Uncovering the Multi-Benefits of Home Upgrades Using Real-Time Continuous Evaluation

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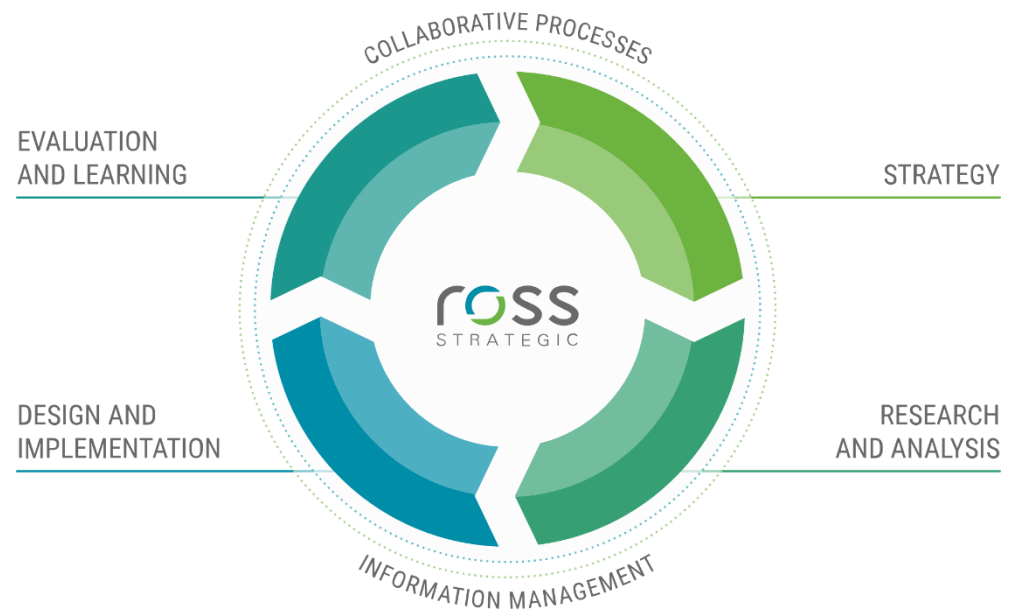
Prepared for: ACEEE's December 2018 Conference on Health, Environment and Energy

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Who We Are

- Small consulting firm based in Seattle, WA and Austin, TX

- Working at the nexus of the environment, health, and energy

- Federal, State & Local, Foundations, Non-Profit, and International

- Committed to integrating diversity, equity, and inclusion best practices

COLLABORATIVE PROCESSES

EVALUATION AND LEARNING

STRATEGY

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DESIGN AND IMPLEMENTATION

RESEARCH AND ANALYSIS

INFORMATION MANAGEMENT

A New Approach to Energy Efficiency Program Evaluation

- Built on our unique implementation of evaluation principles

- Applied to the residential energy efficiency field

- Captured in Department of Energy's Better Buildings Residential Network [Toolkit: Evaluate and Learn As You Go To Strengthen Performance](#)

How does this approach differ from traditional evaluation?

- Conducted **during a program or initiative**, not at the end

- **Targeted** to tackle specific components or challenges

- **Embeds learning** into the evaluation process

- Helps to surface **key strategic questions**

Benefits of this Approach

Strengthen	Identify	Shorten
relationships with evaluators as it helps bridge the gap between day to day program performance and the longer evaluation cycle	**essential program components** to measure by clarifying the goal of evaluation with a targeted framing question	**the timeframe from evaluation results to program improvements** creating a more nimble and adaptable program

