5. MISCELLANEOUS PROGRAMS

We identified two programs or practices that were primarily education and communication activities that cross cut sectors. We also identified four agricultural programs that would tend to be lost in the commercial and industrial program summary. Of these six programs, we completed summaries for the two education and communication programs. Three of the agricultural programs were dropped as not transferable to the Energy Trust, and the one that was, could not be completed.

The lessons learned from these programs is that cross cutting programs can be important for overall success of energy efficiency efforts, but do not tend to generate specific savings on their own.

Table 10 displays the miscellaneous programs that we reviewed.

Table 10

MISCELLANEOUS PROGRAMS

PROGRAM	PROGRAM	TYPE	LOCATION
California	Flex Your Power Campaign	Communications	California
Energy Center of Wisconsin	Education and Training	Education	Wisconsin

MISCELLANEOUS PROGRAM SUMMARIES

California: Flex Your Power Campaign

Name of Organization: California State and Consumer Services Agency (overall campaign) and California Department of Consumer Affairs (media campaign)

Name of Program: Flex Your Power

Name of Contacts: Susan Kossak California Department of Consumer Affairs (media overall campaign); California State and Consumer Agency contractor Wally McGuire of McGuireco

Phone and Emails: 916-323-0315 (Kossak); 415-775-1931 x 315 or wmcguire@mcguireco.com (McGuire).

Name of Informant: Sylvia Bender CEC

Phone and Email for Informant: 916.653.6841; sbender@energy.state.ca.us

Why Nominated

The California communications campaign was nominated as a best practice in communications. The comment from the nominator was "big and sprawling but effective." As noted below, the campaign does appear to be effective; the cost is high and the need for a long-term commitment critical to success.

Program Delivery

The California Flex Your Power Campaign is probably the largest scale energy efficiency/conservation campaign ever initiated in the United States. It includes a mass media campaign and efficiency public relations and co-sponsoring messages. While the need for the campaign evolved out of the west coast energy crisis of 2000 and 2001, the strategy of the campaign was built on a social marketing framework and is a prime example of how social marketing principles can be applied to energy efficiency and conservation.

The mass media campaign was initiated in February 2001. It includes mass media ads at the rate of 300 points a week during 2001and about 150 points during 2002.

Television, radio, newspaper and outdoor ads were targeted at the general market as well as sub-markets such as gay/lesbians, Spanish speaking, African-American and various Asian markets. Different age groups were targeted in each market depending on the market characteristics.

Also included in the campaign are local government, state government and business initiatives to obtain voluntary agreements to reduce consumption by 15%. A grocery store awareness program included shopping bags with Flex Your Power messages and store window ads. Other efforts target school children, non-profits, community organizations and churches. A website www.flexyourpower.com also enabled publication of the names of those who volunteered to reduce their power as well as providing information on how to be more efficient and conserving.

The 2001 media campaign focused on efforts to encourage energy conservation behavior actions. The 2002 media effort includes ads for both energy efficiency investments and conservation actions.

Incentives

There are no incentives, only communication. However, links are made to utility and state incentive programs. These links will be emphasized more in 2002. Three promotional campaigns each focusing on specific energy efficient products and related utility equipment rebate programs are planned for 2002: cooling products in May, Energy Star qualified appliances in August and lighting products in October.

Customer Service

A 1-800 number was provided to consumers through the campaign, the message directed consumers to the website and to utility programs.

Staffing and Contractors

The Department of Consumer Affairs (DCA) has 1-2 people working on it, the overall staff involved included managerial staff as well as consultants to the Governor of CA. This number increased in 2002 with the additional of the efficiency messages.

There was one major advertising contractor for the media efforts in 2001 with unknown number of staff. An additional media contractor to target Spanish-speaking Californians was added in 2002.

Staff from DCA worked with the contractor to conceptualize the project and implement. California Energy Commission (CEC) staff provided input on the technical aspects of the advertising messages. There is also a meeting once a week among all state agency leads under the direction of the Governor's Office: the meeting is facilitated by California Power Authority director David Freeman. With the increased emphasis on efficiency components in 2002, utilities and the campaign planners have intensified their coordination efforts. Manufacturers and retailers are also being included in coordination meetings for marketing and administration of product promotions.

