

BOARD STAFF INTERROGATORY #22

INTERROGATORY

Reference: Exhibit B, Tab 6, Schedule 1, p. 5

Preamble:

Navigant identifies that the following steps can be taken in order to mitigate the issues surrounding self-report studies:

- Fast Feedback
- Sensitivity Analysis
- Triangulation
- Other Best Practice

Navigant's report states: ***Mitigating issues with self-report methods.*** Given concerns with self-report methods, experts noted the following approaches are used to improve the accuracy of self-report studies:

- **Fast feedback:** Fast feedback refers to survey methods where the respondents are asked about factors influencing their participation in a program at a time near to when they participated - e.g., within 3 months of completing participation.

Questions:

- a) Please confirm that Enbridge communicated to the EAC that the participant data required to facilitate the self-report method cannot be made available by the utilities earlier than mid-March of the subsequent year. E.g., 2017 participant data cannot be provided until, at the earliest, mid-March 2018 which equates to a 15-month delay for projects undertaken in January 2017.
- b) Please confirm that, due to these delays, it is not possible to complete the self-report method within the 3-month period following participation as recommended by Navigant.
- c) Specifically for custom project NTG ratios; please indicate the extent to which the three jurisdictions discussed in Navigant's report (California, Illinois and Massachusetts) utilize all of the four steps identified above in order to mitigate the issues of self-report studies.

Witnesses: D. Bullock  
D. Johnson

RESPONSE

a) & b)

Not confirmed. As in prior years, Enbridge has provided participant tracking data for its DSM program within the current program year to facilitate a sampling exercise to undertake verification. Doing so would require a plan that includes sample design utilizing a staged approach (similar to the Wave 1 and Wave 2 CPSV verifications undertaken in the previous framework). This would facilitate a survey delivery in line with the 3 month period following participation as recommended by Navigant.

c) As was outlined in the Navigant report included at Exhibit B, Schedule 6, Tab 1, each of the three jurisdictions discussed (California, Illinois and Massachusetts) incorporate the four steps in order to mitigate the issues of self-report studies in the following ways:

	California	Illinois	Massachusetts
Fast Feedback	Not required but pre-screening occurs for custom programs	NTG conducted in waves throughout the year	Not required
Sensitivity Analysis	Required	Required	Utilized in the development of NTG methods
Triangulation	Utilized (e.g., including vendors)	Include vendors	Including trade allies
Other Best Practices	- Net Saving as well as 3 other non-savings factors determine incentives - NTG algorithm includes both program and non-program influence scores	- Prospective application of NTG - NTG algorithm includes multiple factors to account for different program influence (program factor/ program influence/ no-program scores)	- Prospective application of NTG - time series check ins to support program adjustments - captures long term efforts through previous program (a.k.a. secondary) influence.

Witnesses: D. Bullock  
 D. Johnson