Report # 11-221

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2010 Stakeholder Perception Survey

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Executive Summary

Introduction

In fall 2010, the Northwest Energy Efficiency (NEEA) engaged Market Strategies International (MSI) to conduct a survey to measure stakeholder perceptions of NEEA.

Among the 245 respondents who completed the 2010 Stakeholder Perception Survey, 94 work for an organization that directly funds NEEA (Direct Funders), 42 work for organizations that fund NEEA indirectly (Other NW Utilities), and 109 work for organizations that do not provide funding for NEEA (Non-Utilities). This latter group (Non-Utilities) participated in this study for the first time in 2010 and includes entities such as program implementation and evaluation contractors, market partners, and regional and national non-profit and government organizations.

Key Findings

Stakeholder perceptions of NEEA are generally positive. A majority of stakeholders rate NEEA very positively on having staff members who are highly knowledgeable about energy efficiency issues, providing trustworthy information, and being able to influence the market in ways that individual organizations could not do on their own.

Among areas of concern, nearly one in five Direct Funders report that their opinion of NEEA has become less positive during the past year, and fewer Direct Funders report partnering with NEEA on programs and interacting with NEEA staff compared with 2007 survey results. In addition, significant room for improvement exists with respect to perceptions of NEEA's value. This is particularly true among Other NW Utilities whose ratings on attributes describing NEEA's value to their individual utility consistently lag those of Direct Funders and Non-Utilities.

Overall Favorability

Among all three stakeholder groups, the majority view NEEA positively in terms of their overall impression of the organization. Seventy-four percent of Total Funders (Direct Funders and Other NW Utilities combined) and 89% of Non-Utilities have a positive overall impression of NEEA (5-7 on a 7-point scale). Ten percent of Total Funders and 5% of Non-Utilities had an unfavorable impression of NEEA. While overall favorability is positive, only 37% of Total Funders rate NEEA as *very favorable* (6-7 on a 7-point scale). A significantly higher proportion of Non-Utility customers (61 percent) rate their impression of NEEA as *very favorable*.

The most frequently cited reasons for positive favorability ratings among Direct Funders and Other NW Utilities are NEEA's *commitment to energy efficiency* and *good programs and services*, while the most frequently cited reasons for negative to less positive favorability ratings are *little interaction with NEEA*, *lack of commitment to energy efficiency programs*, and *support needs improvement*.

Among Non-Utility customers who rate NEEA positively on this measure, the most frequently cited reasons are NEEA's *innovation / market transformation, commitment to energy efficiency*, and *previous successful accomplishments*.

Past Year Change in Opinion of NEEA

Three in ten (29 percent) Direct Funders report their general opinion of NEEA has become more positive over the past year. However, of concern is the finding that nearly one in five (19 percent) say their opinion of NEEA has become less positive. The most frequently cited reasons for less positive opinions among Direct Funders are *changes made that have had a negative impact*, and *concern about NEEA's direction*. Roughly three in ten Other NW Utilities (26 percent) and Non-Utilities (33 percent) report more positive views of NEEA, while less positive impressions are noted by 7 percent and 12 percent of these groups, respectively.

Organizational Attributes

Three organizational attributes are measured in the 2010 survey. The majority of Direct Funders strongly agree (6-7 on a 7-point scale) that *NEEA's staff is highly knowledgeable about energy efficiency issues* (63 percent), and that *you can trust the information that comes from NEEA* (60 percent). The proportion of very positive ratings for these two statements is lower among Other NW Utilities (45 percent and 48 percent, respectively).

Among Total Funders, only 12 percent strongly agree that NEEA *moves too slowly on its initiatives* in 2010, which is significantly lower compared to the 2007 result for this measure (27 percent).

Value to the Region

More than six in ten (64 percent) Direct Funders strongly agree that *NEEA is able to influence the market in ways that individual organizations could not do on their own*. This value proposition registers the highest proportion of strongly agree ratings among survey respondents in all three stakeholder groups.

Among Total Funders, significantly fewer strongly agree that *NEEA accelerates market adoption of energy efficiency products, services, and practices in the Northwest* in 2010 (50 percent), compared with 64 percent who strongly agreed with this statement in 2007.

Also among Total Funders, agreement levels are relatively low across several of NEEA's key value propositions, with well under one-half strongly agreeing that *NEEA facilitates collaboration and knowledge sharing between northwest energy efficiency organizations* (43 percent), *NEEA facilitates regional energy efficiency planning and implementation* (35 percent), and *NEEA helps to fill the energy efficiency pipeline to ensure the future energy efficiency opportunities for the northwest* (34 percent).

When asked to name which energy efficiency products, services or practices NEEA had recently been successful in accelerating the market adoption of, ductless heat pumps, CFL light bulbs, and energy efficient electronics were the most frequently mentioned. Unaided mentions of success outside these residential produces were notably low among funders, including codes/standards (5%), lighting/building design (8%) and industrial efficiency (4%).

Value to the Individual Utility

Eight of the eleven "Value to the Individual Utility" statements from the 2007 survey were included in 2010 survey. There were significant improvement in Total Funder perceptions in two areas: *NEEA has helped my organization achieve its energy efficiency goals* (38 percent strongly agree in 2010, versus 22 percent in 2007), and *NEEA offers me ample opportunity to provide meaningful input into its initiatives* (38 percent strongly agree in 2010, versus 27 percent in 2007). The remaining six measures do not show any statistically significant changes from 2007 to 2010, with most ranging between 30 and 40 percent "strongly agree."

For all of the statements with positive connotations (nine of the eleven), a greater proportion Direct Funders strongly agree compared with Other NW Utilities. This is indicative of the more involved relationship NEEA has with its Direct Funders.

Of concern, slightly fewer than three in ten (29 percent) Direct Funders and only 17% of Other NW Utilities strongly agree that *NEEA understands my organization's energy efficiency goals and programs.*

Also of note, a significantly greater proportion of stakeholders in rural areas strongly agree with the statement *NEEA does not understand market conditions in my local service territory* compared with urban stakeholders (31 percent versus 11 percent, respectively).

Familiarity with NEEA and Interactions with Staff

Approximately half of Direct Funders (48 percent) and Non-Utilities (53 percent) indicate they are *very* familiar with NEEA and its initiatives, compared with only one in five Other NW Utilities (21 percent) who say this. Down significantly from 80 percent in 2007, just one-half (50 percent) of Direct Funders report partnering or coordinating with NEEA on one or more programs during the past year. (It should be noted, however, that there is a markedly high proportion (28 percent) of "don't know" responses to this question).

The proportion of Direct Funders reporting interaction with NEEA staff in the past 12 months declined significantly from 90 percent in 2007 to 77 percent in 2010, while the proportion Other NW Utility personnel reporting this increased from 53 percent to 67 percent (not statistically significant). In 2010, 85 percent of Non-Utilities report staff interactions with NEEA.

Nearly half (46 percent) of Direct Funders are very satisfied with their interaction with NEEA (6-7 on a 7-point scale), significantly lower than 64 percent of Non-Utilities reporting this.

Communication

Total Funders report that email (63 percent) and phone (49 percent) are the most common communication channels with NEEA. Significantly fewer Other NW Utilities (31 percent) cite phone as a typical channel compared to Direct Funders (57 percent) and Non-Utilities (62 percent). A significantly higher proportion of Non-Utilities (34 percent) note in-person communication as typical compared to responses from Direct Funders (15 percent) and Other NW Utilities (seven percent).

Approximately two out of five Direct Funders (42 percent) and Other NW Utilities (38 percent) are very satisfied (6-7 on a 7-point scale) with *the way NEEA communicates with you about their work*, versus half (51 percent) of Non-Utilities who indicate this. Among Total Funders who provided negative or neutral ratings on this measure, nearly one-quarter (24 percent) cited the need for *more frequent, proactive communication*.

Across all three stakeholder groups, slightly less than half (46 percent-49 percent) report receiving a NEEA Newsletter, 24 percent-33 percent report receiving a NEEA Bulletin, and solid majorities (59 percent-83 percent) report receiving NEEA's Annual Report. Most respondents view these communication vehicles as useful. A large majority have accessed NEEA's website.

Relatively few respondents to the 2010 survey participated in a NEEA committee or group (7-16 percent). Generally, committee or group participation is more common among Direct Funders versus Other NW Utilities and Non-Utilities. Assessment of these meetings is mixed but generally positive.

When asked what NEEA can do to improve how it interacts with stakeholders, one in ten respondents note *more opportunities for interaction and collaboration*. Other comments relate to better accessibility to information and NEEA staff.

Recommendations

While NEEA is viewed favorably, and recognized for its efforts and expertise by the majority of stakeholders, there remain opportunities for improvement.

- Continue to seek ways to enhance the level of two-way engagement with stakeholders
- Involve utilities early in the decision-making process to optimize alignment between utility and NEEA efforts
- Better communicate changes at NEEA and reasons for change
- Develop and demonstrate an understanding of each individual utility's energy efficiency goals and the unique issues and challenges in their territories, particularly with Other NW Utilities
- Expand efforts to track and promote market transformation efforts and demonstrate the value of NEEA's programs and activities to stakeholders
- Identify ways to better engage and inform "Other NW Utilities" (beyond Direct Funders) that provide funding to NEEA indirectly
- Consider a dashboard summary of NEEA initiatives and their performance / impacts to give stakeholders a quick resource for updates and information

Introduction

The Northwest Energy Efficiency Alliance (NEEA) is a non-profit organization working to maximize energy efficiency in the Northwest. NEEA is supported by, and works in collaboration with the Bonneville Power Administration, Energy Trust of Oregon and more than 100 Northwest utilities on behalf of 12 million energy consumers. By accelerating market adoption of energy efficient products, services and practices, NEEA's initiatives assist the region in maximizing energy efficiency and meeting its energy efficiency goals.

In 2004 NEEA began to receive feedback that staff at funder organizations were dissatisfied with the opportunity to provide meaningful input into NEEA initiatives. NEEA initiated a survey to track the level of satisfaction with that and other aspects of NEEA's value delivery. NEEA repeated the survey in 2005, but findings indicated that satisfaction among stakeholders had not improved despite NEEA's introduction of bi-monthly conference calls that encouraged dialogue on program direction.

In 2006 NEEA conducted comprehensive in-person research that sought to better understand the needs of its funders and initiated a number of activities designed to improve its partnership with stakeholders. These activities included training NEEA staff and contractors to be more aware of stakeholder needs and perspectives, better defining NEEA's mission and value, and establishing processes for better coordination with utility energy efficiency activities.

NEEA resumed its stakeholder survey in mid 2007, to again gauge satisfaction and perceptions of NEEA across value propositions, communications, and relationships. From the 2007 survey results, NEEA learned that, in general, stakeholders had a positive perception of NEEA and thought NEEA brought unique value to the region. They also rated NEEA highly on providing trustworthy information, and favorably on other organizational attributes including reliability, innovation and practicality. In addition, there was some improvement in the percentage of respondents who were satisfied with the opportunity to provide meaningful input into NEEA initiatives. While the majority of respondents indicated that NEEA had helped the region achieve its energy efficiency goals, fewer perceived that NEEA had helped their utility achieve its individual goals. Results strongly suggested that NEEA needed more in-person communication, and recommendations included discontinuing the bi-monthly conference calls in favor of face-to-face communications.

Between late 2007 and 2009, NEEA completed a change in governance structure, hired a new Executive Director, developed strategic and business plans for the impending 2010-2014 funding cycle, and secured $190 million in funding for that period. This work required extensive stakeholder outreach, during which time the survey was suspended to avoid stakeholder survey fatigue. During this period NEEA discontinued the bi-monthly conference calls and launched "Sector Advisory Committees" as a mechanism for providing input into NEEA initiatives.

In fall 2010, NEEA engaged Market Strategies International to resume its stakeholder survey. 2010 survey objectives were similar to previous surveys: measure perceptions of NEEA in terms of value to the region and stakeholders, interactions with NEEA staff, and NEEA communications; and identify any changes in those attitudes since the 2007 survey. The 2010 survey includes external stakeholders, referred to in this document as Non-Utilities, which were not included in the 2007 survey. The Non-Utilities include entities such as program implementation and evaluation contractors, market partners, and regional and national non-profit and government organizations.

Research objectives for 2010 among Direct Funders and Other NW Utilities broadly mirror those of the 2007 study, and include:

- Measuring utilities' perceptions of NEEA in terms of:
  - Value propositions
  - Customer interactions
  - Competition
- Respect/attitude from NEEA staff
- Brand image and brand value
- Project portfolio
- Opportunity for meaningful input/collaboration
- Gauging the level of support for NEEA
- Assessing the usefulness of various utility communications tools
- Assessing progress on utilities' satisfaction with the opportunity to provide meaningful input into programs
- Identifying opportunities to improve NEEA partnership with utilities

Research objectives among Non-Utilities (not surveyed in 2007) include:

- Measuring external stakeholder perceptions of NEEA, in terms of:
  - Value
  - Brand image and brand value
  - Project portfolio
- Gauging the level of support for NEEA
- Identifying opportunities to improve communications and possibly partnership
- Identifying unmet market needs

Please note that in this document, the term "Total Funders" refers to all stakeholders classified as either Direct Funder or Other Northwest Utility. Total Funders are comparable as a whole to the total respondents for the 2007 stakeholder survey (which included Direct Funders and Other NW Utilities[1]). Total Funders are mutually exclusive from the "Non-Utilities" group which includes organizations that do not currently fund NEEA directly or indirectly.

[1] Referred to as "Indirect Funders" in the 2007 Stakeholder Survey Report

Methodology

NEEA provided a list of 533 stakeholders from its program contact database to Market Strategies International (MSI), the firm conducting this research. Individuals were selected for the sample pool based on their connection to energy efficiency roles or responsibilities in their organization. Target individuals included senior-level executives, program staff and managers, evaluation and customer service staff, general managers, and engineers. After initial cleaning and de-duping, 517 of these records were deemed valid and contacted via email and / or phone to complete the survey.

Following notification from their NEEA contacts, stakeholders were first sent an email invitation to participate in a web based (online) survey. MSI then conducted a phone survey among those who did not complete the survey online. A total of 245 surveys were conducted between October 13 and December 2, 2010, with 144 of these completed via the web and 101 completed via phone. MSI conducted the phone interviews during business hours, with each interview averaging 20 minutes in length.

In an effort to gain broad insight, MSI interviewed multiple respondents within some organizations, as provided by NEEA. MSI screened and excluded respondents who said they were "not at all familiar" with NEEA and its programs from the study. (Only one individual contacted indicated that they were "not at all familiar" with NEEA.)

Appendix A shows the final sample disposition table. Appendix H shows the companies that participated in the study.

Questionnaire Design

NEEA provided an initial draft of the questionnaire and collaborated with Market Strategies to refine and finalize the final version. NEEA modified the scope of the study substantially from the satisfaction study conducted in 2007 in order to reflect and gain better insight into NEEA's areas of focus, particularly, to align the survey metrics with NEEA's rebranding efforts. Profiling and screening questions were similar to those used in the 2007 survey to maintain comparability for trending where possible. A copy of the questionnaire is provided in Appendix B.

Analytical Approach

Market Strategies International analyzed findings for the following subgroups:

- Stakeholder classification:
  - Direct Funder
  - Other Northwest Utility (Other NW Utilities)
  - Non-Utilities

Netted as "Total Funders" for comparison to the total sample from the 2007 survey.

- Partnered with NEEA versus not partnered with NEEA on one or more programs in the past 12 months
- The number of reported interactions with NEEA staff
- Geographic classifications (State, Rural versus Urban, I-5 corridor vs. East or West of that corridor)
- Occupation categories and job responsibilities

To provide direct comparisons to data presented in the 2007 stakeholder survey report, top-two-box (6-7 on a 7-point scale) results are the focus of the findings presented for evaluative rating and agreement scale questions in this report.

MSI tested data at the 95% confidence level. Only statistically significant differences between subgroups are included in this report.

Detailed Findings

Respondent Profile

Among the 245 respondents who completed the 2010 Stakeholder Perception Survey, 94 work for an organization that directly funds NEEA (Direct Funders), 42 work for organizations that fund NEEA indirectly (Other NW Utilities), and 109 work for organizations that do not provide funding for NEEA (Non-Utilities). This latter group (Non-Utilities) participated in this study for the first time in 2010.