Participation and Savings

The ads were targeted to achieve 95% reach of adult population by fourth week an average of 25 times. The tracking study showed that in March 2001 60% could recall some ad, with 21% recalling specific Flex Your Power ads, in November 2001 a second tracking study showed that 67% recalled some ad with 36% recalling specific Flex Your Power ads. Within the advertising industry these are considered excellent results. (35% to 53% of those aware of any messages in March and November 2001 respectively)

The annual savings were not estimated directly. However a study conducted for the CEC using a random sample of 5,000 customers of Southern California Edison found that 37% of the customers accounted for 75% of the total reduction in consumption during 2001.

The realization rate was not measured. Studies being conducted request self-reports on actions taken. The studies completed to date on Flex Your Power used different methods and found different results as to whether the campaign influenced actions.

The overall participation rate, overall penetration and overall savings were not measured.

Budget

The media campaign cost between $50 and $61 million in 2001, about $35 million is allocated for conservation messages in 2002, plus another $10 million from the California Public Utilities Commission for efficiency messages. Allocation to administration, program, incentives, etc. was not available.

Key Issues for Program

Social marketing campaigns are typically multi-year efforts. Ten years and longer are common. The Flex Your Power campaign was instigated to respond to a crisis. There is no evidence that there is a long-term commitment to this approach though the campaign has continued into 2002 despite a lower state of crisis concern. The lingering doubts about resource availability in 2004 may lead to a longer-term commitment.

Costs Control

Costs are a concern, but the effort has the full support of the Governor and thus funds are not restricted.

Evaluation and Monitoring

The specific campaign had limited measurement efforts until recently. The major effort during the campaign was a tracking study conducted by the advertising agency. The CEC sponsored a study that is just being completed; CALMAC is sponsoring another study that will begin June 2002. PG&E sponsored a study to compare the effects of their own efforts with those of Flex Your Power, which will be completed by the end of summer 2002.

Transferability to the Energy Trust

Certainly this type of effort is transferable. Based on social marketing experience in other areas, however, such a program requires a long-term commitment both to the investment and to evaluation and measurement to be worthwhile. Additionally, the costs involved in such a campaign would probably swamp the Energy Trust budget without assurance that the MWh goals could be achieved since at this time there is no indication of the savings that can be attributed to the program.

Energy Center of Wisconsin: Education and Training

Name of Organization: Energy Center of Wisconsin

Name of Program: Education & Training

Name of Contact: Marge Anderson

Phone and Email: 608.238.8276 x 132; manderson@ecw.org

Program Delivery

The Energy Center of Wisconsin (Energy Center) provides education and training support for customers and other market actors in all sectors of the economy. A hallmark of these offerings is that they are outcome-based, derived from the design and needs of ongoing programs, not stand-alone training opportunities. Moreover, these offerings are explicitly designed to support behavior change by decision-makers and those who support them (e.g., designers), rather than to provide information transfer alone. The Energy Center won the national Award of Excellence in Education from the American Institute of Architects in 1998 and the Exemplar Award from the International Association of Education & Training in 2000.

The model is appropriate both for resource acquisition programs and for market transformation programs. Indeed, because of the emphasis on changing decisions and behavior—and targeting offerings to decision-makers—the Energy Center model of education and training may be particularly relevant for an organization such as the Energy Trust. (To illustrate the gamut covered: Center staff cite some residential training efforts that focus on detailed skills of contractors—e.g., how to install ductwork—that should result in immediate energy savings, at one end of the spectrum. At the other end is training of architects and engineers about High Performance Buildings in the commercial sector, relating to shell improvements, HVAC choices, and daylighting—training that may not produce results in the next year or two.

Incentives

The offerings are subsidized; however, all do require some fee from attendees (or those who are sending the attendees to the training).

Program Marketing

Most marketing is conducted via mailed announcements. The Energy Center has a database of about 14,000 names, largely drawn from attendees at past trainings. (Many of these represent builders, architects and engineers who were trained on the state's updated building code in the mid-1990s, The Center's first large-scale foray into this arena.) This database is considered invaluable, since it is axiomatic that participants in previous trainings are good candidates for additional opportunities (e.g., a plant manager who attended a workshop on motors is a good prospect for a workshop on compressed air).

