



Nicor Gas Multi-Family Program

PY2018 Process Evaluation Results

NAVIGANT

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Nicor Gas

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01

**Findings and
Actions**

Findings and Actions

FINDING 1

Program participation improved tenant and property board perceptions of property managers.

ACTION 1

Augment outreach materials using verbatim property manager testimony demonstrating the value of the program's free, cost and energy saving energy efficiency upgrades. This can improve the likelihood of building boards and tenants getting onboard.

FINDING 2

Property managers that gave lower satisfaction marks to the energy saving benefits of the program were not necessarily dissatisfied with the energy savings, they simply had difficulty quantifying and understanding the energy saving benefits of the program.

ACTION 2a

Ask Franklin staff to highlight energy bill savings in the assessment to make property managers more aware of the potential dollar savings commonly associated with each measure they are eligible for according to their assessments.

ACTION 2b

Show real bill savings from customers that participate in the program as part of the assessment.

Findings and Actions

FINDING 3

While satisfaction with the products installed through the program is high with an average mark of 8.8, four (7%) property managers mentioned the program could be improved by updating the thermostat model included.

Specific features desired include smart thermostats, or more user-friendly programmable thermostats. One property manager stated the battery-operated thermostats would mean an additional burden to replace the batteries, and wired thermostats would be preferable.

FINDING 4

While both “timing and scheduling” and “disruption during installations” received high marks of satisfaction overall, a very few (2) property managers had a negative experience with both of these factors. Two property managers in particular mentioned feeling burdened with the fact that the installers needed to borrow equipment from the property managers such as a ladder, and/or require assistance from the property manager in another form. Another property manager stated the insulation did not seem to be installed sufficiently, whereas most property managers felt the insulation installation was “very pretty” and well done.

ACTION 3a

Consider alternate thermostat models for inclusion in the program, with specific attention to perceived ease of use in programming settings (or smart thermostats). Navigant acknowledges that Nicor Gas switched mid-2019 to a Honeywell thermostat model.

ACTION 3b

Consider providing or updating detailed instructions for tenant thermostats or a training manual for service providers to explain how to use the thermostats.

ACTION 4

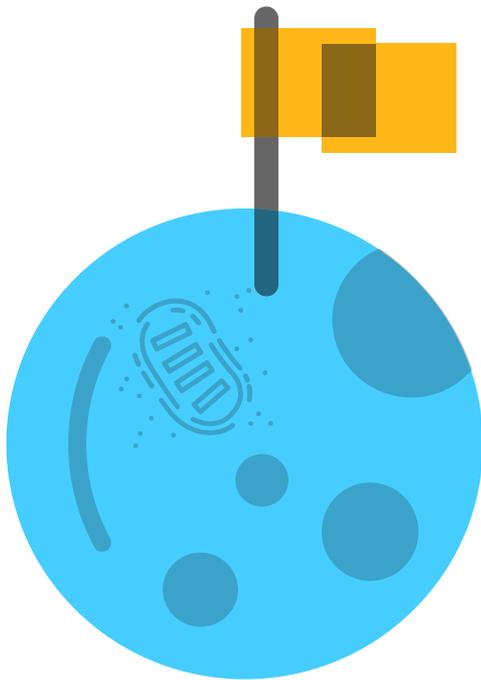
Ensure that all installers are meeting the same standard for communicating information during scheduling and for being prepared to do the work in an equivalently professional and efficient manner. Specific items to focus on based on this feedback include bringing all necessary equipment to an installation job (such as appropriate ladders), installing pipe insulation to the same standard, efficiently conducting the installations, and maintaining a clean environment once installations are complete.

Nicor Gas Multi-Family Program

02

**Program
Details**

What are the program goals?



The Multi-Family Market Rate Program is an energy assessment and direct install residential program jointly operated by ComEd, Peoples Gas, North Shore Gas, and Nicor Gas. It includes utility-specific rebate paths to achieve comprehensive improvements in multi-family properties.

The primary objective of this program is to secure energy savings through direct installation of low-cost efficiency measures at eligible multi-family residences, and achieve comprehensive savings for the building common areas and central systems. The delivery approach consists of the following paths:

(1) The Energy Assessment and Direct Installation (DI) Path of the program provides free energy efficiency products in residential dwelling units and common areas. The energy assessment identifies additional comprehensive efficiency upgrades that allow participants to implement deeper retrofit measures through other delivery paths.

Specific measures include:

- Showerhead (IU)
- Programmable Thermostat (IU)
- Pipe insulation (HW)

(2) The Rebate Path of this program offers prescriptive and custom rebates to multi-family property decision-makers to implement energy saving measures.

