A Tale of Two Channels:
Assessing the Effectiveness of a Small Business Direct Install Program

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ABSTRACT

This paper describes the results of a process evaluation of National Grid New York's Small Business Direct Install (SBDI) program. The SBDI program is designed to help small- and mid-sized business customers reduce their electric energy consumption and related costs. Small business customers have two main pathways to access program services. In one channel, the small business customer works with a program administrator-approved turnkey Direct Install (DI) vendor who manages the entire audit and installation process. In the other channel, the customer selects a contractor, or trade ally, of their choice to propose and install energy-saving upgrades. While each channel of the SBDI program has its own strengths and challenges, program staff have sought to leverage opportunities to improve administrative efficiency across the entire program. This paper summarizes the key findings from the process evaluation and presents information to help inform the design and delivery of other small commercial direct install programs. These programs, which target the hard-to-reach small business market, play a critical role in providing pathways for customers to adopt deeper energy-saving measures and equipment and become more aware of energy-efficient practices.

Introduction

National Grid New York's SBDI program is designed to help small business owners with an average monthly kW demand of 110 kW or less to improve their buildings' electric energy efficiency. Through the program, eligible customers can receive free energy audits, savings analyses, incentives, direct installation services, and (if they qualify) 0% on-bill financing. Customers participate in one of two ways: using the services of the program-approved turnkey DI vendor for their geographic area who provides all services from audit through installation, or using the services of a contractor of their own choosing to identify, propose, and install energy saving-upgrades. In both channels, National Grid pays for the energy audit. In 2016, NMR Group, Inc., completed a process evaluation of the program (NMR Group, Inc. 2016). This paper summarizes the main findings from the evaluation, focusing on the primary differences between the two participation channels. The results from this evaluation shed light on important factors regarding the design and implementation of small commercial direct install programs.

Background

National Grid has provided funding and oversight for its SBDI program in New York since 2009. Through 2013, customers could participate only through the turnkey DI approach or "channel," in which customers use a program administrator-approved DI vendor to conduct and manage the entire audit and installation process. In 2014, the program administrator introduced the Customer-

Directed Option (CDO), which allows customers to select either a contractor from the CDO trade ally network or an unaffiliated contractor to identify, propose, and install energy saving-upgrades.[1] Currently, under the DI channel, the three DI vendors are assigned to separate geographic areas within the service territory. Under the CDO channel, CDO trade allies may be located anywhere in the service territory. The CDO implementation vendor is responsible for overall management of the CDO channel, which includes submitting all project-related documentation to National Grid, acting as a liaison between National Grid and the CDO trade ally network, and overseeing quality inspections of CDO trade allies' work. The SBDI program manager oversees both channels and provides training and technical support to the three DI vendors and the CDO implementation vendor. In turn, the CDO implementation vendor is responsible for providing training and technical support to the trade ally network. While refrigeration and HVAC equipment are among the measures addressed by the program, to date, the majority of savings have been achieved from lighting and lighting controls. Although recent reductions in the SBDI budget have resulted in lowered incentives and fewer completed projects, the program has managed to maintain relatively strong performance and positive customer satisfaction.

Program Design and Implementation

From a customer's perspective, the overall audit and installation process is essentially the same for the DI and CDO channels. Once a customer agrees to an assessment, a trained auditor from the DI vendor or CDO trade ally conducts the free audit and follows up in person with written recommendations for eligible equipment. The recommendations include a proposal, which outlines qualifying incentives and payment options. If the customer agrees, the DI vendor or CDO trade ally will help customers access program incentives and financing, if they qualify, and will oversee or perform the installation of the energy-efficient equipment. The program has implemented QA/QC procedures to ensure quality inspections in both the DI and CDO channels.

Methodology

NMR completed the process evaluation from May to November of 2016. The evaluation team worked closely with National Grid New York's evaluation SBDI study manager to obtain an understanding of the SBDI program, to identify issues for investigation to inform the overall evaluation, and to design the evaluation. The PA evaluation study manager increased the value of the evaluation by performing various data analytics to help guide the research objectives of the evaluation. The evaluation included a) a review of program data and documents, b) in-depth interviews with nine program stakeholders, including the SBDI program manager, the three DI vendors, the CDO implementation vendor, and a sample of four CDO trade allies who perform audits and install equipment via the CDO channel, and c) a mixed-mode survey of 286 customers who participated in the program. The evaluation focused on a few priority areas and specific objectives, including:

- Assessing the relative effectiveness and efficiency of the DI and CDO delivery approaches from the perspectives of customers, program implementers, and program staff;
- Identifying and understanding challenges with delivery and benefits specific to each approach;
- Assessing customer experiences and satisfaction overall and by delivery approach; and
- Identifying opportunities to collect additional data that could be used to assess program progress on an ongoing basis (in real time) and to support future impact and process evaluations.