Nearly three-quarters (74 percent) of Direct Funders are located along the I-5 corridor, while a majority (62 percent) of Other NW Utilities are in the East region. Compared to the Direct Funder and Other NW Utilities groups, larger proportions of Non-Utilities are located in Oregon (43 percent) and states outside the four state northwest region (21 percent).

The majority of survey participants indicate that they are involved in energy efficiency roles at work. For most respondents, implementing or coordinating energy efficiency programs is a large component of their job responsibilities.

Table 1 on the next page shows the respondent profile.

Table 1. 2010 Respondent Profile					
	Total Sample	Total Funders	Direct Funders (a)	Other NW Utilities (b)	Non-Utilities (c)
State					
Washington	39%	53%	54%c	50%c	21%
Oregon	36%	29%	32%	24%	43%b
Idaho	9%	7%	5%	12%	11%
Montana	7%	10%	8%	14%c	4%
Other	9%	--	--	--	21%
Region					
I-5 corridor	60%	60%	74%b	29%	NA
East	36%	36%	24%	62%a	NA
West	4%	4%	1%	10%a	NA
Job Responsibility					
EE program coordination or management	58%	62%	62%	62%	54%
General management	22%	24%	19%	33%	19%
Evaluation or Planning	19%	18%	22%b	7%	21%b
Customer Service	8%	12%	7%	21%ac	4%
Account management	4%	7%	7%	5%	2%
Other	14%	8%	4%	17%a	21%a
Involvement with EE Programs					
All	26%	33%	40%bc	17%	16%
Most	25%	21%	21%	19%	31%
Some	37%	39%	31%	57%ac	35%
None	12%	7%	7%	7%	17%a
Sector					
Residential	66%	75%	71%c	83%c	56%
Commercial	72%	73%	77%	62%	72%
Industrial	55%	59%	64%	48%	50%
Agricultural	27%	32%	36%c	24%	20%
Familiarity with NEEA and its Initiatives					
Very familiar	46%	40%	48%b	21%	53%b
Somewhat familiar	49%	52%	49%	60%	44%
Not very familiar	6%	8%	3%	19%ac	3%
Length of Time at Organization					
Less than 1 year	4%	4%	5%	--	5%
1 to 3 years	14%	15%	21%bc	2%	11%
3 to 5 years	13%	10%	13%	2%	17%b
5 to 10 years	18%	18%	17%	21%	18%
10 years or more	51%	53%	44%	74%ac	49%
Base (n)	***245***	***136***	***94***	***42***	***109***

Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
S2. Which of the following best describes your job responsibilities?
S4. How much of your work involves implementing or coordinating energy efficiency programs?
S5. Which types of customers does most of your work relate to?
S1. How familiar are you with NEEA and its initiatives?
S6. How long have you been with your current organization?

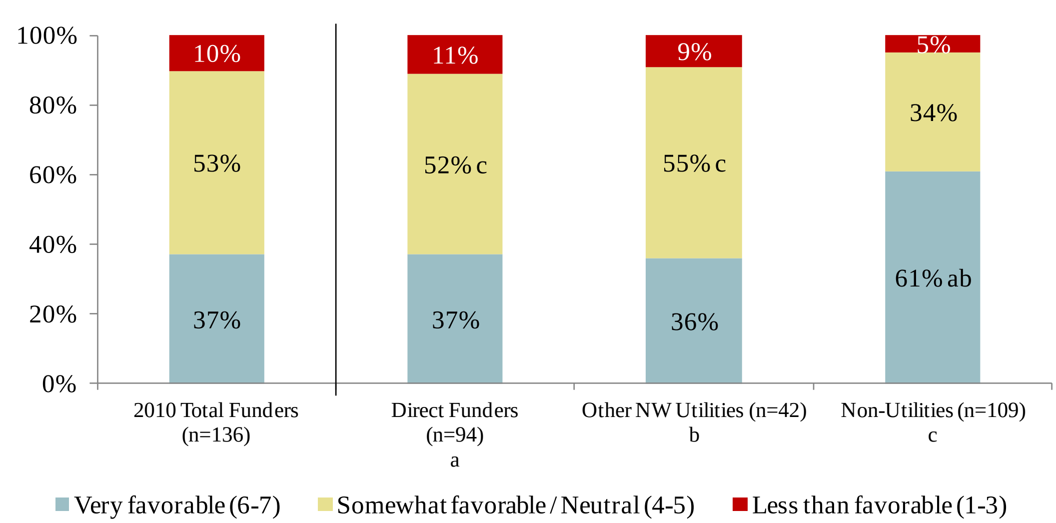
Overall Favorability

Among Total Funders (Direct Funders and Other NW Utilities combined), nearly four in ten (37 percent) have a very positive impression of NEEA (6-7 on a 7-point scale), versus six in ten (61 percent) Non-Utilities who provide very positive ratings on this measure. The proportion of very positive response on this measure is nearly equal between Direct Funders (37 percent) and Other NW Utilities (36 percent). Among both of these groups, more than one-half (52 percent and 55 percent, respectively) provide neutral to somewhat positive ratings (4-5 on a 7-point scale), while one in ten (11 percent and 9 percent, respectively) provide negative ratings (1-3 on a 7 –point scale) on this measure. Only 5 percent of Non-Utilities provide negative ratings. (Figure 1)

Among Total Funders, a significantly larger proportion of respondents in the state of Washington (44 percent) provided very positive ratings on this measure compared with Total Funders across the other three states in the northwest region (Oregon, Idaho and Montana combined, 28%).

The most frequently cited reasons for very positive favorability ratings (6-7 on a 7-point scale) among Total Funders are NEEA's *commitment to energy efficiency* (34 percent), and *good programs and services* (30 percent). Among Non-Utilities rating NEEA very positively on this measure, 36 percent cite *innovative, market transformation.* Among those providing negative to somewhat positive ratings (1-5 on a 7-point scale), *little interaction with NEEA*, *lack of commitment to energy efficiency programs*, and *support needs improvement* and are the most commonly cited issues. (Table 2)

Figure 1. Overall Favorability



Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q1. Please provide a rating of your overall general impression of NEEA using a one to seven scale, where one means you have a very unfavorable overall impression and seven means you have a very favorable overall impression of NEEA.

Table 2. Top Reasons for Favorability Rating				
	Total Funders	Direct Funders (a)	Other NW Utilities (b)	Non-Utilities (c)
Very Positive (6-7 Rating)				
Commitment to energy efficiency	34%	23%	60%	33%
Good programs & services	30%	29%	33%	15%
Innovation, market transformation	18%	17%	20%	36%a
Good partnership with my organization	18%	20%	13%	17%
Previous successful accomplishments	14%	17%	7%	32%
Good leadership/management	12%	14%	7%	17%
Knowledgeable/Quality Staff	10%	14%	0%	23%
Good mission concept	4%	6%	0%	23%a
Base (n)	***50***	***35***	***15****	***66***
Negative to Somewhat Positive (1-5 Rating)				
Little interaction with NEEA	13%	7%	26%	2%
Lack of commitment to EE programs	12%	12%	11%	7%
Support needs improvement	10%	14%	4%	17%
Need to increase flexibility, customize	8%	10%	4%	2%
Concerned with future development/direction	7%	8%	4%	12%
Poor mission concept	5%	5%	4%	14%
Staff not knowledgeable	5%	5%	4%	7%
Base (n)	***86***	***59***	***27****	***42***

Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
*small base size (<30) interpret results with caution.
Q1A. Being as specific as possible, please explain your key reasons for rating your overall impression of NEEA as a [RESTORE Q1].

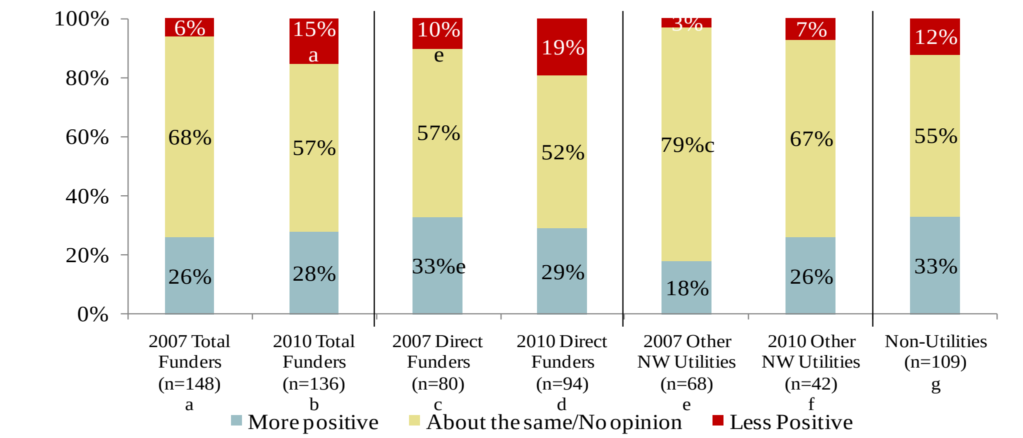
Verbatim responses for this open-end follow-up question are provided beginning on page 1 of Appendix D.

Past Year Change in Opinion of NEEA

Similar to the 2007 finding (26 percent), more than one-quarter (28 percent) of Total Funders report that their general opinion of NEEA has become *more positive* over the past year.

However, the proportion of Total Funders indicating that their opinion of NEEA has become less *positive* over the past year has increased significantly from 6 percent in 2007 to 15 percent in 2010, including nearly one in five (19 percent) Direct Funders who indicate that their opinion of NEEA has declined. (Figure 2)

Figure 2. Change in Opinion of NEEA Over Past Year



Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q26. Over the past year, would you say that your general opinion of NEEA has become more positive, less positive, or stayed about the same?

Among Total Funders, the most commonly cited reasons for more positive opinions of NEEA over the past year are NEEA being *supportive of customer needs*, *improved communication*, and *increased familiarity with NEEA.* Non-Utilities most frequently cite *restructuring of NEEA / changes in leadership*, *focus on mission / strategic development*, and NEEA being *supportive of customer needs*.

The most common issue driving more negative opinions of NEEA among all groups involves *changes made that have had a negative impact*, with some comments noting perceptions that NEEA is expanding beyond its core mission and losing focus. A notable proportion of Direct Funders whose opinion of NEEA has declined also cite *concern about direction*, while a smaller proportion of Direct Funders and Non-Utilities with less positive opinions cite *restructuring of NEEA/Changes in leadership*. (Table 3)

Table 3. Top Reasons for Change in Opinion Over Past Year

	Total Funders	Direct Funders (a)	Other NW Utilities (b)	Non-Utilities (c)
More Positive				
Supportive of customer needs	29%	37%	9%	28%
Improved communication	26%	30%	18%	6%
Increased familiarity with NEEA	24%	30%	9%	14%
Restructuring of NEEA/Changes in leadership	13%	15%	9%	42%
Increased contact/interactions	10%	0%	36%	8%
Focus on mission / strategic development	8%	7%	9%	33%
Base (n)	***38***	***27****	***11****	***36***
Less Positive				
Changes made have had a negative impact	43%	44%	33%	46%
Concerned about direction	33%	39%	0%	8%
Restructuring of NEEA/Changes in leadership	19%	22%	0%	23%
Base (n)	***21****	***18****	***3****	***13****

*small base size (<30) interpret results with caution.
Q26A.What has occurred during the past year to cause your general opinion of NEEA to become more/less positive?
Verbatim responses for this open end follow-up question are provided beginning on page 32 of Appendix D.

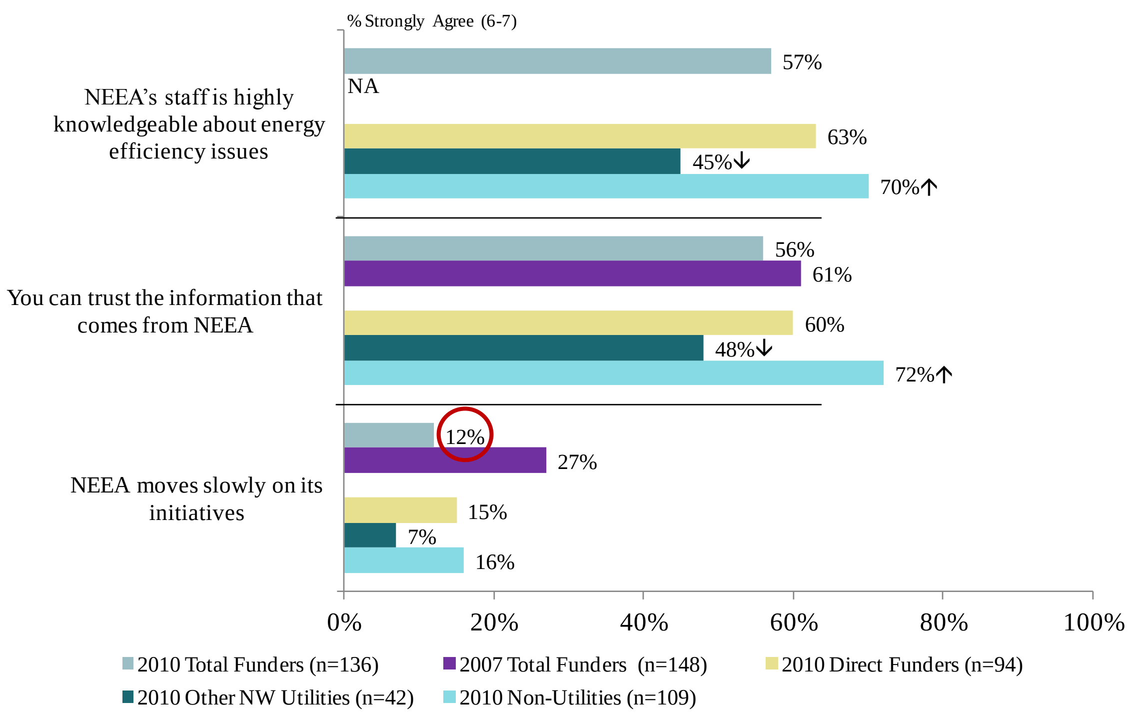
Perceptions of NEEA

Organizational Attributes

Stakeholders report generally positive views of NEEA in 2010. The majority of Total Funders strongly agree (6-7 on a 7-point scale) that *NEEA's staff is highly knowledgeable about energy efficiency issues* (57 percent), and that *you can trust the information that comes from NEEA* (56 percent). These attitudes are most positive among Non-Utilities where 70 percent and 72 percent strongly agree with these two statements, respectively. The proportion of very positive ratings for these two statements is lowest among Other NW Utilities (45 percent and 48 percent, respectively).

Only 12 percent of the 2010 Total Funders strongly agree that NEEA *moves too slowly on its initiatives*, which is significantly lower compared to 2007 results for this measure (27 percent). (Figure 3)

Figure 3. Organizational Attributes



Circles indicate 2010 is significantly higher or lower than 2007 at 95 percent confidence. Arrows indicate a significant difference between 2010 groups at 95 percent confidence.
Q2- Q4. Now, for each of the following statements pertaining to NEEA, please indicate how strongly you agree or disagree with each statement using a one to seven scale, where one means you strongly disagree and seven means you strongly agree with that statement. How much do you agree or disagree with the statement…

Value to the Region

Because NEEA recently completed an effort to clarify its value to the region, only three of the nine value propositions measured in the 2010 survey were previously measured in the 2007 survey. Of note, significantly fewer Total Funders strongly agree (6-7 on a 7-point scale) that *NEEA accelerates market adoption of energy efficiency products, services, and practices in the Northwest* in 2010 (50 percent), compared with 64 percent who strongly agreed with this statement in 2007.

Two out of three (66 percent) Total Funders strongly agree that *NEEA* is *able to influence the market in ways that individual organizations could not do on their own*. This statement registers the highest proportion of strongly agree ratings among Total Funders across the Value to the Region items measured in 2010.

