

Results of the Residential Energy Tax Credit Participant Survey 2007

Final Report:

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Executive Summary

Background

The Residential Energy Tax Credit (RETC) was created in 1977 to encourage the use of renewable resources to meet home energy needs. As a result of the new energy saving technologies that have become widely available, the Oregon Legislature expanded the Residential Energy Tax Credit in 1997 to include highly efficient home appliances and in 1999 to include fuel cells. In 2002 high efficiency heat pump systems, furnaces, and boilers were added to this program. Participation in the RETC program has grown sharply since home appliances became eligible. Between July 2006 and June 2007, the program awarded over 34,000 tax credits for energy efficient appliances.

In 2002, the Oregon Department of Energy (ODOE) conducted the first evaluation of the effectiveness of the Residential Energy Tax Credit Program. The evaluation focused on the effectiveness of the appliance tax credit. This report presents a similar evaluation based the results of a participant satisfaction survey conducted in November 2007 by the University of Oregon's Community Planning Workshop (CPW). An additional element of the 2007 evaluation was an on-line survey of individuals that had RETC applications denied.

Purpose and methods

The purpose of this report is to evaluate participant satisfaction with the Residential Energy Tax Credit program, specifically tax credit process for clothes washers, dishwashers and refrigerators. Other technologies in the tax credit program which involve installation by a contractor, such as heating systems, water heaters, have a more complicated application process and were not included in this survey.

CPW accomplished this through: (1) a survey of randomly selected program participants that had tax credit applications approved between July 2006 and June 2007; and (2) a separate survey of individuals that had applications denied between July 2006 and June 2007. The July 2006 to June 2007 time frame was selected to provide a "baseline" of satisfaction before the on-line application system was made available.¹ A total of 34,186 households participated in the Residential Energy Tax Credit program during the July 2006 to June 2007 time period.

¹ ODOE implemented an online application system in 2007.

CPW administered the surveys by mail and through the Internet. Table S-1 summarizes the sample composition and response rates.

Table S-1. Summary of Sample Sizes and Response Rates

Sample	Total
Approved Program Participants	
Population Size	34,186
Mailed Sample Size	1,200
Number of Valid Responses	288
Response Rate	24.0%
Online Sample Size	4,000
Number of Valid Responses	236
Total Sample Size	5,200
Response Rate	5.9%
Total Responses	524
Margin of Error (@95% CI)	±4.2%
Denied Program Participants	
Population Size	956
Sample Size	700
Number of Valid Responses	42
Response Rate	6.0%
Margin of Error (@95% CI)	±14.8%

Note: CI=confidence interval

The program participant survey had a total response of 524 yielding a margin of error of ±4.2% at the 95% confidence level. What this means is that the results are expected to be within ±4.2% of the population mean. CPW received a lower response rate on the denied survey: 42 completed surveys. This results in a much higher margin of error (±14.8%) than the participant survey. We urge readers to use caution when interpreting the denied survey results.

The primary purpose of the survey directed to tax credit recipients was to learn about recent RETC participants' experience with the RETC program. Specifically, the survey focused on the following issues:

- Participants' satisfaction with the process of obtaining the tax credit and service they received from ODOE;
- How participants learned about the RETC program;
- What motivated the participants to take part in the program;
- Participants' satisfaction with their energy efficient purchase, and;

- Whether participants would be likely to take part in RETC again and what they would like to see changed.

The primary purpose of the online survey directed to those who were denied a tax credit was to determine if there were aspects of the RETC application process that could be improved. Approximately 700 postcard invitations were sent to applicants identified in the ODOE/RETC database that were denied the tax credit. CPW used a different survey instrument for the denied survey because the desired data was different than for program participants. Appendix A includes the survey instruments.

Key Findings

Reponses from the program participant survey

This section summarizes key findings from the Residential Energy Tax Credit program participant survey (e.g., applicants that received approval for a tax credit). A subsequent section summarizes the results of the survey of denied applicants.

