

Program	Recommendation	Recommendation Summary	Type of Recommendation	Level of Effort	Priority	Product Manager	2021 1st Qtr. Update
Commercial New Construction	Recommendation #1: Willdan should continue its current practices of maintenance for energy modeling protocols and the current quality assurance/ quality control (QA/QC) of energy models to ensure sustained accuracy for project savings estimates	Most of the key impact findings from the PY2015-PY2016 evaluation were sufficiently addressed. This resulted in improved adherence to modeling protocols, more consistency in energy modeling techniques, better overall documentation for projects, and fewer findings than the previous evaluation. The Tetra Tech team assessed the degree to which the relevant recommendations from the last CNC program evaluation were addressed. The recommendations related to baseline model assumptions used an incorrect building energy code or minimum efficiency levels, and updates to the program manual were all sufficiently addressed. This resulted in verification and reports that were easy to reconcile with the modeled parameters in the simulation input files for most projects. The Tetra Tech team found that code minimum parameters from ASHRAE 90.1 were correctly applied in almost all cases, and all projects were modeled with the correct systems as outlined in the Performance Rating Method. Finally, tracked savings were reasonable for all projects and measures.	Data Tracking and QA/QC	Medium	High	Erin Rasmussen	Willdan will continue its current practices of maintenance for energy modeling protocols and the current QA/QC of energy models to ensure sustained accuracy for project savings estimates. Recommendation considered Completed
Commercial New Construction	Recommendation #2: Willdan should consider incorporating these exceptions into the modeling protocols and consider adding additional QA/QC checks for these items to ensure sustained accuracy for project savings estimates.	Application of exceptions lacked documentation. During the desk review process, the Tetra Tech team found a few projects with various types of spaces and configurations exceptions, but documentation of these exceptions was not included in the project files. Without documentation of the exceptions, the Tetra Tech team could not determine if these projects reported savings beyond code. Follow-up conversations with Willdan did resolve these questions.	Documentation	Medium	Medium	Erin Rasmussen	Scheduling a call with Willdan and Tetra Tech to discuss this recommendation further and determine what action should be taken.
Commercial New Construction	Recommendation #3: A NTG ratio of 70 percent is recommended for the CNC program in Illinois.	The NTG research indicates moderate program influence on customer decision-making. Overall, interviews with Illinois participants resulted in a calculated NTG ratio of 40 percent for gas and 38 percent for electric, and no spillover. Due to the small number of interviews completed with Illinois participants (n = 2), benchmarking of other programs with characteristics similar to MidAmerican's service territory in Illinois was completed and shows that most of the NTG ratios for these programs are between 58 and 77 percent. These ratios are in line with what the Tetra Tech team heard from market actors and other information gleaned from Iowa respondents.	Savings Adjustment	Low	High	Erin Rasmussen	No action needed. Recommendation considered Completed

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Commercial New Construction	Recommendation #4: Continue to have program staff and key account managers build and leverage relationships to proactively engage customers in the program and early in project development. The Tetra Tech team recognizes that Willdan continues to increase outreach and that MidAmerican continues to meet with Key Account Managers to increase awareness of energy efficiency programs to help build relationships with customers.	Interviews with program participants and market actors show that satisfaction with the program and the services provided by Willdan remains high. The participants and market actors interviewed expressed high satisfaction with the program and found Willdan's services and technical support to be valuable. Many commented that Willdan staff were very supportive, technically sound, and helped the process to go smoothly. Experience with MidAmerican staff and previous projects were identified as the primary sources of program awareness. Additionally, even though natural gas incentives are no longer offered for commercial new construction projects in Iowa as part of MidAmerican's current Energy Efficiency Plan, the Tetra Tech team confirmed with Willdan and MidAmerican that there have been no changes on the modeling or implementation side related to projects with natural gas mechanicals.	Marketing and Education	Medium	Medium	Erin Rasmussen	The program will continue to have program staff and key account managers build and leverage relationships to proactively engage customers in the program and early in project development. Recommendation considered Completed
Commercial New Construction	Recommendation #5: Consider providing additional check-ins between major project milestones to keep participants and market actors aware of any changes to the program. Consider adjusting the presentation and report materials to include more information about the cost estimates (e.g., sources for upfront cost) and the incentive breakdown.	Customers and market actors provided suggestions for program improvements in the areas of modeling information, incentives, and interactions with Willdan and MidAmerican staff. While satisfaction is high, the participants and market actors interviewed did offer some program improvement suggestions. A few respondents noted that some new construction projects take several years, and during that time, they may not keep up with program and staff changes. Other respondents reported that it would be helpful to receive more information on the calculation of upfront costs and incentives (e.g., what sources and assumptions are considered in return on investment calculations or how incentive levels change based on the type of features installed).	Program Design and Implementation	Medium	Medium	Erin Rasmussen	"(a) Additional check-ins: For budgetary reasons, the program eliminated some check-ins from the program to reduce administrative costs. Willdan does try to check-in and verify construction completion dates 6 months and 3 months prior to completion. This part of the recommendation is considered completed. (b) More information about cost estimates: Willdan will consider including the incentive scale in all documents as a refresher. Today the reports are lengthy and have a lot of information on cost and strategy. Costs presented in reports should be used as a tool and not as an exact representation unless the builder has given Willdan their actual measure costs (which is rare). Willdan shows analysis, but it is up to the design team to actually design the premise and choose products. "