Specific measures include:

- Pipe insulation (indoor hot water space heat)
- Condensing boilers
- CDHW controls

How is the program implemented?

In PY2018, the program achieved 306,027 net therms of savings, 6% of Nicor Gas Residential Net Verified Savings.

The program serves multi-family* building owners and managers seeking to generate electricity and natural gas savings throughout the property.

The program implementer, Franklin Energy Services (Franklin), is responsible for targeted outreach to property management companies, building owners, associations, and tenants. Franklin staff also conduct the energy assessments and the majority of direct installations.

The program also offers direct installations of lighting retrofits and gas measures, such as pipe wrap, in common and exterior areas, by experienced service providers. Rebates for comprehensive measures are utility-specific.

Utility**	Customers	
ComEd Only	180	
Nicor Gas Only	29	
Peoples Gas or North Shore Gas Only	273	
ComEd and Nicor Gas	145	
ComEd and Peoples Gas or North Shore Gas	451	
ComEd and Nicor Gas and Peoples Gas or North Shore Gas	14	
Total	1,092	
Utility** (Total)	Customers	%
ComEd	790	72%
Nicor Gas	188	17%
Peoples Gas or North Shore Gas	738	68%

* 3+ units for ComEd and Peoples Gas, 5+ units for ComEd and Nicor Gas.

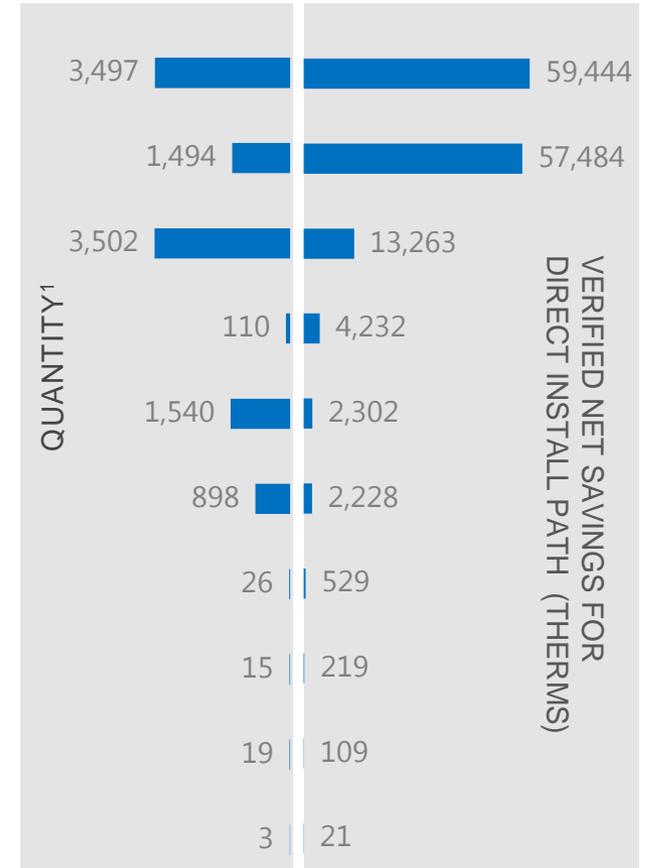
** Program eligibility and available measures differ by gas and electric utility territory and the number of residential units in a participating building. Recognizing these overlaps provides a foundation for understanding the distribution of gas versus electric measures and the proportion of participants eligible for both gas and electric measures.

What is the measure distribution for the direct install path?

Evaluation of specific measures for the direct install path for 143 participants resulted in a total of 139,831 therms of verified net savings due to this path (46% of program net savings).

The showerhead in-unit (IU), programmable thermostat (IU), and hot water (HW) pipe insulation measures resulted in 93% of savings for the direct install path. Most measures were installed in living units with minimal savings from common areas (CA).

- Showerhead (IU)
- Programmable Thermostat (IU)
- Pipe Insulation (HW)
- Reprogrammable Thermostat (IU)
- Bath Aerator (IU)
- Kitchen Aerator (IU)
- Showerhead (CA)
- Programmable Thermostat (CA)
- Bath Aerator (CA)
- Kitchen Aerator (CA)