Characteristics of survey respondents

- About 53% of the survey respondents were female and 47% were male. Respondents were aged 22 to 85. The largest age group was respondents aged 55 to 64 years old, while the average age of survey respondents was about 53 years old.
- The average household size was 2.43 persons while the median household size was 2.0 persons. Households ranged in size from 1 to 10 persons. A majority (51%) of households had two persons. Less than 10% of survey respondents live in single-person household.
- About 28% of survey respondents reported having children. The average number of children in households with children was 0.53; the median number was 0.
- Approximately 23% of respondents estimated their total household income to be between \$100,000-\$149,999 and 22% of respondents estimated a total household income between \$50,000 and \$74,999. The next largest percentage of respondents estimated their total household income between \$75,000 and \$99,999 (18%).
- Almost three-quarters of respondents reported purchasing a clothes washer, while about 22% purchased a dishwasher. About 7% purchased a refrigerator.

Participation in the Residential Energy Tax Credit program

- Over 80% of respondents ranked administration of the RETC program as “good” or “excellent” in the categories of timeliness, accuracy and overall survey.
- Nearly 65% of respondents ranked the availability of information as “good” or “excellent”.
- A smaller percentage of respondents ranked helpfulness and expertise as good or excellent (44% and 39%), while a majority of respondents selected the “don’t know” option for these categories.

Residential Energy Tax Credit program

- Nearly 80% of respondents indicated they received information on the Residential Energy Tax Credit program from the retailer where they purchased their appliance. Previous purchase of a qualified appliance was the second most frequently cited response (21%). The Oregon Department of Energy Web site was the source of information for 10% of respondents. (Note: respondents could select more than one option)
- When asked whether respondents were aware that Energy Star qualified appliances did not necessarily qualify for the Oregon Residential Energy Tax Credit, 53% of respondents stated yes, while 47% were not aware.
- Nearly 24% of respondents considered buying a tax credit eligible appliance prior to going to the store. Twenty-nine percent learned after they began shopping for a specific model appliance and 29% were assisted by the retailer/salesperson. Only 19% found out about the RETC program after they purchased their appliance.
- Of the 29% that considered buying a tax credit eligible appliance after talking with the retailer/salesperson, 93% indicated that they did not receive accurate information from the retailer/salesperson.
- Almost 50% of survey respondents indicated that the Residential Energy Tax Credit program influenced their decision with respect to which appliance they chose to purchase.
- Respondents rated the importance of a variety of factors in making their appliance purchase decisions. Over 90% cited energy efficiency and product functions as “important” or “very important”. Over 80% of respondents thought that the price, product brand name and the water saving capability were important or very important. Over 70% of respondents thought that product availability, product design/appearance and residential energy tax credit qualification were important.

- Approximately 39% of the survey respondents indicated they paid more for their energy efficient appliance. About 44% said they did not pay more.
- About 10% of respondents indicated their appliance cost \$1-\$99 more, while 31% paid \$101-\$200 more and 24% of respondents paid an additional \$200-\$299 more for their appliance. Notably, 27% of respondents indicated they paid \$400+ more for their energy efficient appliance.
- Approximately 86% of respondents indicated they did feel their appliance was worth the additional cost.

Satisfaction with program administration

- Almost 56% of respondents found out the appliance they had purchased qualified for the RETC program from the retailer/salesperson. Stickers on the appliance were the second most frequently cited response, and 39% respondents indicated getting information from this source. Over 16% of respondents found out via the ODOE website, and only 2% of respondents telephoned ODOE. (Note: respondents could select more than one option)
- Nearly 88% of survey respondents stated it was “easy” or “very easy” to learn if the appliance they had purchased qualified for RETC. Only 2% of respondents stated it was “difficult”.
- More than 76% of respondents received an application at the appliance store or department where they purchased their appliance and 20% of respondents downloaded and printed it from the ODOE website.
- A small percentage of respondents (7%) requested additional information about the program.
- Nearly 80% of survey respondents stated it was “easy” or “very easy” to understand the RETC application. Only 3% of respondents rated the application process as “difficult”.
- Over 71% of respondents stated they would be interested in an online application process.
- About 34% of survey respondents indicated they had visited the ODOE Website. The results indicate the majority of respondents that had visited the ODOE Website rated it as either “good” or “excellent” in the categories of “ability to find desired information,” “clarity of information provided,” “usefulness of information provided” and “overall ease of use.”