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Residential Equipment	<p>Recommendation #1: For increased accuracy in savings estimates, use the actual installed equipment capacities for thermostat calculations when that information is part of the application submitted for associated equipment measures. When the information is not included with the application, use the Iowa TRM's default sizing values.</p>	<p>Smart thermostats used the default cooling system capacity in savings calculations. About half of the smart thermostat measures in Iowa were part of a project that included the cooling equipment (central air conditioners or heat pumps) replacement or installation. The cooling model numbers and Air Conditioning, Heating, and Refrigeration Institute (AHRI) sheet were included in the participant documentation but tracked in the central air conditioner or heat pump measure. This actual value was not applied to the associated thermostat measure; instead, the default Iowa TRM cooling capacity was used to calculate energy savings for the thermostat. The calculation is more accurate when actual capacity and efficiencies are used. The use of documented cooling system capacities was responsible for most of the savings adjustments in this evaluation.</p>	Savings Adjustment	Medium	High	Amber Moser, Dave McCammant & Keiji Szalo	System adjustments and procedure changes are under review. Action plan to be developed by 6/30/2021.

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Residential Equipment	Recommendation #2: We recommend a NTG ratio of 60 percent for the Residential Equipment program in Illinois.	The NTG research indicates moderate program influence on customer decision-making. Overall, responses to the participant survey resulted in a calculated free-ridership rate of 55 percent and no spillover. Both the free-ridership value and the lack of spillover seem to be in line with what the Tetra Tech team heard from trade allies as well as customers. This is particularly true for spillover—that is, the equipment currently incentivized through the program are large and relatively expensive, and thus, customers are not likely to install another similar central air conditioner or furnace on their own. Although half of the surveyed Illinois participants said they followed the contractor recommendation on what to install, half also said they had already been planning to install the same high-efficient equipment before they learned about the rebate available through the Residential Equipment program. Responses from Illinois participants to the question of their likelihood of purchasing the exact same equipment without the rebate provided through the Residential Equipment program showed that 56 percent were highly likely (rating 9 or 10) to purchase the equipment on their own. Seven percent said they were unlikely to purchase it without the incentive (ratings 0 to 4). However, 48 percent of the Illinois respondents rated the influence of the rebate high (9 or 10). Another 40 percent rated the rebate influence between 5 and 8. Trade allies also reported some program influence, but as noted earlier, the lower incentive levels seem to be sending customers back to non-eligible program equipment. Benchmarking of other programs in Illinois show NTG rates of 63 to 83 percent, though these included a large amount (8 to 12 percent) of nonparticipant spillover from trade ally studies. For MidAmerican, the addition of air source heat pumps and ductless min-splits in Iowa in July 2020 may stabilize NTG, as long as trade allies can generate projects that do not result in fuel switching.	Savings Adjustment	Low	High	Amber Moser and Dave McCamant	Complete - The NTG ratio is being used for 2020 annual reports in Iowa and Illinois.

