

Energy Trust of Oregon

Request for Qualifications:

2024-2025 Fast Feedback Survey Administration

RFQ Issued: **November 6, 2023**
Intent to Bid Due: **November 14, 2023**
Questions Due: **November 14, 2023**
Proposals Due: **December 1, 2023**

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About Energy Trust

Energy Trust of Oregon is an independent nonprofit organization dedicated to delivering energy efficiency and renewable power benefits to 2.4 million utility customers. We are funded by and serve Oregon customers of Portland General Electric, Pacific Power, Cascade Natural Gas and Avista, and Oregon and Washington customers of NW Natural. A non-stakeholder board of directors guides our work with input from three advisory councils, and we are overseen by the Oregon Public Utility Commission. Since 2002, our technical services, cash incentives and energy solutions have helped participating customers save \$6.3 billion on their utility bills. The cumulative impact of our leadership has been a contributing factor in keeping our state's energy costs as low as possible, adding renewable power to the grid from small and medium-scale projects, and building a sustainable energy future. More information about Energy Trust's background, funding sources, strategic and action plans, policies and programs are available on our website at www.energytrust.org/about.

Some of Energy Trust's requirements in this RFQ and in any subsequent negotiating and/or contracting phases are driven by governing law, the provisions of our grant agreement with the OPUC (the OPUC Grant Agreement) and our funding agreements with each utility.

Introduction

Energy Trust conducts an ongoing survey of recent program participants, called Fast Feedback, to obtain timely information on customer satisfaction, decision-making, and feedback on specific measures and program areas of interest. Fast Feedback began as a pilot in mid-2009 in the Existing Buildings and Production Efficiency programs. The pilot yielded timely information to programs and participants were appreciative of the opportunity to provide feedback, so it was expanded in early 2010. Between 2010 and 2018, Fast Feedback was administered as a short phone survey, intended to gather feedback from participants within a few months of project completion. Each month, randomly selected participants from most major Energy Trust programs (except the new construction programs and renewable projects other than solar) were contacted by phone to complete surveys. The methods remained relatively consistent, with minor changes to questions and groups surveyed over time.

In 2018, Energy Trust tested several modifications to Fast Feedback and analyzed their impacts on response rates, cost per complete, and survey responses. The principal change that we studied was incorporating a web survey component with several different recruiting conditions. In addition, Energy Trust added questions about participant demographics to the residential survey and transferred sample preparation responsibilities to the survey vendor. A residential web survey with phone follow-up was fully adopted in 2019 and questions about firmographics (non-residential survey) were added. A web survey option was added to the non-residential survey in 2021. In 2022, residential solar customers were removed from the Fast Feedback survey and are now contacted by the program using an internal survey to gauge satisfaction and other

metrics. Past Fast Feedback reports can be found on Energy Trust's website at: www.energytrust.org/reports. In 2024 and 2025, the residential survey will be a web survey of a random sample of recent participants with email recruitment and phone follow-up, using a completion incentive. The non-residential survey will be a web survey of a random sample of recent participants with email recruitment and phone follow-up, with no incentive. The residential and non-residential versions of the survey are designed to take roughly five minutes to complete. The survey instruments are customized for participants in certain programs, markets, delivery methods, and measures.

The draft 2024 survey instruments are attached to this RFQ in Appendices B and C.

This RFQ will be used to select a vendor to administer the 2024 and 2025 Fast Feedback surveys.

Research Objectives

Results from Fast Feedback help assess participant satisfaction, understand Energy Trust's influence on customer decisions, and gather suggestions for program and process improvements. The overarching goals of the 2024-2025 Fast Feedback surveys are to:

- Get accurate responses to key questions from program participants within three months of project completion;
- Obtain information about satisfaction with Energy Trust's programs, incentives, and services;
- Obtain information about Energy Trust's influence on participant projects;
- Collect feedback about specific residential contractors;
- Obtain information about the demographic and firmographic characteristics of surveyed residential and non-residential program participants;
- Provide an accessible mechanism through which a diverse set of program participants can provide feedback, including non-English speakers;
- Maximize response rates and minimize response bias so that respondents mirror the broader population of program participants;
- Identify specific program issues and refer to customer service and program staff for follow-up; and,
- Minimize the survey burden on respondents.

We have developed 2024 survey quotas based on the expected project volume for each quota group in each quarter, which are evenly divided into monthly quotas for survey fielding. In 2024 and 2025, we will attempt to conduct enough surveys to achieve 10% relative precision at 90% confidence (90/10 precision) for program-level satisfaction and influence results on a quarterly basis. At the quota group level, the survey quotas will achieve roughly 90/10 precision on an annual basis. The quarterly quotas to achieve this level of precision are presented in Table 1 through Table 3. Satisfaction and influence results and verbatim survey responses will be provided to program staff and to the Oregon Public Utility Commission on a quarterly basis. Full survey results will be summarized in

a mid-year report, which is distributed internally, and in an annual report, which is released publicly.

Tasks

Energy Trust envisions that the selected vendor will conduct the Fast Feedback survey following the tasks outlined below.

Task 1. Project Initiation and Work Plan

The selected vendor will meet with Energy Trust staff via web meeting to review the scope and goals of the project and discuss the details of survey administration, including data transfer and management procedures, quota groups and quotas, sampling, recruiting, incentives, survey programming, Spanish translation and foreign language identification, reporting requirements, and schedule of tasks and deliverables. After the initiation meeting, the selected vendor will send out notes summarizing the discussion and documenting any decisions. Based on the discussion at the meeting, the selected vendor will develop a detailed work plan, including a project schedule, and provide it to Energy Trust for review and approval.

Deliverables:

- Participate in project initiation meeting
- Project initiation meeting notes
- Detailed work plan

Task 2. Review and Program Survey Instruments

There will be two separate survey instruments and surveys: one for residential participants (single-family homes) and one for non-residential (industrial, commercial, and multifamily) participants. Within each of these surveys, there are slightly different questions for particular customers (based on program, quota group, or other project information). These customer groups don't necessarily align with the quota groups shown in Tables 1 through 3, below. The selected vendor will review updated versions of the residential and non-residential survey instruments, particularly the wording of questions and answer choices, and suggest improvements, based on best practices through a culturally responsive lens, and their experience with surveys. The draft 2024 survey instruments can be found in Appendices B and C of this RFQ.

Both the non-residential and residential survey instruments have two versions: one that is adapted for phone and one that is adapted for a web-based survey. The selected vendor will ensure that each version of the survey is optimized for its mode. They will also assess the comparability of questions across the two survey modes and adjust wording, as necessary. As noted above, multifamily participants are included in the non-residential survey. Although many of the program's customers are businesses, such as property management firms and building owners, some are residents. We have attempted to deal with this nuance through the survey logic, but it is an issue that the selected vendor may encounter.

The selected vendor will develop short email recruitment messages for the residential and non-residential web survey, based on the survey introduction text, to invite participants to respond. The non-residential invitation will also include language indicating that businesses who would like to complete the survey via phone may opt in to that method as well as a description of how to do so. The residential and non-residential phone survey instruments contain template phone scripts that may be modified or kept as-is. The selected vendor will provide copies of the final programmed survey instruments and email recruitment message to Energy Trust for review and approval.

The selected vendor will program the final survey instruments into their preferred survey application to support both web and computer-aided telephone surveys. They must fully test the instruments and their programming and skip logic before initiating the survey, to ensure that the surveys are properly administered. Task 4 provides more details on required testing.

No more than twice per year, Energy Trust staff may request changes to the survey instruments with sufficient notice to maintain the survey schedule. Additionally, Energy Trust may make changes to quotas or quota groups prior to the 2025 survey. Changes will not substantially affect the length or complexity of the surveys. The selected vendor will make any needed changes to the survey instruments in both English and Spanish and implement them in their survey application. Changes must be fully tested before resuming surveys. Any time changes are made to the instruments, the selected vendor will provide copies of the most recent versions of the survey instruments to Energy Trust.

Deliverables:

- Programmed residential and non-residential survey instruments
- Email recruitment message for residential survey

Task 3. Translate Survey Instruments into Spanish and Program

The selected vendor will translate the residential and non-residential survey instruments into Spanish and fully test the translation of the instruments to ensure good readability, that the survey questions are intelligible in Spanish, and that their original meaning is retained. The email recruitment message will also be translated to Spanish, to be included in the residential survey invitation emails. The Spanish language instruments will be programmed into the selected vendor's survey application and must be fully tested before initiating the survey, to ensure that the programming and skip logic are correct and that the surveys are properly administered. Task 4 provides more details on required testing.

The web survey introductions must provide an obvious option to easily switch to Spanish, if desired. In addition, each page of the web survey should allow the respondent to easily switch to Spanish. The selected vendor will provide copies of the final programmed Spanish survey instruments to Energy Trust for review. When survey results are analyzed, the selected vendor will be responsible for translating the

results from Spanish to English and combining the Spanish and English survey results (see Tasks 6 and 7).

In past years, Energy Trust has received very few Spanish responses to Fast Feedback. For budgeting and planning purposes, respondents should assume that they will receive five residential and five non-residential survey responses in Spanish for each survey year.