Satisfaction with appliance

- Less than 30% of the respondents noticed a reduction in their electric bill. Notably, 35% had not noticed a change in the electricity bill and 38% indicated that they did not know if their appliance had reduced their electric bill.
- Over 50% indicated that \$50-\$99 would be sufficient incentive to participate in the RETC program. Approximately 20% indicated that a credit or \$100-\$149 would be sufficient incentive, and 17% stated that less than \$50 would be a sufficient incentive.
- Over 92% survey respondents indicated they would use the Residential Energy Tax Credit program again.

Responses from denied applicants

CPW also administered an online survey to applicants that were denied tax credits. We received 42 valid responses.

- About 72% indicated they were denied because their appliance was not a RETC qualifying appliance. A small percentage of respondents indicated that they installed their appliance in a rental unit or someplace other than their primary or secondary home.
- For participants that indicated they purchased an ineligible appliance, many respondents indicated they were provided misleading information by retailers—either from store displays (31%) or from a salesperson (26%). Over 21% of the respondents indicated they thought Energy Star appliances qualified, while 14% thought their appliance was listed as qualifying on the ODOE website.
- Survey results show that respondents believe that efforts at the point of sale would be most effective in reducing confusion about the program. Nearly 65% indicated more knowledgeable or “honest” salespeople would be helpful, and 48% indicated better in-store advertising or product displays would be helpful. About 24% of respondents indicated that having a printable list of qualifying appliances, or a quick web search function on the ODOE website would be helpful.
- About 81% of the respondents who were denied tax credits indicated that the RETC program encouraged them to look for a more energy efficient appliance. Moreover, 86% of respondents indicated that they would apply for the RETC program in the future.

Conclusions and recommendations

The survey results generally suggest that program participants (e.g., those that received tax credits) are satisfied with the Residential Energy Tax Credit program. This observation includes both the program and its energy conserving mission, as well as the program administration and ODOE staff.

Following are several conclusions regarding the Residential Energy Tax Credit program.

- There is confusion between the well-known federal Energy Star program and the state tax credit program, which has higher eligibility standards (“best of the best”).

Recommendation: Work with retailers to take steps to differentiate between the two programs

- The program appears to attract middle to higher income homeowners. This is not surprising in many respects; these are households that are generally well-educated and can receive immediate benefits from a tax credit.

Recommendation: ODOE should consider approaches to increase awareness of the RETC program to lower-income households.

- A large majority of program participants are informed about the tax credit through their retailer and that a very high percentage felt the retailer provided inaccurate information. This suggests that the program’s approach of working through retailers is both appropriate and effective. However, an overwhelming percentage of respondents indicated that the retailers provide inaccurate information on the program.

Recommendation: ODOE should enhance retailer/salespeople’s understanding of the program and ensure that they are providing customers with accurate information. ODOE could create a special web page for retailers, refine informational materials, or conduct workshops.

- A larger percentage of respondents reported getting information about the RETC program from the ODOE Website and respondents showed interest in an online application process.

Recommendation: Explore ways to provide an online application process. Since the survey was administered ODOE now has an online application process.

- The RETC application process was generally rated as easy by survey respondents.

Recommendation: None

- The RETC program appears to provide sufficient financial incentive to consumers to purchase appliances that are energy efficient.

Recommendation: None.

- Only one-quarter of RETC participants experienced a noticeable decrease in their monthly electric bill. This suggests that utility bill savings may only be a part of the incentive for buying the appliance and participating in the program. Program data provided by ODOE suggest that the cumulative energy savings from the program is significant. It is possible that participants may not be paying attention to their monthly energy use costs yet assume that they are saving because they bought an efficient appliance. Thus, the savings still may be a motivating factor although they are not tracking them.

