

Exhibit No. \_\_ (JSP-2)

**BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION**

DOCKET NO. UG-060518

EXHIBIT OF

JANE S. PETERS

REPRESENTING AVISTA CORPORATION

## **RESEARCH INTO ACTION, INC.**

Research Into Action, Inc. is a social marketing and evaluation research firm specializing in implementing field research projects and working with clients to translate the research into actionable plans and products. Research Into Action, Inc. specializes in research related to energy, the environment, and social issues.

Research Into Action helps organizations in three areas: understanding people's behaviors and motives through reliable research; developing research findings to support decision-making and implementation; and working with clients to understand and remedy organizational impediments to action. This work includes program evaluations, market evaluations, market assessments, and performance measurement.

Since its founding in 1996, Research Into Action has consulted on more than 170 projects and has completed contracts worth over \$6 million. Clients include national and international utilities, as well as energy, government, and non-governmental agencies. Research Into Action conducts all phases of qualitative and quantitative research into the design, delivery, analysis, and interpretation of program, product, and service development. The firm specializes in the implementation of field research projects based on a multifaceted understanding of the motives and behaviors of the people to whom the programs are targeted. Dr. Peters and Dr. Marjorie McRae of Research Into Action were members of the team to develop evaluation protocols for the CPUC, and Dr. Peters had the lead role in developing the market effects protocols.

Staff members of Research Into Action have conducted over 2,000 executive interviews with residential homeowners and renters, commercial and industrial firms, and government agency staff. Research Into Action oversees the implementation of mail surveys and telephone surveys with homeowners, renters, and commercial and industrial firms.

Research Into Action uses both qualitative and quantitative research methods. We have analyzed quantitative data using advanced statistical methods and qualitative data using established methods, such as triangulation.

Research Into Action has a great deal of experience managing subcontractors. Annually, we manage \$100,000 to \$150,000 in subcontracts (35%-50% of our revenue). To accomplish this, we develop a task order contract for each sub-contractor, which is then managed directly. All communications are conducted by e-mail and phone. We are familiar with the strengths of our subcontractors and are able to assign activities to them that bring these attributes to our projects.

## JANE S. PETERS, PH.D.

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### SUMMARY

More than 25 years of experience in energy-related customer research, market assessment, program performance measurement and evaluation, strategic planning, organizational analysis, and process reengineering. Have conducted over 2,000 executive interviews and over 75 focus groups; managed over 400 mail customer and trade ally surveys and 1,000 telephone surveys. Recognized energy services industry leader in process and performance measurement and utility program evaluation research and training.

### EXPERIENCE

#### RESEARCH INTO ACTION, INC.

President

(1996 to present)

Designs, plans, implements, and manages customer research and performance measurement projects. Projects include program evaluation, policy analysis, statistical analysis, product and market assessment, service quality analysis and satisfaction studies, customer research, and survey and behavioral research.

Representative projects include:

#### ***Market Transformation and Market Effects Evaluations***

- Member of team that developed *2001 Framework for Planning and Assessing Publicly Funded Energy Efficiency* for the California Public Utility Commission. Principal investigator for Summary Study of the 15 market effects studies conducted for the Market Effects Subcommittee of the California Demand Side Management Advisory Committee. Co-principal investigator for an evaluation of the regional market

transformation efforts for the National Association of Regulated Utility Commissioners.

- Completed or conducting evaluation of a variety of commercial and industrial market transformation efforts for the Northwest Energy Efficiency Alliance: BetterBricks and Energy Efficiency Building Practices Initiative, Regionwide Building Operators Certification Program, Architecture + Energy Program, Scientific Irrigation Scheduling Program, Micro-Electronics Energy Efficiency Initiative, Silicon Crystal Growing, Solar Silicon Furnace Improvements, and the Seattle Lighting Design Lab. These evaluations use a variety of data collection strategies to track program progress.
- Evaluation of NYSERDA's End Use Renewable Program, Energy Trust of Oregon Solar program, LIPA's Photovoltaic Buy-down program and evaluation of the consumer education sub-account of the California Energy Commission Renewable Energy Program. These renewable energy programs all include market transformation components.

## **Evaluations**

- Principal evaluator for team conducting process evaluations for NYSERDA program portfolio, including residential, low income, commercial/industrial and research and development programs. The team is conducting four to six evaluations each year since 2003, in 2006 the NYSERDA also awarded the team the evaluation management activities to support NYSERDA evaluation staff.
- Lead evaluator for Evaluation of the Commercial Industrial portion of the Efficiency Utility in Vermont. This evaluation is a three year evaluation including baseline studies, tracking studies, process and market structure analysis.
- Three years of process (one including impact) evaluations of an innovative low-income program focused on baseload electric energy reduction for a Northeastern utility using in-person interviews, surveys, and billing analysis. Two process evaluations of community based energy efficiency programs for two Midwestern utilities.
- A two-year evaluation of two customer information products for a Midwestern utility. The evaluation uses a time-series panel survey to measure changes in attitudes and behavior associated with the

information product, collection and analysis of sales data and additional customer and trade ally interviews.

- An evaluation of a museum exhibit sponsored by a Midwestern utility and displayed in local area children's museums. The evaluation included a phone survey of children who had and had not visited the museum. Children and their parents were interviewed about energy actions the children routinely performed in their homes to determine if the children who had visited the museum were more or less likely to take energy-conserving actions.