In addition, the Energy Center draws on their excellent relationships with approximately 40 state associations. Some of these associations provide Energy Center with their mailing lists; others will co-sponsor events and mail directly to their members. Moreover, Energy Center is an authorized provider of learning units for the architectural association and works with state regulators to have courses certified as meeting licensure and updating requirements. (They are also an approved provider of CEUs—continuing education units—but find that a less valuable draw for people looking to obtain or update their licenses, because of the need for specificity.)

Attendees tend to be "early adopters." However, this is less true for Energy Center workshops than for those that are designed as "stand-alone" offerings. If the program that is being supported is successful (e.g., the Wisconsin ENERGY STAR® homes program), those who are touched by the program (e.g., builders) and see value to the training include members of the early majority and help the effort to "cross the chasm."

The keys to selecting a workshop to place on the agenda are the needs of the energy-efficiency program, as identified by program managers, with respect to filling gaps in knowledge or skills and the potential for drawing an audience, as assessed by (largely informal) market research—whether the market is ready for pertinent workshops. Center staff note that programs will be more successful if there is both push and pull—that having a program in the field encourages interest in allied workshops. (As an example, training for the Wisconsin ENERGY STAR homes program drew few participants initially, but—as the program itself grew—those workshops began to attract large numbers of attendees.)

The Energy Center sets no specific targets for education and training activities in each sector over the course of a year. However, largely because of the program budgets available, in practice the various sectors are each served at approximately the same rate.

Customer Service

As noted elsewhere in this summary, the program measures itself on customer service. This encompasses a concern with how attendees are treated during registration as well as a follow-up on whether they have changed their decisions or behavior as a result of an offering. In addition, the Energy Center carries out such functions as sending out transcripts each year to workshop and conference attendees, indicating the sessions they attended and any credits they may have earned for licensure or other regulatory requirements.

Staffing and Contractors

The Center assigns 8 FTEs to this activity. These include the department manager, two project managers, a meeting manager (see below), a project coordinator, and customer service representatives.

The Center recognizes that meeting management is a specialized discipline and includes two subspecialties. The first type is a CMP (Certified Meeting Professional), who is trained in logistics and contract issues. The second is a CMM (Certified Meeting Manager), trained in the strategic value of training programs. A strong program must include a staff member with one of these credentials and notes that there are lists of such people available in each state. There are also a number of legal issues specific to the meetings industry—especially in the wake of 9/11—require expertise in this area.

In addition, the Energy Center outsources much of the subject matter development to outside experts—depending on the topic, this will often involve both instructional designers and technical experts with a national reputation. Also, they will outsource work on meeting planning when larger conferences are involved or they face a crunch on internal staff. (The program is seasonal, reflecting summer vacations—and the deer-hunting season—so that some months are very heavy.)

Staff is responsible for instructional design and is generally responsible for logistics and contracting, marketing, and customer services. External consultants normally provide specific content. Much evaluation is done by a staff member of Energy Center and some is done by contractors to Focus on Energy (a major purchaser of Energy Center training services). As noted above, some planning may be outsourced.

Participation and Savings

Energy Center offers roughly 75 trainings per year. They generally range in extent and attendance from one-half day workshops serving 15 people to two-day efforts with about 200 attendees. However, a High Performance Homes program now in planning is expected to involve about 600 attendees.

About 30 percent of the offerings have to be closed because attendance is at the maximum designed by Energy Center. It should be noted that the design number is dictated by the objective of ensuring that attendees have an opportunity to improve and practice their skills and receive feedback. Accordingly, most courses are smaller than would be the case if the effort were intended to be profitable to Energy Center.

Although the trainings are designed to support changes in decision-making and behavior of customers and other market actors, they are not independent of the programs themselves.

Budget

The annual budget has been $1.5 MM to $2.0 MM over each of the past couple of years. (Much of this is from the Wisconsin Focus on Energy program.) Funding comes from the Energy Center budget. As indicated elsewhere, this budget and some fees from attendees cover the costs of the workshops; at this time, no commercial sponsors (e.g., Trane) provide workshop funding.

