



**A process to develop
operational bottom-up evaluation methods:
*from reference guidebooks
to a practical culture of evaluation***

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Contents

- ❑ **What are the stakeholders expecting from evaluation?**
 - analysis of the stakeholders' needs
 - main principles deduced for operational evaluation methods

- ❑ **Concrete answers for operational evaluation methods**
 - seven points to answer stakeholders' needs, and to insure the evaluation methods are operational



Analysing stakeholders' needs

Evaluating energy efficiency operations, what for?

- ❑ increasing requirements for reporting results
- ❑ needs of feedback to improve future operations

+ specific needs at local levels:

- ❑ providing evidences of local contributions
- ❑ building local knowledge and skills
- ❑ communicating results to the public



Analysing stakeholders' needs

Main stakeholders' expectations:

- transparency** of the evaluation methods used
- quality** of the data used
- credibility** of the results reported

Three main evaluation fields:

- analysis of the **programme theory**
- quantification of the **final impacts**
- cost-effectiveness** of the results



Analysing stakeholders' needs

Specificities of evaluating local operations

- operations scattered and diverse
- large partnerships
- evaluation often not taken into account in the operation process



Analysing stakeholders' needs

Main principles of our methodology

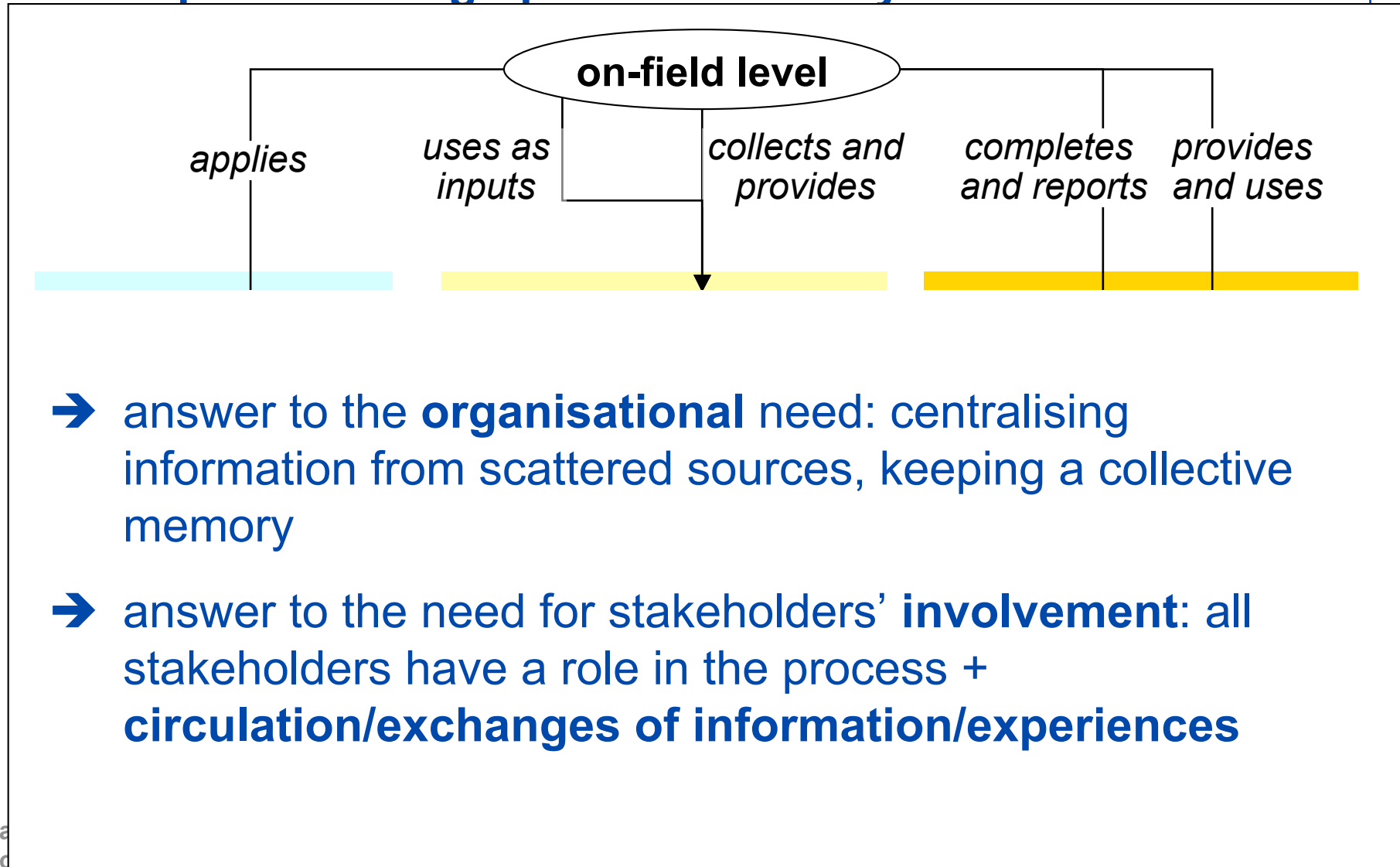
evaluation methods have to:

- ❑ be **operational and easy to appropriate** for all stakeholders involved, and to enable a **progressive training** to evaluation
- ❑ insure **data quality** and **results transparency**
- ❑ support a progressive process of **experience capitalisation**



Concrete answers

First point: setting up a evaluation system on two levels



- answer to the **organisational** need: centralising information from scattered sources, keeping a collective memory
- answer to the need for stakeholders' **involvement**: all stakeholders have a role in the process + **circulation/exchanges of information/experiences**



Concrete answers

Second point: using existing materials

- rich experience available, both:
 - evaluation guidebooks → solid basis for an evaluation methodology
 - evaluation experience feedback → starting point for developing operational methods
- process of **experience capitalisation**
- answer to the need of **reliability**: well-known methods
- more cost-effective to use experience than to start from 0



Concrete answers

Third point:

the user is free to choose the level of evaluation efforts

- ❑ making evaluation possible with minimum input data
- ❑ proposing calculation models taking into account the concrete availability of data
- ❑ providing guidelines for more sophisticated analysis
- ➔ answer to the need for progressive capacity building
- ➔ answer to the need for increasing stakeholders' interest in the evaluation process



Concrete answers

Fourth point:

breaking down the calculation process to make it easier

- ❑ step 1: unitary gross annual results
- ❑ step 2: total gross annual results
- ❑ step 3: total net annual results
- ❑ step 4: total net results over time
- ➔ answer to the need for **transparency**: easier to explain and to appropriate (no “black box”) + frame to provide calculation details
- ➔ distinction between net and gross results for the **communication**



Concrete answers

Fifth point: focusing on the key points

- ❑ main parameters in the calculation process (sensitivity analysis)
 - ❑ main success factors for the operation process (feedback from the operation partners)
- ➔ answer to the need for evaluation methods to be operational: dealing first with the main issues



Concrete answers

Sixth point: including a quality control

- ❑ qualifying input data and data sources
 - ❑ using Quality Assurance Guidelines (*see Vine, 1999*)
 - ❑ progressive approach for addressing uncertainties
- ➔ needs for transparency and reliability: clarifying what data are used and how



Concrete answers

Seventh point: enabling a critical analysis of the results

- ❑ taking account of the differences of view points
 - ❑ favouring comparisons between operations
 - ❑ analysing the benefits and limits of the local dimension
- ➔ answer to the need for raising stakeholders' interest in evaluation: giving additional value to the results



Conclusions and further works

- ❑ First applications successful, but depending on the stakeholders' involvement in the evaluation process
- ❑ Borders reached when dealing with new types of operations
- ❑ Methodological approach used in an on-going project (EMEEES), with adaptations to the specific needs of the European Directive on energy end-use efficiency and energy services



Thank you for your attention.

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