### **Market Assessment**

- Market baseline studies of energy-efficient practices and awareness for the Northwest Energy Efficiency Alliance Commercial Sector Initiative. Specific studies for architects, lighting designers, schools, grocery stores, hospital and health care facilities, and commercial real estate.
- A market assessment for solar domestic water heating programs. The assessment included a review of solar programs, interviews and focus groups with residential consumers to identify key issues, interviews with trade allies and a market simulation and telephone survey of residential consumer response. The findings from these activities were used to develop an estimate of market potential along with a business analysis for the preferred program strategy.
- A market assessment of consumer response to issues of green pricing through a series of three focus groups in the Northeastern part of the United States, and a market assessment of consumer response to utility restructuring in the Western part of the United States. A market assessment of consumer response to landfill gas as a green power supply through focus groups in the western United States.
- A market assessment of an innovative transportation concept, Car Sharing. This project included focus groups with consumers and a survey of consumers. The goal of the study is to estimate market potential for a Car Sharing concept and include this analysis in a business plan for a Car Sharing pilot – the pilot evolved to FlexCar and now Zip Car, nationwide.
- A market assessment in the Pacific Northwest for residential ground source heat pump. This study included telephone interviews with

distributors, manufacturers, and residential homeowners in targeted areas of the Pacific Northwest.

## **BARAKAT & CHAMBERLIN, INC.**

**Principal,  
Project Director**

**(1992 to 1996)  
(1991 to 1992)**

Designed, planned, implemented, and managed a variety of the firm's market and customer research projects related to utility product market assessment, product and service design, marketing, and pricing. Provided performance measurement, policy analysis, statistical analysis, and survey and behavioral research.

Representative projects include:

### ***Market Assessment***

- Conducted a programmatic assessment of market potential for an innovative energy services program for a Midwestern utility based on a pilot test in one community.
- Analyzed energy-efficient equipment marketplace to assist in final design of a Southwestern electric utility's \$80 million DSM financing program. Categorized energy efficiency investments, described energy efficient product purchasing process, and analyzed customers' investment decision-making criteria.

### ***Customer Research***

- Designed and implemented a qualitative customer research project for an electric utility exploring customer interest in "futures contracts" for retail energy services.
- Developed customer site visit research techniques to assist electric utilities in evaluating new services, customer needs and preferences, and customer willingness to pay for these services.
- Conducted strategic customer site visits with large C&I customers for three utilities developing new project and services strategies.
- Conducted more than 100 focus groups with residential, commercial, and industrial customers; with trade allies; and with utility staff to assess

response to market changes, market needs, and product and service design.

- Supervised over 1,000 customer and trade ally surveys to assess market and customer response to products and services offered by electric utilities. Surveys conducted by mail and telephone for all sectors.

### ***Organizational Analysis and Process Re-Engineering***

- Conducted strategic benchmarking studies for several utilities comparing competitive business practices in such areas as product offerings and sales force compensation.
- Conducted an organizational analysis for a Western utility developing a DSM initiative.
- Directed incentive verification audits for a Southwestern utility submitting documentation for cost recovery in two different years.
- Conducted a process assessment of a data tracking and reporting process for a Northeastern utility, including a benchmarking study of comparable data-tracking efforts.
- Conducted a process re-engineering study for a Southern utility embarking on a competitive market strategy.
- Conducted process evaluation of four research and demonstration settings, including the management structure, communications, and contracting processes for two West coast utilities.

### ***Performance Measurement and Program Evaluation***

- Developed and conducted training workshops on process and market evaluation techniques and applications and a workshop on the use of CLASSIFY in evaluations for the Electric Power Research Institute (EPRI) and the Wisconsin Center for Demand-Side Research.
- Conducted process evaluations in research and demonstration settings, including the management structure, communications, and contracting process of research and demonstration projects for two West coast utilities.

- Evaluated demand-side bidding programs including a 50-MW program at a Rocky Mountain state utility, a 20-MW project at a California utility, and an in-depth analysis of the demand-side portion of an integrated bidding program in New York; examined the process, organizational, and communication issues associated with four different resource acquisition strategies for a Northwestern utility.
- Conducted process evaluations of a variety of utility programs including a thermal energy storage, residential audit, and commercial audit program for a Texas utility; an industrial program for a Northwestern utility; and large C&I retrofit and new construction programs for two Southwestern utilities.
- Conducted comprehensive evaluations of a small commercial/industrial retrofit program for a Northeastern utility; a residential program that included weatherization, new construction, and appliance rebates for two Midwestern utilities; and low-income programs for several utilities.

### ***Strategic Planning***

- Developed strategic market research plans for two utilities preparing for competition.
- Prepared performance measurement plans for over a dozen utilities, including comprehensive evaluation plans as part of DSM planning studies, specialized plans for mature as well as start-up programs, and detailed program-specific plans.
- Provide ongoing technical support to utilities to develop performance measurement strategies and implement evaluation plans.
- Provided technical support to the DSM Program Office, Electric Generating Authority of Thailand.

### **ERC ENVIRONMENTAL AND ENERGY SERVICES CO., INC.**

**Manager, Portland Office**  
**Senior Analyst, Manager**

**(1990)**  
**(1983-1990)**

Directed research staff of nine in conducting program evaluation and planning projects. Principal investigator for process and market evaluations of demand-side management programs in the residential, commercial, industrial, and agricultural



sectors. This work included pioneering work in the commercial and industrial sectors, the examination of a variety of third-party and competitive bidding programs, and the development of evaluation plans, including the evaluation plan for demand-side bidding programs in New York state.

## EDUCATION AND TRAINING

Ph.D., Urban Studies, Portland State University, Portland, Oregon, 1989

- *Integrating Psychological and Economic Perspectives on Energy Consumption: The Determinants of Thermostat Setting Behavior.* Ph.D. dissertation, Portland State University, Portland, Oregon, 1989.