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Residential Equipment	Recommendation #3: Consistent with previous findings, continue portfolio-level marketing efforts and engaging trades to help educate customers on program offerings. Further, investigate social media options for reaching younger homeowners.	Outreach to customers from both trade allies and utility sources is important. At least two-thirds of the nonparticipants surveyed were aware that MidAmerican offers rebates and services to customers to help them save energy, and half had specifically heard of the equipment rebates. Nonparticipating survey respondents were more likely than surveyed participants to mention that they heard about the program from a MidAmerican bill insert (36 percent) or brochure (17 percent), which would explain why they are aware of the program, but maybe not the specific incentives or eligibility requirements. In addition, 20 percent of nonparticipating survey respondents heard about the program from a friend, family member, or co-worker, compared with about 13 percent of surveyed participants. This corresponds with the trade allies reporting that residential customers tend to come to them aware that there is something available through MidAmerican, but they are unsure of the actual incentive levels or equipment eligibility. Trade allies said they provide this level of information and education, which is further exemplified by the high proportion of participating surveyed respondents (59 percent Iowa and 75 percent Illinois) that indicated a contractor or retailer was their primary source of information about the program. There was a high proportion of older customers who completed the participant and nonparticipant surveys. This may be a reflection of the demographics across the MidAmerican territory, and/or that the measures currently eligible for rebates through the program are higher-cost measures typically installed in single-family homes by higher-income earners who tend to be older. This also may indicate an opportunity to develop more targeted marketing to reach younger homeowners.	Marketing and Education	Medium	Medium	Amber Moser and Dave McCamant	Development of a portfolio-level marketing plan is underway. Action plan will be developed by 6/30/2021.

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Residential Equipment	Recommendation #4: Continue to work with trade allies to facilitate the use of the electronic application process and provide timely responses to questions.	The application process is frequently completed by trade allies who have dedicated staff to work on applications. All trade allies interviewed mentioned completing the application for their customers in some capacity, many completing all of it. About 20 percent of surveyed participants said they filled out the application themselves and 42 percent said they had help from their contractor. Both trade allies and surveyed participants reported the application was easy to understand, complete, and submit. MidAmerican has recently launched the online application option for trade allies; half of those we spoke with have signed up to use the online application, but half have not. Questions arose regarding contact procedures for alternate payees and issue resolutions, but these are quality control processes that are documented and instituted to prevent issues.	Marketing and Education	Medium	Medium	Amber Moser and Dave McCammant	MidAmerican continues to encourage trade allies through email, phone calls and trade ally meetings to utilize the electronic application process. As of mid-February 2021 there are 246 trade allies that have access and have been trained, compared to 203 at the end of 2020. In addition, new in 2021, MidAmerican is now able to accept an alternate payee for residential HVAC applications submitted online, if authorized by the customer. Previously, applications involving an alternate payee required a paper application to be submitted. Response to trade ally questions is provided within 24 hours of the inquiry.
Residential Equipment	Recommendation #5: Include messaging about non-rebate benefits to help lessen potential disappointment with lower incentives. Continue to investigate additional methods for increasing proactive communication with trade allies, potentially supplementing in-person vendor annual meetings with webinars.	Surveyed program participant and trade ally satisfaction remains high, but trade ally satisfaction could be improved. Among surveyed participants, the overall program satisfaction rating was higher in Illinois, with 94 percent rating their satisfaction as very or extremely satisfied, compared with 78 percent in Iowa (previously 87 percent). The decrease in overall program satisfaction in Iowa is at least partially a result of the decrease in incentive amounts, as the proportion of very or extremely satisfied ratings for "the amount of the incentive received" was 63 percent in Iowa and 73 percent in Illinois (previously 76 percent and 91 percent, respectively). Ratings for other aspects of the program remain high and similar to the previous evaluation results. In addition, 60 percent of the surveyed participants said they were extremely likely to recommend the program to others. Half of the trade allies interviewed said they were very satisfied with the program. They were also highly likely to recommend the program to a peer. However, some trade allies suggested increased communication about the program would be appreciated, noting they have not been able to attend annual vendor meetings and may not hear about program updates until they submit an application.	Marketing and Education	Medium	Medium	Amber Moser and Dave McCammant	All customer messaging going forward has been updated to include non-rebate benefits, for instance tips to save energy and money on utility bills. Non-rebate benefits will also be included in communication to trade allies. Increasing proactive communications with trade allies will be addressed in the first half of 2021.