Deliverables:

- Spanish versions of residential and non-residential survey instruments
- Spanish version of email recruitment message for residential survey
- Programmed Spanish residential and non-residential survey instruments

Task 4. Survey Testing

The selected vendor will review and conduct technical testing of each version of the programmed Fast Feedback survey instrument (English and Spanish, residential and non-residential, and phone and web versions), to ensure wording and answer choices are correct, and that the survey logic makes sense and works as intended. The web survey must function properly with all mobile and tablet devices, as well as with all common web browsers for desktop and laptop computers. The web survey should be tested in each environment to ensure compatibility. The selected vendor will provide Energy Trust staff with access to test the web survey. In addition, the selected vendor will arrange for Energy Trust staff to participate in monitoring calls for a mix of residential and non-residential phone surveys, if desired.

Prior to beginning the first month of surveys in 2024, the selected vendor will pre-test each version of the survey with a small sample of 30-40 respondents covering both residential and non-residential participants and a variety of quota groups and project types. The English version of the survey must be pre-tested and the Spanish version must be available, though it may not be used by randomly selected pre-test participants. The pre-test may be conducted with 2024 participants that were not sampled, 2023 participants who were not previously surveyed, or volunteers. The selected vendor will analyze the pre-test results to identify any potential anomalies in the surveys. If significant methodological or result anomalies are present in the pre-test results, then they will not be counted towards the quarterly quotas or combined with 2024 survey response data. If no issues are present, then pre-test responses may be incorporated into the Q1 quotas and 2024 survey response data.

The goal of these testing and monitoring activities is to identify opportunities to improve the survey questions and wording, identify any issues with the survey programming or skip logic, and provide feedback to the phone interview staff. The selected vendor will make any changes to the survey instruments, programming, or fielding, that are identified and deemed necessary by Energy Trust. Once testing is complete and the programmed instruments have been revised and updated, the selected vendor will summarize the testing findings, describe any changes made, and confirm that the surveys are ready to be fielded in a short memo to Energy Trust. In

addition, final versions of the instruments will be provided to Energy Trust if any changes are made.

Deliverables:

- Review and technical testing of all versions of survey
- Pre-test of all versions of survey with non-sampled participants or volunteers
- Updates to programmed surveys to resolve issues identified during testing
- Short memo summarizing testing and confirming survey ready to field

Task 5. Conduct Sampling and Create Recruitment Lists

Each month, beginning in March 2024 and going through January 2026, Energy Trust staff will provide the selected vendor with a dataset of recent, residential and non-residential participants that are eligible for the survey. The dataset will include Energy Trust identifiers, along with contact information, quota groups, and other project information needed to carry out the survey. The selected vendor will clean the participant data prior to creating the survey recruitment lists. This includes but is not limited to summarizing key project information, **removing duplicates**, identifying incomplete records, identifying the best contact and contact information, and removing ineligible projects and contacts. The data cleaning logic may need to be updated periodically to adjust to changes to Energy Trust data systems over time.

In addition, the selected vendor will aggregate participant data such that customer contacts that participated in more than one program or project are assigned to take only one survey and asked about only one project. For residential participants, if a customer completed more than one type of measure within a project, only one measure will be selected to be asked about in the survey. In these cases, the contractor will randomly select a measure using a weighted approach that ensures measures with quota groups that are a larger percentage of the population are selected more frequently than measures with smaller quota groups as a percentage of their population. For non-residential participants, projects often have multiple measure types, so respondents will simply be asked non-specific questions about the improvements they made. If a non-residential project spans several sites, a single address must be selected for the survey. For both the residential and non-residential surveys, there are many cases where a participant may be assigned to more than one quota group. Overlapping quota groups are noted in Tables 1 through 4 below. In these cases, completing a survey with one participant will count towards two (or more) survey quotas.

Only a subset of participants are included in the Fast Feedback sample frame. Sample populations provided to the selected vendor will already have filtered out non-qualifying customers. A summary of the current exclusion criteria is below:

- For the residential survey, customers that purchase a new home, new manufactured home, midstream or retail buy-down measure, or receive a free

service, such as direct install or an energy saver kit, are excluded from Fast Feedback surveys.

- For the non-residential survey, New Buildings program participants, special promotions, pilot projects, midstream or buy-down measures, green motor rewind service, building operator training, strategic energy management projects, and technical studies are excluded.
- In addition, services and incentives that don't result in energy savings are excluded from both surveys.

After the monthly participant data have been prepared, the selected vendor will randomly sample eligible participants from each quota group and create recruitment lists for both the residential and non-residential surveys. Energy Trust has developed quarterly quotas for the surveys, shown in Tables 1 through 3 below, based on the expected quarterly project volume in each quota group. The selected vendor will use the quarterly quotas to set monthly survey completion targets. These quotas ensure that enough surveys are completed to achieve 90/10 precision for each quota group on an annual basis and each program on a quarterly basis. The selected vendor will sample enough participants from each quota group to ensure that the monthly targets and quarterly quotas for completed surveys are met, except in cases where the number of eligible participants is limited by a small number of completed projects. As noted above, the selected vendor will ensure that each customer contact is asked questions.

Tables 1 through 3 provide approximate numbers of quarterly projects completed in each quota group, which were used to determine the survey quotas. These estimates are based on the 2023 program year. However, project volumes may vary significantly from one year to the next, quarter to quarter, and month to month. Typically, the highest incentive volume is in the month of December and the lowest is in January. In addition, the number of participants eligible for a survey in a given month will be lower than the number of completed projects due to several factors:

- A project may have no contact identified;
- A project may not be included in one of the survey quota groups;
- A contact may be associated with multiple projects but may only be surveyed regarding one project;
- A contact may have been recently surveyed by Energy Trust (residential participants are not surveyed more than once per year and non-residential participants are not surveyed more than every six months);
- A contact may be on Energy Trust's Do Not Contact list; or
- A contact may have no valid contact information.

Energy Trust may adjust the survey quota groups or quotas periodically during the year to adapt to program changes and account for fluctuating project volumes, which affects the number of participants eligible for Fast Feedback.

As noted in Tables 1 through 3, below, there are several quota groups that partially or entirely overlap with other quota groups. Therefore, completing surveys with one of

these quota groups will also count towards another quota group. However, the selected vendor will need to draw additional sample for the overlapping quota groups to ensure they achieve the target number of completes. This overlap between quota groups is also an important consideration for reporting; participants in one quota group may not be mutually exclusive from other quota groups.

The selected vendor will use the randomized residential and non-residential recruiting lists of recent program participants to recruit for monthly surveys, as outlined in Tasks 6 and 7, below. If survey completion rates are lower than expected, the selected vendor will draw additional sample and continue recruiting until the quota is achieved for each quota group or the number of eligible customer contacts is exhausted. The selected vendor will document their sampling methods and the creation of the survey recruitment lists in the mid-year and annual reports.

Deliverables:

- Monthly residential and non-residential survey recruiting lists
- Sections in mid-year and annual reports documenting sampling methods and creation of survey recruiting lists

Table 1: Residential participant quota groups and quarterly survey quotas for 2024

Program	Quota/Reporting Group	Quarterly Quota	Estimated Quarterly Projects
Residential - Oregon			
	Ceiling Insulation	16	507
	Central Air Conditioner	14	87
	Ducted Heat Pumps	16	495
	Ductless Heat Pumps	16	279
	Gas Fireplaces	15	156
	Gas Furnaces	16	415
	Heat Pump Advanced Controls	15	98
	Other Insulation	16	203
	Smart Thermostats	16	233
	Windows	17	1170
	Duct Sealing*	14	75
	Sub-Total	171	3,716
	<i>Moderate Income†</i>	16	445
	<i>Rental Properties†</i>	16	187
	<i>Manufactured Home Promotions†</i>	8	21
	<i>Instant Incentives †</i>	17	1,213
	<i>No Cost Offers †</i>	10	22
	Oregon Sub-Total	196	3,716

Program	Quota/Reporting Group	Quarterly Quota	Estimated Quarterly Projects
Residential – WA			
	Washington Participants	43	282
TOTAL**		239	3,998

* New measure/program delivery channel, so estimated project volumes are uncertain.

** The number of distinct projects in the Total rows may be less than sum of projects in each quota group, due to overlap between groups.

† Participants in these program delivery-based quota groups are also included in the other, measure-based quota groups and the quotas will likely be achieved without any additional sampling. However, if the minimum quotas are not achieved through filling the measure-based quotas, then additional sample will be drawn to meet these program delivery-based quotas (for 2024, we assumed 5 additional participants per quarter to fill each of these quota groups).