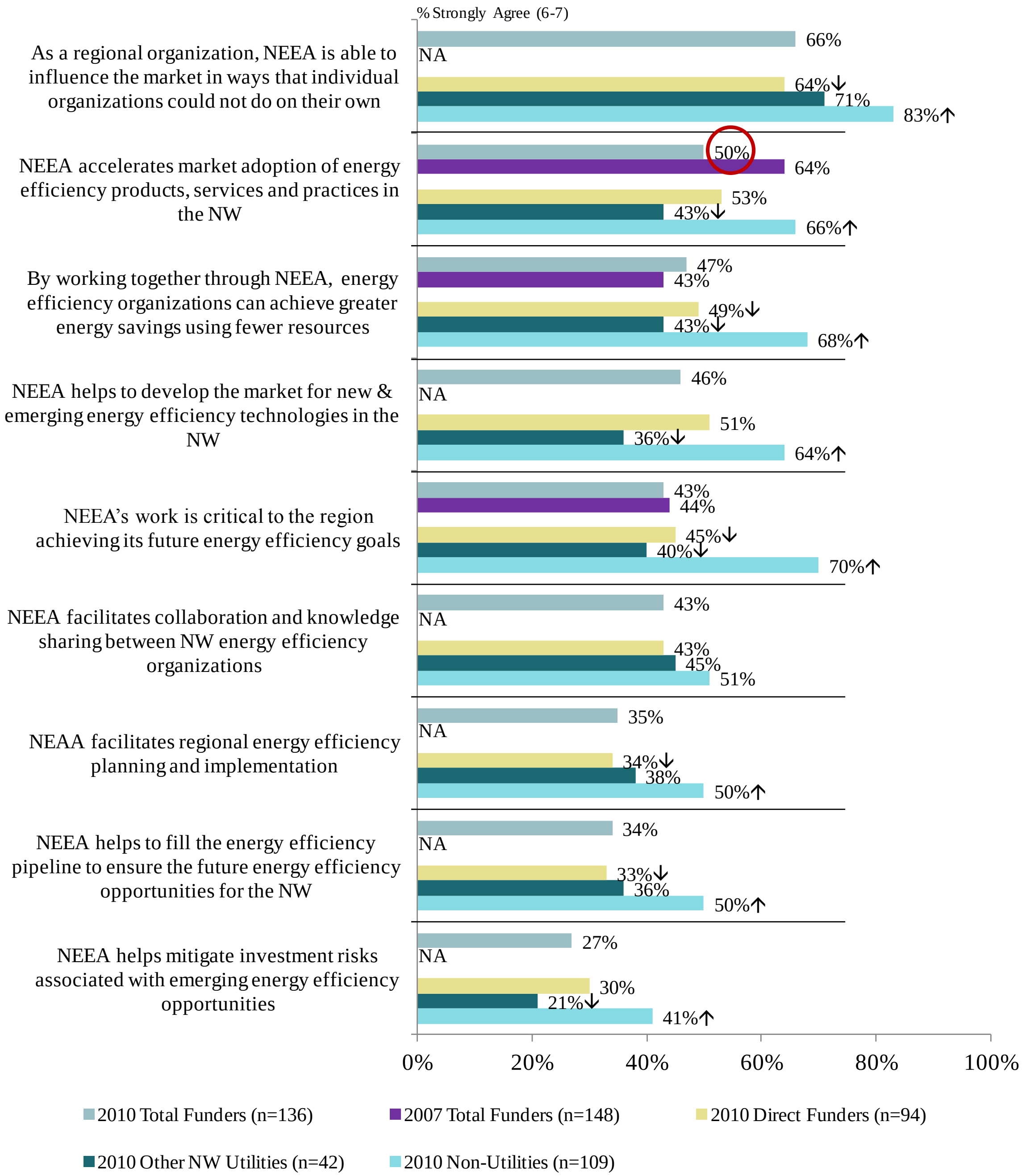
Half of Total Funders (50 percent) strongly agree that *NEEA accelerates market adoption of energy efficiency product, services, and practices in the Northwest*. Slightly less than half strongly agree that *working through NEEA energy efficiency organizations can achieve greater energy savings using fewer resources* (47 percent), and that *NEEA helps develop the market for new and emerging technologies* (46 percent).

Agreement levels are relatively low among Total Funders across several of NEEA's key value propositions, with well under one-half strongly agreeing that *NEEA facilitates collaboration and knowledge sharing between northwest energy efficiency organizations* (43%), *NEEA facilitates regional energy efficiency planning and implementation* (35 percent), and *NEEA helps to fill the energy efficiency pipeline to ensure the future energy efficiency opportunities for the northwest* (34 percent). Just over one-quarter strongly agree that *NEEA helps to mitigate investment risks associated with emerging energy efficiency opportunities* (27 percent).

Compared with Direct Funders and Other NW Utilities, Non-Utilities rate NEEA more positively on all value propositions with several significant differences noted.

(Figure 4)

Figure 4. Value to the Region Attributes



Circles indicate 2010 is significantly higher or lower than 2007 at 95 percent confidence. Arrows indicate a significant difference between 2010 groups at 95 percent confidence.
Q5-Q13. How much do you agree or disagree with the statement…

Specific Energy Efficiency Products, Services or Practices Mentioned

Among Total Funders who agree that NEEA has recently been successful in accelerating the market adoption of energy efficiency products, services, or practices, the most frequently mentioned products include ductless heat pumps (39 percent), CFL light bulbs (31 percent), and energy efficient electronics (25 percent). Significantly fewer Other NW Utilities cited energy efficient electronics (3 percent) compared with the other stakeholder groups. Also of note, very few Total Funders cited industrial energy efficiency education (4 percent), and integrated building design (3 percent). (Table 4)

Table 4. Energy Efficient Products, Services, or Practices that NEEA Has Been Successful in Accelerating the Market Adoption of. (Top Mentions)

	Total Funders	Direct Funders (a)	Other NW Utilities (b)	Non-Utilities (c)
Ductless heat pumps	39%	36%c	47%c	23%
CFL light bulbs	31%	36%	19%	24%
Energy efficient electronics	25%	34%bc	3%	20%b
New code adoption, building codes & standards	7%	7%	8%	6%
Lighting designs	5%	6%	3%	12%
Industrial energy efficiency education	4%	5%	3%	10%
Integrated building design	3%	5%	0%	11%b
Base (n)	***122***	***86***	***36***	***106***

Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q14. Which energy efficiency products, services, or practices has NEEA recently been successful in accelerating the market adoption of?

Verbatim responses for this open end question are provided beginning on page 21 of Appendix D.

Value to the Individual Utility

Eight of the eleven "Value to the Individual Utility" statements from the 2007 survey are included in 2010 survey. For all of the statements with positive connotations (nine of the eleven), a greater proportion Direct Funders strongly agree compared with Other NW Utilities, with many significant differences noted. This is indicative of the more involved relationship NEEA has with its Direct Funders. However, only one of these statements, *I have access to sufficient information about NEEA's activities* (53%) elicits strong agreement from a majority of Direct Funders, suggesting that NEEA has room for improvement with its value propositions in this area.

Results for two of the measures that can be trended show significant increases in agreement compared to 2007 among Direct Funders and Other NW Utilities combined: *NEEA has helped my organization achieve its energy efficiency goals* (38 percent strongly agree in 2010, versus 22 percent in 2007), and *NEEA offers me ample opportunity to provide meaningful input into its initiatives* (38 percent strongly agree in 2010, versus 27 percent in 2007). The remaining six measures do not show any statistically significant changes from 2007 to 2010, with most ranging between 30 and 40 percent "strongly agree."

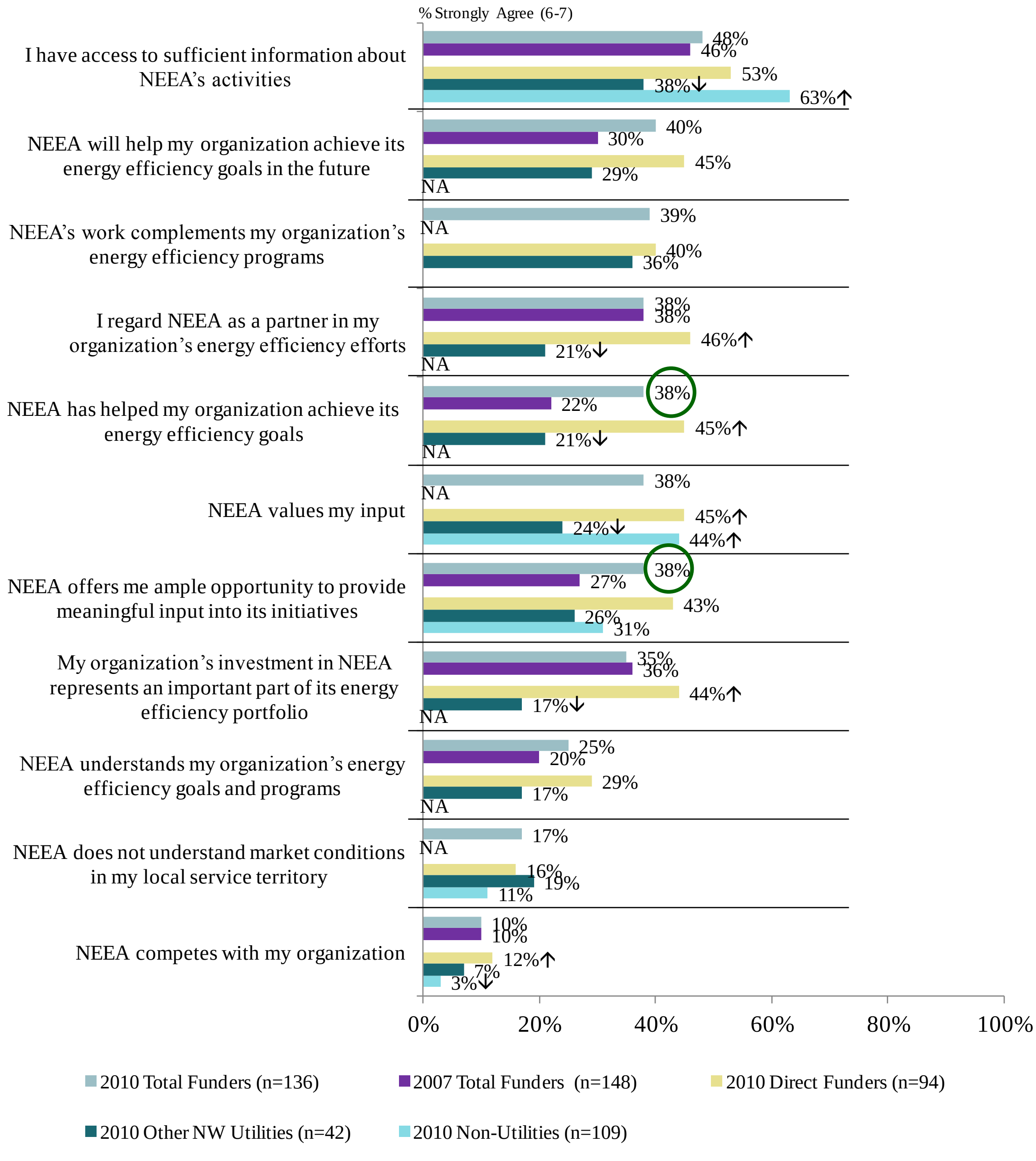
Of some concern, just under three in ten (29 percent) Direct Funders strongly agree with the statement, *NEEA understands my organization's energy efficiency goals and programs*.

Small proportions of Direct Funders agree with the two negative statements in this section, *NEEA does not understand market conditions in my local service territory* (16 percent), and *NEEA competes with my organization* (12 percent, versus a significantly lower 3 percent among Non-Utilities).

A significantly greater proportion of stakeholders in rural areas strongly agree with the statement *NEEA does not understand market conditions in my local service territory* compared with urban stakeholders (31 percent versus 11 percent).

(Figure 5)

Figure 5. Value to the Individual Utility

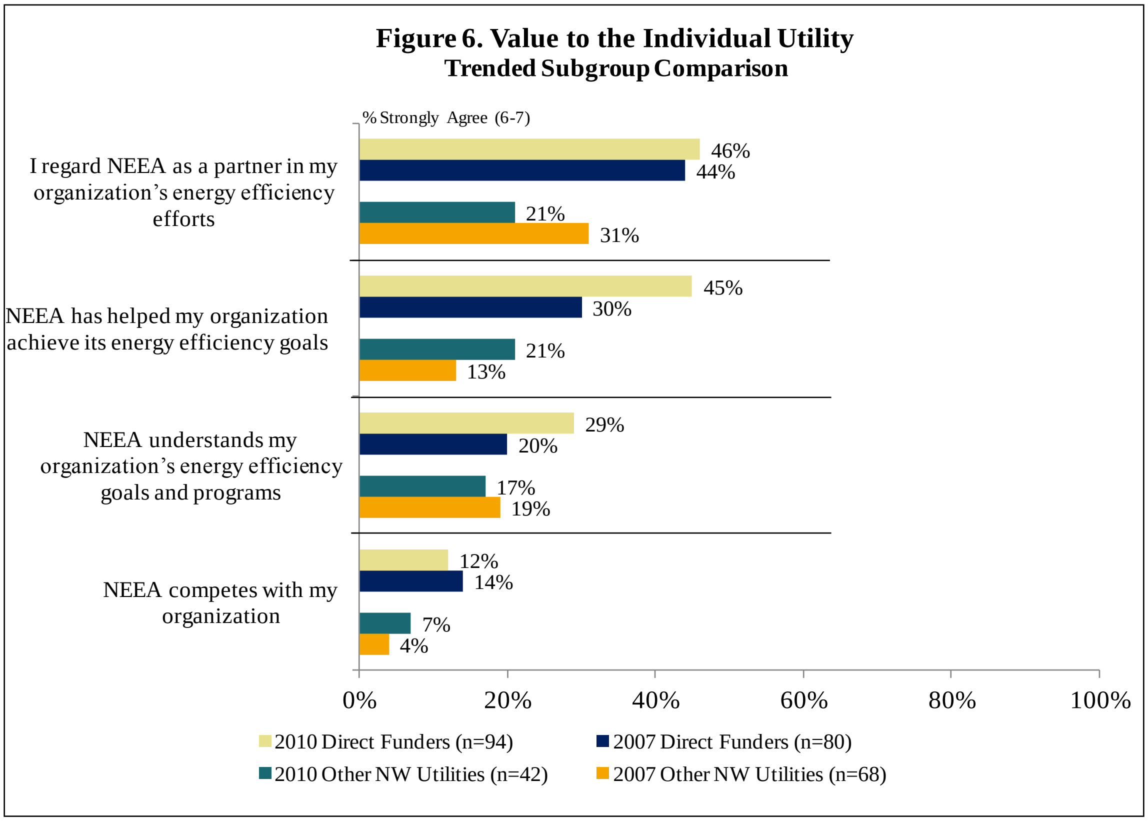


Circles indicate 2010 is significantly higher or lower than 2007 at 95 percent confidence. Arrows indicate a significant difference between 2010 groups at 95 percent confidence.

Q15-Q25. Now, for each of the following statements pertaining to your organization's relationship with NEEA, please indicate how strongly you agree or disagree with each statement using the same one to seven scale, where one means you strongly disagree and seven means you strongly agree with that statement. How much do you agree or disagree with the statement…

Trend Comparisons Among Subgroups

Across the "Value to the Individual Utility" statements, the most notable shift is an increase in the proportion of Direct Funders who strongly agree that *NEEA has helped me achieve my organization's energy efficiency goals* from 30 percent in 2007 to 45 percent in 2010 (significant at the 90% confidence interval). (Figure 6)



Q15, Q16, Q18, Q21. How much do you agree or disagree with the statement…

Familiarity, Partnerships, and Interactions with NEEA Staff

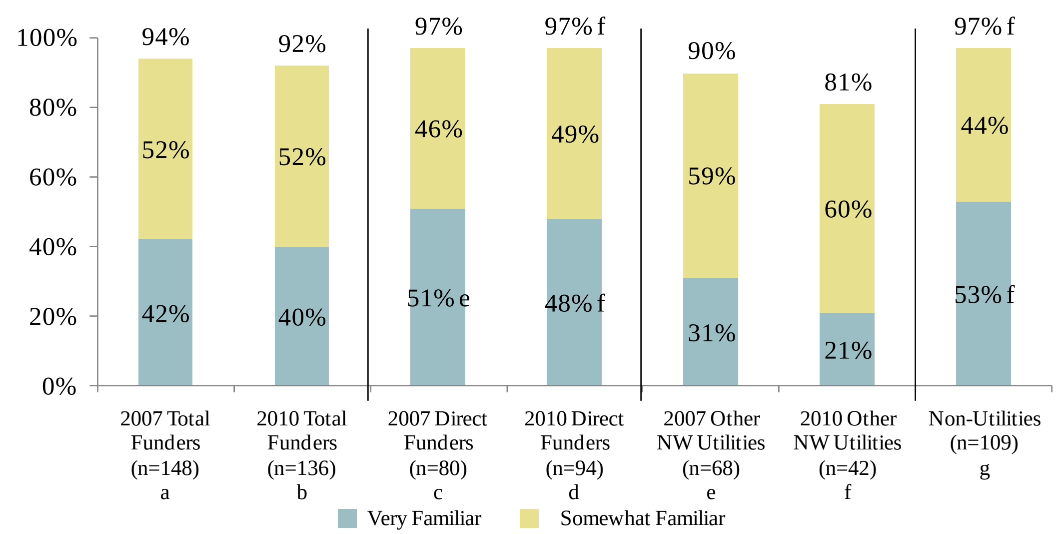
Familiarity

At the beginning of the 2010 survey, respondents were asked about their level of familiarity with NEEA and its initiatives. Level of familiarity in 2010 is generally consistent with that reported in 2007. Four in ten (40 percent) Total Funders indicate that they are *very familiar* with NEEA in 2010, versus 42 percent who said this in 2007.