[1] If a customer chooses a contractor that is not part of the program's trade ally network, that contractor must be approved by the SBDI program.

The evaluation sought to draw on multiple perspectives from program staff, implementers, and participants to provide feedback on various aspects of the SBDI program. The evaluation also built upon findings from a 2010 evaluation of the SBDI program (Tetra Tech 2010) and best practices and lessons from evaluations of other small commercial direct install programs in New York (Tetra Tech 2010; NMR Group, Inc. 2011; Research Into Action and Tetra Tech 2014; DNV GL 2015; New York State Evaluation Studies Subcommittee 2015).

Program Data and Document Review

With National Grid's SBDI evaluation study manager's assistance, NMR reviewed program data covering 2010 to 2016 to explore patterns of program participation as a whole and by key characteristics. These characteristics included delivery channel, implementer, and business type. Additionally, NMR's review of documents, including the program manual, marketing materials, and previous evaluation reports, helped to identify issues for further investigation and informed the development of the stakeholder interview guides and customer survey.

Stakeholder Interviews

Program manager. NMR interviewed the SBDI program manager to gain a full understanding of the program. The structured interview addressed program goals and objectives; overall program structure, including staffing, resources, and participation channels; marketing and outreach; and perceived program strengths, challenges, and opportunities for improvement.

Program vendors. NMR also interviewed the three DI vendors and the CDO implementation vendor that provides oversight and technical assistance to the CDO trade allies that deliver program services.

CDO trade allies. The CDO trade allies are typically electrical contractors and lighting distributors. NMR sought to interview a sample of CDO trade allies that, together, had completed at least one-half of the 2015 and 2016 projects. Together, the four CDO trade allies interviewed for the evaluation were responsible for two-thirds of CDO projects completed in 2015 and 2016. While these CDO trade allies represent the majority of activity in the program, the evaluation team acknowledges that excluding less active CDO trade allies limits the range of experiences and perspectives to those of the most engaged trade allies. Therefore, the results cannot inform programs seeking information to help increase program activity among less active CDO trade allies.

The in-depth interviews with DI vendors and CDO trade allies covered a range of topics, such as roles and responsibilities, including marketing and outreach, customer enrollment, audit and measure installation processes, and QA/QC practices; program data tracking and reporting; overall satisfaction; perceptions of customer value and satisfaction; and strengths, challenges, and suggestions for improvement.

Customer Survey

For the customer survey, NMR targeted a total of 268 customers who had completed installations between April 2015 and April 2016. This included 67 customers for each DI vendor and 67 for the CDO implementation vendor. To develop the sample for the customer survey, NMR identified 2,169 individual applications from the program data. Small business customers may have more than one application because multiple locations participated in the program. With help from National Grid's evaluation study manager, NMR established 1,413 unique customers for the survey and asked customers with more than one application about their most recently completed project.

The evaluation team notified the entire sample by mail and sent follow-up emails to 720 contacts with email addresses. After allowing customers to respond online for roughly two weeks after sending

notification of the survey, the team contacted non-respondents to complete the survey by telephone.[2] As Table 1 shows, a total of 286 customers completed the survey either online or over the phone. for an overall response rate of 39%, using the American Association for Public Opinion Research (AAPOR) approach for Response Rate 3 (RR3).[3] The survey resulted in a margin of error of ± 5% at the 90% confidence level, assuming a 50/50 break in responses,[4] for the entire sample. By delivery channel, the margin of error at the 90% confidence level was ± 5% among DI vendor customers and ± 9% among CDO implementation vendor.

The customer survey explored a range of topics, including customer satisfaction and experience with the audit and installation processes, perceived value of financing options, motivations and barriers to participation, overall satisfaction with the program, and recommendations for program improvements.

Table 1. Customer survey sample and targets by group

Channel	Number of Applications	Number of Unique Applications	Targeted Completes	Actual Completes	AAPOR Response Rate	Margin of Error*
CDO	495	371	67	71	43%	8.8%
DI	644	441	67	72	35%	8.9%
	531	264	67	70	30%	8.5%
	499	337	67	73	54%	8.6%
DI Total	*1,674*	*1,042*	*201*	*215*	*37%*	*5.0%*
Total	**2,169**	**1,413**	**268**	**286**	**39%**	**4.5%**

*Assuming a 50/50 split in responses.

Results

This section summarizes findings in several areas relevant to the design and implementation of the SBDI program, with a particular focus on key distinctions between the DI and CDO channels. Survey results are unweighted and statistically significant differences between CDO and DI customers are noted.[5] We have not reported differences between individual implementers in this paper, but the evaluation report explores these and other issues in greater depth.