Table 2: Commercial participant quota groups and quarterly survey quotas for 2024

Program	Quota/Reporting Group*	Quarter 1 Quota	Quarter 2 Quota	Quarter 3 Quota	Quarter 4 Quota	Estimated Annual Projects
Existing Buildings - Oregon						
	Assembly/Religious	5	10	9	15	92
	Education	6	7	5	28	138
	Healthcare	6	5	7	16	67
	Multifamily	12	17	14	22	1,116
	Office	9	9	9	23	182
	Other Commercial	8	14	9	23	262
	Restaurant	9	14	11	10	124
	Retail	7	13	11	21	225
	Warehouse	7	9	8	11	73
	Sub-Total	69	98	83	169	2,279
	<i>Direct Install†</i>	7	12	11	31	601
	<i>Lighting†</i>	12	15	10	19	337
	<i>No-Cost Offers***†</i>	0	1	5	6	15
	<i>Small-Medium Business†</i>	15	15	15	15	582
	<i>Small Multifamily†</i>	12	16	12	21	594
	Oregon Total	94	123	138	219	2,279
Existing Buildings - WA						
	Washington Total	2	4	1	8	17
Commercial Solar						

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Program	Quota/Reporting Group*	Quarter 1 Quota	Quarter 2 Quota	Quarter 3 Quota	Quarter 4 Quota	Estimated Annual Projects
	Commercial Solar PV	7	16	12	15	182
TOTAL**		103	143	145	242	2,478

- * The Existing Buildings Oregon quota groups are based on building types. Because only one site is selected for each project, there is no overlap between the building type quota groups.
- ** The number of distinct projects in the Total rows may be less than sum of projects in each quota group, due to overlap between groups.
- *** The number of projects in this cross-cutting quota group is expected to increase in 2024 and 2025.
- † Participants in these program delivery-based quota groups are also included in the building type quota groups and the quotas will likely be achieved without any additional sampling. However, if the minimum quotas are not achieved through filling the building type quotas, then additional sample will be drawn to meet these program delivery-based quotas (for 2024, we assumed 5 additional participants per quarter to fill each of these quota groups).

Table 3: Industry and agriculture participant quota groups and quarterly survey quotas for 2024

Program	Quota/Reporting Group*	Quarter 1 Quota	Quarter 2 Quota	Quarter 3 Quota	Quarter 4 Quota	Estimated Annual Projects
Production Efficiency						
	Agriculture	2	10	13	14	90
	Compressed air	1	1	3	8	16
	HVAC and controls	2	5	6	13	41
	Grow Lighting	4	7	7	13	58
	Lighting	5	9	7	22	120
	Other industrial measures	4	5	7	27	117
	Pumps and Motors**	2	5	7	16	51
	Sub-Total	20	42	50	112	493
	<i>Custom projects†</i>	2	4	7	28	106
	<i>Standard projects†</i>	4	10	14	24	209
	<i>Agriculture sector†</i>	3	11	15	24	247
	<i>Food & beverage sector†</i>	3	4	6	15	46
	<i>High tech sector†</i>	1	3	2	14	28
	<i>Metals sector†</i>	2	3	2	6	14
	<i>Wood & paper sector†</i>	2	4	3	15	37
	Total***	41	63	71	132	493

- * The Production Efficiency quota groups are primarily based on measure categories. Because participants often complete more than one type of measure in a project, these quota groups overlap somewhat. For example, an industrial customer that completes a project with an HVAC measure and a Refrigeration measure would be counted in both groups.
- ** Excludes green motor rewind measures.
- *** The number of distinct projects in the Total rows may be less than sum of projects in each quota group, due to overlap between groups.
- † Participants in these program track and sector-based quota groups are also included in the above, measure category-based quota groups and the quotas will likely be achieved without any additional sampling. However, if the minimum quotas are not achieved through filling the measure category-based quotas, then additional sample will be drawn to meet these program track and sector-based quotas (for 2024, we assumed 3 additional participants per quarter to fill each of these quotas).

Task 6. Conduct Monthly Residential Surveys

The selected vendor will conduct monthly Fast Feedback surveys of residential customers participating in Energy Trust programs in 2024 & 2025 within three months of project completion (date project recognized in Energy Trust systems) and within one month of initiating the monthly wave of surveys. The residential survey will be administered first on the web, with phone follow-up to non-respondents. The selected vendor will attempt to recruit every eligible customer randomized to the monthly recruiting list until targets are met, using the contact information provided by Energy Trust, with a goal of maximizing response rates and minimizing bias.

At the beginning of the monthly wave of surveys, a recruitment email will be sent to all residential customers on the recruiting list with a valid email address. In past years, about 85% of eligible participants have had a valid email address. The email will contain the short recruitment message developed in Task 2, in both English and Spanish, along with the survey web link. The selected vendor will administer the web-based survey and collect survey responses through their survey application. The selected vendor will send email reminders to non-respondents approximately one week after initial contact. Customers that do not respond to the survey within approximately one week of the reminder will be queued for phone follow-up. Customers that do not have a valid email address on file will be immediately advanced to the phone survey.

The selected vendor will then make phone calls to the remaining residential customers on the monthly survey recruiting list. The selected vendor will dial each customer on the recruiting list up to five times to obtain a completed interview until the monthly quota is achieved or the monthly recruiting list is exhausted. As noted above, if the monthly target for a quota group is not achieved and the recruiting list has been exhausted, the selected vendor will randomly draw additional sample and continue recruiting. The selected vendor will continue sampling and recruiting until either the monthly target for completed surveys is achieved for each quota group or the number of eligible customer contacts is exhausted. Each quarter, the selected vendor will aim to complete 239 surveys with residential respondents, although this may be adjusted during the year, depending on changes to programs, project volumes, quota groups, or measures.

The selected vendor will enhance their recruitment efforts and motivate customers to complete the surveys by offering a small cash incentive of \$10 upon completion of the

survey. The details of the survey incentives will be described to customers in the recruitment emails and in the introductions to the web and phone surveys. The selected vendor will coordinate and deliver the survey incentives to all customers that respond to the survey. The selected vendor will be responsible for all tax reporting associated with the survey incentives and make it clear to respondents that the completion incentives are coming from the selected vendor, not Energy Trust.

At the start of the web survey, the survey application will present respondents with an option to switch from English to Spanish. In addition, the selected vendor will have a fluent Spanish speaking interviewer available to complete phone surveys with Spanish speaking respondents, when needed. During the monthly phone surveys, when a Spanish speaker is encountered who cannot (or prefers not to) complete the survey in English, the selected vendor will flag them for a Spanish language interview. A Spanish speaking interviewer will either complete the survey in Spanish immediately or call the respondent back and attempt to complete it later. Spanish survey responses will be translated and recorded in English and combined with the English survey responses. To the extent possible, the selected vendor will record incidents where the respondent cannot complete the survey in English or Spanish due to a language barrier and record the respondent's primary language. The selected vendor will report on the frequency of surveys completed in Spanish and other non-English speaking respondents, by primary language spoken, in the monthly survey dispositions and in the mid-year and annual reports, described in Task 8. To the extent possible, the selected vendor will report on the primary language for respondents that did not complete surveys in the mid-year and annual reports.

The selected vendor will track any customer requests not to be contacted and/or surveyed by Energy Trust and include those with the monthly survey disposition. In addition, the selected vendor will track customer requests for follow-up with an Energy Trust representative, and other issues reported by respondents, such as problems with incentive payments or a participant not recalling the project or measure in question. The selected vendor will report these issues to Energy Trust staff, using a standard template provided by Energy Trust, within one week of the survey, as noted in Task 8.

Deliverables:

- Complete monthly web and phone surveys in English and Spanish
- Achieve monthly quotas for completed surveys by quota group
- Translate and record Spanish survey completes and combine with English survey responses
- Record language barrier incidents, including primary language of respondents
- Deliver survey incentives to respondents
- Track customer requests not to be contacted and/or surveyed
- Track customer requests for follow-up with an Energy Trust representative

Task 7. Conduct Monthly Non-Residential Surveys

The selected vendor will conduct monthly Fast Feedback surveys of non-residential customers participating in Energy Trust programs in 2024 and 2025 within three months of project completion (date project recognized in Energy Trust systems) and within one month of initiating the monthly wave of surveys. The non-residential survey will be administered by web survey with an option to be administered by phone. The selected vendor will attempt to recruit every eligible customer randomized to the monthly recruiting list until they meet the targets, using the contact information provided by Energy Trust, with a goal of maximizing response rates and minimizing bias.

For each monthly survey, the selected vendor will send initial outreach and follow up emails with all non-residential customers on the monthly survey recruiting list. The selected vendor will send one follow up email to unresponsive customers approximately one week after the initial email. Customers that do not respond to two email contact attempts will be advanced to the phone survey. The selected vendor will dial each customer on the phone recruiting list up to five times to obtain a completed interview until the monthly quota is achieved or the monthly recruiting list is exhausted. Customers without email information will be automatically advanced to the phone survey. Each sampled customer will be able to indicate via the recruitment emails that they would prefer to complete the survey via phone and will be immediately moved to the phone queue at that time with no further email recruitment. As noted above, if the monthly target for a quota group is not achieved and the recruiting list has been exhausted, the selected vendor will randomly draw additional sample and continue recruiting. The selected vendor will continue sampling and recruiting until either the monthly target for completed surveys is achieved for each quota group or the number of eligible customer contacts is exhausted. Annually, the selected vendor will aim to complete 940 surveys with non-residential respondents, although this may be adjusted during the year, depending on changes to programs, project volumes, quota groups, or measures.

The selected vendor will have a Spanish version of the web survey available and a Spanish speaking interviewer available to complete phone surveys with Spanish speaking respondents, when needed. At the start of the web survey, the survey application will present respondents with an option to switch from English to Spanish. During the monthly phone surveys, when a Spanish speaker is encountered who cannot (or prefers not to) complete the survey in English, the selected vendor will flag them for a Spanish language interview. A Spanish speaking interviewer will either complete the Spanish survey immediately or call the respondent back and attempt to complete it later. Spanish survey responses will be translated and recorded in English and combined with the English survey responses. To the extent possible, the selected vendor will record incidents where the respondent cannot complete the English or Spanish version of the survey due to a language barrier and record the respondent's primary language. The selected vendor will report on the frequency of surveys completed in Spanish and other non-English speaking respondents, by primary

language spoken, in the monthly survey dispositions and in the mid-year and annual reports, described in Task 8.