Recommendation: Take steps to better inform program participants about energy savings and utility bill savings at the time of purchase. This may be challenging as it relates to the finding that most program participants felt retailers provide inaccurate information about the program. Consider including facts in the RETC brochure on energy cost savings.

In summary, perhaps the most telling statistic is that 97% of program participants would use the program again. This suggests that the structure and administration of the program is effective—at least from the participant perspective. The survey results suggest the program administration is effective, but that a few minor changes may improve specific elements of the program.

Chapter 1

Introduction

Background

The Oregon State Legislature created the Residential Energy Tax Credit (RETC) in 1977 to encourage the use of renewable resources to meet home energy needs. As a result of new energy saving technologies that have become widely available, the Oregon Legislature expanded the Residential Energy Tax Credit in 1997 to include highly efficient home appliances and in 1999 to include fuel cells. In 2002, high efficiency heat pump systems, furnaces, and boilers were added to the program.

Since 1997, the program has awarded more than 300,000 tax credits to Oregon households for installing renewable resource systems and for purchasing energy-efficient appliances and alternative fuel vehicles. A 2006 economic evaluation by ECONorthwest indicates that in 2006 RETC program participants spent nearly \$11 million dollars on eligible appliances that yield an estimated \$2.2 million in annual energy savings.² More recent figures for 2007 from ODOE place that number at: \$28.4 million spent on appliances.

Participation in the RETC program has grown since home appliances became eligible. In 2006, the program awarded 34,000 tax credits for energy efficient appliances. While the ECONorthwest study addressed the economic impacts of the RETC program, it did not evaluate participant satisfaction with the program. This report presents the results of a participant satisfaction survey conducted in November 2007 by the University of Oregon's Community Planning Workshop (CPW).

Purpose and methods

The purpose of this report is to evaluate participant satisfaction with the Residential Energy Tax Credit program, specifically tax credit process for clothes washers, dishwashers and refrigerators. Other technologies in the tax credit program which involve installation by a contractor, such as heating systems, water heaters, have a more complicated application process and were not included in this survey.

CPW accomplished this through: (1) a survey of randomly selected program participants that had tax credit applications approved between July 2006 and

² *Economic Impacts of Oregon Energy Tax Credit Programs in 2006*, ECONorthwest, May 2007.

June 2007; and (2) a separate survey of individuals that had applications denied between July 2006 and June 2007. The July 2006 to June 2007 time frame was selected to provide a “baseline” of satisfaction before the on-line application system was made available.³ A total of 34,186 households participated in the Residential Energy Tax Credit program during the July 2006 to June 2007 time period.

CPW administered the surveys by mail and through the Internet. Table S-1 summarizes the sample composition and response rates.

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³ ODOE implemented an online application system in 2007.

