# **The Need for Speed** Evaluation as an **Opportunity Accelerator**



Many regions have successfully retooled evaluation to move beyond retrospective assessment to an integral part of continuous improvement for existing programs and solutions. But have our evaluation practices evolved to provide critical and timely insight for emerging interventions and technologies? **Not yet.** 

**Integrating evaluation into emerging opportunity pipelines** can not only assess the impacts created by an opportunity but can better equip markets and networks to accelerate opportunity adoption both of which are key to innovating at the speed that our climate clock demands.

In a moment when innovation is imperative, leveraging evaluation to innovate will require out-of-the-box thinking, proactive planning, and early engagement.

Here we provide some key considerations to help encourage the integration of evaluation for folks working in innovation, research and development, and emerging technologies, as well as for program managers tasked with piloting new interventions.

#### **Set Objectives**

Engage your evaluation team early to brainstorm and identify research questions you need to answer to determine if a new opportunity is a fit for your portfolio. And if it is, make sure you understand what you'll need to do to make its adoption successful. For example, move beyond common impact and process evaluation objectives like gross savings and customers satisfaction, and explore additional research questions that can help you understand **market barriers and readiness**. This includes identifying trusted messengers, as well as status quo bias and communication channels. Also consider research questions that will help you understand the viability and impacts of **scaling** up a technology or intervention, including installation costs, product costs, quantity, and the size and maturity of manufacturers and contractor networks.

- Create a logic model for your pilot to help identify and align your evaluation objectives. This may seem like more work up front, but the clarity created in this added step will save you pain and regret later.
- Reach out to the program manager(s) who might ultimately adopt the opportunity being evaluated. They can help you understand the **decision-making** criteria they would use to characterize a potential emerging offering as a good fit for their program, and what **supporting material** or data might help them with successful pilot-to-program transfer.

#### **Define Metrics**

Identify a full suite of metrics that will answer your research objectives and, where possible, characterize any outputs and outcomes from field tests or pilots that you established in your logic model. Some key metrics will likely remain central to this assessment, like gross and net energy savings for example, but new metrics might prove to be meaningful. These can include the effects of decarbonization, non-energy benefits, or economic development efforts.

#### **Ensure Evaluability**

Once your evaluation objectives and metrics are clearly identified, work with your evaluation team to ensure your field test or pilot design is optimized for an impact and cost-effectiveness assessment. This can involve working with implementation contractors during the **design phase** to make sure that relevant data is collected and to identify opportunities to reduce burden on participants and market actors. Get into the weeds! Some metrics may require very specific types of data or levels of granularity (census tracts or non-integer interval meter reads), or frequency (hourly, monthly) and the design phase is often the easiest (or only!) chance to make it possible to get this data.

Additionally, this is the time to think through whether you will implement an experimental design and, if so, how? Will you withhold customers to create a control group? What sample size is sufficiently large to allow for required precision of key metrics? Create time to make these important design decisions up front and encourage your evaluation team to proactively think through the implications of design decisions on their ability to meet evaluation objectives.

### **Assess Participant Experience**

Help your evaluation team resist the urge to rely on existing and common question batteries and methodologies for important goals like understanding customer experience and estimating the influence of an emerging opportunity. A new program delivery model, intervention, or technology may feel "similar enough" to evaluators and may create the desire to use existing data collection instruments (surveys, interview scripts) and processes (sample designs, data collection modalities, etc.), but the nuance of emerging offerings should not be overlooked. In fact, this is precisely what should be assessed! Encourage your evaluation team to dig deeper.

Also consider quick, but critical tasks like **cognitive pre-tests** of survey or interview questions to be sure that language used in data collection activities describes the intervention in a way that participants understand. Confirming that customers understand questions' intent is important to ensure that that data accurately reflect participants' experiences. What's more, understanding the insights of those engaged with your technology, service, or program will be critical to successfully scaling your investments.

- Create an opportunity for observation. Often, people cannot articulate what is working and not working in a design. Observing people interact with a technology or engage in a process can provide far more insight than self-report.
- Successful adoption relies on mature market actor networks (manufacturer representatives, distributors, contractors, trusted messengers, community stakeholders, etc.). Identify other key actors in the network whose experience you'd also benefit from understanding. Work with your evaluation team to gain this insight.

# We need to evolve our evaluation practices to meet key changes occurring in our industry.

These changes include but are not limited to financing mechanisms, energy efficiency and demand response integration, and the value stacking of energy efficiency with health and resiliency, and technological and behavioral interventions, including program design models.

## Creating innovative evaluations

can be especially tricky where evaluators are used to using the values and approaches specified in local Technical Reference Manuals and/or evaluation guidelines. In these cases, early engagement is key, but expectation setting even more so.

Evaluation plans, budgets, and timelines are often tied to evaluation guidelines, methods, and calendars making evaluators unable or ill equipped to revamp evaluations without sufficient planning and runway. Create time and space for innovative evaluations by providing an early heads up and an invitation for fresh thinking and departures from the norm!