The selected vendor will track any customer requests not to be contacted and/or surveyed by Energy Trust. In addition, the selected vendor will track customer requests for follow-up with an Energy Trust representative, problems with incentive payments, and other issues, such as a participant not recalling the project or measure in question. The selected vendor will report these issues to Energy Trust staff, using a standard template provided by Energy Trust, within one week of the survey, as noted in Task 8.

Deliverables:

- Complete monthly phone surveys in English and Spanish
- Achieve monthly quotas for completed surveys by quota group
- Translate and record Spanish survey completes and combine with English survey responses
- Record language barrier incidents, including primary language of respondents
- Deliver survey incentives to respondents
- Track customer requests not to be contacted and/or surveyed
- Track customer requests for follow-up with an Energy Trust representative

Task 8. Analysis and Reporting

Requests for follow-up. If a respondent expresses any dissatisfaction with their program experience, they are asked whether they would like a follow-up phone call with an Energy Trust representative. This offer is also made to phone respondents if they sound upset, angry, have a specific complaint, or mention an issue with their incentive check. Occasionally respondents will also request not to be contacted by Energy Trust. The selected vendor must send all requests for follow-up, complaints, do not contact requests, reports of problems with incentives, and other issues reported by respondents, to Energy Trust in a timely manner—less than one week from completion of the survey. Energy Trust staff will provide a spreadsheet template for reporting follow-up requests. Energy Trust customer service staff follow-up as soon as possible after the request is received.

Data. Within one week of the completion of each month’s phone and web surveys, the selected vendor will send Energy Trust staff a list of dispositions for all participant contacts sampled in the monthly recruiting lists. The list of contact dispositions should include name, phone number, email address, survey disposition, survey date (if applicable), survey length (if applicable), language spoken (if other than English), and two Energy Trust identification numbers (project ID and contact ID). Energy Trust will record each respondents’ survey date to ensure they are not called again within twelve (12) months for residential participants or six (6) months for non-residential participants. This information will be used to generate subsequent call lists.

After surveys for a given quarter are completed, the selected vendor will have one month to provide a spreadsheet containing all open-ended question verbatim comments, split by residential and non-residential surveys. At this time, the selected vendor will also provide complete datasets of survey responses from that period (one for residential and one for non-residential) to Energy Trust. The verbatim comments and survey response datasets must include the two primary Energy Trust identification numbers (project ID and contact ID). Project ID and contact ID are used by Energy Trust only to prevent respondents from being contacted too frequently, for analytical purposes, and to track potential problems with contractors, forms, or other administrative matters. Individual survey results and respondent identities are kept confidential and securely stored.

After surveys for a given quarter are completed, the selected vendor will have one month to provide a spreadsheet of tabulated results. These tables should contain overall satisfaction, satisfaction with program representative (for non-residential) and program influence metrics at the program level. These results should be weighted by quota group and survey mode so that results better represent the population of program participants.

Mid-year and annual reports. The selected vendor will produce two reports summarizing Fast Feedback survey results—a mid-year report and an annual report. Energy Trust staff will provide the selected vendor with a list of data, tables, charts, and information that must be included in the mid-year and annual reports. Additional findings and data should be included based on the findings of the selected. In cases where the survey differs from past years, Energy Trust staff will provide direction to the selected vendor on how results should be displayed.

Each report will present the full survey results for the residential and non-residential surveys separately, summarizing the responses to all relevant survey questions. Screening questions and questions used only for the survey logic may be omitted. Overall satisfaction, satisfaction with program representatives and the program influence metrics are key results that will be highlighted in the reports, including charts showing trends over time. Program-level results should be tabulated and summarized for all relevant survey questions. Key results should be further tabulated by quota group. The distinct programs and quota groups that will be reported on in 2024 and 2025 are listed in Tables 1 through 3. Energy Trust may change the programs and quota groups before the start of the 2025 surveys.

The selected vendor will also summarize information for the residential and non-residential surveys, such as number of surveys completed, response rates, number of Spanish language surveys, number of phone and web surveys (for residential only), and respondent demographics and/or firmographics. The selected vendor will also summarize the cleaning and aggregation of the participant data, as well as sampling procedures. Energy Trust staff will provide the selected vendor with any historic survey data or past reports necessary to produce the mid-year and annual reports. All program-level results should be weighted by quota group and survey mode so that results better represent the population of program participants.

Draft reports will be provided to Energy Trust within three weeks of delivery of the survey response data needed to produce the reports. Energy Trust staff will provide comments or suggested edits to the selected vendor, and they will provide a final report back to the Energy Trust within three weeks. Achieving an acceptable final report may take more than one iteration.

Invoicing. The selected vendor will submit monthly invoices by the 10th of each month following the month in which services were performed. The selected vendor will be required to submit monthly status reports presenting (1) a summary of accomplishments during the previous month, (2) current month's activities/plans; (3) variances in schedule and budget, including any necessary explanations; and if applicable, (4) issues or concerns to be addressed with proposed solutions. These reports must accompany the invoice, starting with the first month after surveys begin.

Deliverables:

- Complaints, requests for follow-up, requests to not be contacted, reports of problems with incentives, and other issues reported by respondents, within one week, on an ongoing basis
- Spreadsheets containing survey contact dispositions, within one week after completion of the month's surveys
- Open-ended question verbatim comments, within one month after completion of a quarter's worth of surveying
- Datasets of survey responses, within one month after completion of a quarter's worth of surveying
- Tabulated satisfaction and influence results by program, within one month after completion of a quarter's worth of surveying
- Mid-year report of survey results (draft and final)
- Annual report of survey results (draft and final)
- Monthly invoices and status reports

Schedule

Draft mid-year reports will be delivered to Energy Trust no later than October 30, in 2024 and 2025. Draft annual reports will be delivered to Energy Trust no later than April 30th, 2024 and 2025. All final reports must be delivered within two weeks of receiving feedback from Energy Trust on the draft reports.

Respondents should provide a timeline for the tasks above. It is expected that Energy Trust will enter into a contract with the selected vendor beginning in January 2024 and going through July 2026. The selected vendor will implement Fast Feedback surveys for 2024-2025 Energy Trust participants.

Budget

The selected vendor will be paid on a time-and-materials basis for their services and will be reimbursed for direct costs related to the project, such as phone survey administration and survey incentives. All direct costs must be substantiated with invoices or receipts. The estimated total budget for this project is \$200,000.

*Respondents should provide detailed budgets, breaking out the estimated hours and costs by year task and by staff member **for each year's survey**. Budget proposals should describe the underlying assumptions and may identify drivers of cost that can be modified without compromising the integrity of the survey. Respondents should describe any cost drivers or options and their estimated budget impact.*

Proposal Requirements

Proposal must contain the following information. There is a 17-page limit for proposals, not including résumés, insurance coverage information, conflict of interest disclosure, or representations and signature page.

1. Proposal Information

Team Structure & Qualifications

Proposals should provide an overview of the lead firm and any subcontractors. We encourage respondents to create a team of firms with specialized expertise to fill different project roles where applicable. Proposals should describe the respondent team's qualifications and experience doing similar work and identify specific aspects of survey administration where the respondent team's experience will be particularly relevant or important. **Not to exceed four (4) pages.**

Staffing and subcontracting plan

Describe the project team structure, role of each key team member, subcontractor roles, COBID numbers for COBID certified subcontractors (see *Supplier diversity requirements section below*) and the management plan. **Not to exceed two (2) pages.**

Technical proposal

Provide a high level technical proposal describing respondent's proposed approach to survey administration. Identify any potential challenges or methodological issues that seem likely to come up and propose solutions. **Not to exceed three (3) pages.**

Supplier diversity requirements

Proposals should indicate if respondent's firm or subcontractors are certified with the Certification Office for Business Inclusion and Diversity (COBID) of Oregon as one or more of the following: Minority Business Enterprise, Women Business

Enterprise, Emerging Small Business, or Service-Disabled Veteran Business Enterprise.

It is required that a minimum of 20% of the value of any resulting contract be directed towards COBID certified firms. This should be reflected in the staffing and subcontracting plan and budget proposal. **Please describe how this requirement will be met. Not to exceed one (1) page.**

If respondents need assistance making connections with COBID-certified research, evaluation, data analysis, and engineering firms, or other types of potential partners, Energy Trust can facilitate introductions with firms in our Planning and Evaluation contractor pool. If this is of interest, bidders should reach out to the Energy Trust contact listed below when providing their intent to bid.

Schedule

A proposed schedule should include approximate dates of major activities and deliverables. Assume a project kick-off meeting will be scheduled within two weeks of awarding the contract. **Not to exceed two (2) pages.**

Budget

Provide a detailed budget proposal, based on the proposed methods and staffing plan. Should be bid as a time-and-materials, “not-to-exceed” budget cap type contract. Proposals should describe the underlying budget assumptions and any drivers of cost that can be modified without compromising the integrity of the survey.

It is anticipated that the budget for the scope described in this RFQ will be approximately \$200,000; however, Energy Trust reserves the right to revise its budget assumptions at any time. We ask that bidders propose as competitive a budget for the project as they can, while being realistic about the scope that they can complete within that budget. If the proposed budget will exceed the \$200,000 threshold listed here, we will consider it, but ask that bidders provide a rationale for why it is necessary.