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Nonresidential Equipment	Recommendation #1: Continue to ensure exterior lighting fixtures use the parameters for outdoor lighting rather than interior lighting.	Exterior lighting projects used an incorrect coincident factor across all projects in Illinois and all Iowa 2019 projects. The Tetra Tech team found that 181 projects across Iowa and Illinois were using a coincident factor determined by the building type from the Iowa TRM, rather than the coincident factor of 0 percent as specified for exterior lighting. In discussing with MidAmerican, the coincident factors were adjusted for the PY2020 Iowa population, and a new data extract was submitted, in which the Tetra Tech found that the savings had been calculated correctly. It was decided that these variances would not be changed for the PY2019 projects, and as result, represent the largest adjustment to the peak demand savings across both Iowa and Illinois.	Savings Adjustment	Low	High	Amber Moser, Dave McCammant & Keiji Szalo	Complete - The calculation issue in the system has been resolved. The coincidence factor will be 0 on all exterior lighting fixtures going forward.
Nonresidential Equipment	Recommendation #2: Continue to ensure the savings calculations use the tracked interaction factors for energy and demand savings.	Multiple projects used waste heat or interaction factors in their lighting savings calculations rather than the factors specified in the tracking system. The Tetra Tech team found 27 projects across Iowa and Illinois that were using an interaction factor in their energy and demand savings calculations that differed from the values that were tracked in the tracking system. In discussing with MidAmerican, the savings for the measures where this occurred in the PY2020 Iowa population were corrected, and a new data extract was submitted, in which the Tetra Tech found that the savings had been calculated correctly. It was decided to not make adjustments to the PY2019 populations in both Iowa and Illinois.	Savings Adjustment	Low	High	Amber Moser, Dave McCammant & Keiji Szalo	Complete - The TRM has since been updated therefore, going forward, we will no longer use the Appendix-A savings calcs in the LED Fixtures regardless of the lumens.

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Nonresidential Equipment	Recommendation #3: We recommend a NTG ratio of 75 percent for the Nonresidential Equipment program in Illinois. Additionally, continue outreach to the small businesses, as there is indication that rebates are effective for making energy efficiency improvements in this sector.	The NTG research indicates moderate overall program influence on customer decision-making. However, in looking more specifically at “small” versus “large” businesses, NTG values are higher among the small business sector. The program-level calculated NTG is a weighted value comprising both free-ridership and spillover. Program participants interviewed as part of this evaluation generally agreed that the rebates offered have had some effect on their decision to install high efficiency equipment. However, the magnitude of this effect varied by customer, with some surveyed participants indicating that they likely would have installed the same equipment even without the rebate. This is not surprising given awareness trends across the country, including for businesses to increase their sustainability practices, for which energy efficiency can play a key role. Very few, if any, similar types of programs across the country have a NTG value of 100 percent. Interviews with trade allies corroborated the finding that the rebates are having some influence on customer decisions around high efficiency equipment in MidAmerican’s service territory. The Tetra Tech team did review NTG for the small business sector. In analyzing the NTG value for the “small” versus “large” businesses, the Tetra Tech team found higher NTG values for small businesses—values ranged from 73 percent to 89 percent, depending on the question and methodology.	Savings Adjustment	Low	High	Amber Moser and Dave McCammant	Complete - The NTG ratio is being used for 2020 annual reports in Iowa and Illinois.
Nonresidential Equipment	Recommendation #4: Trade Ally Ambassadors should continue to try to connect with smaller trade allies. In addition, the program should continue with regular electronic communications and training, which are particularly helpful for smaller contractors.	Trade allies who have worked with a Trade Ally Ambassador are more likely to say they are adequately informed of program changes. Six of the 14 trade allies interviewed indicated they are adequately informed of program changes, and most of these six trade allies say they have worked with a Trade Ally Ambassador. All found the Trade Ally Ambassadors knowledgeable and services helpful. Of another six who said they are not adequately informed of program changes, only one said they have worked with a Trade Ally Ambassador, but it has been some time since they had that interaction. These six are also smaller contractors, with all but one having a staff of less than 12.	Marketing and Education	Medium	Medium	Amber Moser and Dave McCammant	Outreach strategy to smaller trade allies will be developed and an action plan in place by 7/1/2021. The trade ally website, dedicated specifically to trade allies, has been enhanced to include all necessary resources to assist customers in participating in MidAmerican’s energy efficiency programs. The website is considered a one-stop-shot which includes updates on available incentive dollars and communications regarding changes to programs and/or rebates.