B.A. with Distinction, Psychology, Occidental College, Los Angeles, California, 1972

Other:

- Message Retention for Adult Audiences Training – November 1992
- Services Marketing Institute – March 1995

## PROFESSIONAL AFFILIATIONS

American Evaluation Association

American Marketing Association

Association of Energy Engineers

Association of Energy Service Professionals

- Board of Directors (1996 to 1999)
- Chair, Evaluation Standards Subcommittee of the Monitoring & Evaluation Committee (1990 to 1993)

National Energy Program Evaluation Conference

- Member, Conference Planning Committee (1996 to present)
- Treasurer (2003-present)

Solar Energy Association of Oregon

- Board Member (1981-1984; 1996 to 2002)

## PUBLICATIONS

“Bedpans, Baked Beans and Businessmen: Changing the Business Practices that Drive Energy Use in Hospitals, Grocery Stores, and Commercial Real Estate.” With Marjorie McRae, David Cohan and Rick Kunkle. *Proceedings of the 2008 National Energy Services Conference*. International Association of Energy Services Professional. Phoenix, AZ. January 2008.

“The Role of Evaluation in Innovative Programs.” With Ben Bronfman, Anne West, Nikhil Gandhi, Shahana Samiullah, and Kevin Cooney. *Proceedings of the 2008 National Energy Services Conference*. International Association of Energy Services Professional. Phoenix, AZ. January 2008.

“Integrating Evaluability Assessment into the Program Planning, Implementation and Evaluation Process: Case studies from Southern California Edison’s IDEEA Program Portfolio.” With Ben Bronfman, Shahana Samiullah, Anne West, Nikhil Gandhi, and Kevin Cooney. *Proceedings of the 2008 National Energy Services Conference*. International Association of Energy Services Professional. Phoenix, AZ. January 2008.

“How Organizations Implement Evaluation Results.” With Sharon Baggett, Patricia Gonzales, Paul DeCotis, and Ben Bronfman. *Proceedings of the 2007 International Energy Program Evaluation Conference*. Chicago, IL. August 2007

“The California Evaluation Protocols: A Panel to Summarize and Discuss Their Content and Application.” With Nick Hall, Lori Megdal, Pete Jacobs, and Rick Ridge. In *Proceedings of the 17<sup>th</sup> National Energy Services Conference and Exposition*. Association of Energy Services Professionals. Las Vegas, NV. January 2007.

“Commercial Energy Efficiency Loans: What Role Do They Play in the Efficiency Toolbox?” With Dulane Carr-Moran. In *Proceedings of the 17<sup>th</sup> National Energy Services Conference and Exposition*. Association of Energy Services Professionals. Las Vegas, NV. January 2007.

“Evaluation of Public Benefits Programs: A Review of the NYSERDA Experience to Date.” With P. DeCotis, P. Gonzales, S. Baggett, and L. Freeman. In *Proceedings of the 2006 ACEEE Summer Study on Energy Efficiency in Buildings*. American Council for an Energy Efficiency Economy. Washington, D.C. August 2006.

“Getting Beyond the Fear Factor.” In *Proceedings of the 16<sup>th</sup> National Energy Services Conference*. Association of Energy Services Professionals. Phoenix, AZ. February 2006.

“The Chinese Motor System Optimization Experience: Developing a Template for a National Program.” With R Williams, A. McKane, Zou Guijn, S. Nadel and V. Tutterow. In *Proceedings of the 2005 Energy Efficient Motor Driven Systems Conference*. Heidelberg, Germany. September 2005.

“China Motor Systems Energy Conservation Project Process Evaluation.” With S. Nadel, and Zou Guijin. In *Proceedings of 2005 International Energy Program Evaluation Conference*. New York, NY. August 2005.

“How Architects Do and Do Not Drive New Construction Decisions.” With D. Cohan, M. Burdick and R. Scholl. In *Proceedings of 2005 International Energy Program Evaluation Conference*. New York, NY. August 2005.

“Efficient Building Equipment in Oregon: What They Got and How They Got It.” With M. McRae, M. Sutter, R. Ridge, and B. Bronfman. In *Proceedings of 2005 International Energy Program Evaluation Conference*. New York, NY. August 2005.

“Industrial Process and Equipment Efficiency in Oregon: An Evaluation of the Energy Trust’s Production Efficiency Program.” With M. McRae, S. Scott, B. Bronfman. In *Proceedings of the ACEEE 2005 Summer Study for Industry*. American Council for an Energy Efficient Economy. Washington, D.C. July 2005.

“National Energy Efficiency Program Best Practices Study: Overview, Sample Results and Initial Lessons Learned.” With M. Rufo, K. James, M. Myers, and D. Brockett. In *Proceedings of the 2004 Summer Study on Energy Efficiency in Buildings*. Washington, D.C. August 2004. Panel 5.

“Using Program Theory And Logic To Improve Design and Likelihood of Real Market Change: Experience With A State Public Benefits Program.” With S. Albert, V. Engel, G. Jordan, L. Megdal. In *Proceedings of the 2004 Summer Study on Energy Efficiency in Buildings*. Washington, D.C. August 2004. Panel 6.

“Using Logic Models to Improve and Enhance Nonresidential Programs.” With D. Moran, S. Albert, V. Engel, L. Megdal. In *Proceedings of the 2004 Summer Study on Energy Efficiency in Buildings*. Washington, D.C. August 2004. Panel 4.

“Back to the Future: Results from a National Consumer Survey about Energy Conservation and Efficiency.” In *Proceedings of the 14<sup>th</sup> National Energy Services Conference*. Jupiter, Florida December 2003.