Proposals should summarize the budget in a table, breaking out the estimated hours and costs by task, by staff member, and by year of survey administration. Please use the budget template provided below. Staff and subcontractors listed in

the budget should be identified by name, with billing rates for each. **Not to exceed two (2) pages.**

Budget template:

Staff Name	Firm	Hourly Rate	Hours Per Task			Total Hours	Total Cost
			Task 1	Task 2	Task...		
Staff Member 1							
Staff Member 2							
Staff Member...							
Subcontractor 1							
Subcontractor...							
Total Hours Per Task							
Direct Costs							
Total Cost Per Task							

Diversity, equity, and inclusion (DEI) & cultural competence experience

Proposals should describe respondent’s recent activities, policies, and investments aimed at integrating DEI into their business operations. Energy Trust seeks to contract with organizations that share its commitment to building a diverse, equitable, and inclusive workplace and business environment, and that apply a cultural competence lens to their evaluation work. Respondents must provide responses to each of the DEI and cultural competence related questions in **Appendix D. Not to exceed two (2) pages.**

Data security and confidentiality

Proposals should provide any data security certifications (e.g., ISO-27001 or SOC 2) that are held and **maintained by the respondent and any subcontractors engaged in the project.** Energy Trust recognizes that these certifications can present significant barriers for some firms. If your organization or subcontractor does not hold any relevant data security certifications, please provide a brief description of the **systems, policies, and procedures** used to ensure that Energy Trust provided data and data collected throughout the evaluation are kept secure and confidential during fielding, data transfers, storage, and analysis. **Not to exceed one (1) page.**

2. Work Product Example

Proposals should include **one past report** that showcases the respondent team’s work on a similar project, as well as their data presentation and reporting capabilities. If needed, the names of people and organizations may be redacted from the report to allow sharing it. The work product example should be included as an appendix to the proposal. **No page limit, but please keep materials to a minimum.**

3. Resumés

Proposals should include resumés of all key team members, from the lead firm and any subcontractors who will be performing work. These should be included in an appendix to the proposal. **No page limit.**

4. Insurance Coverage Information

Energy Trust requires its contractors to maintain, at a minimum, workers compensation insurance, adequate commercial general liability insurance coverage, and automobile liability insurance. Cyber liability coverage may also be required. Provide a description of the insurance coverage provided by respondent for performing the impact evaluation work, including:

- Whether such coverage is on a “comprehensive” or “commercial” form
- Whether such coverage is on a “claims made” or “occurrence” basis
- All endorsements excluding coverage of any nature, if any
- All limits, including aggregate limits and the current remaining coverage amounts under those limits
- Effective date

This information should be provided in an appendix to the proposal. **No page limit.**

5. Conflict of Interest Disclosure

Respondent must disclose any direct or indirect, actual or potential conflicts of interest respondent or its subcontractors may have with Energy Trust in its proposal. A “direct or indirect conflict” is defined as any situation in which an individual or a member of their family or close business or personal acquaintance, is employed by Energy Trust or the OPUC, or may be reasonably construed to have a direct or indirect personal or financial interest in any business affairs of Energy Trust, whether because of a proposed contract or transaction to which Energy Trust may be a party or may be interested or is under consideration, or whether such conflict is purely conceptual, because of similarity of business interests or affairs.

Respondent’s disclosure must specifically address any existing contracts between Energy Trust and the respondent, its staff, or any of its proposed subcontractors. If a potential conflict of interest is identified by the respondent, then the respondent should propose strategies to mitigate the conflict. If no conflict is identified by respondent, the respondent will explicitly provide such a statement in their RFQ response. The determination of whether a conflict of interest exists is left to the sole discretion of Energy Trust. This information should be provided in an appendix to the proposal. **No page limit.**

6. Representations and Signatures Page

Respondent’s proposal must contain the signature of a duly authorized officer or agent of the respondent company submitting the proposal. Respondent’s duly authorized officer or agent shall sign **Appendix A** certifying to the representations

stated on **Appendix A**. The signed page should be provided as an appendix to the proposal.

Proposal Selection Criteria

Proposals will be judged on the criteria listed below. As noted above, failure to meet the proposal requirements may result in the rejection of a proposal without scoring.

- Technical proposal
- Qualifications of proposed team and staffing plan, including subcontractors (if applicable)
- Proposed budget
- Supplier Diversity Program compliance
- Diversity, equity, and inclusion responses
- Data security and confidentiality
- Work product example

Schedule & Administration of Proposal Selection Process

RFQ Schedule

- **November 6, 2023** RFQ issued
- **November 14, 2023** Intent to bid due
- **November 14, 2023** Questions/request for additional information due
- **November 20, 2023** Response to questions sent no later than
- **December 1, 2023** **Proposals due**

Requests for Additional Information and Proposal Submission

Any questions and/or requests for clarification regarding this RFQ, as well as stating intent to bid on the project, must be submitted via email to the contact named below by **November 14, 2023**. Responses to questions and requests for additional information will be posted on Energy Trust's website no later than **November 20, 2023**. Energy Trust cannot accommodate individual phone, mail, or fax inquiries about the RFQ. All questions must be submitted via email.

Stating intent to bid does not obligate a respondent to submit a proposal. Only electronically submitted proposals (in PDF form) will be accepted; faxed or print proposals will not. A signed letter of transmittal (cover letter) is required and should be scanned and submitted along with the proposal. All proposals must be received by 5pm Pacific Time on **December 1, 2023**. Energy Trust will not be obligated to consider information received outside this time interval for the purposes of this RFQ. Please submit proposal to:

Cody Kleinsmith
Project Manager – Evaluation
Energy Trust of Oregon
Email: cody.kleinsmith@energytrust.org

Revisions to RFQ

If it becomes necessary to revise any part of this RFQ, an addendum will be issued by Energy Trust and will be posted on the website. Respondents should contact Energy Trust if they find any inconsistencies or ambiguities to the RFQ. Clarification given by Energy Trust may become an addendum to the RFQ.

Withdrawal and Modification of Proposals

Respondents may withdraw their proposal and submit a revised proposal prior to the response deadline. After the response deadline, Respondent initiated changes will not be accepted. Respondents may withdraw their proposal from consideration at any time.

Proposal Evaluation and Notification for Negotiations

Energy Trust will review the proposals as received and will initiate negotiations with the leading respondent.

Validity and Deadlines

Proposals should specify the date through which the proposal is valid.

RFQ Governing Provisions

All submitted proposals are subject to the following additional provisions.

Right to Accept or Reject Proposals, Multiple Awards

Energy Trust reserves the right to make multiple awards, reject any and all proposals and to waive any nonconformity in proposals received, to accept or reject any or all of the items in the proposal, and award the contract in whole or in part as it is deemed in Energy Trust's best interest. Energy Trust may also choose to negotiate any of the details of proposals prior to contracting.

Confidentiality

Respondents shall clearly identify only those portions of their proposals that they do not want revealed to third parties and label such portions as "Confidential Information". Except as required under law or for regulatory purposes Energy Trust will maintain confidentiality of such information. Energy Trust will not accept proposals or other documents that are marked to indicate the entire document is the confidential or proprietary information of the sender or that restricted handling is required. Normal business practices will be observed in handling proposal materials.

Ownership and Return of Proposals

All materials submitted in response to this RFQ shall become the property of Energy Trust and shall not be returned to the respondent.

No Verbal Addendums

No verbal agreement or conversation made or had at any time with any officer, agent, or employee of Energy Trust, nor any oral representation by such party shall add to, detract from, affect or modify the terms of the RFQ, unless specifically included in a written addendum issued by Energy Trust.

Proposal Costs

Each proposal prepared in response to this RFQ will be prepared at the sole cost and expense of the respondent and with the express understanding that there will be no claims whatsoever for reimbursement from Energy Trust.

Waiver of Claims

Respondent waives any right it may have to bring any claim, whether in damages or equity, against Energy Trust or its officers, directors, employees, or agents, with respect to any matter arising out of any process associated with this RFQ.

Energy Trust Rights Reserved

Energy Trust reserves the right, in its sole discretion, to reject any or all proposals in whole or in part, to waive any minor irregularities or informalities in a proposal, and to enter into any agreement deemed to be in their best interests. In addition to any other enumerated reserved rights and/or options as stated in this RFQ, Energy Trust may in its sole discretion do any one or more of the following:

- Determine which proposals are eligible for consideration in response to this RFQ.
- Disqualify proposals that do not meet the requirements of this RFQ, in the sole determination of Energy Trust.
- Negotiate with any Respondent to amend any proposal.
- Select and negotiate and/or enter into agreements with Respondents who, in Energy Trust's sole judgment, are most responsive to the RFQ and whose proposals best satisfy the interests of Energy Trust, in its sole discretion, and not necessarily on the basis of price alone or any other single factor.
- Issue additional subsequent solicitations for proposals, including withdrawing this RFQ at any time and/or issuing a new RFQ that would supersede and replace this one.
- Vary any timetable or schedule, add or change any provisions discussed herein.
- Conduct any briefing session or further RFQ process on any terms and conditions.
- Suspend or modify the RFQ process at any time.
- Enter into relationships with more than one Respondent.

