# Reduce Evaluation Risk: Evaluability Assessment
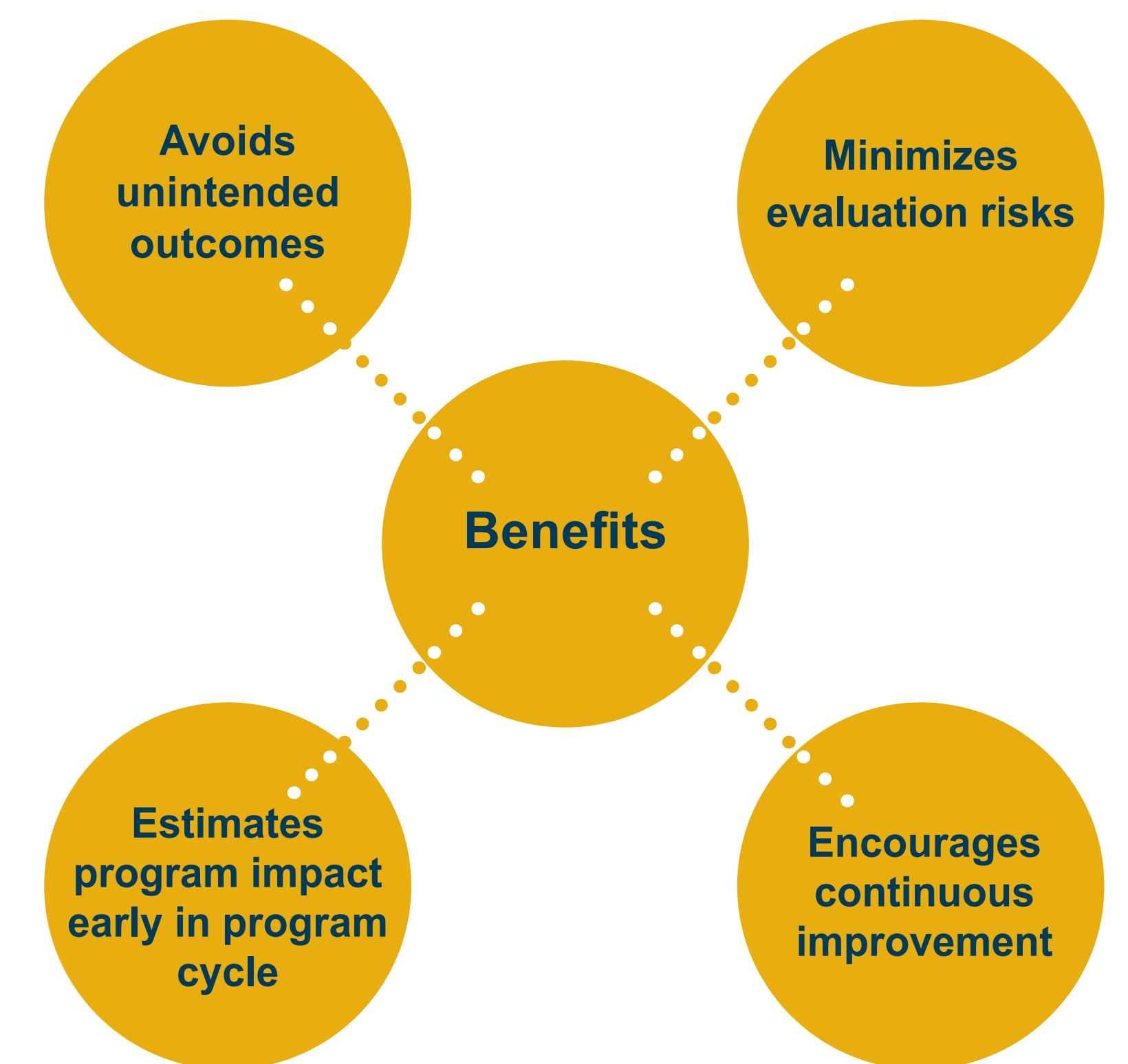
## Purpose

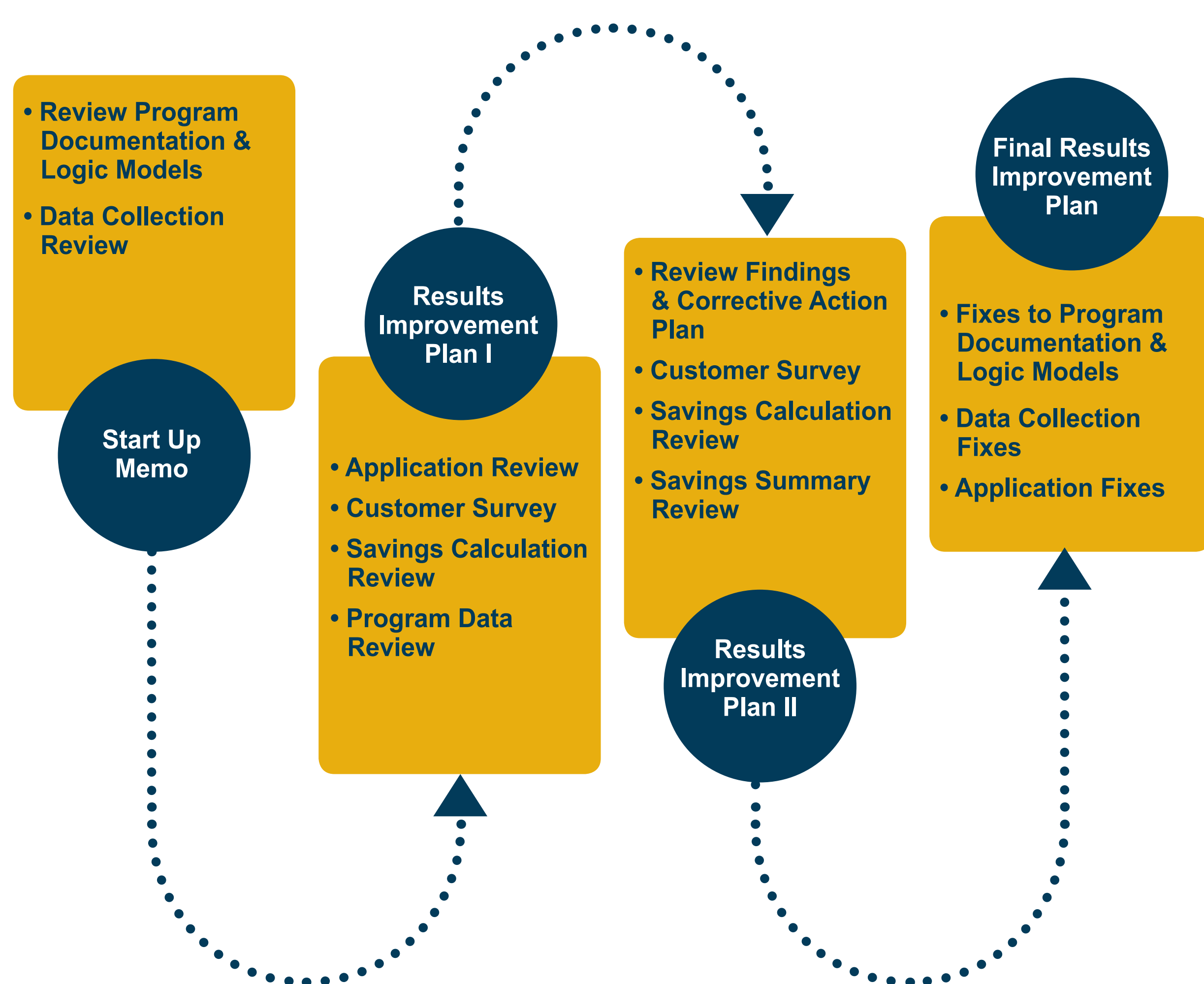To quickly identify program design or implementation shortcomings

## Goals

▶ Work with program staff to create an improvement plan

▶ Provide feedback to strengthen program design and implementation

▶ 'Quick and early' results enable mid-course corrections

## Benefits

▶ Minimizes evaluation risks such as:
- Inappropriate baselines
- Misinterpretation of Technical Reference Manual measures
- Insufficient support for savings claims

▶ Avoids unintended outcomes

▶ Helps encourage continuous improvement

▶ Estimates program impact early on in program cycle

Avoids unintended outcomes

Minimizes evaluation risks

**Benefits**

Estimates program impact early in program cycle

Encourages continuous improvement

## Process

- Review Program Documentation & Logic Models
- Data Collection Review

Start Up Memo

Results Improvement Plan I

- Application Review
- Customer Survey
- Savings Calculation Review
- Program Data Review

- Review Findings & Corrective Action Plan
- Customer Survey
- Savings Calculation Review
- Savings Summary Review

Results Improvement Plan II

Final Results Improvement Plan

- Fixes to Program Documentation & Logic Models
- Data Collection Fixes
- Application Fixes

## Balancing Evaluation and Program Design Goals

**Evaluation Goals:**

- Document program savings and information to guide evaluators
- Document influence of program
- Reduce free ridership
- Achieve a realization rate close to 100%, so that incentive amounts accurately reflect actual savings

**Program Design Goals:**

- Provide flexibility, to encourage greater participation and customer satisfaction
- Streamline program delivery, to reduce time and costs
- Facilitate comprehensive projects with deep energy savings

## Project Example

**Utility:** Consumers Energy

**Program:** Multifamily Solutions Program – Whole Building

**TRC Role:** Evaluability Assessment

**Goal:** To review program documents, from a program evaluation perspective, to ensure the program procedures and data collected contribute to the measurable success of the program. Program documents included:

- Logic model
- Data collection procedures
- Program application
- Program implementation plan
- Operations manual
- Program handbook
- Energy efficiency measure documentation

**Outcomes:**

- Early coordination with the regulatory evaluation team
- Agreement about the program baseline conditions

## Tips for working with your Evaluator

- Engage program evaluation contractor early.
  *(before you think you need them)*

- Conduct evaluation activities quarterly or semi-annually for early feedback, when feasible.

- Involve evaluator in early review of baseline and engineering approaches, especially on large, custom projects.

- Reserve bandwidth for program staff to engage with the evaluator.

- Ask for a presentation of evaluation findings and recommendations prior to the delivery of a written report.

- Implementers should ask to participate in presentations of findings and report review.

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