"Getting the Big Picture of A Small Place." With R. Lloyd, S. Albert, M. McRae, & L. Megdal. In *Proceedings of 2003 International Energy Program Evaluation Conference*. Seattle, WA. August 2003. pp. 263-274.

"Education That Changes Behavior: The Impacts of the BOC Program." With M. McRae, E. Titus, T. Rooney. In *Proceedings of 2003 International Energy Program Evaluation Conference*. Seattle, WA. August 2003. pp. 725-732.

"You Never Know Until You Try: An Independent Evaluation of the EnVINTA One-2-Five® Energy Program." With Phil Degens and Jeff Harris. In *Proceedings of the ACEEE 2003 Summer Study for Industry*. Washington, D.C. June 2003 pp.2-91-98.

"Effects of Using WebTV Graphics on the Accuracy of Self-Reports." In *Proceedings of ACEEE 2002 Summer Study on Energy Efficiency In Buildings*. Washington D.C. August 2003. pp. 10.237-10.246.

"Energy Use in the Microelectronics Industry." With Feldman, S. and Bronfman, B. In *Proceedings of the 12<sup>th</sup> National Energy Services Conference*, Association of Energy Services Professionals, Jupiter FL. December 2001 pp.215-225.

"I Can Do It! The Role of Self-Efficacy in Motivating Changes in Attitudes and Behavior Relating to Energy Efficiency and Renewables. With S. Feldman. In *Proceedings of the 2001 International Energy Program Evaluation Conference*. Salt Lake City, UT. August 2001 pp.479-486.

"Evaluating a Campaign to Increase Demand for Energy Efficiency Commercial Buildings" With L. Dethman and J. Gordon. In *Proceedings of the 2001 International Energy Program Evaluation Conference*. Salt Lake City, UT. August 2001. pp. 695-706.

"Usability Test of *Betterbricks.com*: An Informational Website to Foster Highly Energy Efficient Commercial Buildings. With L. Dethman, J. Gordon. In *Proceedings of the 2001 International Energy Program Evaluation Conference*. Salt Lake City, UT. August 2001. pp.715-726.

"A Framework for Planning and Assessing Publicly Funded Energy Efficiency." With Sebold, F., M. Goldberg, K. Keating; S. Feldman; L. Skumatz; A. Fields; and C. Dickerson. In *Proceedings of the 11<sup>th</sup> National Energy Services Conference*. Association of Energy Services Professionals. New Orleans, LA. December 2000.

"Detecting Behavioral Change for a Visit to a Children's Museum Energy Conservation Exhibit." With M. McRae, L. Morander, D. O'Brien. *Proceedings of the*

2000 ACEEE Summer Study on Energy Efficiency in Buildings. Asilomar, CA. August 2000.

"Building Operator Certification: A Market Transformation Venture Becomes Self-Supporting." With C. Putnam and A. Mulak. *Proceedings of the 2000 ACEEE Summer Study on Energy Efficiency in Buildings*. Asilomar, CA. August 2000.

"Evaporative Cooling in California: Assessing the Market and Establishing Baselines for Evaporative Cooling Technologies in the Residential and Commercial/Industrial Sectors." With B. Mast, P. Ignelzi, L. Skumatz, S. Feldman, C. Gustafson, & M. O'Drain. *Proceedings Evaluation in Transition: Working in a competitive Energy Industry Environmental 1999 International Energy Program Evaluation Conference*. Denver, CO. August 1999.

"The Persistence of Savings from a Comprehensive, Low-Income Energy-Efficiency Program." With E. Titus & K. Seiden. *Proceedings Evaluation in Transition: Working in a competitive Energy Industry Environmental 1999 International Energy Program Evaluation Conference*. Denver, CO. August 1999.

"A Comprehensive Analysis of A Utility-Sponsored Solar Water Heating Program." With A. West, H. Reichmuth & D. Robison. *Proceedings Evaluation in Transition: Working in a competitive Energy Industry Environmental 1999 International Energy Program Evaluation Conference*. Denver, CO. August 1999.

"Measuring Market Effects of Utility Programs: Lessons from California." *Proceedings of 1998 ACEEE Summer Study*. With B. Mast, L. Megdal, P. Ignelzi, and N. Horowitz. Pacific Grove, CA. August 1998. pp. 7.213 - 7.233.

"Changing Customers Attitudes to Energy Efficiency: Midterm Results from an Advertising Campaign." *Proceedings of 1998 ACEEE Summer Study*. With K. Seiden, S. Baggett, and L. Morander. Pacific Grove, CA. August 1998. pp. 8.251-8.261.

"Promoting High Efficiency Residential HVAC Equipment: Lessons Learned from Leading Utility Programs." With C. Neme & D. Rouleau. *Proceedings from the 1998 ACEEE Summer Study on Energy Efficiency in Buildings*. Pacific Grove, CA August 1998. pp 2.153 - 2.164

"Radio Tags, Salmon, and Law Enforcement." *Proceedings of Hydrovision '98*. With J.J. Pizzimenti, D.Olsen, Las Vegas, NV. July 1998.

"Market Simulation As A Method To Assess Market Potential For A Solar Domestic Hot Water Program In Wisconsin." *Proceedings of the 1997 International Energy*

*Program Evaluation Conference*. With B. Tannenbaum, Chicago, IL. August 1997. pp.65-72.

"Market Research and Program Design for Solar Domestic Hot Water." *Proceedings of the 1997 Solar Energy Conference*, American Solar Energy Society, Boulder, Co. April 1997.