Among Direct Funders, approximately one-half (48 percent) indicate they are *very familiar* with NEEA, with nearly all (97 percent) indicating that they are *very* or *somewhat familiar*. These results are nearly identical to those of 2007.

Familiarity (very and somewhat familiar) among Other NW Utilities declined slightly from 90 percent to 81 percent (not statistically significant). Among Non-Utilities, who were included for the first time in 2010, 97 percent indicate that they are either *very familiar* (53 percent) or *somewhat familiar* (44 percent) with NEEA and its initiatives. (Figure 7)

Figure 7. Familiarity with NEEA and Its Initiatives

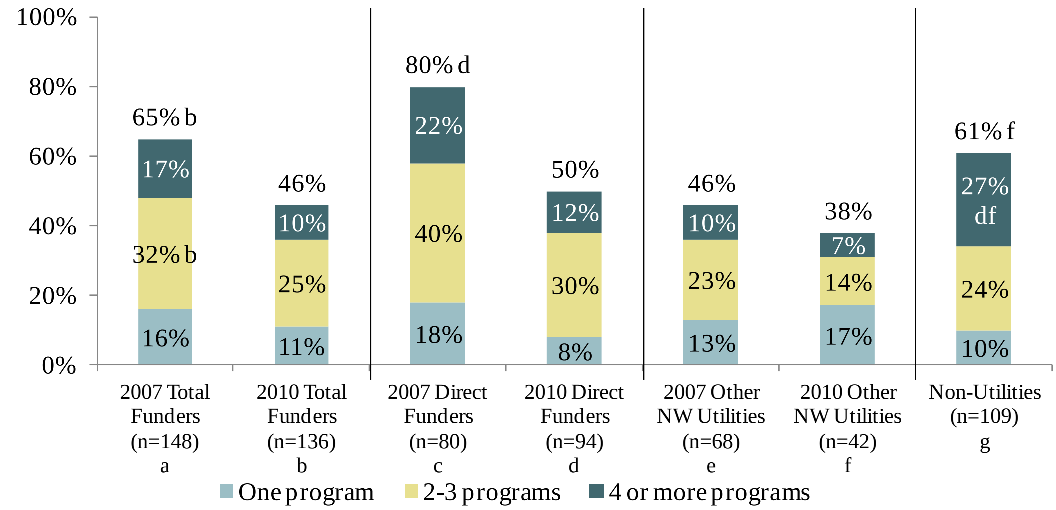


Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
S1. How familiar are you with NEEA and its initiatives? Would you say that you are…

Partnerships

Less than half (46 percent) of Total Funders report partnering or coordinating with NEEA on a program during the past year, down significantly from 65 percent reporting this in 2007. Most of this overall decline is due to a significant decline in the proportion of Direct Funders reporting program partnerships, from 80 percent in 2007 to 50 percent in 2010. (Figure 8)

Figure 8. Program Partnerships

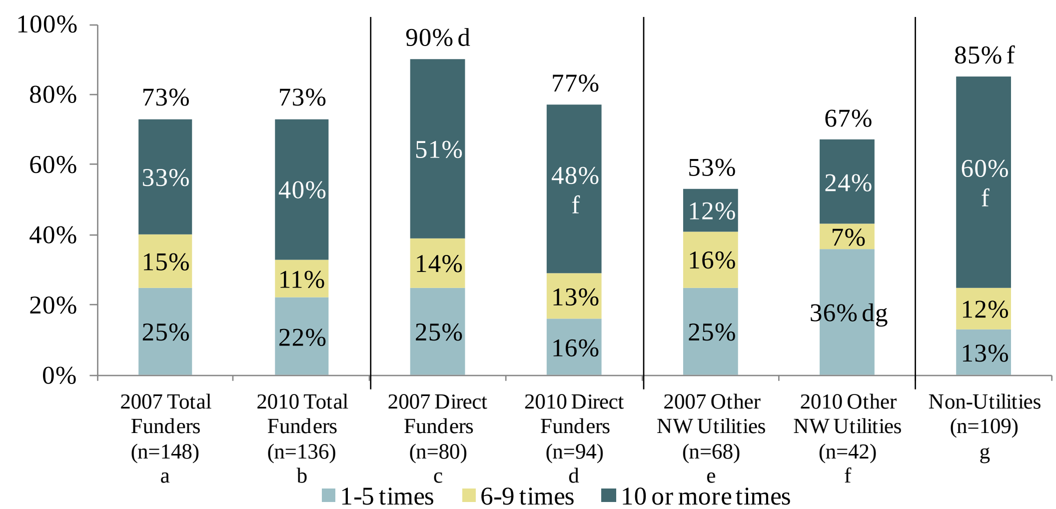


Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q28. In the past 12 months, on how many programs have you partnered on or coordinated with NEEA?

Staff Interactions

In 2007 and 2010, almost three out of four Total Funders (73 percent) report interacting with NEEA staff at least once in the past year. The proportion of Direct Funders reporting staff interactions declined significantly from 90 percent in 2007 to 77 percent in 2010, while the proportion Other NW Utility personnel reporting this increased from 53 percent to 67 percent (not statistically significant). In 2010, 85 percent of Non-Utilities report staff interactions with NEEA, which is the highest proportion measured among the three stakeholder groups in 2010. (Figure 9)

Figure 9. Staff Interactions

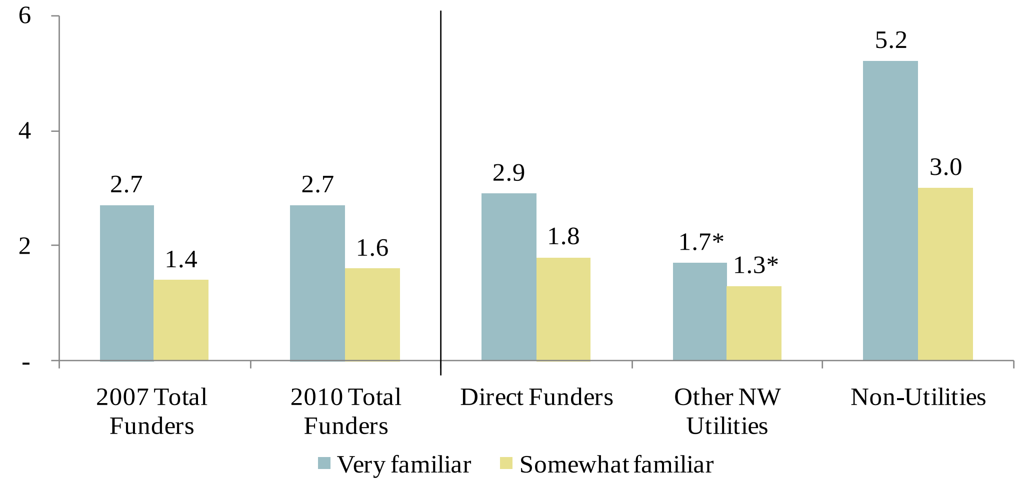


Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q27. In the past 12 months, how many times have you interacted with a member of the NEEA staff?

Familiarity and Partnerships, Staff Interactions

The level of familiarity with NEEA and its initiatives relates strongly to the number of reported programs that stakeholders have partnered on with NEEA. Total Funders who are *very familiar* with NEEA report partnering with NEEA on programs nearly twice as many as respondents who are only *somewhat familiar* (2.7 times versus 1.6 respectively). Similarly, Non-Utilities who are *very familiar* with NEEA have participated in an average of 5.2 programs, versus an average of 3.0 programs reported by Non-Utilities who are *somewhat familiar* with NEEA. (Figure 10)

Figure 10. Familiarity and Mean Number of Programs Partnered On With NEEA

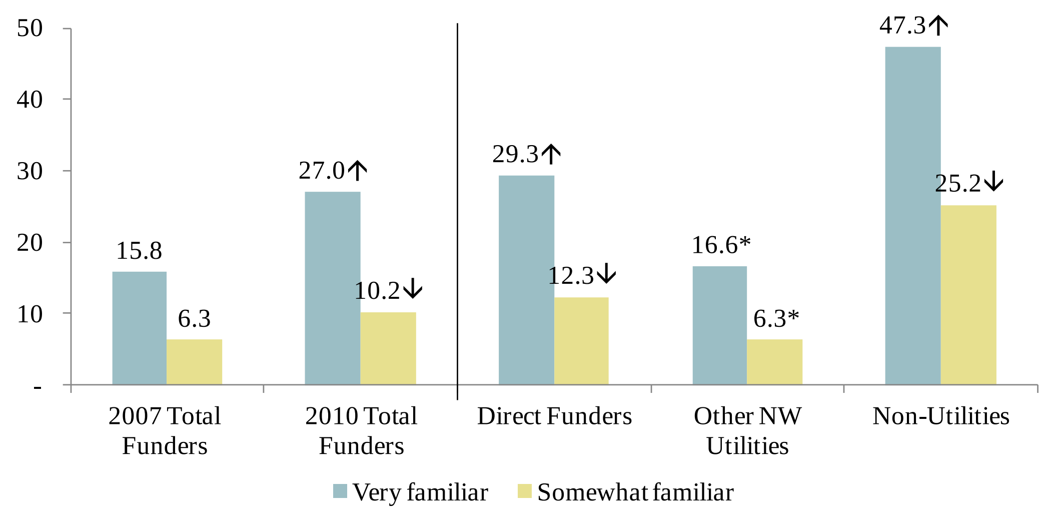


*small base size (<30) interpret results with caution

S1. How familiar are you with NEEA and its initiatives? Q28. In the past 12 months, on how many programs have you partnered on or coordinated with NEEA?

The average number of staff interactions reported by Total Funders has increased notably from 2007 to 2010. As with program partnerships, familiarity with NEEA is highly related to the number of reported interactions that stakeholders had with NEEA staff over the past year. Compared with either the Direct Funders or Other NW Utilities groups, the Non-Utilities report more frequent staff interactions. (Figure 11)

Figure 11. Familiarity and Mean number of Staff Interactions

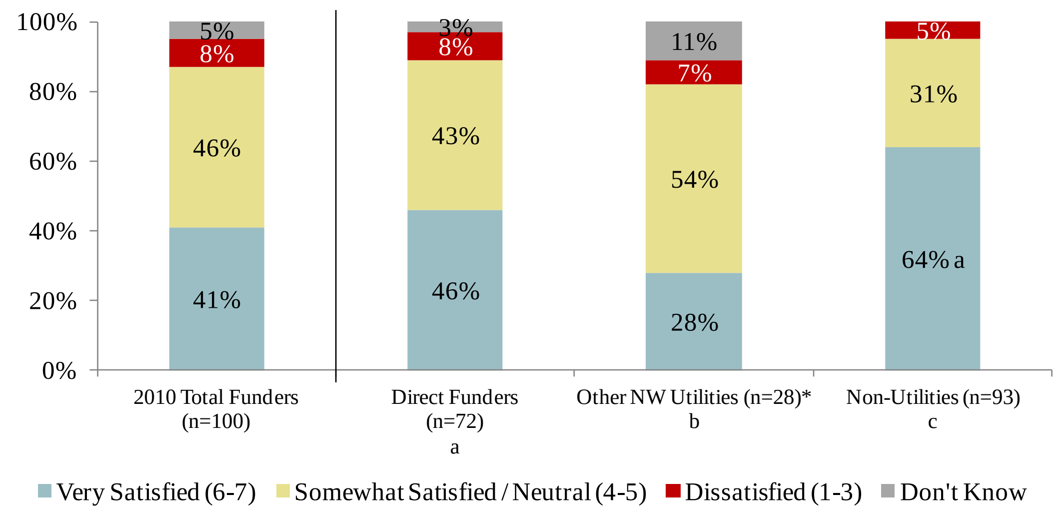


Arrows indicate a significant difference between Very Familiar and Somewhat Familiar groups at 95 percent confidence.
*small base size (<30) interpret results with caution
S1. How familiar are you with NEEA and its initiatives? Would you say that you are…
Q27. In the past 12 months, on how many programs have you interacted with a member of the NEEA staff?

Satisfaction with NEEA Interactions

For many stakeholders, the NEEA staff members are the "face of the organization." Overall, respondents have a positive perception of the staff through interactions with them. Two out of five Total Funders (41 percent) are very satisfied with their interaction with NEEA (6-7 on a 7-point scale). Ratings among Non-Utilities (64 percent very satisfied) are significantly higher compared to results among Direct Funders (46 percent). (Figure 12)

Figure 12. NEEA Interaction Satisfaction

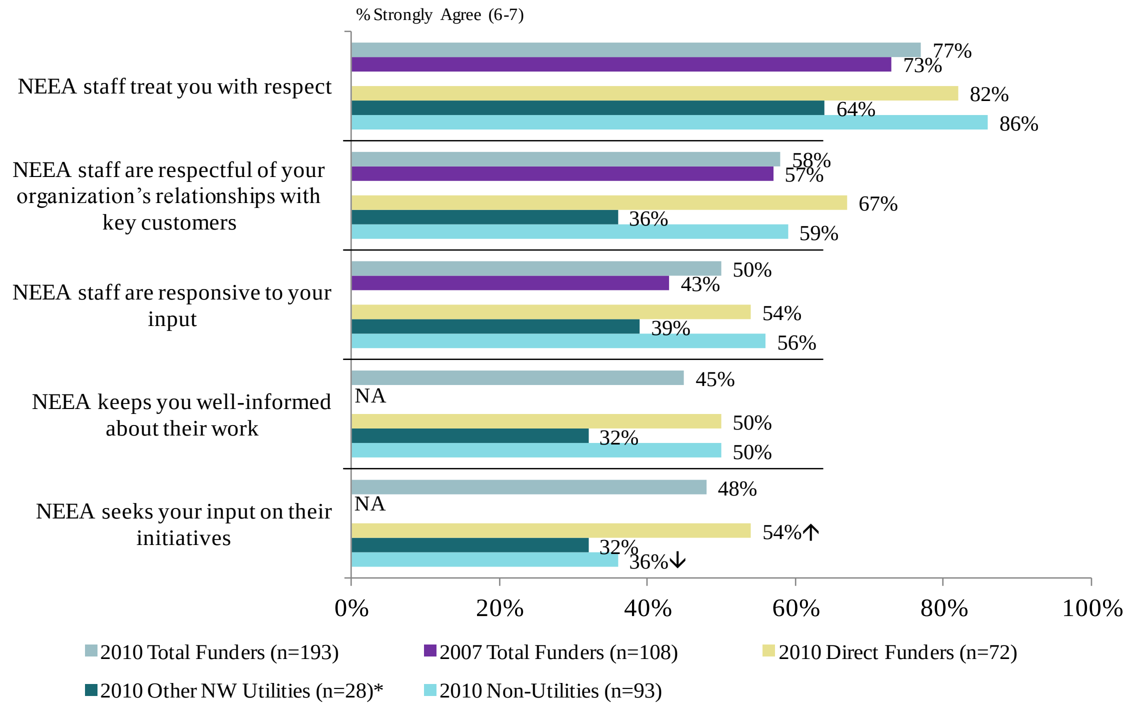


Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
*small base size (<30) interpret results with caution.
Q29. Please rate your overall satisfaction with your interactions with NEEA, using a one to seven scale where one means you are very dissatisfied and seven means you are very satisfied. How satisfied are you overall with your interactions with NEEA?