Achieve Greater Impact
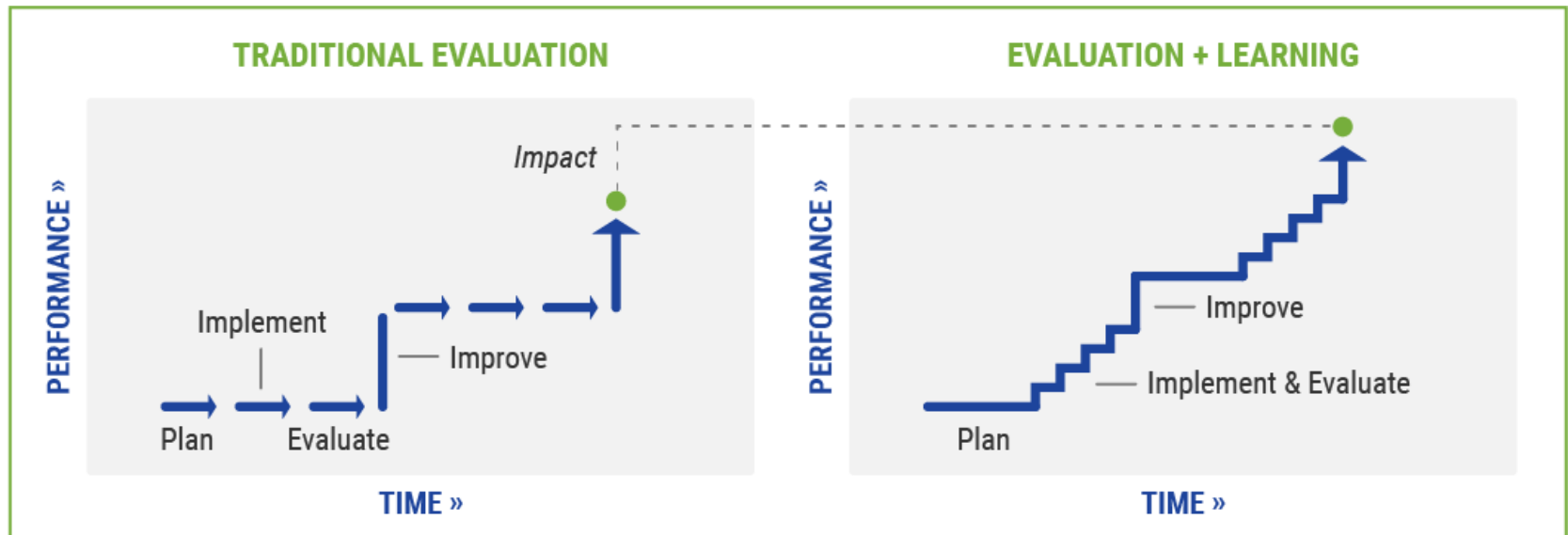
Learning from Evaluation: A Roadmap for Improvement

What: Review Key Sources of Data

- Come to the discussion with all needed information

- Identify examples of success and failure, highlight defining moments, and compare stories

Goal: Identify what worked and what did not based on the available facts; avoid providing interpretations of the "why" at this stage in the process.

So What: Interpret Data and Results

- Mine the data and stories by highlighting what was similar, different, or surprising

- Ask, "So what does this mean?"

- Group similar information in categories

Goal: Identify patterns in the data and stories and develop insights based on those patterns.

Now What: Develop Your Hypotheses

- Transition from a retrospective conversation to thinking about the future

- Ask, "Given what we've learned, what will make us more successful in the future?"

Goal: Create testable hypotheses to create an actionable path forward for addressing your question and improving the likelihood of future success.
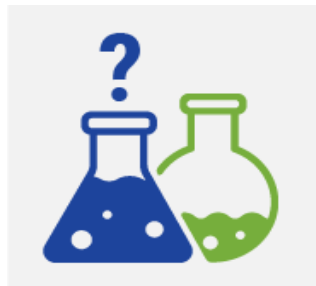
What Next: Find Opportunities to Incorporate Improvements

- Identify opportunities to test hypotheses in the real world

- When possible, look at existing work or scheduled events to apply lessons learned to activity that is already planned

- Once hypothesis are implemented ask, "Did our solutions lead to our desired results?"

***Goal:** Create a cycle of continual improvement: constantly learning, reflecting, and strengthening of the program.*

This Framework Can….

Help define evaluation design, as well as use evaluation results to refine theory of change, business processes, strategic planning, and program implementation

Be used at many levels – project team, organization, cross-organization, coalitions, or as a backbone of a community of practice

Be conducted in 1 hour up to a 2-day retreat

Putting It Into Practice

Framing Question: How can our program better utilize potential health benefits from energy efficiency upgrades to encourage more homeowners to participate?

30 Minutes: Look for Patterns

What insights can we draw from this data?
- What is similar, different, surprising?

SO WHAT: INSIGHTS

30 Minutes: Develop Hypotheses

What would make us successful?
- If [action], then [expected result]
- What hypotheses are testable?

NOW WHAT: HYPOTHESES

WHAT: DATA | WHAT NEXT: OPPORTUNITIES

30 Minutes: Share Stories

What can we learn from our experiences?
- Stories from past work
- Facts vs. interpretation

30 Minutes: Commit to Action

What are our upcoming opportunities to test new ideas?
- Event/Hypothesis/Action
- Event/Hypothesis/Action

Key Takeaways

- In the fast-paced residential EE environment, programs must be nimble and adaptable

- Do not wait to learn, evaluate, and improve at the end of an initiative

- Integrating learning provides a mechanism for testing and measuring multiple-benefits of home upgrades

- It also allows for identifying and updating hypotheses around health outcomes

Thank You!

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