



Evaluating Persistence – Lessons Learned from SEM

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About

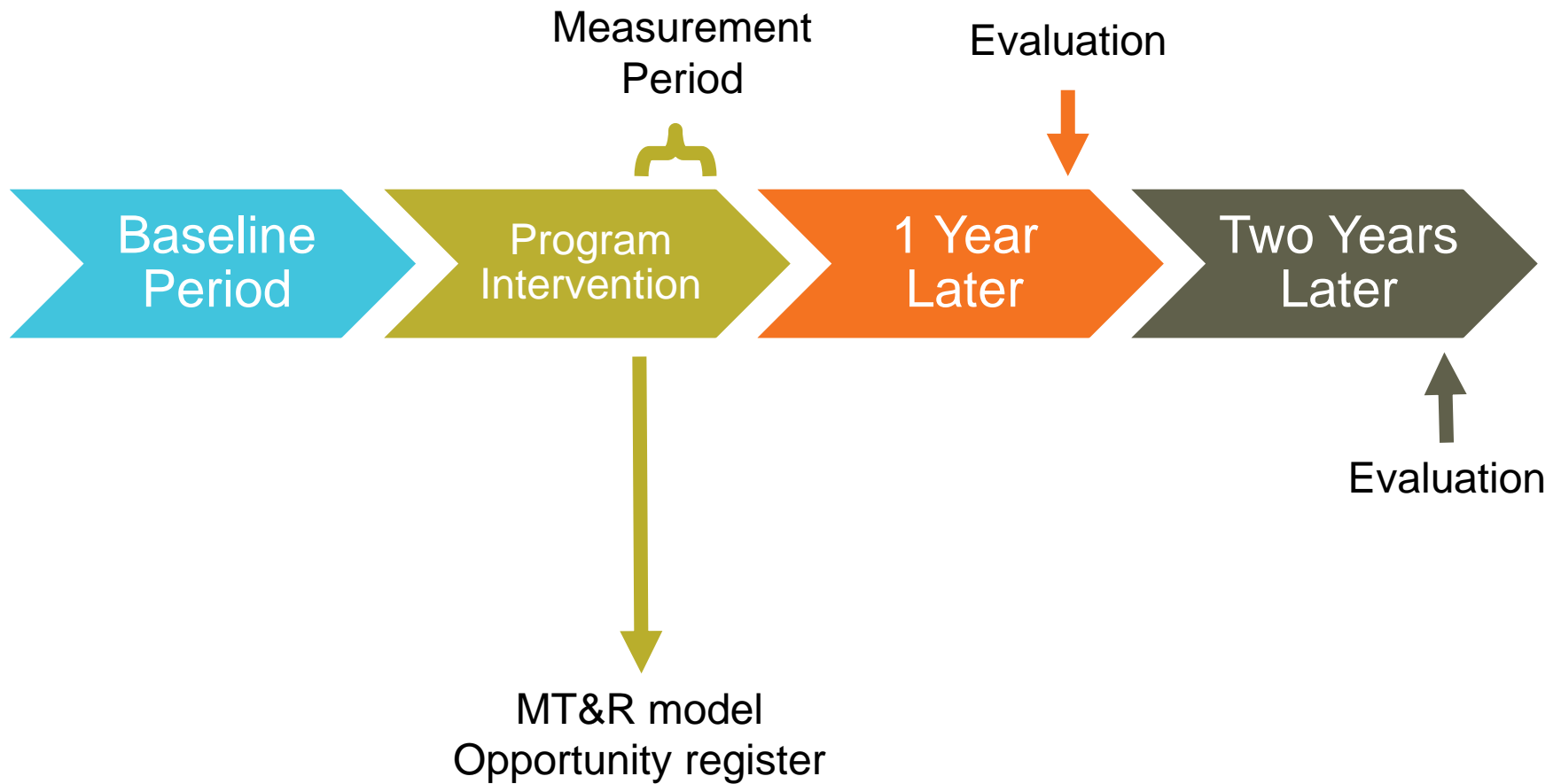
- Independent nonprofit
- Serving 1.5 million customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas
- Providing access to affordable energy
- Generating homegrown, renewable power
- Building a stronger Oregon and SW Washington

What is Strategic Energy Management (SEM)?

- Offering to industrial customers that combines training, technical services, and incentives, with a goal of empowering companies to strategically manage their energy use
- SEM represents a growing source of savings for Energy Trust's industrial program



Components of SEM and evaluating SEM at Energy Trust



SEM Evaluation Methods

“Plan A”

Review and Gather Data
Needed to Update MT&R
Model



Review Opportunity Register,
Interview Site Staff, and
Conduct Site Visit



Account for Capital Project
Savings

“Plan B, C, D . . .”

- Bottom-up analysis using site visit information, opportunity register
- Qualitative analysis using interview findings, opportunity register

In practice, we were limited in our ability to employ our “Plan A” evaluation methods, because:

- ✓ Dependent on customers to provide data (production, energy, shutdowns, etc.) after program participation
 - ✓ Staff turnover
 - ✓ Not maintaining MT&R models; staff did not have an incentive to compile and provide updated data
- ✓ Documentation (MT&R models, opportunity registers, and summary reports) may meet needs of implementers and customers during the program intervention, but may not meet evaluation needs
- ✓ Industrial facilities = dynamic facilities

Key Lessons Learned

- Assess the information you are likely to get (and what is usable) well in advance of evaluation
- Have a Plan A . . . as well as a Plan B and a Plan C, and a Plan D for evaluation



Thanks for Selecting

UNDA
DAI

Thank You

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