Resulting Contract

The selected respondent will be required to execute a written contract, including a detailed statement of work, with Energy Trust to perform the evaluation work. No award will be considered a commitment, and no obligations or legal relations shall exist between

Energy Trust and the selected respondent until a final and binding contract has been executed by and between Energy Trust and the contractor. Time is of the essence with regard to this program, and prolonged contract negotiations will not be undertaken. In general, Energy Trust strongly prefers contracts that are consistent with Energy Trust's standard terms and conditions; negotiations for such contracts can generally be completed quickly. In some cases, a few terms and conditions may need to be substituted or waived, in accordance with contract negotiations. Any party involved in these contract discussions can terminate negotiations at any time and for any reason. If it appears that contract negotiations are not proceeding in a timely manner, Energy Trust may opt to terminate the discussions and select another respondent.

Appendix A: Representations and Signature page

I, the undersigned declare that;

1. I am an authorized agent of the respondent and have authority to submit this proposal on behalf of the respondent.
2. The information provided in this proposal is true and correct to the best of my knowledge.
3. I have read this Request for Proposals in its entirety and agree unconditionally to all of its conditions and requirements.
4. The respondent has not directly or indirectly induced or solicited any other respondent to submit a false or sham proposal.
5. The respondent has not solicited or induced any other person, firm, or corporation to refrain from proposing.
6. The respondent has not sought by collusion to obtain for itself any advantage over any other respondent or Energy Trust.
7. The respondent's proposal is genuine; not made in the interest of, or on behalf of, any undisclosed person, firm, or corporation; and is not submitted in conformity with an agreement of rules of any group, association, organization, or corporation.
8. I understand and accept that the approval or rejection of respondent's request is within the sole discretion of Energy Trust and that there is no legal commitment until all due diligence has been performed and a properly authorized contract has been duly and properly executed.
9. I authorize the representatives of Energy Trust to investigate the business and personal financial credit history of respondent, its affiliates, and all associated partners, principals and management and authorize the release of all said information.
10. I agree that I will report immediately in writing to Energy Trust any changes to the information contained herein at any time while I am under consideration for funding.

The information contained in this proposal and any part thereof, including its exhibits, schedules, and other documents and instruments delivered or to be delivered to Energy Trust is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead Energy Trust as to any material fact.

Date: _____

Authorized Signature: _____

Name and Title: _____

(please print)

Appendix B

2024 Residential Fast Feedback Phone Survey Instrument

READ-INS

MEASURE

Thermostat	1
Heat Pump Advanced Controls	2
Ceiling Insulation	3
Floor Insulation	4
Wall Insulation	5
Windows	6
Heat Pump	7
Ductless Heat Pump	8
Gas Furnace	9
Gas Fireplace	10
Central Air Conditioner	11
Duct Sealing	12

MEASURE2

	IF MEASURE IS...
You purchased and installed your new thermostat	1
You purchased and installed your new gas fireplace	10
The services or work were performed	4-9, 11-12

MEASURE3

	IF...
new <Measure>	Instant Incentive = 1
Participation with Energy Trust	Instant Incentive = 0

ACTION1

	IF MEASURE IS...
purchased your thermostat	1
purchased your gas fireplace	10

had the services or work performed	4-9, 11,12
------------------------------------	------------

ACTION2

	IF MEASURE IS...
purchasing your thermostat	1
purchasing your gas fireplace	10
having services or work performed	4-9, 11,12

Self-Installation of Measure

Yes	1
No	0

Instant Incentive

Yes	1
No	0

WEB INVITATION

SUBJECT LINE: Rate your Energy Trust experience

Dear <CONTACT>,

You recently participated in an Energy Trust program, which provides services and cash incentives for energy efficiency and renewable energy improvements such as the <MEASURE> installed at <SITEADDRESS>. As part of its commitment to continuous improvement, Energy Trust would like to get your feedback about your experience with Energy Trust and the <MEASURE>.

If you are willing to tell us about your experience with Energy Trust and the [measure], the company administering this survey will send you a \$10 gift card as a thank you for your time.

The survey takes less than 5 minutes depending on your answers. Your responses will be treated confidentially.

When prompted, copy and paste your access code to access your survey: [CODE]

Click here to get started.

SECOND WEB INVITATION

SUBJECT LINE: You can still rate your Energy Trust experience

Dear <CONTACT>,

We recently contacted you to ask about your experience with an Energy Trust program that provided services and/or cash incentives for the <MEASURE> installed at <SITEADDRESS>. We have not yet reached our goal for number of responses to this survey – can you be one of the people who put us over the top?

Please tell us about your experience with Energy Trust and the [measure]. The company administering this survey will send you a \$10 gift card as a thank you for your time!

The survey takes less than 5 minutes depending on your answers. Your responses will be treated confidentially.

When prompted, copy and paste your access code to access your survey: [CODE]

Click here to get started.

THIRD WEB INVITATION

SUBJECT LINE: Don't forget to rate your Energy Trust experience

Dear <CONTACT>,

A few days ago, we sent you a request to provide feedback on your experience with an Energy Trust program that provided services and/or cash incentives for the <MEASURE> installed at <SITEADDRESS>. Can you help us reach our goal for number of survey responses by sharing your experience with us?

Please tell us about your experience with Energy Trust and the [measure]. The company administering this survey will send you a \$10 gift card as a thank you for your time!

The survey takes less than 5 minutes depending on your answers. Your responses will be treated confidentially.

When prompted, copy and paste your access code to access your survey: [CODE]

Click here to get started.

WEB INTRODUCTION

Thank you for agreeing to take this survey—we want to get your feedback about your experience with Energy Trust and your <MEASURE>. The survey takes less than 5 minutes, depending on your answers. Your responses will be treated confidentially. After each question, just click the right-arrow button.

Before you begin, please confirm that the information below is correct. If the information

is incorrect, please re-enter the survey URL and input your access code again.

If the information is still incorrect, email <CONTRACTOR CONTACT> for additional guidance.

Name: <FirstName>, <LastName>
Address: <Site Street Address>, <Site City>
Measure installed: <MEASURE>

SCREENING QUESTIONS

S1: Screener 1 – Product Instant Discount

Ask if MEASURE = 1-3 AND Instant Incentive = 1

When you purchased your <MEASURE>, do you recall receiving a discount from Energy Trust on the purchase price?

Yes	1
No	2
Don't know	98

S2: Screener 2 – Contractor Instant Discount

Ask if (MEASURE = 4-11 AND Instant Incentive = 1) OR MEASURE = 12

When you had work or services performed by your contractor, do you recall receiving a discount from Energy Trust on the total cost of the project?

Yes	1
No	2
Don't know	98

MAIN SURVEY

Q1A

Ask if MEASURE = 1

Is the smart thermostat that you recently purchased still installed in your home?

Yes	1
No, I removed it	2
No, I haven't installed it yet	3

Don't know (*Terminate: That's all the questions we have for you. Thank you for your time.*) 98

Q1B

Ask if Q1A = 2

Why is the thermostat no longer installed? Please select the reasons that best apply to you.

Failed or was defective	1
Not compatible with heating or cooling system	2
Internet connection or WiFi problem	3
Made my home uncomfortable	4
Could not successfully install or wire thermostat	5
Could not properly setup or program thermostat	6
Could not successfully operate thermostat	7
Other reason (<i>Please specify:_____</i>)	96
Don't know [<i>Exclusive answer</i>]	98

[Terminate survey. That's all the questions we have for you. Thank you for your time.]

Q2

Did you or anyone in your household visit the Energy Trust website or receive any printed materials before you <ACTION1>?

Yes	1
No	2
Don't know	98

Q3

Did you or anyone in your household talk or e-mail with an Energy Trust representative regarding your <MEASURE>?

Yes	1
No	2
Don't know	98

Q4

Thinking of your <MEASURE>, please rate your satisfaction with each of the following elements on a 5-point scale where 1 is not at all satisfied and 5 is very satisfied.

Elements	Display if MEASURE =	Responses
A: Incentive application process	1-12 AND Instant Incentive = 0	1-5 scale with DK, Not applicable
B: Information and materials from Energy Trust	Q2 = 1	1-5 scale with DK, Not applicable
C: Interaction with Energy Trust representative	Q3 = 1	1-5 scale with DK, Not applicable
D: Performance of your new <MEASURE>	ALL	1-5 scale with DK, Not applicable
E: Comfort of your home after <MEASURE2>	1-12	1-5 scale with DK, Not applicable
F: Time it took to receive your incentive	1-12 AND Instant Incentive = 0	1-5 scale with DK, Not applicable
G: Overall experience with Energy Trust	ALL	1-5 scale with DK, Not applicable

[Only item Q4G will be counted towards Energy Trust’s satisfaction metric.]

Q5

Ask if: Q4A-G < 3

Please describe why you were dissatisfied.

[Open-ended response]

Q6

Ask if: MEASURE = 1-12 AND Self-Install = 0

How influential were the following elements on your decision to <ACTION3>? Please use a 5-point scale where 1 means it did not have any influence on your decision to <ACTION3> and 5 means it had a great influence.

Elements	Display if :	Responses
A: The Energy Trust incentive	Instant Incentive = 0 OR S1 = 1 OR S2 = 1	1-5 scale with DK, Not applicable
B: Information and materials from Energy Trust	Q2 = 1 OR Q3 = 1	1-5 scale with DK, Not applicable

C: The salesperson or retailer	MEASURE = 1, 11	1-5 scale with DK, Not applicable
D: Your contractor	MEASURE = 1-12 AND Self-Install = 0	1-5 scale with DK, Not applicable
F: The energy efficiency rating of your new <MEASURE>	Ask if MEASURE = 7-11	1-5 scale with DK, Not applicable
G: The cooling provided by your new <MEASURE>	MEASURE = 8	1-5 scale with DK, Not applicable

[All influence items except Q6F and Q6G will be counted towards Energy Trust's influence metric.]

