

Orange and Rockland Utilities  
Small Business Direct Installation Program  
Process Evaluation Recommendations

Recommendation Number	Evaluator's Recommendations	Status	PA Response
1a	Consider offering free CFLs and other free measures contingent upon the installation of reduced cost measures. This approach will eliminate second visits that result in only free measure installations.	Rejected	The SBDI IC stopped installing free measures during initial visits in 2010 and began installing free measures simultaneously with the installation of paid measures.
1b	Evaluate whether additional HVAC measures may be cost-effective for inclusion in the SBDI program.	Implemented	Due to the nature of the direct install program with the exception of HVAC tune-ups, more costly replacement upgrades related to HVAC are performed in O&R's C&I Existing Buildings Program.
1c	Assess whether new SBDI program measures approved by DPS may be appropriate to add.	Rejected	New measures were already included.
2a	<b>Data Collection:</b> <ul style="list-style-type: none"> <li>• Include separate fields to track the SBDI staff person's name and company.</li> <li>• For each interaction, include a status field that identifies whether : <ul style="list-style-type: none"> <li>- the customers require follow-up,</li> <li>- has completed a step</li> <li>- or is final</li> </ul> </li> <li>• Include contact name, direct telephone number and email for contact at the customer business.</li> <li>• Link contacts table to eligible customer table. Provide functionality to look up a customer in the eligibility list.</li> <li>• Include type of Contact (e.g. incoming call, outgoing call, email).</li> </ul>	Implemented	The new SBDI IC has already incorporated all recommendations in their data management tool.
2b	Add a look-up table for each subcontractor company to restrict the values entered for Contractor Company.	Implemented	The new SBDI IC has already incorporated all recommendations in their data management tool.
2c	Record the result of the interaction: Limit the reasons that an energy survey was not completed or scheduled (e.g., decision-maker not present, decision-maker refused, gatekeeper refused, business closed).	Implemented	The new SBDI IC has already incorporated all recommendations in their data management tool.
2d	Require that key date fields in database be completed. These include survey completion, work order completion, work order signed, and installation complete.	Implemented	The new SBDI IC has already incorporated all recommendations in their data management tool.
2e	Require Willdan monthly reports to include aging statistics on all pending energy surveys, customer agreement/refusals (work orders) and installations	Implemented	The new SBDI IC has already incorporated all recommendations in their data management tool.
3	Develop hardcopy marketing brochures that include the logos of authorized subcontractors to establish their legitimacy.	Implemented	In addition to co-branded business cards, and ID badges, marketing brochures include both O&R and vendor logos.
4a	Target chain accounts at the corporate level as much as possible (e.g., Chief Financial Officer or Chief Operations Officer).	Implemented	O&R hired an internal sales person to target large accounts with large savings potential.
4b	Use O&R utility staff to reach out to chain accounts that do not have existing relationships with Willdan or Willdan's subcontractors to leverage the utility brand and relationship with the corporate customers.	Implemented	O&R hired an internal sales person to target large accounts with large savings potential.
4c	Provide energy survey results to the customer right away. Consider portable tablet computers that can be used for email and to obtain customer signatures.	Implemented	The new IC uses IPADs to perform surveys on site with easy to understand graphics and survey results in real time.
4d	Develop protocols for follow-up. Once an account is contacted for the program, the program should contact that customer a predetermined number of times (e.g., once a week) within a limited time frame (e.g., one month to two months) to establish a final decision	Implemented	The new IC's software tracks customer contacts and follows up on surveys using a pre-determined timeline.
5a	For installation contractors, restructure the reimbursement of the equipment with a 10 percent bonus for installations completed within two weeks. Penalize contractors that have a predetermined number or percentage of installations that are not completed within three weeks.	Rejected	Performance metrics were included in the latest contract, ensuring that installations are completed in a timely manner.
5b	Require SBDI implementation contractors to inspect 10 percent of each subcontractor's completed projects, with an increased percentage of inspections for contractors who perform poorly and fewer inspections for those who do well.	Implemented	100% of all new subcontractors projects are inspected during an initial probationary period, then 10% are inspected.