Marketing and Outreach

The DI vendors and CDO trade allies are the primary public faces of the SBDI program, and they play an important role in marketing and outreach for the program. DI customers were significantly more likely than CDO customers to receive a referral to SBDI from a colleague or friend, while CDO customers were significantly more likely to be recruited directly by a CDO trade ally. Analysis of program data reveals that a considerable portion of customer leads are generated by the DI vendors and CDO trade allies.

[2] An analysis of a selection of survey items revealed no consistently significant differences in results between online or phone respondents, so it appears unlikely that the mixed-mode survey introduced bias to individuals' responses to the survey questions.

[3] The AAPOR response rate adjusts for number of eligible sample units by considering important factors such as eligible respondents and total sample contacted.

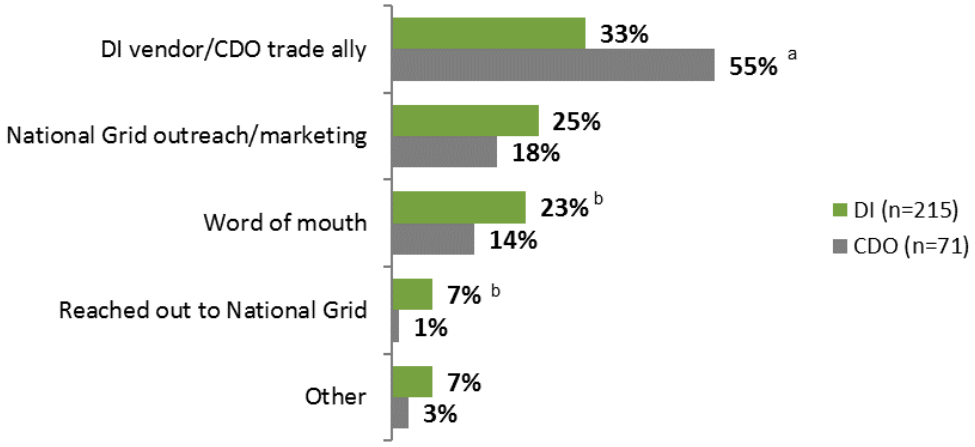
[4] It is worth noting that the sample error for individual questions asked in the surveys varies based on the number of respondents for a question, the proportion of responses, and the specifics of how the question was asked. For this reason, we provide statistical testing for individual questions.

[5] Statistically significant at the 90% confidence level.

Approximately one-half of DI projects (52%) result from DI vendors' cold calls or walk-in visits. More than four-fifths of CDO projects stem from CDO trade allies conducting such outreach (87%). National Grid also markets the SBDI program (e.g., through web, email, direct mail, and sales calls) and has structures in place to automatically forward customers who express interest in the SBDI program to the DI vendor in their jurisdiction. Customer leads are not forwarded to CDO trade allies and a substantial portion of CDO customers typically participate as a result of some direct or indirect effort by the CDO trade allies.

The customer survey asked participants how they first heard about the SBDI program, which confirmed trends in the program data. Overall, participants were most likely to learn about the program from a DI vendor or CDO trade ally (38%), National Grid's marketing and outreach (23%), or from a colleague, business associate, or friend (21%). Examining responses by channel reveal key differences (Figure 1):

- CDO customers were significantly more likely to learn about SBDI from a CDO trade ally than DI customers were to hear about it from a DI vendor (55% versus 33%).
- DI customers were significantly more likely than CDO customers to receive a word-of-mouth referral to the SBDI program (23% versus 14%).



[a] Statistically significantly higher than DI respondents at the 90% confidence level.
[b] Statistically significantly higher than CDO respondents at the 90% confidence level

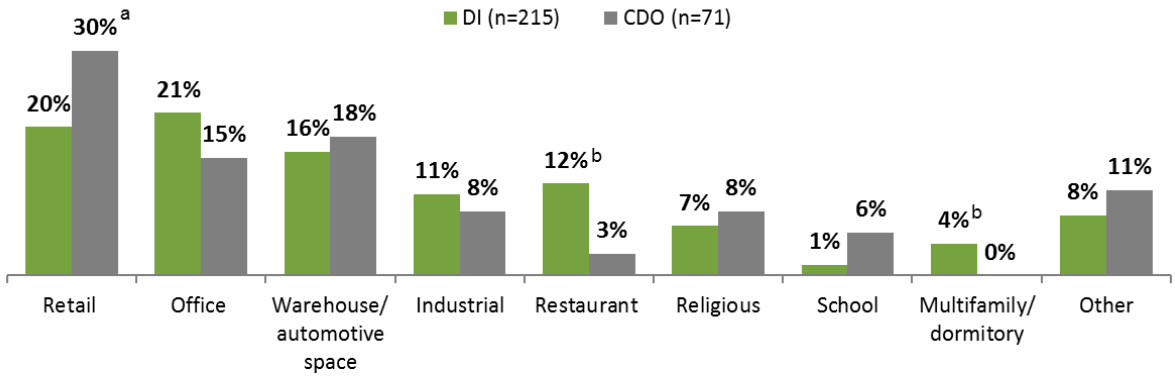
Figure 1. How did customers learn about SBDI?