"Energy Investment Decision Making in Industrial Firms." *Energy Services Journal*, vol. 2, no. 1. With M. Seratt and R. Way, Winter 1996.

"If You Think You Understand Consumers' Environmental Views, Think Again!" Book review in *Energy Services Journal*, vol. 2, no. 2, Spring 1996.

*Performance Measurement: New Visions for a Competitive Electric Utility Environment*. TR-105844. With P. Herman and M. McRae. Palo Alto: Electric Power Research Institute, December 1995.

"It's Confidential! Should Evaluators Care?" *Proceedings of the 1995 International Energy Program Evaluation Conference*. Chicago, IL, August 1995.

"Energy Efficient Motors and Food Processing: Rebates After EPACT?" *In Proceedings of the ACEEE 1995 Summer Study on Energy Efficiency in Industry*. Volume II, pp 365-371. With K.L. Johnson, S. Baggett, and T. Cheater. Saratoga, NY. August 1995.

"Giving Customers Greater Voice in Strategic and Integrated Resource Planning." *Proceedings of the 7th National DSM Conference*. With S. Khawaja and D. Frederick. Palo Alto: Electric Power Research Institute, June 1995.

"An Assessment of the Decision-Making Process within the Industrial Sector." *Proceedings of the ACEEE Summer Study on Energy Efficiency in Buildings*. With M. Seratt, R. Way, and T. Newcomb. Pacific Grove, CA, August 1994.

"Innovativeness, Predisposition and Freeridership." *Proceedings of the ACEEE Summer Study on Energy Efficiency in Buildings*. With P. Windell. Pacific Grove, CA, August 1994. pp. 1:201-1:208.

"The Free Market and Freeridership in DSM Bidding Programs." *Proceedings of the ACEEE Summer Study on Energy Efficiency in Buildings*. With S. Baggett and M. Chi. Pacific Grove, CA, August 1994.

"Evaluating DSM: Can an Engineer Count on It?" A Short Paper Summarizing a Panel Session at the July 1992 Summer Power Meeting. With J. Flory, L. Vogt, K.

Keating, B. Hopkins, and N. R. Friedman. Piscataway, NJ: IEEE Power Engineering Society, November 1993.

“Bidding for DSM Resources: A New Business Venture.” *Proceedings of the 1993 International Energy Program Evaluation Conference*. With M. McRae and J. Oates. Chicago, IL, August 1993.

“Do You Get What You Pay For in DSM Bidding Programs?” *Proceedings of the 1993 International Energy Program Evaluation Conference*. With M. McRae and P. Brandeis. Chicago, IL, August 1993.

“The Process of Evaluation: Insights from Anthropology.” *Proceedings of the 1993 International Energy Program Evaluation Conference*. With M. O'Drain. Chicago, IL, August 1993.

“Is This the Time to Set Guidelines for Evaluation Practice?” *Proceedings of the 6th National DSM Conference*. With S. Barrata, J. Gallagher, M. Fels, and N. Hall. Palo Alto: Electric Power Research Institute, March 1993.

“Using Process Evaluation to Improve Program Design.” *Proceedings of the EPRI-EUMRC Market Research Symposium*. With P. Clippert. Dallas, TX, November 1992.

“Evaluation of Boston Edison's Small Commercial and Industrial Retrofit Program.” *Proceedings of the ACEEE Summer Study on Energy Efficiency in Buildings*. With A. Goett and M. Spada. Pacific Grove, CA, August 1992.

“State of the Art of DSM Program Evaluation.” *Proceedings of the IEEE Power Engineering Conference*. Seattle, WA, July 1992.

DSM Process Evaluation: A Guidebook to Current Practice. PR-100647. With P. J. Spinney and P. O'Rourke. Palo Alto: Electric Power Research Institute, May 1992.

DSM Evaluation Six Steps for Assessing Programs. CU-9999. With M. McRae, P. Herman, and A. Goett. Palo Alto: Electric Power Research Institute, March 1992.

Handbook of Evaluation of Utility DSM Programs. ORNL/CON-336. Prepared for Oak Ridge National Laboratory. Edited by E. Hirst and J. Reed. With B. Bronfman, G. Fitzpatrick, E. Hicks, E. Hirst, M. Hoffman, K. Keating, H. Michaels, S. Nadel, J. Reed, W. Saxonis, A. Schon, and D. Violette. December 1991.

“A Dual State Bidding Program: Effects of Different Guidelines.” Proceedings of the Fifth International Energy Program Evaluation Conference. With D. Barry, M. Horowitz, and D. Wolcott. Chicago, IL, August 1991.

“Integrating Psychological and Economic Perspectives of Thermostat Setting Behavior.” Proceedings of the ACEEE Summer Study. Asilomar, California, August 1990.

“Process Evaluation Findings: The Industrial Sector.” Proceedings of the Canadian Electrical Association Conference on DSM Programs. Winnipeg, May 1990.

“Comparative Analysis of Three Commercial Sector Financing Mechanisms.” Proceedings of the National Energy Program Evaluation Conference. With M. Haeri. Chicago, IL, August 1989.

“Integration of Process Evaluation and Program Design.” Proceedings of the National Energy Program Evaluation Conference. With P. Evans. Chicago, IL, August 1989.

“Lessons in Industrial Conservation Program Design.” Proceedings of the ACEEE Summer Study on Energy Efficiency. Asilomar, CA, August 1988.

“Energy Conservation in Commercial Buildings: Lessons Learned from the BPA Purchase of Energy Savings Program.” Proceedings of the Third National Conference on Energy Conservation Program Evaluation. With B. Broillet and G. C. Gustafson. Chicago, IL, August 1987.