Among Total Funders, the proportion strongly agreeing that *NEEA* staff *treat you with respect* (77 percent) is higher than strong agreement levels for all other staff interaction measures as in 2007. Nearly three out of five (58 percent) Total Funders also strongly agree that *NEEA* is *respectful of your organization's relationships with key customers*.

Agreement levels for all of these statements are uniformly lower among Other NW Utilities compared with Direct Funders and Non-Utilities. (Figure 13)

Figure 13. Staff Interactions



Arrows indicate a significant difference between 2010 groups at 95 percent confidence.
*small base size (<30) interpret results with caution.
Q30-Q34. Continuing to think about the personal interactions you've had with NEEA over the past 12 months, please indicate how strongly you agree or disagree with each statement, again using a one to seven scale where one means you strongly disagree and seven means you strongly agree with that statement. How much do you agree or disagree with the statement…

Communication and Events

Sources of Information

Email (63 percent) and phone (49 percent) are the most commonly reported channels used to communicate with NEEA among Total Funders. Significantly fewer Other NW Utilities (31 percent) cite phone as a typical channel compared to Direct Funders (57 percent) and Non-Utilities (62 percent). A significantly higher proportion of Non-Utilities (34 percent) note in-person communication as typical compared to responses from Direct Funders (15 percent) and Other NW Utilities (seven percent). (Table 5)

The NEEA web site (34 percent) and emails (32 percent) are the predominant "other sources relied upon to stay informed about NEEA's work" for Total Funders. One in ten (10 percent) Total Funders name the NEEA Newsletter, while six percent cite the Annual Report. (Table 6)

Table 5. Typical NEEA Communication Channels (Top Mentions)

	Total Funders	Direct Funders (a)	Other NW Utilities (b)	Non-Utilities (c)
Email	63%	64%	62%	72%
Phone	49%	57%b	31%	62%b
In-person	12%	15%	7%	34%ab
Meetings, conferences	18%	22%	10%	14%
Webinars	7%	8%c	2%	0%
Conference calls	6%	8%c	0%	2%
Advisory committee, board members	6%	8%c	0%	2%
Internet/ website	6%	5%	7%	5%
NEEA newsletter	2%	0%	7%a	2%
Base (n)	***136***	***94***	***42***	***109***

Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q35. How do you typically communicate with NEEA?

Verbatim responses for this open end question are provided beginning on page 40 of Appendix D.

Table 6. Other Sources Relied Upon to Stay Informed About NEEA's Work (Top Mentions)

	Total Funders	Direct Funders (a)	Other NW Utilities (b)	Non-Utilities (c)
NEEA web site	34%	38%	24%	45%b
Emails	32%	34%	26%	29%
Co-workers/peers	13%	17%a	5%	7%
Other reports or publications	12%	15%	7%	13%
NEEA newsletter	10%	10%	10%	16%
Annual report	6%	8%	0%	5%
Other in-person meetings	3%	4%	0%	7%
Base (n)	***136***	***94***	***42***	***109***

Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q36. In addition to personal interactions, what other sources do you rely upon to stay informed about NEEA's work?

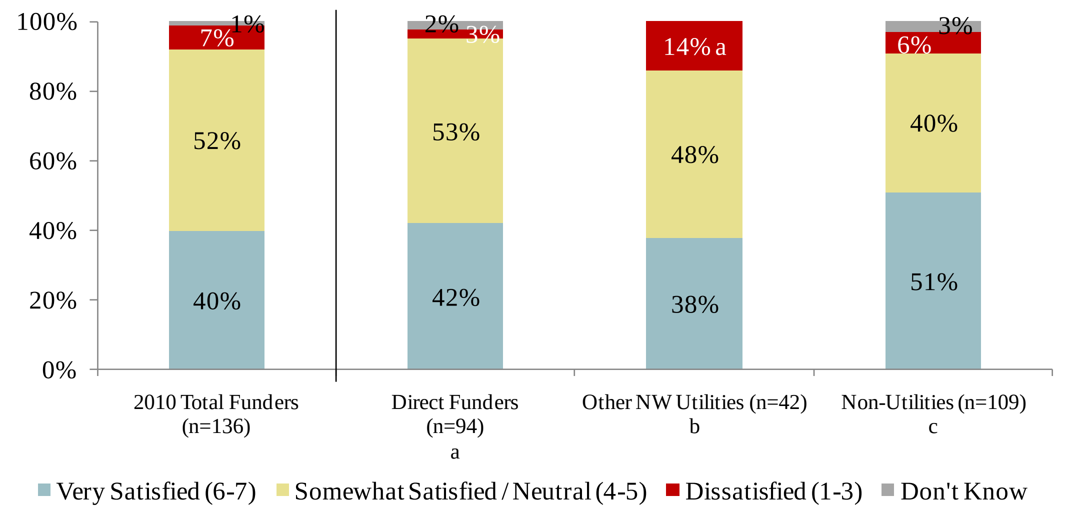
Verbatim responses for this open end question are provided beginning on page 51 of Appendix D.

Satisfaction with Personal Interactions and Communications

Two out of five Total Funders (40 percent) are very satisfied (6-7 on a 7-point scale) with *the way NEEA communicates with you about their work*. (Figure 14)

Nearly one in six (16 percent) Total Funders who provided positive ratings on this measure said that *NEEA is responsive to requests for information* and *provides timely, regular communications*. Among Total Funders who provided negative or neutral ratings on this measure, nearly one-quarter (24 percent) cited the need for *more frequent, proactive communication*. (Table 7)

Figure 14. Satisfaction with the Way NEEA Communicates with You About Their Work



Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q37. Thinking about both your personal interactions and other communications from NEEA like web sites, newsletters and reports, how satisfied are you overall with the way NEEA communicates with you about their work?

Table 7. Top Reasons for Satisfaction with NEEA's Communications				
	Total Funders	Direct Funders (a)	Other NW Utilities (b)	Non-Utilities (c)
Positive (6-7 Rating)				
Timely, regular communication	27%	23%	38%	23%
Good email communications	24%	20%	31%	12%
Responsive to requests for information	20%	23%	12%	21%
Information is useful, relevant	11%	5%	25%	18%a
Good access to information	7%	10%	0%	16%
Base (n)	***55***	***39***	***16****	***56***
Negative / Neutral (1-5 Rating)				
Need more frequent, proactive communication	27%	28%c	23%	10%
More updates on current projects or issues	8%	11%	0%	24%
Need customized information, more relevant to my needs	8%	6%	12%	10%
Information needs to be concise	8%	11%	0%	6%
Need more communication/ information	4%	6%	0%	6%
Base (n)	***79***	***53***	***26****	***50***

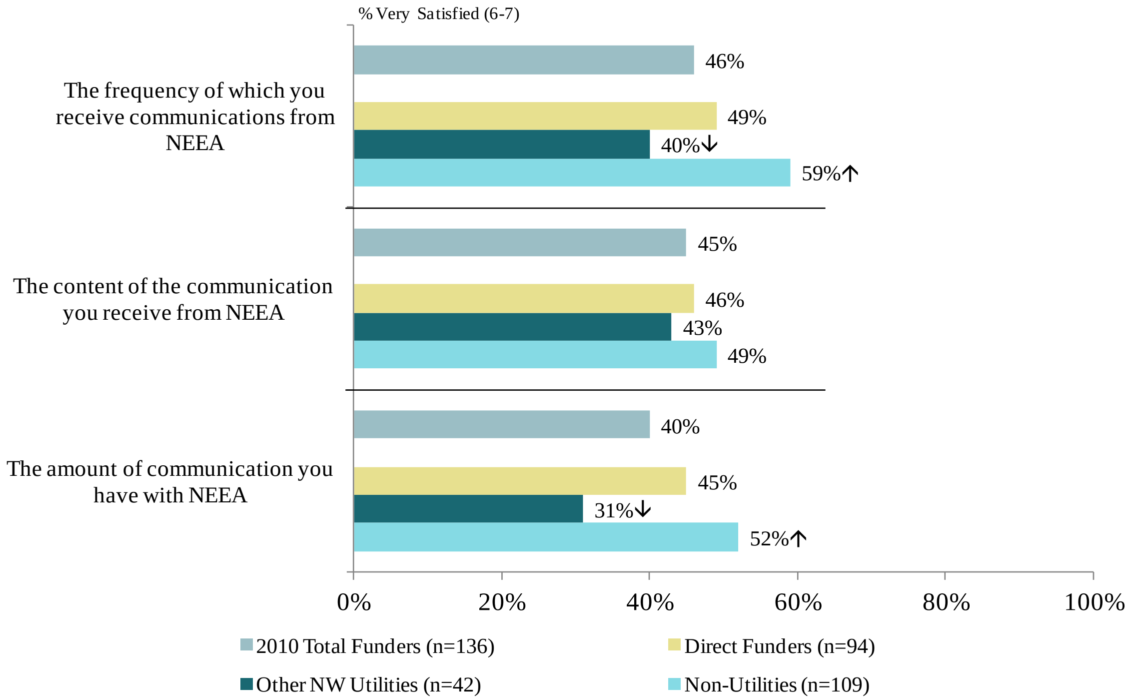
Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
*small base size (<30) interpret results with caution.
Q37A. What aspects of NEEA's communications caused you to rate your satisfaction in this area a [RESTORE Q37]?

Verbatim responses for this open end follow-up question are provided beginning on page 62 of Appendix D.

Communications Attributes

Among Total Funders, just under half are very satisfied (6-7 on a 7-point scale) with *the frequency with which you receive communications from NEEA* (46 percent), *the content of NEEA communications* (45 percent), and *the amount of communication that they receive from NEEA* (40 percent). (Figure 15)

Figure 15. Communication Attributes



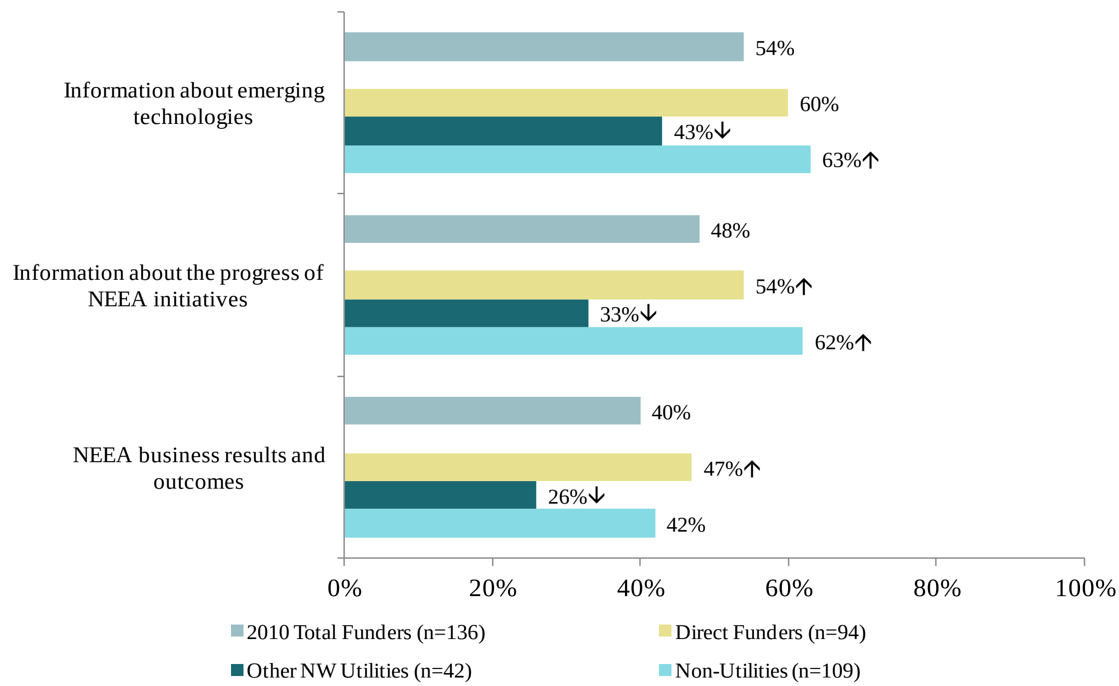
Arrows indicate a significant difference between 2010 groups at 95 percent confidence.
Q38-Q40. Again thinking about the communications you receive from NEEA, how satisfied are you with each of the following attributes using the same one to seven scale?

Importance of NEEA Communications

Across all stakeholder groups, the priority of the three communication topics measured was the same in terms of very important responses (6-7 on a 7-point scale), though there was limited differentiation across the topics within the groups. *Information about emerging technologies* received the highest proportion of very important ratings, followed by *information about the progress of NEEA initiatives*, and *NEEA business results and outcomes*. (Figure 16)

When asked what other types of information they would consider as important for NEEA to provide to their organization, information about *new technologies* and *current projects, status, and their impact* received the most mentions. (Table 8)

Figure 16. Importance of Information



Arrows indicate a significant difference between 2010 groups at 95 percent confidence.
Q41-Q43. For each type of information that NEEA provides, please indicate how important that information is to you on a one to seven scale, where one means it is not at all important to you and seven means it is extremely important to you.

Table 8. Other Types of Information Important for NEEA to Provide to Your Organization

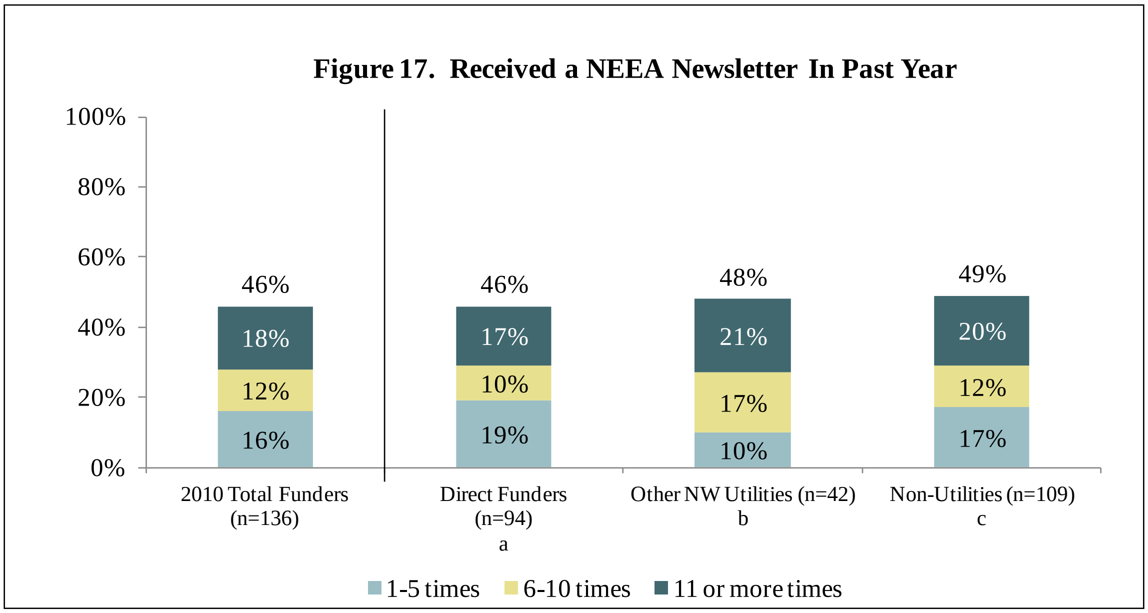
	Total Funders	Direct Funders (a)	Other NW Utilities (b)	Non-Utilities (c)
New technologies	12%	13%c	12%	4%
Current projects status, their impact	11%	14%	5%	9%
Details of savings / cost effectiveness	7%	5%	12%c	3%
Planning information, long-term goals	6%	8%	0%	7%
Research data, market trends	6%	4%	10%	4%
Collaboration / Networking initiatives	5%	7%	0%	8%
Base (n)	***136***	***94***	***42***	***109***

Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q44. What other types of information would you consider extremely important for NEEA to provide to you and your organization?

