. What changes, if any, do you recommend to increase program efficiency and effectiveness?

Program Changes

35. Have any RAP program changes occurred yet?
    35.1. What are they?
    35.2. How does We Energies communicate program changes?

36. What about the underlying Focus on Energy AHPwES program?
    36.1. Have there been any recent changes there?
    36.2. How are those communicated when they occur?

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