Market Segments

While both channels provide program service to a wide variety of businesses, each seems to also have a niche. DI is more likely to provide services to full-service restaurants and CDO is more likely to provide services to retail stores. Combining program data with survey results reveals that the most common business types include retail (22%), offices (20%), and warehouse or automotive spaces (17%) (Figure 2). The data showed a few notable differences between the market served through the DI and CDO channels:

- The CDO channel was significantly more likely than the DI channel to have treated retail businesses (30% versus 20%).
- The DI channel (12%) was significantly more likely than the CDO channel (3%) to treat restaurants—in particular, this difference was noticeable among full-service restaurants (10% versus 1%, respectively).

The evaluation did not explore trends over time, but this may be an area for further investigation by program staff or future evaluations.



Other includes grocery, firehouses (each 2%) municipal buildings, farms, and hospitals (each 1%).
[a] Statistically significantly higher than DI respondents at the 90% confidence level.
[b] Statistically significantly higher than CDO respondents at the 90% confidence level.

Figure 2. Customer survey respondents' business type

Payment Options

The option to use the interest-free payment plan is an exceptional benefit to customers, and it facilitates upgrades that customers would not otherwise make. Customers who pursue energy-saving upgrades through the program receive incentives up to 60% of the total cost of the project, as determined by program criteria. In addition, customers have the choice of receiving either a 15% discount on their copayment if they pay the full cost up front, or (if they qualify based on payment history) interest-free financing of the copayment for 12 or 24 months.

All of the interviewees reported that the payment plan was an extremely strong selling point for the program. All of the DI vendors and CDO trade allies stated that this option—which, according to some interviewees, is not offered through the large C&I program or SBDI programs in which they have participated in other jurisdictions—is important to promoting sales. A few of their comments are included below.

> *It's an important piece of the sales pitch, particularly for projects that show a return on investment within 24 months. It's important when you can show a customer that energy savings can cancel out project costs.*

> *It's a huge advantage. This is the only program that we run that has on-bill financing. Especially where the program is with incentives, it's huge to be able to offer that to customers.*

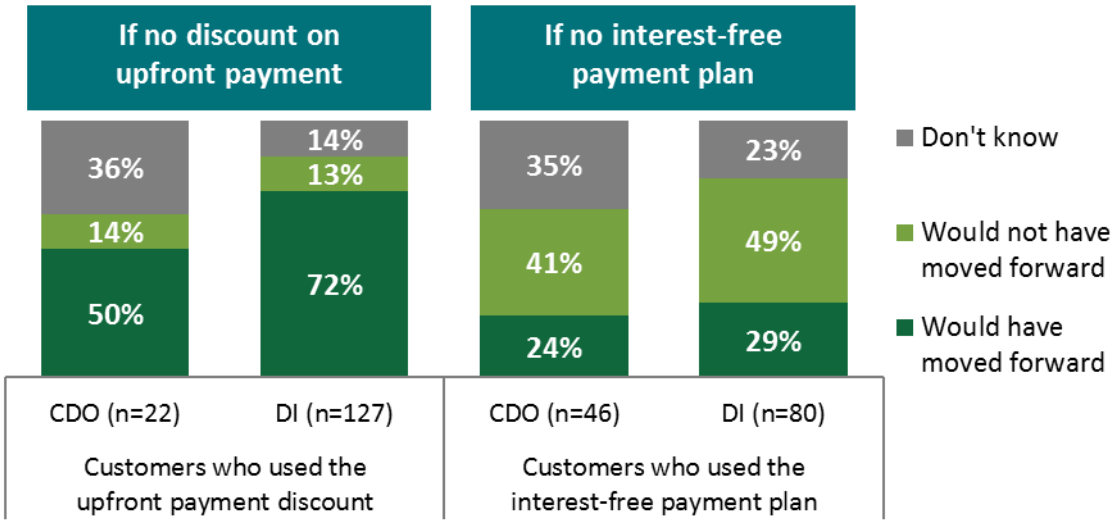
> *With the on-bill financing, you can advertise to the customer, there's no cash outlay, nothing out of your pocket. By the time you're getting billed for this, your electric bill is already lower. It's paying for itself.*

All of the DI vendors and CDO trade allies stated that removing the interest-free payment plan option would have a negative effect on the program. Respondents speculated that participation—and, by extension, sales—would drop as a result. Two of the four CDO trade allies mentioned that their company would no longer participate in the program if this option were removed. One CDO trade ally mentioned that the recent reductions in incentives offered by the program have negatively impacted sales and eliminating the payment plan would make it even harder to sell projects. Another CDO trade ally, that offers only the payment plan to their customers, commented that removing this option would require

them to assume the liability for collecting the upfront payment, which is something they are not willing to do.