Roughly 25 percent of the budget goes to direct costs. The remainder covers labor, including the time of an evaluator (who is on the Energy Center's staff, though independent of this department).

This sort of program is very different from managing an engineering project. A key is instructional design and the skills involved, as well as the testing and development, require considerable time and effort.

Key Issues for the Program

Initially, the program was somewhat *ad hoc*. It established its value when the Energy Center was given the opportunity to provide training on the new building energy code to builders, architects and engineers throughout the state. This led to strong acceptance of the program and an expansion of the department. A second growth spurt has occurred because of the Focus on Energy program, which is statewide and covers all sectors of the economy. There has been an increase in the

budget and that the State's need for information about the program offerings has underlined the need to plan and schedule them earlier than had been the practice. (the Energy Center had been providing schedules for each quarter; they are moving to provide this information a year in advance.) The earlier notice may help with the marketing of some workshops and conferences and with assessing the likely attendance in advance.

Keeping Costs Down

There are three ways in which some costs may be reduced as the Energy Center program moves forward. The first is to reduce labor costs through the development of on-line registration systems and the ability to handle fees through a secure web link. The second is to streamline internal procedures through improved planning and advance scheduling. (At present, approximately 90 percent of offerings are identified at the beginning of the program year, but the actual planning and scheduling has not always been initiated so as to take advantage of that information.) The third is to explore the potential of accepting sponsorships from members of the manufacturing chain, as is common in many other programs. Obviously, the concern to be addressed here is to establish standards both for the technical quality of the manufacturers permitted to participate and for maintaining objectivity in what is presented to attendees.

Monitoring and Evaluation

The Energy Center regularly collects assessments of its courses from attendees immediately after each offering. The most important metrics include an assessment of the usefulness of the information that was presented and the quality of the presentation itself (though many of the raters do not distinguish between the two). In addition, attendees are asked to assess whether they were treated as "valued customers" with regard to administrative functions such as registration.

Frequently (but not always, given budget constraints), Energy Center or the Focus on Energy program also conduct follow-up assessments with attendees. These follow-ups are generally after three months to one year, and they focus on changes in behavior that can be traced to workshop/conference attendance. This focus is consistent with the overall objectives of the program and embodies the logic of the instructional emphasis; moreover, it is viewed as consistent with customer service, in that Energy Center believes that people attend the offerings on the expectation that their investment of time and money will indeed make a difference.

The Energy Center is strongly committed to acting on the basis of the evaluations received. This may take the form of dropping an instructor who achieves less than "B" ratings on content usefulness or presentation. It may also result in curricular redesign or, in at least one instance, changing the composition of the instructional team so as to provide greater emphasis to the need for an engineering perspective (to supplement an architectural one).

Transferability to the Energy Trust

The Energy Center would be happy to consult with the Energy Trust in any way that would be helpful. (The Energy Center is interested is seeing a number of offerings used elsewhere throughout the country, but does not see any practical possibility of rolling out programs on their own. Moreover, they believe that training will be most effective if it maintains a local flavor.) In addition, the Energy Center does have some courses that could be provided for a small licensing fee, thus saving the Energy Trust the costs of initial curriculum development.

Some specific items of advice include the suggestion that the Energy Trust consider setting up an opportunity for people to indicate their initial interest in workshops or suggest ideas for workshops on-line, while obtaining enough additional information from opt-in sign-ups about interests and background to begin populating a database for future marketing.

At a broader level, a successful program must be built on customer service and that the inclusion of people who understand instructional design is crucial to success. While subject experts will be available to the Energy Trust, knowledge of the relevant issues is in no way synonymous with knowing how to transmit the information in a way that will affect decisions and practice.

In starting an education and training program, she advises, it is very important to collect and show the evaluation data. This information helps demonstrate to skeptics the value of the effort and takes education and training from the status of "poor relations" to that of having a seat at the table.

References

Anderson, Marge. (2002) *Education and Training for Market Transformation Programs: Keys to Success*. Forthcoming in the Proceedings of the 2002 ACEEE Summer Study, Panel 6. Asilomar, CA.

5. Miscellaneous Programs