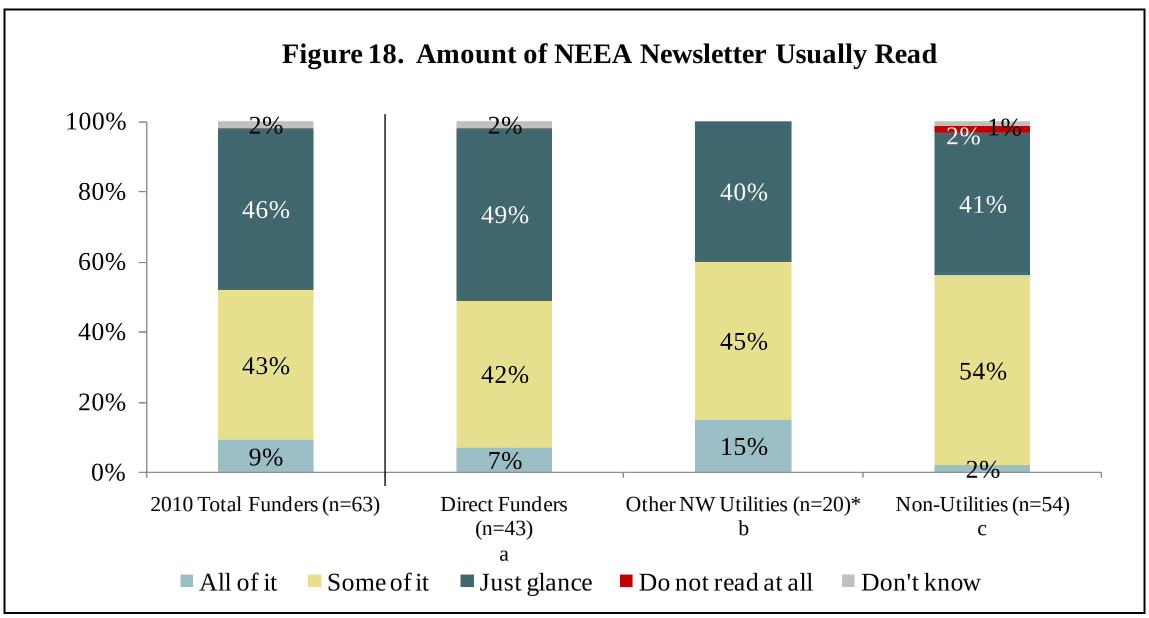
Verbatim responses for this open end question are provided beginning on page 75 of Appendix D.

NEEA Newsletters

Slightly less than half of Total Funders (46 percent) received a NEEA newsletter during the past year. Among those who received a newsletter, 52 percent read some or all of it, while 46 percent only glanced at it. More than four out of five (83 percent) Total Funders find the NEEA newsletters to be somewhat or very useful; however, just 13 percent rate them very useful. Additionally, four out of five (81 percent) thought that the frequency of NEEA newsletters is about right. (Figures 17-20)

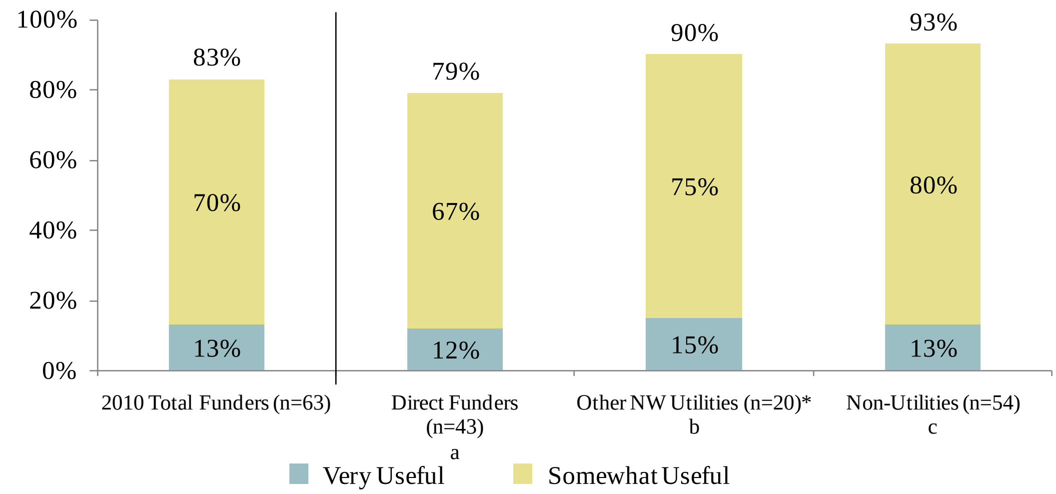


Q45. In the past 12 months, how many times have you received a NEEA newsletter?



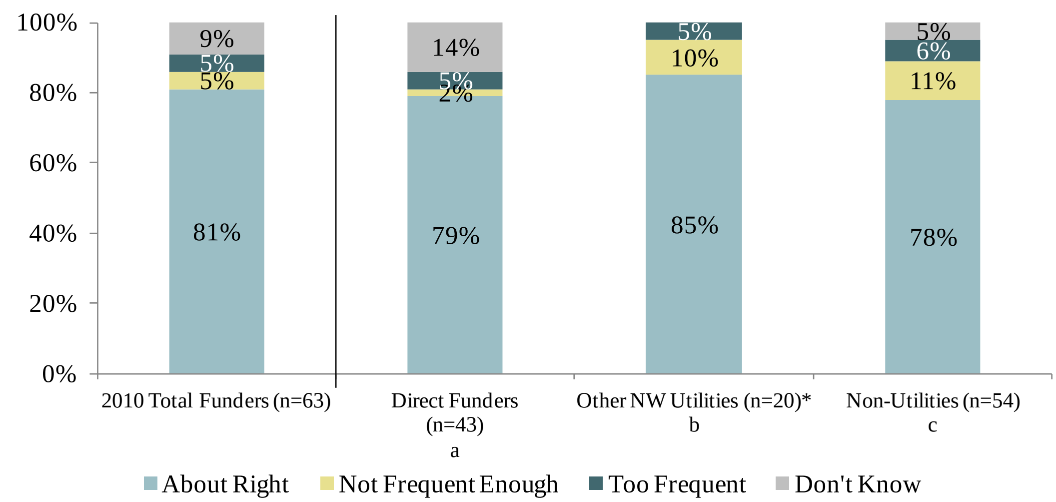
*small base size (<30) interpret results with caution.
Q45A. When you receive a NEEA Newsletter, do you usually read all of it, some of it, just glance through it, or not read it at all?

Figure 19. Usefulness of NEEA Newsletters



*small base size (<30) interpret results with caution.
Q45B. Did you find the NEEA Newsletters to be…?

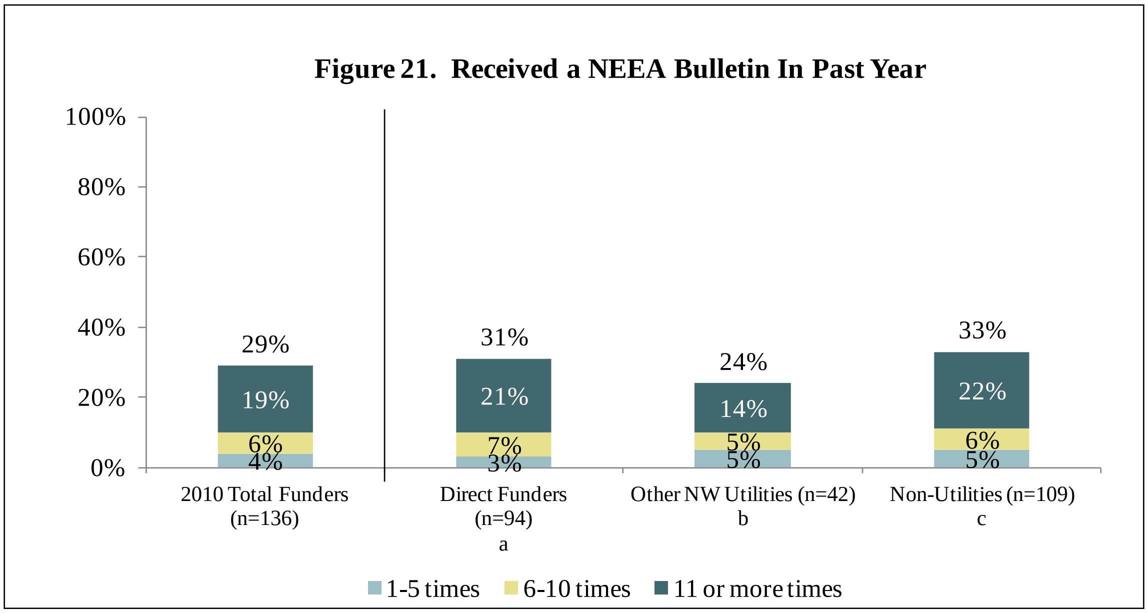
Figure 20. Perception on Frequency of NEEA Newsletters



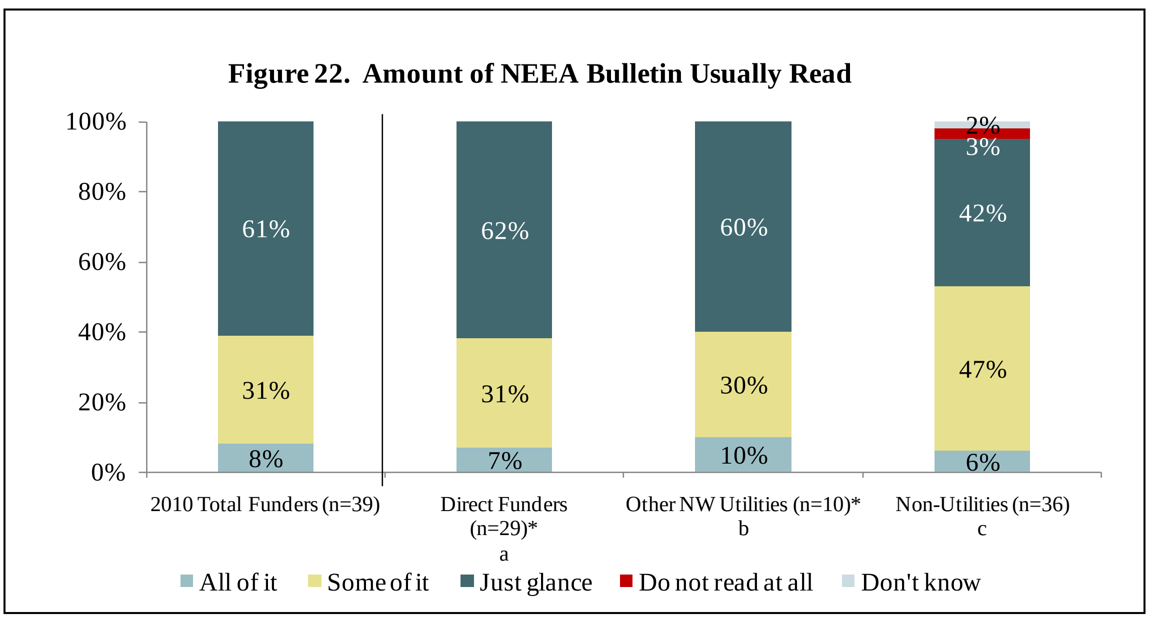
*small base size (<30) interpret results with caution.
Q45C. Would you say the frequency of the NEEA Newsletters is…?

NEEA Bulletins

Just three in ten (29 percent) Total Funders report receiving one or more NEEA Bulletins during the past year. Among those who say that they received a NEEA Bulletin, 39 percent read some or all of it while 61 percent only glanced at it. More than four out of five (85 percent) find the NEEA Bulletins to be somewhat or very useful. Additionally, 85 percent also think that the frequency of NEEA Bulletins is about right. (Figures 21-24)



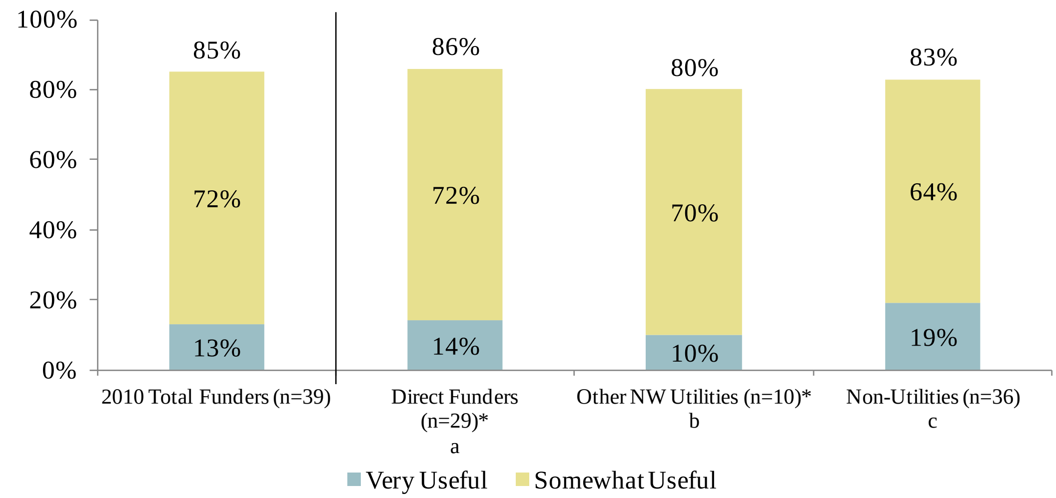
Q46. NEEA Bulletins are subscription or opt-in based, on topics of interest such as job announcements, RFPs, market and evaluation reports, press releases, etc. In the past 12 months, how many times have you received a NEEA Bulletin?



*small base size (<30) interpret results with caution.

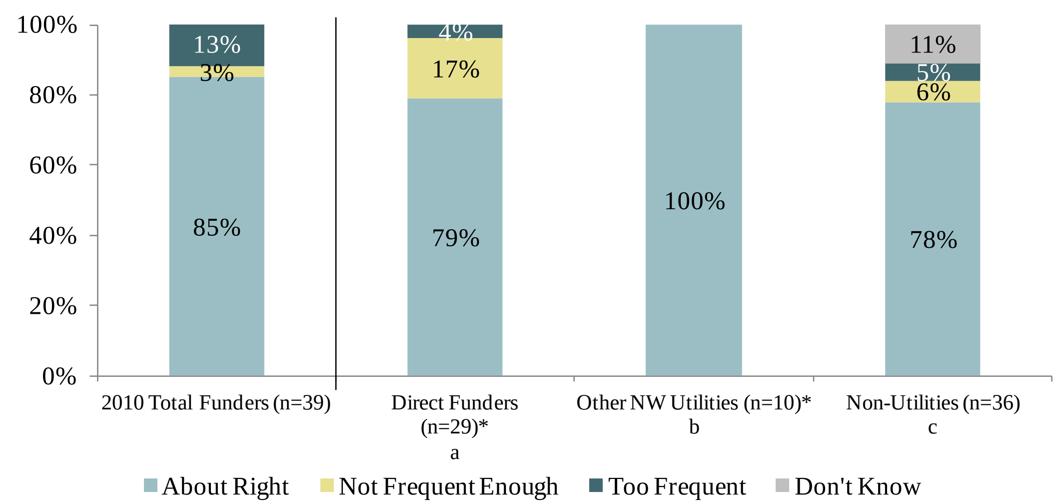
Q46A. When you receive a NEEA Bulletin, do you usually read all of it, some of it, just glance through it, or not read it at all?

Figure 23. Usefulness of NEEA Bulletins



*small base size (<30) interpret results with caution.
Q46B. Did you find the NEEA Bulletins to be…?