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Nonresidential Equipment	Recommendation #5: Continue portfolio-level marketing efforts and engaging trades to help educate customers on program offerings.	Portfolio-level marketing and outreach efforts remain successful in raising general customer awareness of program rebates, though trade allies continue to contribute heavily to awareness. Respondents to the participant survey most commonly reported learning about the Nonresidential Equipment program through an equipment vendor, contractor, or other professional (64 percent for Iowa participants and 48 percent for Illinois participants). As illustrated in the participant survey results, trade allies continue to play a key role in customer outreach for the Nonresidential Equipment program. Most trade allies interviewed reported routinely discussing program rebates with MidAmerican customers and incorporating MidAmerican rebates into price estimates and comparisons. Most trade ally impressions of customer awareness of the program was that customers are not aware of the program. Customers may ask if there is a rebate available, knowing it is a possibility, but they really are unaware of the program itself.	Marketing and Education	Low	Medium	Amber Moser and Dave McCamant	Development of a portfolio-level marketing plan is underway. Action plan will be developed by 6/30/2021.
Nonresidential Equipment	Recommendation #6: Continue current levels of program support and continue to find opportunities to educate customers about the value of energy efficiency.	Surveyed participants and trade allies continue to be satisfied with the program. However, there were indications that satisfaction is lower compared to the last evaluation cycle and could be driven by the decrease in rebate amounts—the amount of the incentive received was the lowest rated program aspect among surveyed participants. Participant survey respondents generally expressed high satisfaction with the program overall, as well as individual aspects of their participation experience. Over 80 percent of both Iowa and Illinois survey respondents rated their satisfaction with the program overall as a 3 or 4 on a scale of 1 to 4 where 1 was “not at all satisfied” and 4 was “very satisfied.” Using the same scale, eight of the 14 trade allies provided a rating of 3 or 4. Of the individual aspects of the program asked in the survey, both Iowa and Illinois participants gave the highest satisfaction ratings to the contractor who installed the equipment, followed by the type of equipment eligible for the program. The lowest rated item was the amount of incentive received. High satisfaction with the program is also represented by the propensity to recommend the program to others. Based on participant survey respondent answers, 65 percent of Iowa respondents and 83 percent of Illinois respondents were “extremely likely” to recommend the program (9 or 10 on a scale of 0 to 10 where 0 was “extremely unlikely” and 10 was “extremely likely”). Trade allies were also asked how likely they are to recommend the program to a peer using the same scale. Nine trade allies rated their likelihood a 10 (none rated their likelihood a 9).	Marketing and Education	Medium	Medium	Amber Moser and Dave McCamant	MidAmerican and Nexant will continue current levels of program support. Opportunities to educate customers about the value of energy efficiency will be included in business news articles, on social media, the MidAmerican website home page and more.

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Residential Assessment	Recommendation #1: Consider surveying program participants to gain insight into how the smart power strips are used in customer homes and to better estimate the percentages that are being used for home office applications versus entertainment centers.	The program appropriately applied Iowa TRM inputs and assumptions to its savings values and tracking data, resulting in 100 percent realization rates. The Tetra Tech team performed a review of how the program applied Iowa TRM inputs to its kit measures and kit types (electric, gas, and dual fuel), and found that these assumptions were appropriately used. The tracking data was also reviewed, and no inconsistencies were identified. When calculating future savings estimates, we note that the Iowa TRM bases participant savings for advanced power strips on the assumption that 41 percent of strips are used in home offices and 59 percent are used in entertainment systems. The Iowa TRM recommends using improved ratios for home office and entertainment system distribution, when available.	Savings Adjustment	Medium	Medium	Erin Rasmussen	MEC will consider this in the next evaluation cycle
Residential Assessment	Recommendation #2: Consider adjusting the installation rates for individual kit measures to match the rates identified through the customer survey, particularly for the water saving measures. Given this affects the Iowa TRM, this recommendation should be brought to the Iowa TRM Technical Advisory Committee (TAC) for review.	The Iowa TRM installation rate assumptions for water saving devices are higher than what was found in the customer web survey and postcard responses. The Iowa TRM embeds installation rates within the measure-level deemed savings calculations and values. On average, both the survey and the postcard responses show that installation rates were close to participants' installation activities for all measures except water saving measures (e.g., bathroom aerator, showerhead). For the water saving measures, both the survey and postcard responses reflect lower installation rates for water saving measures than what is currently documented in the Iowa TRM. For future years' planning, it will be important to ensure savings values better align with participants' installations of these measures. The discrepancy in water saving measures installation rates appear to be driven by customers not always needing the measures provided in the kit. Survey results reflect that some customers simply did not need the measures they received in the kit (aerator n=115; showerhead n=179), and kits come with a standard suite of measures. Lower installation rates for aerators and showerheads are likely to persist for this reason.	Savings Adjustment	Medium	High	Erin Rasmussen	Data has been provided to the IA TRM program implementer and changes will be made in version 6. This recommendation is considered completed