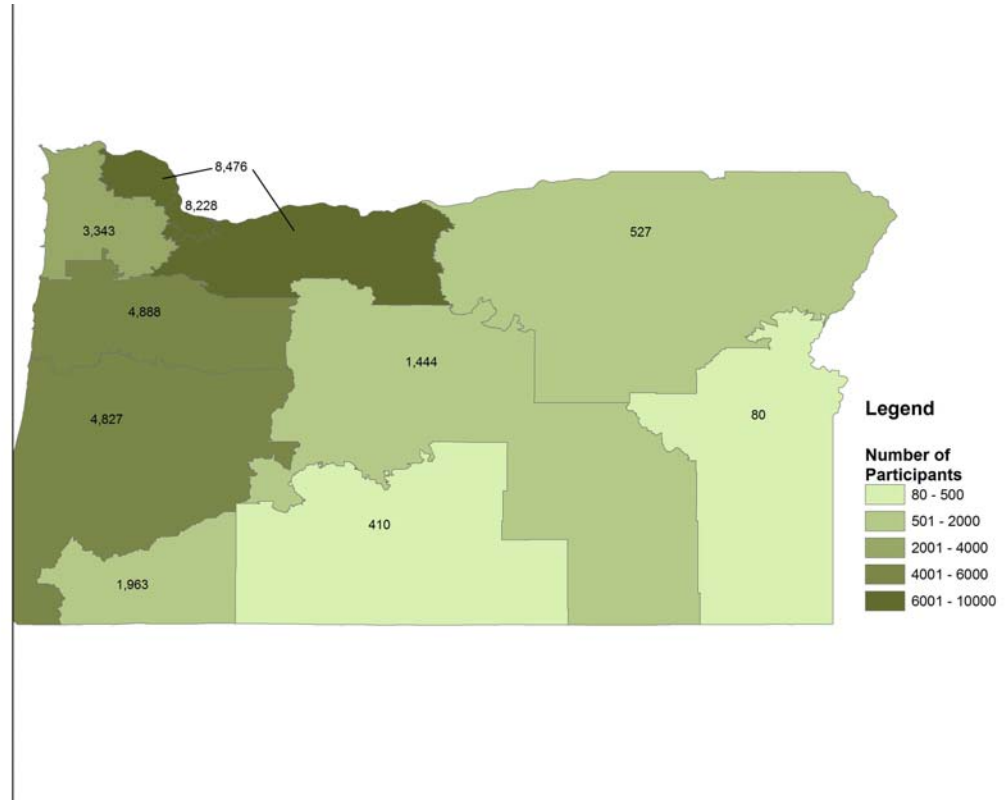
The Oregon Department of Energy's priority was to survey tax credit recipients who purchased appliances in the past year. The primary purpose of the survey was to learn about recent RETC participants' experience with the RETC program. Specifically, the survey focused on the following issues:

- Participants' satisfaction with the process of obtaining the tax credit and service they received from ODOE;
- How participants learned about the RETC program;
- What motivated the participants to take part in the program;
- Participants' satisfaction with their energy efficient purchase, and;
- Whether participants would be likely to take part in RETC again and what they would like to see changed.

CPW developed survey questions based on the survey instrument used in the 2002 RETC survey and incorporated feedback from ODOE. The survey included questions to allow analysis of responses by demographic characteristics. A copy of the survey instruments and recruitment materials are presented in Appendix A.

A total of 34,186 households participated in the Residential Energy Tax Credit appliance program between July 2006 and June 2007. Map 1-1 shows the location of program participants by 3-digit zip code area in Oregon.

Map 1-1. RETC program participants, by 3-digit zip code area July 2006-June 2007



CPW began the administration of the mailed survey by sending a postcard to the mailed survey sample of 1,200 program participants (e.g., those individuals that received tax credits) informing them they would receive a survey in the near future. The postcard was followed about one week later with an initial survey mailing that consisted of a cover letter describing the nature and importance of the survey along with the confidential nature of the research, a copy of the survey, and a postage-paid return envelope. Non-respondents (those who hadn't yet returned their survey) received a follow-up postcard approximately ten days later, reminding them to complete the survey.

For the online survey, CPW mailed a postcard invitation to 4000 participants that directed them to the online survey. A copy of these materials can be found in Appendix A.

CPW tabulated and analyzed survey responses using the Statistical Package for the Social Sciences (SPSS) computer program. SPSS allowed CPW to conduct statistical analysis and cross-tabulation of survey responses.

Organization

The remainder of this report is organized as follows:

Chapter 2, Analysis of RETC Participant Survey Results

summarizes demographic information of individuals that responded to the survey and presents a detailed discussion of the RETC participant survey results.

Chapter 3, Analysis of RETC Denied Survey Results summarizes demographic information of individuals that responded to the survey and presents a detailed discussion of the RETC denied survey results.

This report also includes two appendices.

Appendix A, Survey Instrument presents all materials associated with the administration of the Residential Energy Tax Credit survey.

Appendix B, Transcript of Written Survey Comments presents a verbatim transcript of written comments provided by survey respondents.

Chapter 2

Analysis of Participant Survey

This chapter presents the Residential Energy Tax Credit Survey results. It is organized into the following sections consistent with the survey instrument:

- Characteristics of survey respondents
- Participation in the Residential Energy Tax Credit program
- General questions about the RETC program
- Satisfaction with tax credit process
- Satisfaction with energy efficient purchase

Appendix A contains a copy of the survey instrument.