Q7

Ask if MEASURE = 2-11 AND Self-Install = 0

How did you find your contractor? Please select all that apply.

Word of mouth	1
Online service (Yelp, Angie's List, Craigslist, HomeAdvisor, etc.)	2
Web search	3
An advertisement for the contractor	4
Energy Trust website / Find a Contractor tool	5
Energy Trust contractor referral service	6
Not Applicable	97
Don't know	98

Q8

Ask if MEASURE = 2-12 AND Self-Install = 0

Thinking of your experience with your contractor, please indicate your satisfaction with the following service elements, using a 5-point scale where 1 is not at all satisfied and 5 is very satisfied.

Elements	Display if:	Responses
A: Quality of the installation work	ALL	1-5 scale with DK, Not applicable
B: Communication with the contractor	ALL	1-5 scale with DK, Not applicable
C: Information provided about Energy Trust incentives	Instant Incentive = 0 OR S1 = 1 OR S2 = 1	1-5 scale with DK, Not applicable
D: Assistance with the incentive application process	MEASURE = 1-11 AND Instant Incentive = 0	1-5 scale with DK, Not applicable

E: Overall experience with the contractor	ALL	1-5 scale with DK, Not applicable
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DEMOGRAPHIC QUESTIONS

We are almost done with the survey, but first, we'd like to ask some questions about you. The information you provide will be used to help ensure that Energy Trust is serving all of its customers.

Q9A

Do you currently occupy the home at <Site Street Address> where the new <MEASURE> was installed?

- Yes 1
- No 2

Q9B

Ask if: Q9A = 1

Do you rent or own the home?

- Rent 1
- Own 2
- Other 96

Q9C

Ask if: Q9A = 2

Are you the landlord or property manager for this home?

- Landlord 1
- Property manager 2
- Other 96

Q10

What year were you born?

[Enter 4 Digit Year] 1900-2010

Q11

Regarding the home where the new <MEASURE> was installed, how many people currently live there full time? The total should include any children that live in the home.

[Drop-down box with options 0-12+]

Q12

Which of the following ranges describes your total 2019 household income before taxes?

Less than \$30,000	1
\$30,000 to under \$50,000	2
\$50,000 to under \$70,000	3
\$70,000 to under \$100,000	4
\$100,000 to under \$200,000	5
\$200,000 or more	6
Don't know	98

Q13

Which of the following racial and ethnic backgrounds best describe you? Please select all that apply.

Asian or Asian Indian	1
Black or African American	
Hispanic, Latino, or Spanish	3
Middle Eastern or North African	4
Native American or Alaska Native	5
Native Hawaiian or other Pacific Islander	6
White or European	7
Some other race, ethnicity, or origin (Please specify: _____)	96
Don't know	98

Q14

Do you have any other feedback about your experience with Energy Trust or suggestions on how to improve their services?

[Open-ended response]

Q15A

Ask if: Q4A-G < 3

You mentioned earlier being less than satisfied with some aspect of your <MEASURE>. Would you like to have a representative from Energy Trust call you to discuss this issue?

Yes 1
No 2

[If Q15A = 1 then complete a Study Action Form and return to Energy Trust within 24 hours]

Q15B

Ask if: Q15A = 1

What information would you like us to share with the representative about this issue?
You won't receive a call back if you don't tell us a little bit about the issue.

[Open-ended response]

Q15C

Ask if: Q15A = 1

What is a good time to have someone call you?

[Open-ended response]

CONCLUSION

That concludes our questions. Thank you very much for your time. If you have any questions about Energy Trust or their services, please call 1-866-368-7878 or visit energytrust.org.

Thank you again for your time and feedback.

Appendix C

2024 Nonresidential Fast Feedback Phone Survey Instrument

READ-INS

PROGRAM

Existing Buildings – Oregon Incentives	1
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Existing Buildings – Multifamily	2
Existing Buildings – Washington	3
Production Efficiency	4
Commercial Solar PV	5

CROSSPROGRAM

	ALL PROGRAMS
Direct Install = 1	1
Direct Install = 0	0

MEASURE1

	IF PROGRAM IS...
participation with Energy Trust	1-5
new solar PV system	6

MEASURE2

	IF PROGRAM IS...
energy efficiency improvements	1-5
solar PV system	6

MEASURE3

	IF PROGRAM IS...
making energy efficiency improvements	1-5
installing a solar system	6

MEASURE4

	IF PROGRAM IS...
make the energy efficiency improvements you did	1-5
install the solar system you did	6

CONFIRMATION

[Do not read] Please visually confirm that the record contains the correct information:

Name: <Contact Name>

Phone Number: <Contact Phone>

Company Name and Address: <Company Name> at <SITE ADDRESS>, <Site City>

Measures Installed: <MEASUR LIST>

[If record is incorrect, please go back to the opening page of the survey.]

PHONE INTRODUCTION1

Use If PROGRAM = 1-3,5 and CROSSPROGRAM = 0

May I speak with <CONTACT>? *[If blank or no longer with company, ask to speak to owner or project lead.]*

Hello, I'm calling on behalf of Energy Trust of Oregon. You recently participated in an Energy Trust program, which provides financial incentives, information, and technical services for energy efficiency and renewable energy improvements. You recently received an incentive from Energy Trust for <MEASURE3> at <SITE ADDRESS>.

Are you the right person to talk to about this project and participating with Energy Trust?

[If Yes, then continue.]

[If No, then ask]: Can you please provide me with the name and phone number of someone I can discuss this project with? Can you transfer me?

I would like to ask you about your experience with Energy Trust and your <MEASURE2>. The survey takes about 5 minutes depending on your answers. Your responses will be treated confidentially. We appreciate your help.

PHONE INTRODUCTION 2

Use If PROGRAM = 1-3,5 and CROSSPROGRAM = 1

May I speak with <CONTACT>? *[If blank or no longer with company, ask to speak to owner or project lead.]*

Hello, I'm calling on behalf of Energy Trust of Oregon. You recently participated in an Energy Trust program, which provides financial incentives, free services, information, and technical services for energy efficiency and renewable energy improvements. You recently received free energy efficiency services from Energy Trust at <SITE ADDRESS>.

Are you the right person to talk to about this project and participating with Energy Trust?

[If Yes, then continue.]

[If No, then ask]: Can you please provide me with the name and phone number of someone I can discuss this project with? Can you transfer me?

I would like to ask you about your experience with Energy Trust and your <MEASURE2>. The survey takes about 5 minutes depending on your answers. Your responses will be treated confidentially. We appreciate your help.

PHONE INTRODUCTION 3

Use If PROGRAM = 4

May I speak with <CONTACT>? *[If blank or no longer with company, ask to speak to owner or project lead.]*

Hello, I'm calling on behalf of Energy Trust of Oregon. You recently participated in an Energy Trust program, which provides financial incentives, information, and technical services for energy efficiency and renewable energy improvements. You received an incentive from Energy Trust for a(n) <SUBTYPE> project at <SITE ADDRESS>.

Are you the right person to talk to about this project and participating with Energy Trust?

[If Yes, then continue.]

[If No, then ask]: Can you please provide me with the name and phone number of someone I can discuss this project with? Can you transfer me?

I would like to ask you about your experience with Energy Trust and your <SUBTYPE> project. The survey takes about 5 minutes depending on your answers. Your responses will be treated confidentially. We appreciate your help.

Use for ALL

[If Needed]: We are not selling anything. This is strictly a survey for research purposes. I work for <CONTRACTOR>, an independent survey research firm that is part of a team that Energy Trust hired to do this research. If you would like to verify this call and get more information, you may call my supervisor at [NUMBER].

As part of its commitment to continuous improvement, Energy Trust is conducting an ongoing evaluation of its programs and services. Your responses will help Energy Trust improve their offerings for customers such as yourself. It is an opportunity to provide feedback to Energy Trust on your experience. This survey will take about five minutes. Energy Trust surveys a small number of customers to get feedback on their services and programs. You were randomly selected to participate in this survey. If you would like to contact Energy Trust of Oregon, please call 1-866-368-7878.

*This project occurred at <SITE ADDRESS>. To help refresh your memory, I'll read a list of the types of energy improvements that were made as part of the project: <MEASURE_LIST>. *[If <CROSSPROGRAM> != 1 then add: You likely received an incentive check from Energy Trust in <MONTH>.]**

SCREENING QUESTIONS

CP1 – Cell Phone Screener 1

Before we begin, have we reached you on a cell phone?

Yes	1
No (<i>Continue Survey</i>)	
Refused [<i>Don't Read</i>] (<i>Thank and Terminate</i>)	99

CP2 – Cell Phone Screener 2

Ask if CP1 = 1

And are you in a safe place to speak, that is, not involved in any activity which needs your full attention, such as driving?