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Residential Assessment	Recommendation #3: Review website analytics to learn how customers engage with the interactive feature of the tips page (e.g., check complete, bookmark to save for later).	Customers are satisfied with the program and MidAmerican; however, the tips platform does not appear to motivate customers to engage in energy saving actions or behaviors. Eighty percent of participant survey respondents said they were either extremely or very satisfied with the program overall. Further, nearly all participants (91 percent) were very or extremely satisfied with MidAmerican. While customers gave high ratings on the usefulness of the program, including the tips, in the survey and in interviews the design review participants (n=12) described the usefulness was more about receiving an affirmation that the activities they had already done were valuable and less about motivating them to do new or more activities around their home. Design review survey participants described that they had not and would likely not revisit the tips page, including to engage with the features of the tips page to look for suggestions of other improvements to make, to check off items that they have done, or to bookmark items to "Save for later." This feedback from a small number of participants indicates that there is an opportunity for MidAmerican to review website analytics to further assess whether customers engage with the tips platform to create a list of actions they can take to save energy, which is a key outcome of the tips platform.	Program Design and Implementation	Medium	Medium	Erin Rasmussen	In 2021, MidAmerican will embed the Oracle tool into its website so that the customer can more easily access the information (including tips) each time they log in to their My Account page. This is expected to be completed in early Q2 2021
Residential Assessment	Recommendation #4: Simplify navigation features on the MidAmerican website leading to the HomeCheck® Online home assessment to make it easier for customers to find.	Navigating to the online assessment was not always easy for customers. MidAmerican could simplify website navigation features to make it easier for customers to access the online assessment both to support ongoing engagement of existing participants and to support new participation among those who have never completed the assessment. Through the participant survey, about two-thirds (65 percent) of customers said it was very to extremely easy to navigate to the online assessment. However, upon further exploration during the design review interviews, the Tetra Tech team found that 11 out of 12 participants interviewed had challenges in navigating to the online assessment through the MidAmerican website. Menu options were not necessarily intuitive for customers, and some felt they were not tech savvy enough to figure out how to easily get to the program page. While participants were able to find the online home assessment when they originally participated, they could not do so again without instruction from the Tetra Tech team interviewers.	Program Design and Implementation	Medium	High	Erin Rasmussen	In 2021, MidAmerican will embed the Oracle tool into its website so that the customer can more easily access the information (including tips) each time they log in to their My Account page. This is expected to be completed in early Q2 2021

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Residential Assessment	Recommendation #5: Implement similar marketing and outreach practices to continue to increase participation in the Residential Assessment program.	Customers engaged in response to marketing messages through the residential newsletter. MidAmerican began implementing their marketing plan to heavily market the program in quarterly marketing activities starting in Q1 2020. This is reflected in a substantial increase in participation, including 6,992 kits requested in Iowa the week after the newsletter was issued and 7,696 total kits requested in February 2020.	Marketing and Education	Medium	High	Erin Rasmussen	In Q1 2021, the program was featured in the printed customer newsletter for February billing cycle and in the emailed customer newsletter which will be emailed in late February. Additionally, with the Oracle tool embedded in the MidAmerican website, it will be easier for customers to navigate to the tool.