According to the survey data, DI customers were nearly twice as likely as CDO customers to pay up front (59% versus 31%). This is in keeping with the rate for the entire sample frame, in which 58% of DI customers paid up front versus 34% of CDO customers. While surveys did not confirm this, the difference may be a product of CDO trade allies being more effective than the DI vendors at directing customers to the interest-free payment plan option (65% versus 37%), since, as we note above, trade allies are responsible for assuming financial liability for upfront payments.

Customer survey results indicate that for those customers who take advantage of it, the payment plan really matters. Customers were asked if they would have moved forward with the program upgrades if the form of payment that they used had not been available. As Figure 3 shows, more than two-thirds of upfront payers (69%) said they would still have moved forward with the installations even if they had not received the 15% discount associated with upfront payment. Far fewer CDO customers than DI customers who paid up front would have moved forward with the upgrades (50% versus 72%). Only about one-quarter of customers who used a payment plan (27%) estimated that they would have moved forward in absence of this option. This relatively lower level was fairly consistent across channels (24% for CDO customers and 29% for DI customers).[6]



These questions were asked only of respondents able to confirm their payment method.

Figure 3. Rate customers would have moved forward with program in absence of form of payment used (Base: Customers who correctly confirmed their payment method)

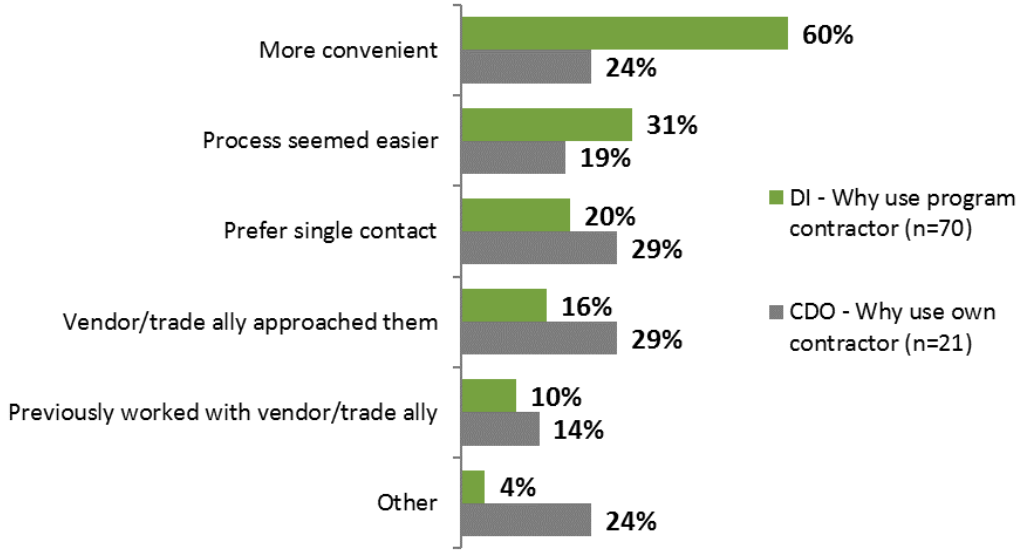
[6] To lay the groundwork for future program net-to-gross analysis efforts, the customer survey asked respondents a series of questions assessing their decision-making process and the importance of the SBDI program within that process. Their responses do not initially imply overwhelming signs of potential free ridership. While some had specific energy efficiency project plans before learning about the program, many said their budgets could not have accommodated the cost of the projects without the program discount, and nearly the same share would not have made the upgrades in absence of the program. A small share still would have installed equipment of the same or higher efficiency in absence of the program discount. Similarly, some still would have installed the equipment in the near future without the program discount. In general, these findings were consistent for both CDO and DI customers.

Customer Experience

The burden of participation appears to be equally low for customers who participate with either a DI vendor or CDO trade ally. The customer survey asked all participants to indicate the extent to which they or the DI vendor or CDO trade ally was responsible for overseeing certain aspects of the program. Using a scale of 1 to 5, where 1 is "no effort at all" and 5 is a "great deal of effort," customers' average ratings were consistently on the low end of the scale regardless of the channel they used (ranging from 1.6 to 1.9). This indicates that both DI vendors and CDO trade allies handled the majority of the program-related tasks for customers.