CPW also analyzed a number of the questions by age and income level. The intent here was to evaluate whether respondents from different age or income groups have different values.

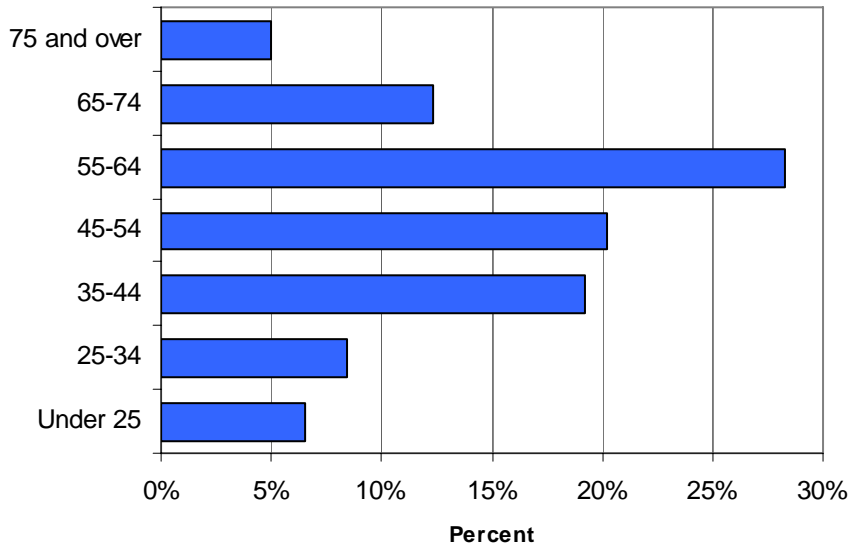
Characteristics of survey respondents

One of the objectives of the survey was to find out more about the characteristics of individuals that participate in the residential energy tax credit program. Key variables include age, gender, household size, housing tenure, and household income.

About 53% of the survey respondents were female and 47% were male. Figure 2-1 shows the age of survey respondents that ranged from 22 to 85. The average age of survey respondents was about 53 years while the median age was 54 years.

Over a quarter of survey respondents were between the ages of 55 and 64. The second largest age groups were respondents aged 45-54 and respondents aged 35-44 (20% and 19% respectively).

Figure 2-1. Age of survey respondent



Source: RETC Participant Survey, CPW 2007

An overwhelming majority of respondents own their home while a small percentage of respondents were living in rentals (97% vs. 3%). This is consistent with program requirements that appliances be installed in a primary or secondary residence. The average household size was 2.43 persons while the median household size was 2.0. Households ranged from 1 to 10 persons. Table 2-1 shows that a majority (51%) of respondents had two persons in their household. Fifteen percent of survey respondents live in households with 4 people, 11% in households of 3 people, and approximately 9% live alone.

Table 2-1. Household size of survey respondents

Size	Number	Percent
1	49	9.4%
2	268	51.3%
3	57	10.9%
4	80	15.3%
5	24	4.6%
6	8	1.5%
7	2	0.4%
9	1	0.2%
Total	522	100.0%

Source: RETC Participant Survey, CPW 2007

About 28% of survey respondents reported having children, with over 81% of those respondents having either 1 or 2 children. The average number of children in households with children was 0.52; the median number was 0.

Table 2-2 shows the location of survey respondents and program participants at the 3-digit zip code level. CPW received survey responses from 160 different zip codes in Oregon. We compare the zip areas of survey respondents with the location of program participants to validate whether the responses are consistent with participants. A comparison of the two data sets shows that the percentage of survey respondents by zip code is relatively comparable to the percentage of total program participants. Over 34,100 households that participated in the Residential Energy Tax Credit program had current Oregon addresses.

