

## 2012 BECC Conference: Poster Presenter Abstracts

Presenter: David Sumi, The Cadmus Group

Other Contributors: Jim Stewart and Jessica Aiona, Cadmus, and Nick Hall, TecMarket Works

### ***Why Evaluation Should Perform Random Assignment for Behavioral Programs - And What Evaluators Must Do If Treatment and Control Group Assignments are Done by Others***

This presentation will address two important evaluation activities that can arise for behavioral DSM programs. These programs involve benchmarking of a residential customer's energy usage against comparable customers in the same geographical areas, periodic reporting of the results to the customer, and ongoing delivery of customer-tailored information about energy saving tools, resources and promotion of other available residential DSM programs. Evaluations of these programs typically involve experimental designs, i.e., random assignment to treatment vs. control groups. The authors have recently conducted the program random assignment for a utility's residential behavioral program. We believe that undertaking this activity prior to launch of the behavioral program had not been previously performed by an evaluation team. This presentation will recommend: (1) why it is important for the evaluator to conduct the random assignment; (2) the procedures for performing assignments; and (3) the evaluation activities required if assignments are not conducted by the evaluator. The random assignments involved coordination on: timing of program launch; total pool of utility customers available for assignment; number of planned program strata; minimum number of control group customers required; and, return of assigned samples to the program implementer for covariate balance testing (i.e., covariate distributions for the treatment and control groups should be similar). This testing was also conducted by the evaluator prior to delivering assigned samples to the implementer. If evaluation does not conduct the random assignment, treatment/control group equivalence must be assessed based on tests for pre-program consumption, demographic and psychographic profile matching, and geographic differences testing.