Figure 24. Perception on Frequency of NEEA Bulletins

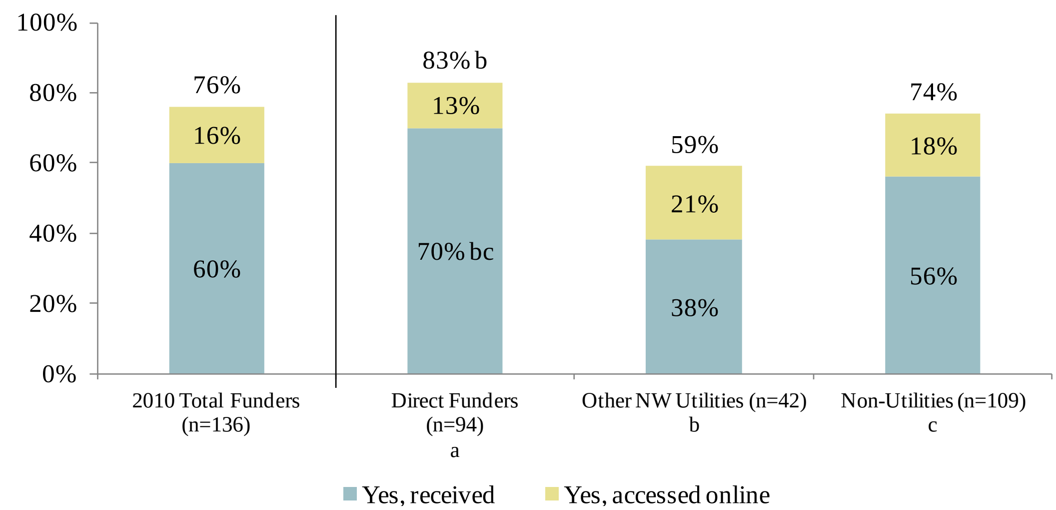


*small base size (<30) interpret results with caution.
Q46C. Would you say the frequency of the NEEA Bulletins is…?

NEEA Annual Reports

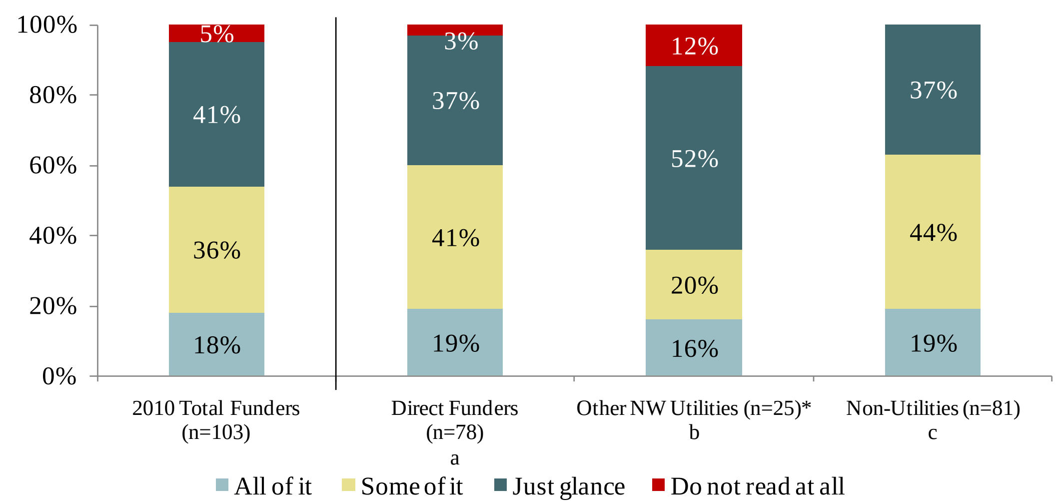
Three out of four (76 percent) Total Funders either received an NEEA annual report (60 percent) or accessed it online (16 percent). Significantly more Direct Funders report receiving or accessing a copy of the Annual Report compared with Other NW Utilities. Among Total Funders who received or accessed the Annual Report, just over half (54 percent) read some or all of it while 41 percent only glanced at it. Nearly three out of four (72 percent) Total Funders find the NEEA annual report to be *somewhat* or *very useful;* however only 14 percent rated the Annual Report as *very useful*. (Figures 25-27)

Figure 25. Received a NEEA Annual Report In Past Year



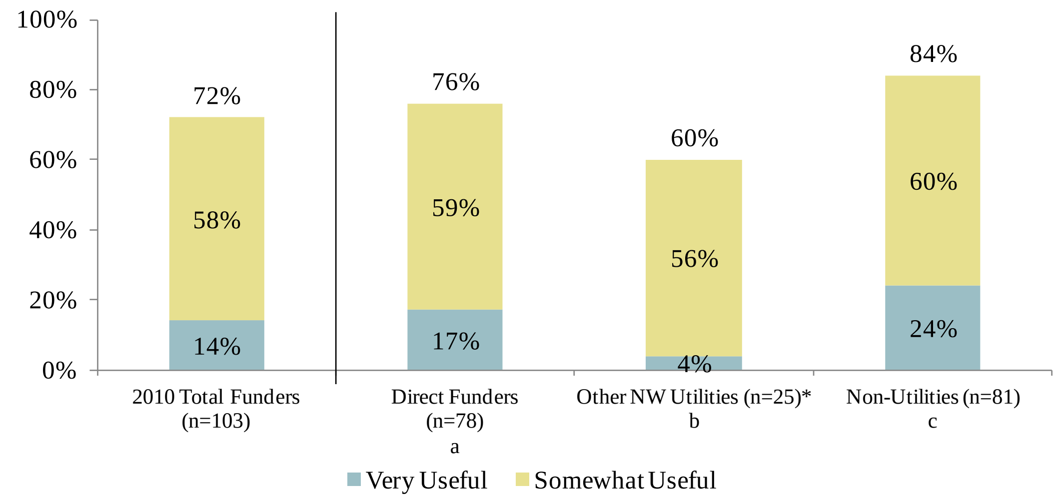
Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q47. In the past 12 months, have you received the NEEA Annual Report, or accessed it online at NEEA's web site?

Figure 26. Amount of NEEA Annual Report Read



*small base size (<30) interpret results with caution.
Q47A. When you received or accessed the Annual Report, did you read all of it, some of it, just glance through it, or not read it at all?

Figure 27. Usefulness of NEEA Annual Report

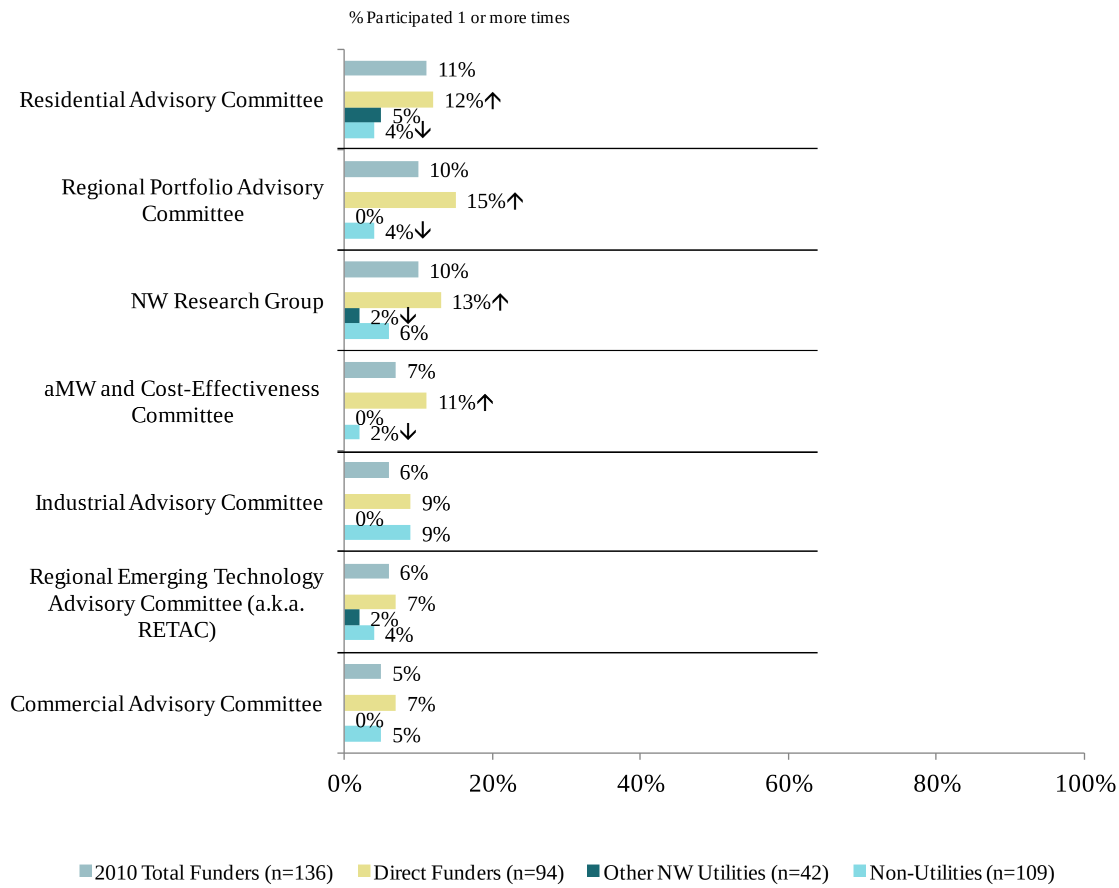


*small base size (<30) interpret results with caution.
Q47B. Did you find the Annual Report to be..

NEEA Committee or Group Participation

Just over one-quarter (27 percent) of respondents to the 2010 survey participated in one or more NEEA committees or groups. Generally, committee or group participation is more common among Direct Funders versus Other NW Utilities and Non-Utilities. (Figure 28)

Figure 28. Committee or Group Participation

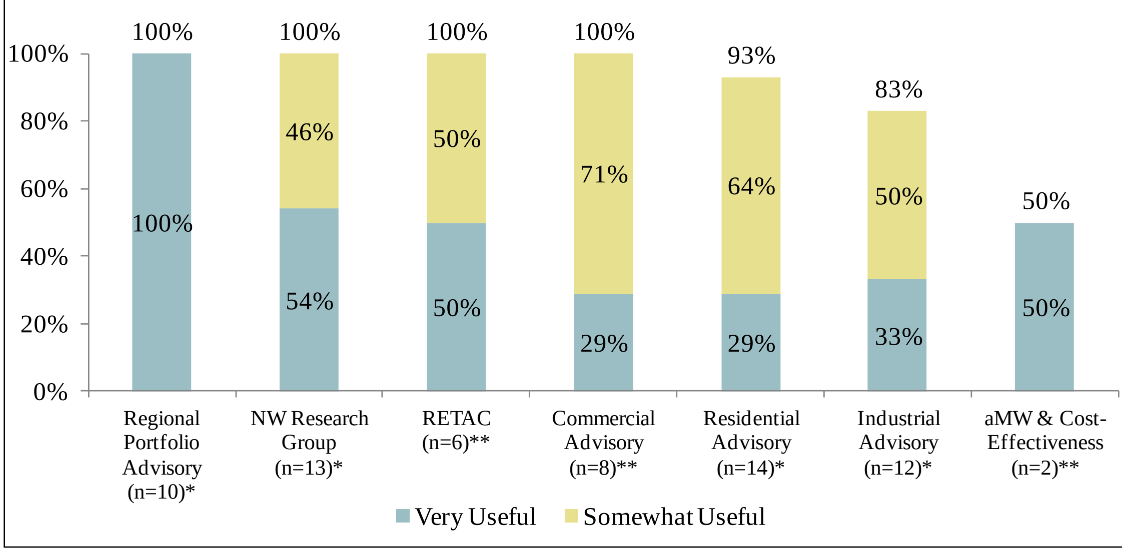


Arrows indicate a significant difference between 2010 groups at 95 percent confidence.
*small base size (<30) interpret results with caution.
Q49A-Q49G. NEEA facilitates several regional advisory committees and other regional groups.] In the past year, how many times have you participated in each of the following advisory committees or group meetings…

Please note that base sizes for the next measures reported in this section are very small. Results should be considered with caution.

All of the respondents who participated in a Regional Portfolio Advisory Committee meeting (n=10) rate the committee meetings as very useful. This compares to 54 percent for the NW Research Group, 33 percent for the Industrial Advisory Committee, and 29 percent for the Residential Advisory Committee. (Figure 29)

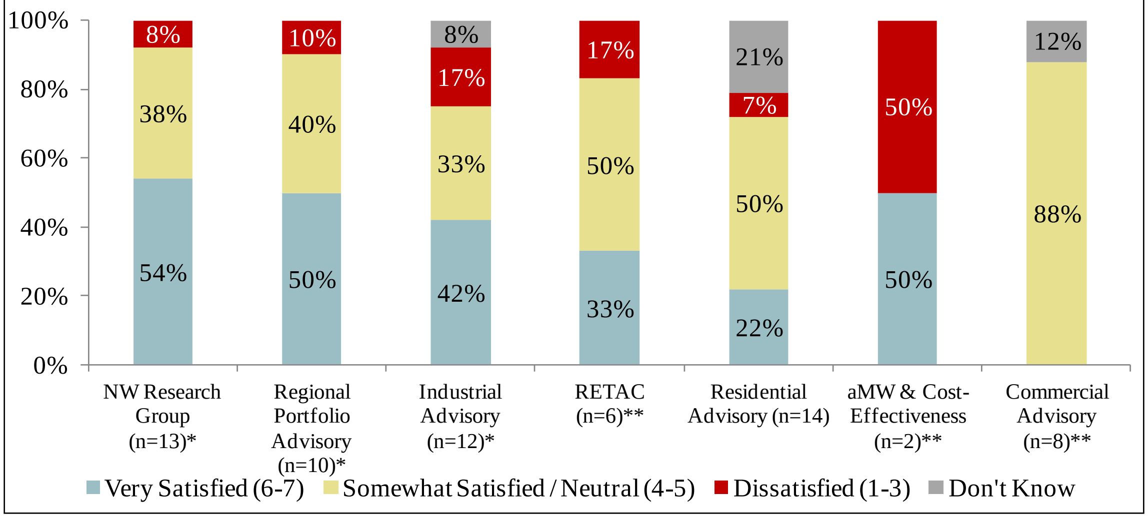
Figure 29. Usefulness of Committee or Group Meeting



*small base size (<30) interpret results with caution.
**very small base size (<10) results should be viewed as qualitative only.
Q50. Did you find the {RESTORE SETGRP} meeting[s] to be:
NOTE: If a respondent indicated that they participated in more than one committee or group meeting, they were asked follow-up questions only about the committee or group that they attended most frequently.

Half (50 percent) of those who attended a Regional Portfolio Advisory Committee meeting and more than half (54 percent) who attended a NW Research Group meeting indicate they are very satisfied with the meetings. Among those attending an Industrial Advisory Committee meeting, less than half (42 percent) are very satisfied, while just over one-fifth (22 percent) are very satisfied with the Residential Advisory Committee meetings. (Figure 30)

Figure 30. Satisfaction with Committee Experience

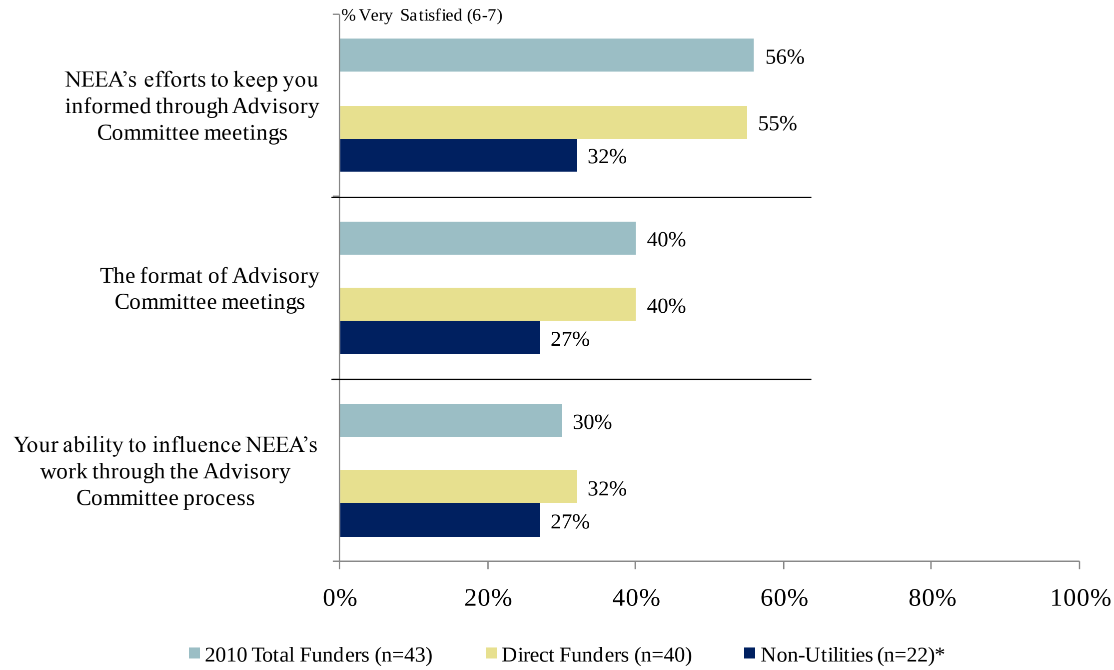


*small base size (<30) interpret results with caution.
**very small base size (<10) results should be viewed as qualitative only.
Q51. Thinking about your experience with the {RESTORE SETGRP}, how satisfied are you with this process for understanding and influencing NEEA’s work?