Unable to speak/call me later (<i>Schedule callback</i>)	1
Unable to speak/callback on landline (<i>Schedule callback</i>)	2
Safe to speak (<i>Continue Survey</i>)	3
Refused [<i>Don't Read</i>] (<i>Thank and Terminate</i>)	99

Continue survey if CP1 = 2 OR CP2 = 3

S1: Screener 1 – Multifamily Resident or Owner

Ask if PROGRAM = 2

Our records indicate that this project was completed in a multifamily building. Do you reside in this building, or are you a property manager, landlord, etc?

Resident	1
Property manager / landlord	2
Refused [<i>Don't Read</i>]	99

MAIN SURVEY

Q1

Ask if Program = 2 or CROSSPROGRAM = 1

Did Energy Trust program staff visit your property to assess energy efficiency opportunities OR DO A VIRTUAL ASSESSMENT? [*If needed*]: *This is sometimes referred to as a walk-through survey and is used to identify a building's energy efficiency opportunities. It does not include other technical services. [If Program = 4-5]: Afterwards, you would have received a walk-through survey report with energy efficiency recommendations.*

Yes	1
No	2
Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

Q2

Ask if Program = 1,3-4 and CROSSPROGRAM = 0

Did you receive a technical study, energy analysis, or other technical services funded by Energy Trust? *[If needed]: This may have included an Energy Trust-funded technical study, building energy analysis, or other energy-related technical and **engineering services**. [If Program = 4-5]: This does not include walk-through surveys.*

Yes	1
No	2
Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

Q3

Thinking of your <MEASURE1>, please rate your satisfaction with each of the following elements on a 5-point scale where 1 is not at all satisfied and 5 is very satisfied.

Elements	Display if...	Responses
A: Incentive application process	Program ≠ 4	1-5 scale with DK, Not applicable, and Refused
B: Information and materials from Energy Trust	ALL	1-5 scale with DK, Not applicable, and Refused
C: Site assessment or walk-through survey VIRTUAL OR IN PERSON	Q1 = 1	1-5 scale with DK, Not applicable, and Refused
D: Energy Trust-funded technical services	Q2 = 1	1-5 scale with DK, Not applicable, and Refused
E: Interaction with Energy Trust representative	ALL	1-5 scale with DK, Not applicable, and Refused
F: The scheduling process to receive services	Cross Program = 1	1-5 scale with DK, Not applicable, and Refused
G: Turnaround time to receive your incentive	Program = 1-4 and Cross Program = 0	1-5 scale with DK, Not applicable, and Refused
H: Performance of the <MEASURE2>	ALL	1-5 scale with DK, Not applicable, and Refused
I: The vendor or installation contractor, if applicable	ALL	1-5 scale with DK, Not applicable, and Refused
J: Overall experience with Energy Trust	ALL	1-5 scale with DK, Not applicable, and Refused

[Only items Q3E and Q3J will be counted towards Energy Trust's satisfaction metric.]

Q4Ask if: Q3A-Q3J < 3

Please describe why you were dissatisfied with the above item(s).

[Record verbatim response]

Q5

How influential were each of the following elements on your decision to <MEASURE4>? Please answer using a 5 point scale where 1 means it did not have any influence on your decision to <MEASURE4> and 5 means it had a great influence.

Elements	Display if...	Responses
A: The Energy Trust Incentive	Cross Program = 0	1-5 scale with DK, Not applicable, and Refused
B: Information and materials from Energy Trust	ALL	1-5 scale with DK, Not applicable, and Refused
C: Services provided at no cost or greatly reduced cost	Cross Program = 1	1-5 scale with DK, Not applicable, and Refused
D: The Energy Trust program representative	ALL	1-5 scale with DK, Not applicable, and Refused
E: Site assessment or walk-through survey	Q1 = 1	1-5 scale with DK, Not applicable, and Refused
F: Energy Trust-funded technical services	Q2 = 1	1-5 scale with DK, Not applicable, and Refused
G: The vendor or installation contractor, if applicable	ALL	1-5 scale with DK, Not applicable, and Refused

Q6Ask if Cross Program = 0

In the absence of the Energy Trust incentives and services, would your firm or organization have made funds available to cover the entire cost of the <MEASURE2>?

Yes	1
No	2
Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

FIRMOGRAPHIC QUESTIONS

We are almost done with the survey, but first, we'd like to ask some questions about you [Add if S1 ≠ 1: and your firm or organization]. The information you provide will be used to help Energy Trust better understand its customers and ensure they are serving everyone.

Q7

Ask if S2 = 1

Approximately how many properties does your firm or organization currently own or operate in Oregon?

1-2	1
3-5	2
6-10	3
10-19	4
20-99	5
100+	6
Not applicable	9
Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

Q8A

Ask if Program ≠ 2

Does your firm or organization own or lease the space that it occupies at <SITE_ADDRESS>?

Own	1
Lease	2
Other (Specify and record verbatim)	3
Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

Q8B

Ask if Q8A = 2

Does your firm or organization have the authority to make decisions about maintenance, upgrades and energy improvements to the space that you lease?

Yes, any type of upgrade	1
Yes, but only some types of upgrades	2

No	3
Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

Q9Ask if Program ≠ 2 OR S1 = 2

Approximately how many people does your firm or organization currently employ in Oregon? [*If needed*]: Your best guess is fine. Include yourself, full-time and part-time employees in the total.

1-5	1
6-9	2
10-19	3
20-49	4
50-99	5
100-499	6
500+	7
Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

Q10Ask if Program ≠ 2 OR S1 = 2

Which of the following best describes your position at your firm or organization?

Owner	1
Executive or decision-maker	2
Manager	3
Employee	4
Other (Specify and record verbatim)	5
Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

Q11Ask if Q10 = 1-2 OR S1 = 1

Which of the following racial and ethnic backgrounds best describe you? [Multiple responses permitted]

Asian or Asian Indian	1
-----------------------	---

Black or African American	2
Hispanic, Latino, or Spanish	3
Middle Eastern or North African	4
Native American or Alaska Native	5
Native Hawaiian or other Pacific Islander	6
White or European	7
Some other race, ethnicity, or origin (Specify and record verbatim)	96
Refused [<i>Don't Read</i>]	99

Q12

Ask if Q10 = 1-2 OR S1 = 1

What best describes your gender?

Female	1
Male	2
Non-binary/third gender	3
Refused [<i>Don't Read</i>]	99

Q12A

Ask if Q12 = 1-2

Transgender is an umbrella term that refers to people whose gender identity, expression or behavior is different from those typically associated with their assigned sex at birth. Other identities considered to fall under this umbrella can include non-binary, gender fluid, and genderqueer. Do you identify as transgender?

Yes	1
No	2
Refused [<i>Don't Read</i>]	99

Q13

Ask if Program ≠ 2 OR S1 = 2

Which of the following describe your firm or organization? [Multiple responses permitted]

Minority Owned	1
Women Owned	2
Small Business	3
Service Disabled/Veteran Owned	4

Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

Q13A

Ask if Q13 = 1-5

Does your firm or organization have any state certifications for being a [pipe in responses from above]? [Multiple responses permitted]

Minority Owned	1
Women Owned	2
Small Business	3
Service Disabled/Veteran Owned	4
Don't know [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	

Q14

Do you have any other feedback about your experience with Energy Trust or suggestions on how to improve their services? [*Probe: ANYTHING ELSE?*]

[Record verbatim response]

No / Nothing / Can't think of anything [<i>Don't Read</i>]	98
Refused [<i>Don't Read</i>]	99

Q14A

Ask if Q1A-Q1G or Q3B or Q4B < 3

You mentioned earlier being less than satisfied with some aspect of your <MEASURE1>. Would you like to have a representative from Energy Trust call you to discuss this issue?

Yes	1
No	2

[If Q14A = 1 then complete a Study Action Form and return to Energy Trust within 24 hours]

Q14B

Ask if: Q14A = 1

What information would you like us to share with the representative about this issue? [*If needed*]: You won't receive a call back if you don't tell us a little bit about the issue.

[Record verbatim response]

Q14C

Ask if: Q14A = 1

What is a good time to have someone call you?

[Record verbatim response]

CONCLUSION

That concludes my questions. Thank you very much for your time. If you'd like, I can provide you with a toll-free phone number and website for Energy Trust if you have any questions about them or their services. Would you like that number or website?

[If requested]: The number is 1-866-368-7878. The website is energytrust.ORG.

Thank you again for your time and feedback.

[INTERVIEWER'S NOTE: If the respondent asked for an Energy Trust follow-up, AND asked for or was given the Energy Trust phone number, let the respondent know that Energy Trust will follow-up with the respondent FIRST and allow Energy Trust a few days to reach out to the respondent.]

Appendix D: Diversity, Equity and Inclusion Experience

Diversity, equity, and inclusion experience

1. Provide specific recent examples of activities, policies or investments that demonstrate how respondent promotes diversity, equity, and inclusion within respondent's company in the areas of
 - a. recruitment, hiring, retention and promotion;
 - b. training and professional development;
 - c. industry workforce development and support.

Cultural competence in evaluation

Culture shapes each step of the evaluation process—from the conceptualization of a study and its research questions; to decisions on what data to collect, how to collect it, and how to analyze it; to the interpretation and presentation of results. Culturally competent evaluation requires researchers to recognize their own cultural assumptions about a research project, continually consider cultural and contextual factors in their research design, and implement methodological adjustments to account for diverse research contexts.

2. Provide your plan to apply culturally competent research practices in this project.
3. Provide a specific example of your team's experience applying culturally competent research practices when working with diverse customer groups; how did the research project's goals, methods, or outcomes change?