One-third of respondents (33%) confirmed that they were aware of the two participation channels. The survey asked customers who were aware of the two options to indicate why they chose to use the DI vendor or the CDO trade ally, rather than the other option (Figure 4). Although the small number of CDO respondents (n=21) prevents us from testing for statistical significance, there are notable differences between the two channels:

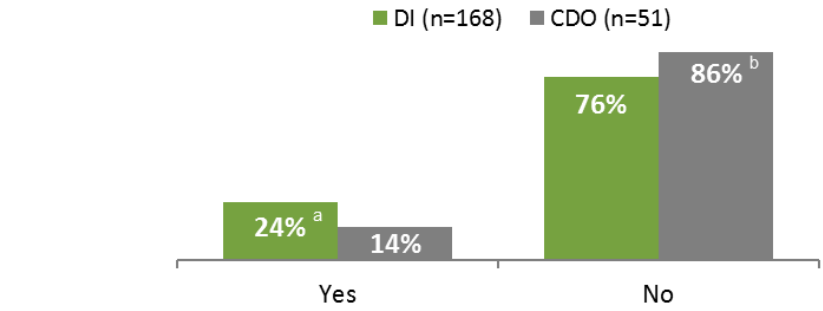
- DI customers were more likely to say they chose to use a program-approved DI vendor because it was more convenient (60% DI versus 24% CDO) or the process seemed easier (31% DI versus 19% CDO).
- CDO customers were more likely to say they chose to work with the CDO trade ally because the CDO trade ally approached them (29% CDO versus 16% DI), they prefer a single contact (29% CDO versus 20% DI), or they had previously worked with the CDO trade ally (14% versus 10%).



Multiple choice question; asked only of respondent who knew there are two contractor options.
The CDO *Other* category includes respondents (5) who thought their contractor *were* approved.

Figure 4. Reasons for choosing DI or CDO Channels (Base: Customers aware of the DI and CDO Channels)

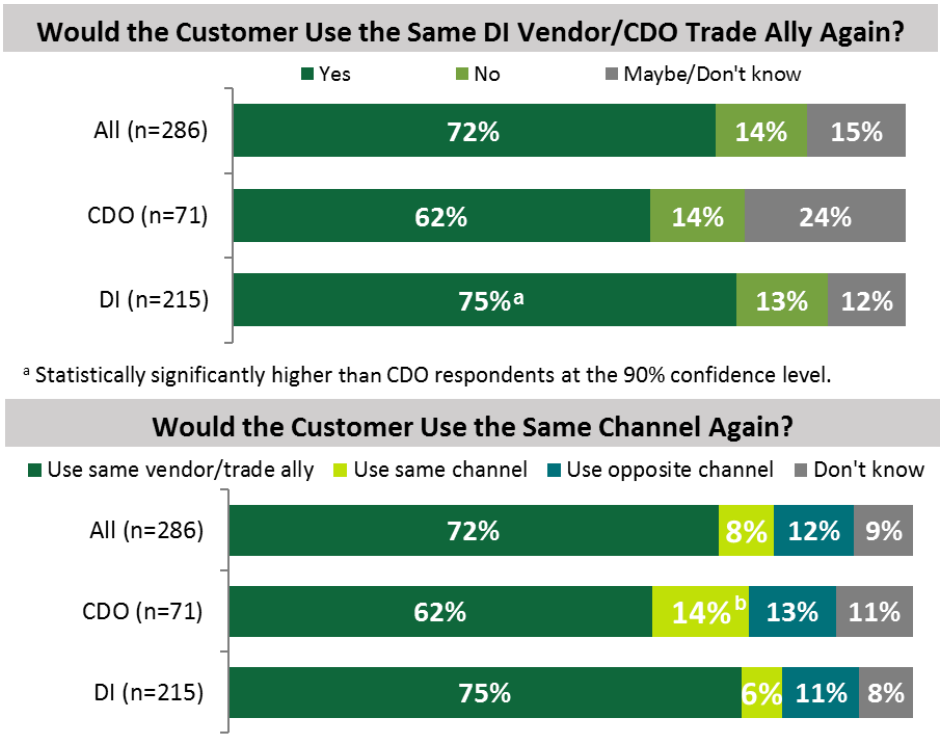
Customers were asked if there were any energy efficiency upgrades they were hoping to get help with through the program that they could not get (Figure 5). DI customers (24%) were significantly more likely than CDO customers (14%) to say yes. This difference is very likely due to the fact that DI vendors are largely limited to products offered through the third-party contractor that provides equipment to the program, while CDO trade allies can obtain a wider range of products, as long as the products meet program requirements.



Two respondents were not asked this question.
Excludes respondents who said "Don't know."
[a] Statistically significantly different than CDO respondents at the 90% confidence level.
[b] Statistically significantly different than DI respondents at the 90% confidence level.

Figure 5. Were there upgrades customers wanted to get through the SBDI Program that they could not get?