Satisfaction with Advisory Committee

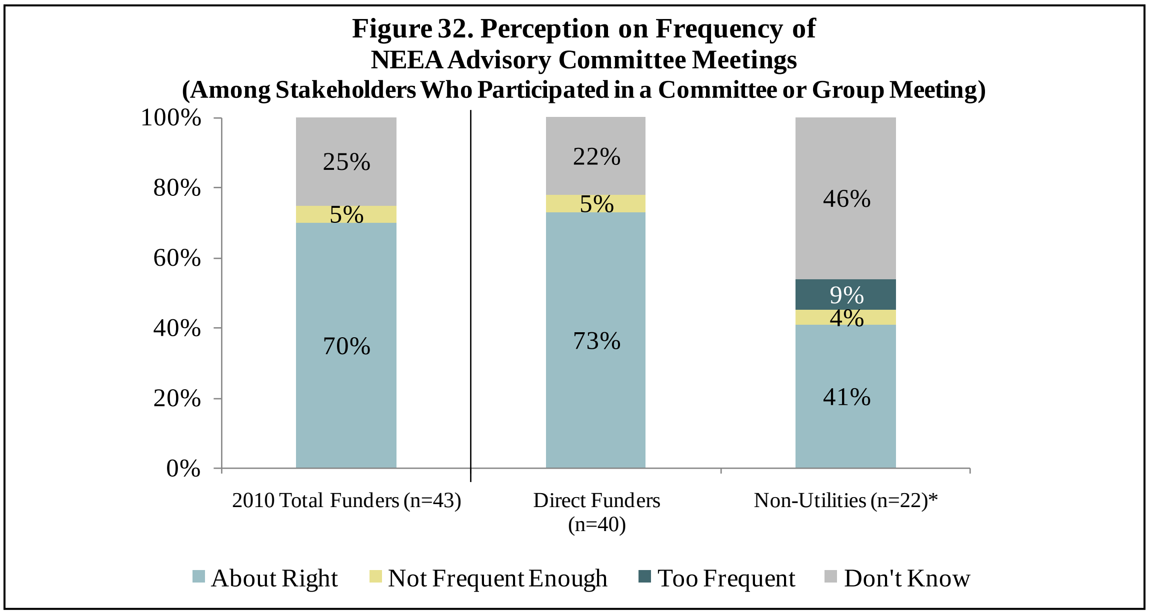
More than half (56 percent) of Total Funders (among meeting participants) are very satisfied with *NEEA's efforts to keep them informed through Advisory Committee meetings*. Less than half are very satisfied with *the format of the Advisory Committee meetings* (40 percent), and their a*bility to influence NEEA's work through the advisory committee process* (30 percent). (Figure 31)

Figure 31. Satisfaction with Advisory Committee Attributes (Among Stakeholders Who Participated in Any Committee or Group Meeting)



*small base size (<30) interpret results with caution.
Other NW Utility base size less than 10, data not shown.
Q52-Q54. Using the same one to seven scale, how satisfied are you with…

Among those who have attended an NEEA advisory committee meeting, most (70 percent) think that the frequency of the meetings is *about right*. (Figure 32)



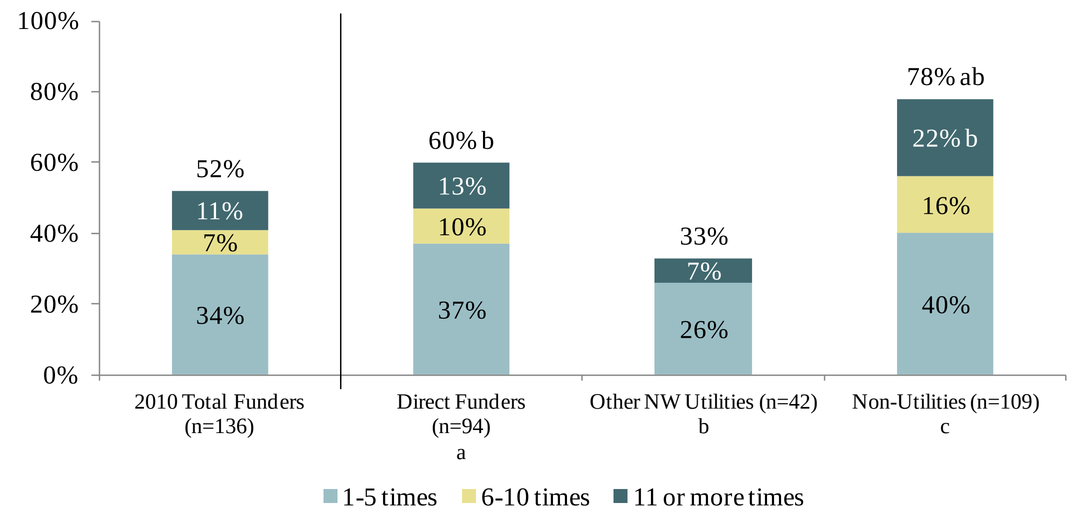
*small base size (<30) interpret results with caution.
Other NW Utility base size less than 10, data not shown.
Q55. Would you say the frequency of NEEA Advisory Committee meetings is…

Verbatim responses to open end follow-up questions about committee or group participation can be found beginning on page 91of Appendix D.

Other In-Person Meetings with NEEA Staff

Among Total Funders, half (52 percent) report that they have participated in other in-person meetings with the NEEA staff, compared with more than three-quarters (78 percent) of Non-Utilities who report this. (Figure 33)

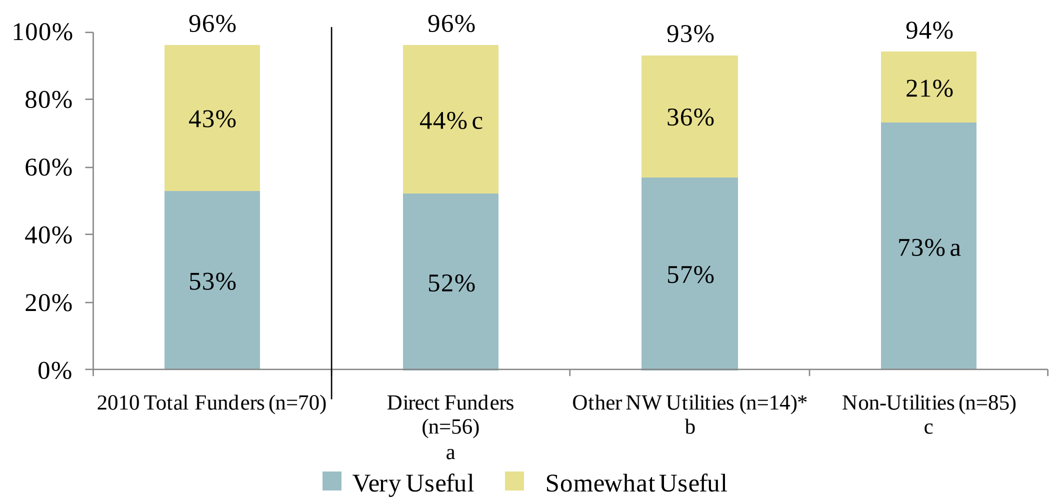
Figure 33. Participated in Other In-Person Meetings with NEEA Staff



Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q57. In the past year, how many times have you participated in other in-person meetings with NEEA staff?

Just over half (53 percent) of Total Funders rate these in-person meetings with NEEA staff as very useful, compared with nearly three quarters (73 percent) of Non-Utilities who view them as very useful. (Figure 34)

Figure 34. Usefulness of Other In-Person Meetings With NEEA Staff

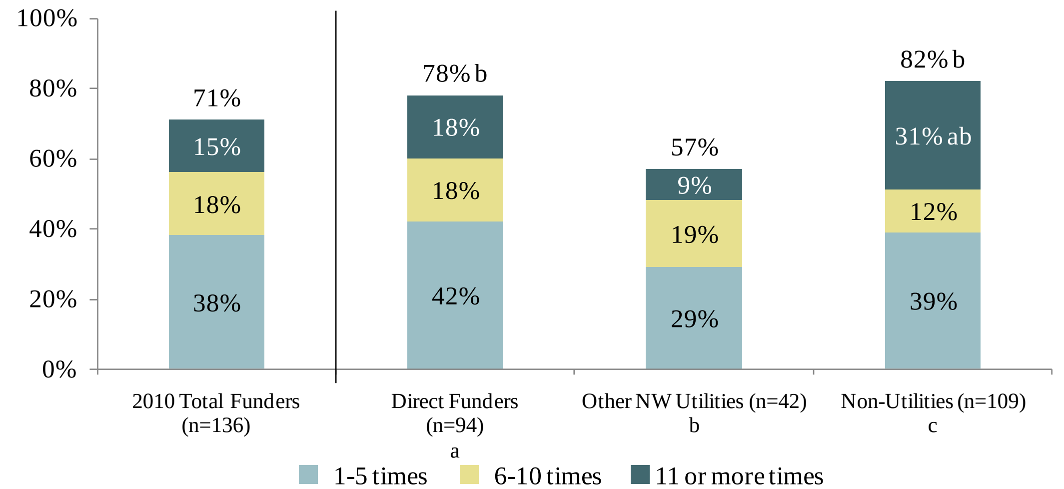


Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
*small base size (<30) interpret results with caution.
Q57A. Did you find the other in-person meetings with NEEA staff to be…

The NEEA Website

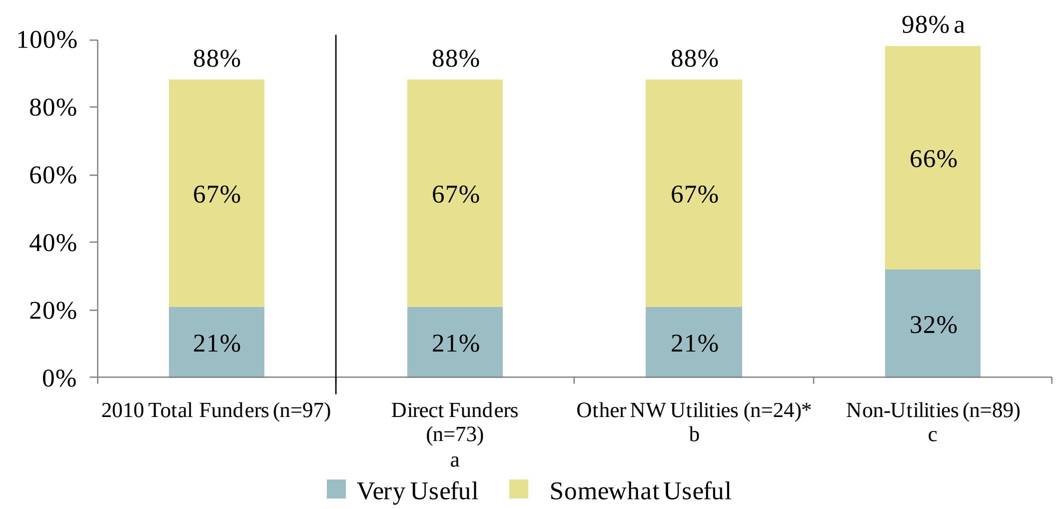
Among Total Funders, 71 percent say that they have accessed the NEEA website one or more times. Significantly more Direct Funders and Non-Utilities accessed the website compared with Other NW Utilities. One in five (21 percent) Total Funders find the website very useful, compared with one-third (32 percent) of Non-Utilities who indicate this. (Figures 35-36)

Figure 35. Accessed NEEA Website in Past 12 Months



Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
Q58. In the past 12 months, approximately how many times have you accessed NEEA's website, NW Alliance.org?

Figure 36. Usefulness of NEEA Website (Among Stakeholders Who Accessed the Website)



Letters indicate a number is significantly higher at 95 percent confidence than the corresponding group.
*small base size (<30) interpret results with caution.
Q58A. Did you find NEEA's website to be…

Improving NEEA Interactions with Stakeholders

When asked what NEEA can do to improve how it interacts with stakeholders, one in ten responders to this question (10 percent-11 percent across all groups) note *more opportunities for interaction and collaboration*. Other comments relate to better accessibility to information and NEEA staff. (Table 9)

Table 9. Ways NEEA Can Improve How it Interacts With You and Your Organization				
	Total Funders	Direct Funders (a)	Other NW Utilities (b)	Non-Utilities (c)
Satisfied, continue in same direction	13%	10%	21%	16%
More opportunities for interaction & collaboration	10%	11%	10%	11%
Provide access to information / make information easier to obtain	7%	7%	7%	3%
Be more accessible	5%	4%	7%	4%
Nothing else NEEA can do	4%	4%	5%	5%
Clarify initiatives / decisions / program goals	4%	5%	2%	5%
Better relevance to the region, local support	4%	4%	5%	4%
Base (n)	***136***	***94***	***42***	***109***

Q59. Finally, please tell me what, if anything, NEEA could do to improve how it interacts with you and your organization.

Verbatim responses to this open end question can be found beginning on page 95 of Appendix D.

Conclusions

Stakeholder perceptions of NEEA are generally positive, though with a good deal of variation between the three stakeholder categories and many of the subgroups of focus.

Direct Funders are generally more positive about their relationship with NEEA and NEEA's contribution to their energy efficiency efforts compared with Other NW Utilities. This is likely due to more engagement with NEEA among Direct Funders versus that of Other NW Utilities. Among the stakeholder groups, Non-Utilities tend to provide the most positive feedback on most measures, possibly due to the different nature of their relationship with NEEA.

While roughly three in ten stakeholders say their general opinion of NEEA has improved during the past year (similar to the 2007 response to this question), the finding that nearly one in five (19 percent) Direct Funders' opinion of NEEA has become less positive during this time is of concern. Many of the less positive opinions are tied to changes that have taken place at NEEA, and stakeholders' concerns about these changes and NEEA's direction.

NEEA is widely recognized among stakeholders for its expertise and its unique role in influencing the market and promoting energy efficiency, however Other NW Utilities that provide funding indirectly to NEEA lag Direct Funders and Non-Utilities in familiarity and interaction with NEEA. This lack of engagement and knowledge of NEEA's activities appears to result in less positive views of NEEA across many attributes.

NEEA has achieved some gains among Total Funders, with a significantly greater proportion strongly agreeing that *NEEA has helped my organization achieve its energy efficiency goals* and *NEEA offers me ample opportunity to provide meaningful input into its initiatives* in 2010. Of some concern however, is the finding that only three in ten (29 percent) Direct Funders strongly agree that *NEEA understands my organization's energy efficiency goals and programs* indicating a need for NEEA to better engage and listen to individual utilities' issues and concerns.

A significantly greater proportion of rural stakeholders strongly agreeing with the statement *NEEA does not understand market conditions in my local service territory* compared with urban stakeholders indicates a continuing challenge with rural utilities and their perceptions of regional bias at NEEA.

While most stakeholders receive regular communications from NEEA and visit NEEA's website, some continue to express a desire for increased interaction NEEA staff, and more information about the impact of NEEA programs and activities.

Recommendations

While NEEA is viewed positively, and recognized for its efforts and expertise by the majority of stakeholders, there remain several avenues for enhancing and promoting its role in the region.

- Continue to seek ways to enhance the level of two-way engagement with stakeholders

- Involve utilities early in the decision-making process to optimize alignment between utility and NEEA efforts

- Better communicate changes at NEEA and reasons for change

- Develop and demonstrate an understanding of each individual utility's energy efficiency goals and the unique issues and challenges in their territories, particularly among Other NW Utilities

- Expand efforts to track and promote market transformation efforts and demonstrate the value of NEEA's programs and activities to stakeholders

- Identify ways to better engage and inform "Other NW Utilities" (beyond Direct Funders) that provide funding to NEEA indirectly

- Consider a dashboard summary of NEEA initiatives and their performance / impacts to give stakeholders a quick resource for updates and information