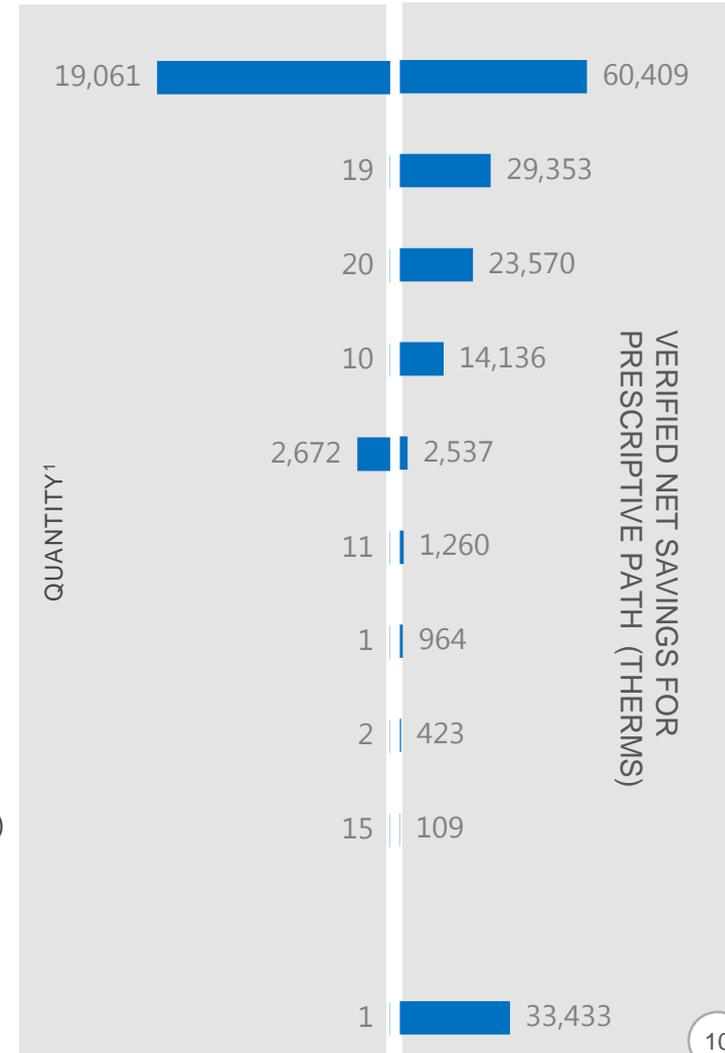
What is the measure distribution for the rebate path?

Evaluation of specific measures for the prescriptive path for 42 participants resulted in a total of 132,763 therms of verified net savings due to this path (43% of program net savings).

One custom participant achieved 33,433 verified net savings in therms (11% of program net savings).

The pipe insulation (indoor hot water space heat), condensing boiler, central domestic hot water (CDHW) controls, and hydronic boiler measures resulted in 96% of verified net savings for the prescriptive path.

Pipe Insulation (Indoor HW Space Heat)	19,061
Condensing Boilers	19
CDHW Controls	20
Hydronic Boilers	10
Outdoor Pool Covers	2,672
Efficient Furnace	11
Boiler Tune-up, Space Heating	1
Storage Water Heater	2
Programmable Thermostat (CA)	15
Custom	1



Source: Navigant 2018 Impact Evaluation Report

¹Metrics in each item except for outdoor pool covers, which are in units of square feed, and the custom project.

Evaluation Questions

While the primary purpose of the participant surveys is to gather net-to-gross information, the evaluation team identified the following key evaluation questions as part of its collaborative evaluation planning process with ComEd and Nicor Gas:



What are building owners' and building managers' perspectives and overall satisfaction with the program?



What are the non-energy impacts resulting from participation?



What are the opportunities for continuous improvement?

FREE RIDERSHIP SURVEY

SPILLOVER SURVEY

Administration

Administered by Blackstone Group on behalf of Navigant through telephone survey delivered to property managers and/or building owners. The population included 188 Nicor Gas participants.

Participants

The team contacted customers who participated in the program between January 2018 and December 2018.**

The team contacted customers who participated in the program between April 2017 and December 2017.**

Fielding

Survey fielded between March 1, 2019 and April 26, 2019.

Sample

The free ridership research sample had 669 participants, targeting 414 measure-level completes, yielding 350 measure-level completes across both gas and electric measures.

The spillover research sample consisted of 1,609 participants, targeting 68 program-level completes and yielding 65 completes.

Focus

The free ridership survey targeted CY2018 program participants and focused on free ridership and satisfaction.

The spillover survey was administered to PY6 program participants and focused on spillover and satisfaction.

Completes

15 Nicor Gas property managers responded to the free ridership survey, and 8 responded to the SO survey, for a total of 23 completes. With a 2018 population of 188 Nicor Gas participating properties, this results in an 8% response rate for the free ridership survey which represents 21% of program net verified savings.

* The free ridership survey targeted CY2018 program participants and focused on free ridership and satisfaction while the spillover survey was administered to GPY6/EPY9 program participants and focused on spillover & satisfaction.