Nearly three-fourths of all customers (72%) reported that they would work with the same DI vendor or CDO trade ally again (Figure 6). An additional 8% said they would still use the same channel even if they were uncertain about using the same DI vendor or CDO trade ally—meaning that, in total, 80% of customers claimed they would use the same channel again (Figure 6). However, DI customers (75%) were significantly more likely than CDO customers (62%) to report that they would work with the same implementer. Furthermore, CDO customers reported a higher degree of uncertainty in their responses compared to their DI counterparts (24% versus 12%).



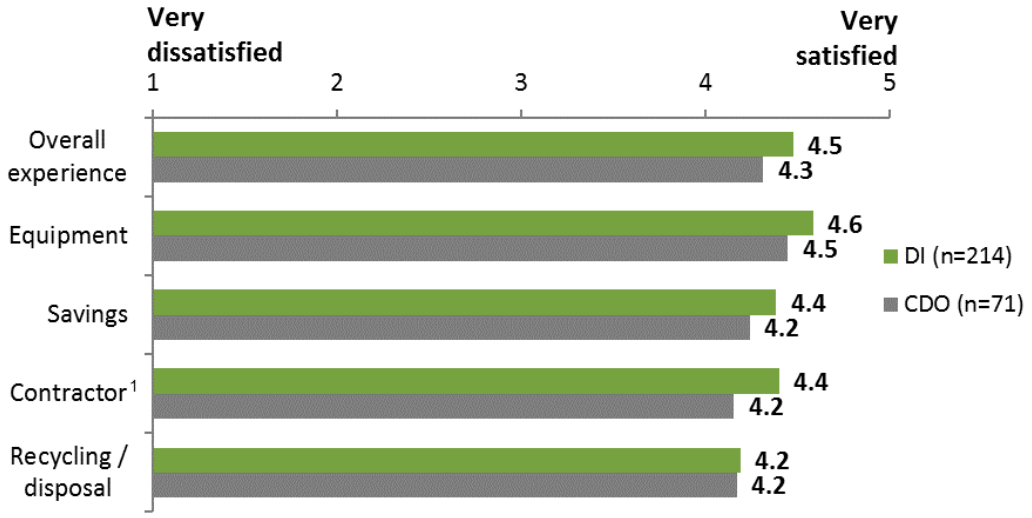
[a] Statistically significantly higher than CDO respondents at the 90% confidence level.

Use same channel refers to those who would not use same vendor/trade ally, but would use same path.
[a] Statistically significantly higher than CDO respondents at the 90% confidence level.

Figure 6. Would the customer use the same DI vendor/trade ally or channel again?

Customer Satisfaction

In general, customers reported strong satisfaction with the SBDI program regardless of the channel they used. The customer survey asked respondents to rate their satisfaction with various aspects of the program. Using a scale of 1 to 5, where 1 is "very dissatisfied" and 5 is "very satisfied," respondents' overall average ratings ranged between 4.2 and 4.6 (Figure 7). Customers provided the highest average satisfaction rating to equipment and the lowest to equipment recycling and disposal. On average, DI customers provided slightly higher ratings compared to CDO customers, but these differences were not statistically significant.



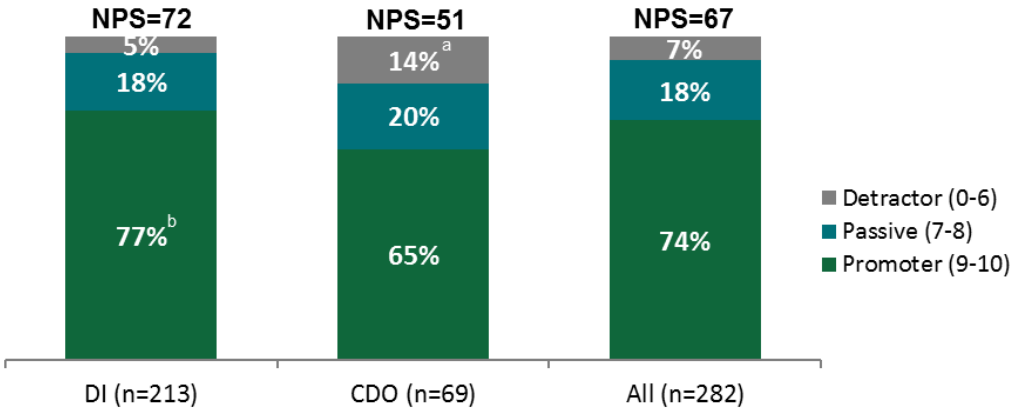
Sample sizes vary by topic; maximum sample sizes are shown.
[1] Qualitative responses revealed that respondents assessed program vendors *and* subcontractors

Figure 7. Customers reported strong satisfaction with the SBDI Program

While customer satisfaction scores were relatively high for all groups, DI vendors received substantially higher Net Promoter Scores (a measure of customer loyalty) than CDO vendors. Customers were also asked to rate the likelihood of recommending the SBDI program to others. For this question, respondents used a scale of 0 to 10, where 0 is "extremely unlikely" and 10 is "extremely likely." This rating, or Net Promoter Score (NPS), is a well-established measure of customer loyalty. With the NPS, respondents are grouped as promoters (score 9-10), passives (7-8), and detractors (0-6). The NPS is calculated by subtracting the percentage of detractors from the percentage of promotors, and is presented as a whole number.