“The Use of Non-Participant Evaluation to Enhance Program Design.” *Proceedings of the Second National Conference on Energy Conservation Program Evaluation*. With B. H. Bronfman. Chicago, IL, July 1985.

*The Energy Book: A Resource Guide for Oregon*. Solar Oregon Lobby/RAIN Magazine. With Carlotta Collette and John Steinke, eds. July 1982.

“Information Centers: Where Are We Today?” SOLAR 82 Conference, Portland, Oregon, 1982.

## SELECTED TECHNICAL REPORTS

*Market Research Report Compressed Air Efficiency 000-58*. With Fred Gordon, Will Miller. Pacific Energy Associates. August 2000. ([www.nwalliance.org](http://www.nwalliance.org).)



*Regional Building Operator Certification Market Progress Evaluation Report, No. 3. E99-052.* Prepared for the Northwest Energy Efficiency Alliance. With Marjorie McRae, Sharon Baggett and Dave Robison. Research Into Action. May 2000. ([www.nwalliance.org](http://www.nwalliance.org).)

*Scientific Irrigation Scheduling Market Progress Evaluation Report (end of Year 1998). 99-041.* Prepared for the Northwest Energy Efficiency Alliance. With Dave Robison. Research Into Action. August 1999. ([www.nwalliance.org](http://www.nwalliance.org).)

*Architecture and Energy Program Marketing Progress Evaluation Report. No. 1. 99-033.* Prepared for the Northwest Energy Efficiency Alliance. Research Into Action. August 1999. ([www.nwalliance.org](http://www.nwalliance.org).)

*Regional Building Operator Certification Market Progress Evaluation Report, No. 2 (Volumes 1 & 2). E99-027 & 031.* Prepared for the Northwest Energy Efficiency Alliance. With Sharon Baggett and Dave Robison. Research Into Action. May and June 1999. ([www.nwalliance.org](http://www.nwalliance.org).)

*Market Effects Summary Study Volumes 1-3.* Prepared for the California Demand-Side Advisory Committee (CADMAC). With Bruce Mast, Lori Megdal and Patrice Ignelzi. Research Into Action. December 1998. ([http://www.aesp.org/htdocs/mertc/mer\\_library.htm](http://www.aesp.org/htdocs/mertc/mer_library.htm))

*A Comparative Study of the Northwest Energy Efficiency Alliance and Northeast Energy Efficiency Partnership.* Prepared for the National Association of Regulatory Utility Commissioners. With Jonathan Raab. Raab & Associates. December 1998. ([www.naruc.org](http://www.naruc.org).)

*Regional Building Operator Certification Market Progress Evaluation Report. E98-015.* Prepared for the Northwest Energy Efficiency Alliance. With Sharon Baggett and Dave Robison. Research Into Action. September 1998. ([www.nwalliance.org](http://www.nwalliance.org).)

*Proposed Market Assessment and Evaluation Guidelines for Market Transformation Initiatives in the Northeast (Final Draft) 072398.pdf.* Prepared for the Northeast Energy Efficiency Partnership. With David Hewitt. Northeast Energy Efficiency Partnership. July 23, 1998. ([www.neep.org](http://www.neep.org).)

*Building Operator Certification - Washington State Market Progress Evaluation Report, No. 2. E98-007.* Prepared for the Northwest Energy Efficiency Alliance. With Sharon Baggett and Dave Robison. Research Into Action. May 1998. ([www.nwalliance.org](http://www.nwalliance.org).)

Lighting Design Lab - Process Evaluation. Prepared for the Northwest Energy Efficiency Alliance. Research Into Action. April 1998. ([www.nwalliance.org](http://www.nwalliance.org).)

*Building Operator Certification - Washington State Market Progress Evaluation Report, No. 1. E98-001.* Prepared for the Northwest Energy Efficiency Alliance. With Sharon Baggett and Dave Robison. Research Into Action. December 1997. ([www.nwalliance.org](http://www.nwalliance.org).)

*Final Report Evaluation of the Program for Enhanced Harvest and Habitat Law Enforcement and Public Awareness for Anadromous Salmonids and Resident Fish in the Columbia River Basin.* Prepared for the Bonneville Power Administration. With J. Jennings, J. Pizzimenti, D. Olsen, A. Dunau, and J. Campbell. Research Into Action. September 1997.

*Final Report Wisconsin Solar Domestic Water Heater Market Research.* Prepared for the Energy Center of Wisconsin. With D. Robison and R. Winch. Research Into Action. March 1997.

*Conceptual Design of Research: The High Efficiency Laundry Market and Metering Analysis (THELMA).* Prepared for the Electric Power Research Institute. With D. Robison. Barakat & Chamberlin, Inc. February 1994.

*Process Evaluation of the Electric Ideas Clearinghouse.* Prepared for the Bonneville Power Administration With S. Baggett and J. Stout. Barakat & Chamberlin, Inc. November 1993.

*Program Evaluation: A Seminar for Senior Management and Program Evaluation: A Seminar for Non-evaluators.* Prepared for the Wisconsin Center for Demand-Side Research. Barakat & Chamberlin, Inc. August 1993.

*Power Smart Desk Review.* Prepared for the British Columbia Utilities Commission. With H. Schick, K. Grabner, M. McRae, and K. Seiden. Barakat & Chamberlin, Inc. July 1993.

*Evaluation Plan: Energy Management Partnership Program.* Prepared for the Los Angeles Department of Water and Power. With P. Ignelzi. Barakat & Chamberlin, Inc. December 1992.