** Survey samples were extracted from different program years to allow time for spillover to occur, to question free ridership closer to the time of decision making, and to avoid overlap and survey fatigue.

Nicor Gas Multi-Family Program

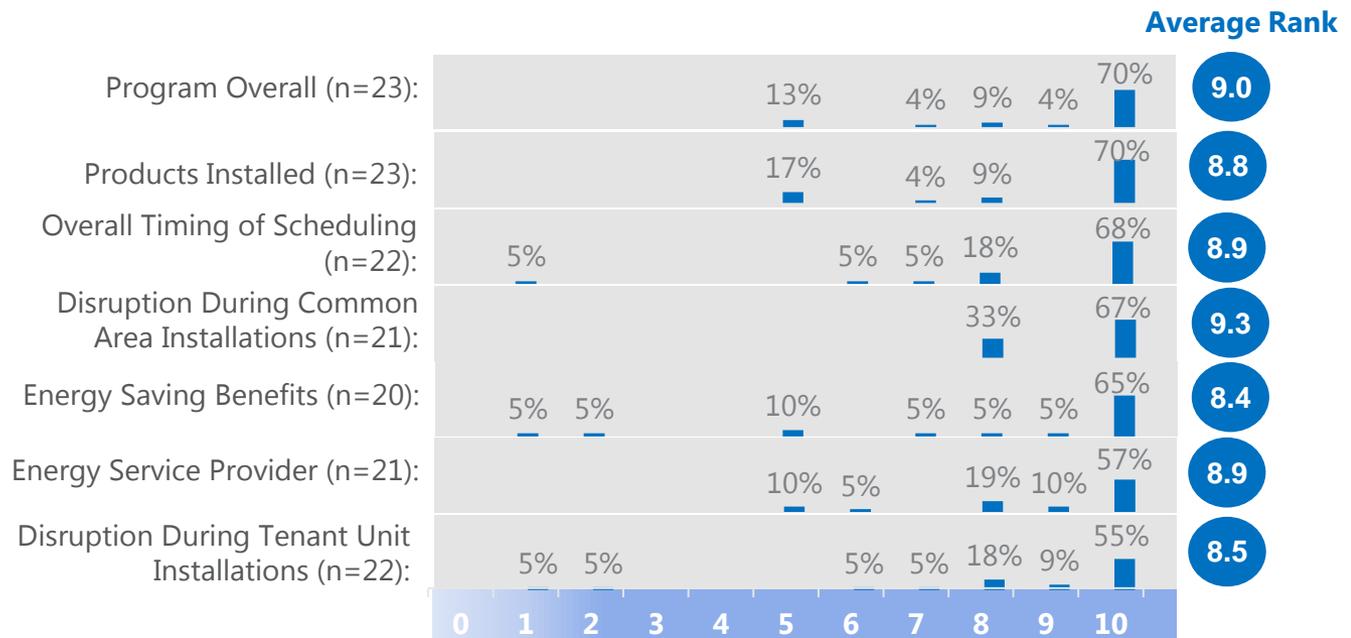
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**Participant
Surveys**

Property Manager Satisfaction

Fourteen (61%) respondents gave open ended comments verifying their satisfaction with the program (count of mentions). Aside from the energy and monetary savings (which all mentioned), the following additional positive feedback includes:

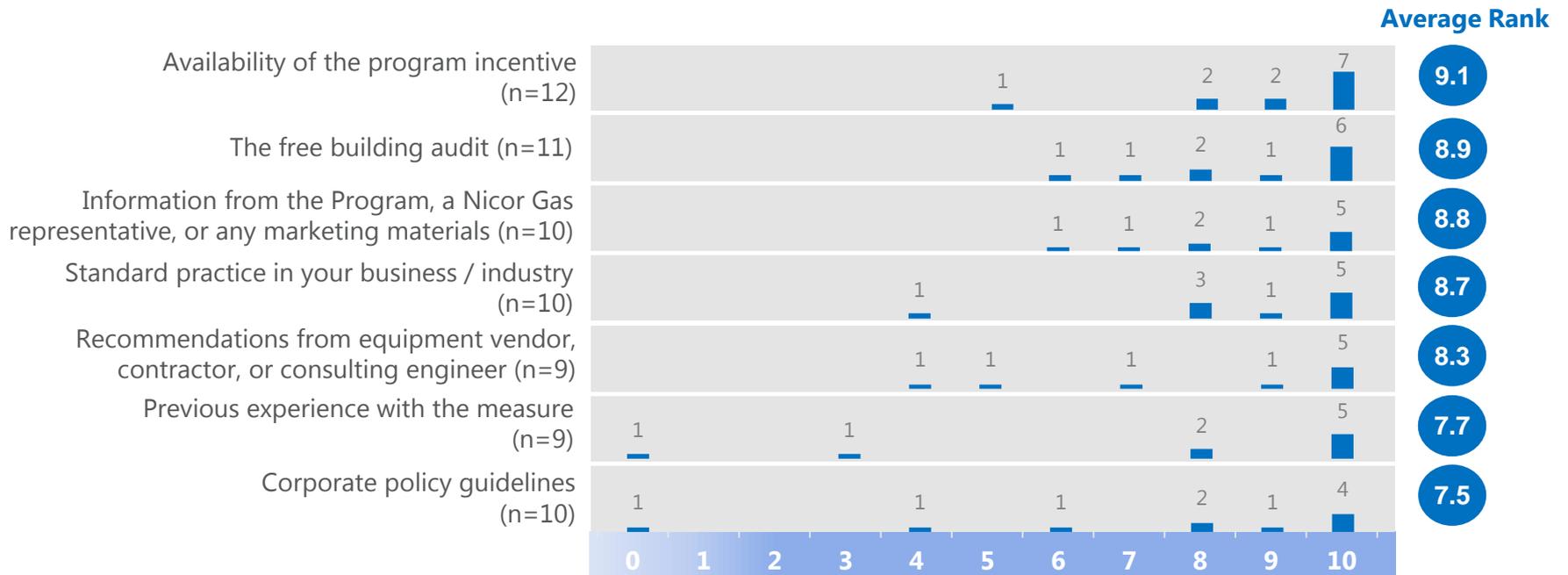
- Commentary on the minimal disruption and quick timeliness of the installation team (4 mentions).
- The professionalism of the installers being tidy and knowledgeable - able to answer any questions adequately (4 mentions).
- Twelve mentions were more generic and simply stated the process was easy and they had nothing to complain about.



What were the key drivers in participants' decision making process?

The program incentive and free building audits are the main factors that drove property managers to participate in the program.

Property managers were asked to rate the importance of the following factors on their decision to participate in the program on a ten point scale, where 0 indicated "not at all important" and 10 indicated "extremely important". The results are depicted below.



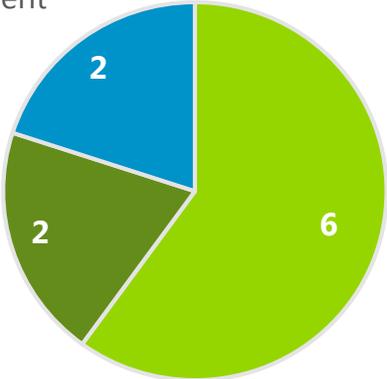
What non-energy impacts did participants see?

Ability to market apartments or building as energy efficient

Increased peace of mind

“The tenants say it is really nice. More consistent temperature, and they can set the thermostat the way they want.”

“We have increased performance and more reliable service, and I get less [complaint] calls”



Happier Tenants

Suggestions for continuous improvement

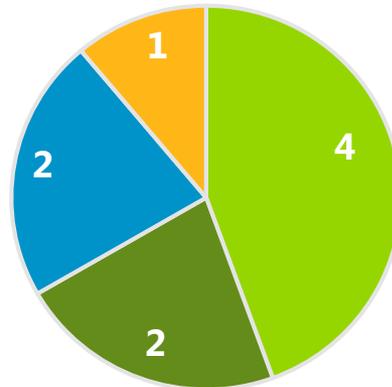
Five (22%) respondents stated suggestions for improvement in the following categories (count of mentions):

Showerhead model (2)

- "Tenants don't like them, and prefer their old showerheads"

Pipe insulation (1)

- "It seemed pretty rudimentary, I'm not convinced it was done well"



Thermostat model (4)

- "They are not smart thermostats"
- "Tenants find them confusing"
- "I have to monitor the batteries"

Installer burden (2)

- One installer forgot a ladder necessary for the installation and the property manager felt burdened providing their own.
- Another property manager stated they needed to provide help to the installers and didn't anticipate this based on information provided in the scheduling calls.

Nicor Gas Multi-Family Program

04

**Future
Evaluation
Questions**

Future Evaluation Questions

OVERVIEW

Navigant would like to acknowledge the following future evaluation question posed during the IL TRM advisory group meetings.

QUESTION 1

How often are property managers involved with in-unit decisions versus common area decisions?

- Have property managers replaced in-unit energy consuming items in the past?
- Did they do this without incentives?
- If so, how often does this occur and for what items?