SBDI customers' overall NPS was 67 (Figure 8). The NPS for DI customers was notably higher than that reported by CDO customers (72 versus 51). While it is not appropriate to test for statistical significance when comparing the NPS, examining percentages of promoters and detractors shows a clear pattern.

- DI customers were significantly more likely than CDO customers to be program promoters (77% versus 65%).
- CDO customers were significantly more likely than DI customers to be detractors (14% versus 5%).



Categories are based on ratings of *likelihood to recommend the program to someone else*.
Four respondents did not provide a rating.
[a] Statistically significantly higher than DI respondents at the 90% confidence level.
[b] Statistically significantly higher than CDO respondents at the 90% confidence level.

Figure 8. Customers' net promoter scores

Competition Between Implementers

Implementers reported experiencing program-related rivalry, but the evaluation results indicate that this competition has not led to confusion in the marketplace. The structure of the program, which allows DI vendors and CDO trade allies to offer SBDI services in the same region, naturally creates marketplace competition between the two groups and among CDO trade allies. All three of the DI vendors and three of the four CDO trade allies stated that they have encountered program-related competition. All three of the DI vendors mentioned that the primary deciding factor for customers is the final project cost. One of the DI vendors also emphasized the benefit of being able to offer customers a turnkey approach by helping the customers from "start to finish." According to this DI vendor, "Just the word turnkey says we can offer everything. We handle everything from start to finish for the customer. [It's a] smoother process."

The CDO trade allies also mentioned that cost is important, but they tended to emphasize other factors such as customer service and warranty terms. One of the CDO trade allies also mentioned that *they* offer a turnkey approach. "We do whatever the customer wants. If they want a turnkey solution, we make it feasible for that job." While nearly all DI vendors and CDO trade allies noted that they had encountered competition for program customers – and it is clear from the interviews that they would prefer not to have the competition – there was little evidence that the competition has created confusion in the marketplace. For example, when asked to confirm the vendor that provided services, the majority overwhelming confirmed this information, and one-third of customers reported that they were aware of the two channels offered.

Conclusions

While program-specific recommendations can be found in the full evaluation report, here we discuss conclusions and considerations for program administrators and implementers planning or running SDBI-style programs in other jurisdictions.

National Grid New York's SBDI program provides a strong model for other small commercial direct install programs. The evaluation shows that it is possible for SBDI programs to successfully offer commercial customers more than one channel to access energy-saving upgrades—thereby increasing the reach of the program—while maintaining strong delivery and customer satisfaction. The evaluation found

that for this SBDI program, each channel has its own strengths that contribute to the overall success of the program. DI vendors offer an experience that is comparatively more convenient and generates higher rates of word-of-mouth advertising. By contrast, CDO trade allies are more likely to directly recruit customers and are somewhat better than DI vendors at addressing additional opportunities for energy-saving equipment, most likely due to access to a greater variety of equipment choice through this channel. Both channels provide program services to a wide variety of businesses, although each seems to have a niche. DI is more likely to provide services to full-service restaurants and CDO is more likely to provide services to retail stores. Regardless of the delivery channel, customers see the burden of program participation as low, indicating that both channels provide customers with relatively easy access to energy-saving services. So far, the program has been able to sustain the two channels without causing marketplace confusion, while preserving positive customer experiences.

Of course, offering two participation channels at once is a more substantial undertaking than offering just one. It requires effective, well-coordinated strategies on both the DI and CDO sides and not every program administrator is in a position to offer two participation channels. For those that are not, the findings suggest that the DI approach is the one most likely to generate customer loyalty.

Finally, the evaluation found the interest-free-payment plan to be critical to the success of the National Grid SBDI program. It seems likely that it would be important for other small commercial direct install programs as well. Customers who used the payment plan option reported that this option made it possible for them to make upgrades that they otherwise would not have undertaken. Program implementers see the payment plan offering as an important part of their sales pitch, especially since there have been recent cuts to program incentives. While the payment plan may be less convenient and more costly for program administrators to implement than a simple discount, this evaluation shows that it brings in customers who otherwise would not participate in the program.

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