*Evaluation of the Orange & Rockland Utilities Competitive Bidding Program for Demand-Side Resources.* Prepared for the New York State Energy Research and Development Authority. With M. Seratt, L. Stucky, and D. Darden-Butler. Barakat & Chamberlin, Inc. November 1992.

*Evaluation Plan: Residential Outreach Program ( A Better Idea )*. Prepared for the Los Angeles Department of Water and Power. With J. Schlegel and S. Pigg. Barakat & Chamberlin, Inc. September 1992.

*Residential Load Study*. Prepared for the City of Tacoma, Washington, Energy Conservation Office, Light Division. With P. Windell, K. Seiden, and R. Way. Barakat & Chamberlin, Inc. July 1992.

*Start-Up Process Evaluation of Energy Management Partnership and Commercial New Construction Programs for Los Angeles Department of Water and Power*. Prepared for LADWP. With P. Windell and P. Seratt. Barakat & Chamberlin, Inc. June 1992.

*Resource Acquisition by Bonneville Power Administration: An Assessment of Current Experience*. Prepared for BPA. With M. McRae and M. Seratt. Barakat & Chamberlin, Inc. May 1992.

*Comparative Process Evaluation of Five Research and Demonstration Projects*. Prepared for the Bonneville Power Administration. With P. Seratt. Barakat & Chamberlin, Inc. February 1992.

*Evaluation of the Orange and Rockland Utilities Competitive Bidding Program for Demand Side Resources (Interim Report)*. Prepared for New York State Energy Research and Development Authority. With Marvin J. Horowitz and Deborah Barry. ERC International. January 1991.

*Process Evaluation of the PowerADDvantage Program*. Prepared for the Bonneville Power Administration. With Deborah Barry. ERC International. July 1990.

*Process Evaluation of the Sponsor-Designed Program: The Refrigeration Retrofit Program for the Food Processing Industry Final Report*. Prepared for the Bonneville Power Administration. With Peggy Seratt. ERC International. January 1990.

*Process Evaluation of the Partnership Business Closure Program: Final Report*. Prepared for the Bonneville Power Administration. ERC International. December 1989.

*Process Evaluation of the Sponsor Designed Program: The Refrigeration Retrofit Program for the Food Processing Industry: 1988 Annual Report*. Prepared for the Bonneville Power Administration. ERC International. March 1989.

*Interim Process Evaluation of Bonneville Power Administration's Energy Savings Plan Program.* Prepared for the Bonneville Power Administration. ERC International. October 1988.

*Comparative Analysis of Commercial Sector Financing Mechanisms: CIPP, PES Pilot and Puget Incentive Programs.* Prepared for the Bonneville Power Administration. With M. Hossein Haeri and Greg C. Gustafson. ERC International. September 1988.

*Development of an Appliance Sales Data Collection System: Final Report.* Prepared for the California Energy Commission. With Ahmad Faruqui. ERC International. May 1988.

*Process Evaluation of the Sponsor Designed Program: The Refrigeration Retrofit Program for the Food Processing Industry (Interim Report).* Prepared for the Bonneville Power Administration. ERC International. December 1987.

*Process Evaluation of the BPA Purchase of Energy Savings Pilot Program.* Prepared for the Bonneville Power Administration. With Greg C. Gustafson and Mira Vowles. ERC International. October 1987.

*Process Evaluation of the Sponsor-Designed Site Specific Program.* Prepared for the Bonneville Power Administration. International Energy Associates Limited. With Greg C. Gustafson. March 1987.

*Process Evaluation of the Industrial Test Program: Final Report.* Prepared for the Bonneville Power Administration. With Greg C. Gustafson. International Energy Associates Limited. March 1987.

*Process Evaluation of the BPA Purchase of Energy Savings Field Test.* Prepared for the Bonneville Power Administration. With Greg C. Gustafson. International Energy Associates Limited. February 1987.

*Summary Report, Non-Response Evaluation: Site-Specific Sponsor Designed Program Focus Groups.* Prepared for the Bonneville Power Administration. With Greg C. Gustafson. International Energy Associates Limited. September 1986.

*Street and Area Lighting Program Evaluation Update.* Prepared for the Bonneville Power Administration. With Benson H. Bronfman. International Energy Associates Limited. August 1986.

*Evaluation of Reasons for Non-Response to BPA's Purchase of Energy Savings Pilot Program Request for Proposals.* Prepared for the Bonneville Power Administration.

With Greg C. Gustafson and Benson H. Bronfman. International Energy Associates Limited. April 1986.

*Interim Report on the Purchase of Energy Savings (PES) Field Test.* Prepared for the Bonneville Power Administration. With Greg C. Gustafson. International Energy Associates Limited. January 1986.

*Evaluation of Responses to BPA's Request for Commercial Sector Proposals.* Prepared for the Bonneville Power Administration. With Benson H. Bronfman. Evaluation Research Corporation. September 1984.

*Census of Institutional Buildings: Oregon, Washington, Idaho, and Montana.* Prepared for the Bonneville Power Administration. With David I. Lerman, Fred Huetter, and Benson H. Bronfman. Evaluation Research Corporation. July 1983.

### SELECTED PRESENTATIONS

"BOC: A Sustainable Service." American Council for an Energy Efficient Economy Market Transformation Symposium. Washington, DC. March 2002.

"Residential Market Data Trends." E-Source Residential Summit. Colorado Springs, CO. October 2001.

"The Logic of Market Transformation Programs." Affordable Comfort Conference 2001. Milwaukee, WI. May 2001.

"The Logic of Energy Efficiency Program Evaluation." American Council for an Energy Efficient Economy Market Transformation Symposium. Washington, DC. March 2001.

