

Advice for domestic survey collection & monitoring

The following advice was compiled from feedback from local authorities involved in the evaluation of the first phase of pilots as part of the development of Scotland's Energy Efficiency Programme (2017).

Start communicating early about surveys and monitoring

- From the first information that you give to households, present the evaluation as part of receiving the energy measures or advice (Although, remember that people must still have the option to refuse to take part in the evaluation).
- Talk to people face to face wherever possible e.g. through public meetings
- Ask households who have already taken part in the survey and monitoring to share their experiences at events or in written materials.
- Show people examples of the monitoring equipment that will be used so that they understand when it comes to installing it.
- If using letters or leaflets to promote the programme, make sure that the survey and monitoring are mentioned prominently.

Face to face vs. telephone vs. postal / online surveys?

- Face to face survey collection worked best for collecting quality data and ensuring the same households that received monitoring equipment also completed the survey.
- If you are using postal or online surveys, make sure you have a plan for monitoring the number of surveys that have been returned. Follow up with household visits and phone calls where households have not yet returned the survey
- If completing the survey via telephone interviews, make sure that householders receive an 'information pack' about the survey process in advance. This should tell them about the purpose of the evaluation, what will happen to their responses, and include a consent form.

Design a smooth 'customer journey'

- Be clear which organisations are involved in the evaluation and what their role is (this applies to the programme in general)
- Give contact phone numbers in case of issues or questions
- Where possible, use the same person to do both sets of surveys so that the householder can build trust over the project.
- Brief all contractors that the evaluation is going on and make sure they can provide contact details if a householder needs them.

Provide survey training for interviewers

- Train interviewers so that they are familiar with the survey and are comfortable asking the questions (including more personal questions about income or health).
- Householders will not always read the information packs / consent forms. - Make sure interviewers can answer questions about the purpose of the evaluation and what will be done with the survey information (how it will be stored, analysed, and kept confidential).

Consider using incentives

- The following types of financial incentives were used during Phase 1 SEEP pilots' evaluation:
 - Vouchers for each participation in a survey (£20 before, £20 after)
 - Prize draw for vouchers
- Other approaches included:
 - Explaining that the monitors will enable them to measure changes in energy use (i.e. potential savings on energy bills)



energy
saving
trust