"Evaluating a Market Based Energy Program." American Evaluation Association Conference. Waikiki, HI. November 2000.

"Field Tested MT Evaluation Methods: The Scoping Study and other Resource Tools" International Energy Program Evaluation Conference. Denver, CO. August 1999.

"Applied Performance Measurement for Hard to Measure Programs" Affordable Comfort Conference. Chicago, IL. April 1999.

"Measuring Change: Lessons Learned" Affordable Comfort Conference. Madison, WI. May 1998.

“Marketing with Community Involvement-Panel Session.” Association of Energy Services Professionals Annual Meeting. Boca Raton, FL. December 1997.

“Market Simulation As A Method To Assess Market Potential For A Solar Domestic Hot Water Program In Wisconsin” International Energy Program Evaluation Conference. Chicago, IL. August 1997.

“Market Research and Program Design for Solar Domestic Hot Water.” 1997 Solar Energy Forum, Washington, D.C. April 1997.

“Transitioning Evaluation to Performance Measurement.” Regional Evaluation Network. Portland, OR. June 1996.

“Stepping Over the Line: What Do Your Competitors' Customers Really Want?” 1996 Conference on Innovative Approaches to Electricity Pricing. Electric Power Research Institute, La Jolla, CA. March 1996.

“Building Successful Focus Groups for Energy Evaluation.” Department of Energy, Washington, D.C. October 1994.

“Customer Data Collection Issues: Duct Sealing.” Affordable Comfort Conference, Philadelphia, PA. March 1994.

“Opportunities in the Energy Services Marketplace.” Environmental Investment Opportunities for the 21st Century, Portland, OR. February 1994.

“Using Process Evaluation to Improve Lighting Programs.” Efficient Lighting 1993, Electric Power Research Institute, Scottsdale, AZ. December 1993.

“Evaluation Standards and Guidelines.” Association of Demand-Side Management Professionals annual membership meeting, with K. Oswald, San Diego, CA. December 1993; Phoenix, AZ, December 1992.

“What Utilities Are Saying About DSM Bidding.” 16th World Energy Engineering Congress, Association of Energy Engineers, Atlanta, GA. October 1993.

“Customer Response to Energy Consumption Information and Attitudes to Energy Consumption.” Oregon Public Utilities Commission Residential Metering Workshop, Portland, OR. October 1992.

“Qualitative Evaluation of Commercial and Industrial Energy Programs.” American Evaluation Association annual meeting, Chicago, IL. October 1991.

Evaluation of DSM Programs. Edison Electric Institute Rate Research Committee meeting, Portland, OR. September 1991.

Evaluation Standards: Is the Pain Worth the Gain? Panel presentation, Fifth International Energy Program Evaluation Conference, Chicago, IL. August 1991.

Demand-Side Management Bidding. Infocast seminar on Competitive Bidding for Power Contracts, San Francisco, CA. May 1991.

Thermostat Setting Behavior and Comfort Zones. Affordable Comfort V, Philadelphia, PA. March 1991.

Chipping Away at the Old Block. 1985 National Women's Studies Association Conference, with S. A. Baggett, Seattle, WA. June 1985.

How to Look at the Office in a Computer World. Women's Research Conference, University of Utah, Salt Lake City, UT. October 1984.

Variables Affecting Sex-Role Stereotyping. Annual Conference, Western Psychology Association, with A. Schell, Anaheim, CA. May 1973.

#### SELECTED WORKSHOP AND TRAINING SEMINARS

EPRI 1995 Performance Measurement Workshop, with D. Violette et al., Denver, Co. November 1995.

Product Development and Marketing, Western Energy and Communication Association, with W. LeBlanc, G. Collins, and S. Schick, Irvine, CA. September 14-15, 1995.

Process/Market Evaluation. Seventh International Energy Program Evaluation Conference, with K. Van Liere, Chicago, IL. August 1995.

Using CLASSIFY in Program Evaluation. EPRI-EUMRC Marketing Symposium, Conference with D. Linewebber, Marina del Rey, CA. November 1994.

EPRI 1994 Program Evaluation Workshop, with D. Violette, et al., Denver, CO. November 1994.

Improving DSM Effectiveness through Consideration of Commercial Customer Needs: Using Commercial CLASSIFY in Evaluation. Workshop sponsored by the Wisconsin Center for Demand-Side Research, Oconomowoc, WI. February 1994.

*Jane S. Peters, Ph.D.*

EPRI 1993 DSM Evaluation Workshop, with M. Evans, M. Goldberg, D. Violette, K. Van Liere, P. Jacobs, and H. Misuriello, Santa Fe, NM. November 1993.

Lecturer: Overview of Program Evaluation/Process Evaluation and Impact Evaluation and Measurement Issues. Demand-Side Management: Principles and Applications, An Intensive One-Week Training Seminar. Sponsored by the Demand-Side Management Training Institute, San Francisco, CA. November 1993.

DSM Process Evaluation, with K. Van Liere, Chicago, IL, August 1993, Milwaukee, WI, February 1993, and FonduLac, WI. November 1992.

EPRI Process Evaluation Seminar, with P. Spinney, Boston, MA, June 1992, and with K. Van Liere, Palm Beach, FL. October 1992.

DSM Program Evaluation Training Workshop for the Electric Generating Authority of Thailand, Bangkok, Thailand. September 1992.

DSM Program Evaluation Training Workshop, Barakat & Chamberlin-sponsored workshop, with A. Goett, Toronto, ON. June 1992.

DSM Program Evaluation Training Workshop for the PSCo Collaborative, Denver, CO. May 1991.