Table 2-2. Location of survey respondents and program participants

3-Digit Zip	Survey respondents		Total participants	
	Number	Percent	Number	Percent
970 - N. Coast	116	23.6%	8,476	24.8%
971 - Central Coast	55	11.2%	3,343	9.8%
972 - Portland Metro	102	20.8%	8,228	24.1%
973 - Mid-Valley	66	13.4%	4,888	14.3%
974 - South Valley/Mid-Coast	81	16.5%	4,827	14.1%
975 - Southern Oregon	27	5.5%	1,963	5.7%
976 - South Central Oregon	9	1.8%	410	1.2%
977 - Central Oregon	22	4.5%	1,444	4.2%
978 - Northeastern Oregon	10	2.0%	527	1.5%
979 - Southeastern Oregon	3	0.6%	80	0.2%
Total	491	100.0%	34,186	100.0%

Source: RETC Participant Survey, CPW 2007

Respondents were asked to estimate total household income for the year 2006. Table 2-3 shows that 23% of respondents estimated their total household income to be between \$100,000-\$149,999 and 22% of respondents estimated a total household income between \$50,000 and \$74,999. The next largest percentage of respondents estimated their total household income between \$75,000 and \$99,999 (18%).

Table 2-3. Total household income, 2006

Income	Number	Percent
Less than \$5,000	0	0.0%
\$5,000-\$9,999	0	0.0%
\$10,000-\$14,999	3	0.6%
\$15,000-\$24,999	9	1.9%
\$25,000-\$49,999	65	13.5%
\$50,000-\$74,999	106	22.0%
\$75,000-\$99,999	85	17.6%
\$100,000-\$149,999	110	22.8%
\$150,000 or more	45	9.3%
Decline to answer	59	12.2%
Total	482	100.0%

Source: RETC Participant Survey, CPW 2007

Respondents were asked to indicate whether they purchased a refrigerator, dishwasher or clothes washer recently or between July 2006 and June 2007. Table 2-4 shows that 71% of respondents recently purchased a clothes washer, while 22% purchased a dishwasher. Only 7% of respondents had recently purchased a refrigerator. When compared to the percentage of total participants in the RETC program who purchased a clothes washer, dishwasher or refrigerator, the percentages are relatively consistent. However, there were a slightly higher percentage of survey respondents who recently purchased a refrigerator compared with the overall percentage of participants who purchased refrigerators (7% vs. 2%).

Table 2-4. Type of appliance recently purchased by survey respondents compared and total participants

Appliance	Survey respondents		Total participants	
	Number	Percent	Number	Percent
Clothes washer	315	70.9%	24,854	74.1%
Dishwasher	99	22.3%	8,205	24.5%
Refrigerator	30	6.8%	498	1.5%
Total	444	100%	33,557	100%

Source: RETC Participant Survey, CPW 2007

Some participants purchased multiple appliances. Table 2-5 shows that between the time of July 2006 and June 2007 12% of respondents also purchased a dishwasher, 11% purchased a clothes washer and 8% purchased a refrigerator. Over 63% of participants did not purchase a second appliance during that timeframe.

Analysis of the Residential Energy Tax Credit provided to CPW by the Oregon Department of Energy shows that 1,404 households had received a tax credit for two or more appliances. This equates to about 4.3% of all households that received tax credits during the analysis period. The survey results show that a higher percentage of respondents had received more than one tax credit. These results suggest that households that have used the program more than once were more likely to respond to the survey.

Table 2-5. Type of second appliance purchased by survey respondents between June 2006 and June 2007

Appliance	Number	Percent
Clotheswasher	59	11.3%
Dishwasher	60	11.5%
Refrigerator	43	8.2%
None	331	63.4%

Source: RETC Participant Survey, CPW 2007

Participation in the Residential Energy Tax Credit program

One purpose of the survey was to gather program participant’s perceptions on how the Residential Tax Credit program is administered. The survey instrument asked respondents to rate their participation in the Residential Energy Tax Credit program in the categories of timeliness, accuracy, helpfulness, expertise, availability of information and overall service.

Table 2-6 shows that a majority of respondents rated administration as good or excellent in the categories of timeliness, accuracy, overall service, and availability of information (86%, 85%, 81% and 65%, respectively). A smaller percentage of respondents ranked helpfulness and expertise as good or excellent (44% and 39%), while a majority of respondents selected the “don’t know” option for these categories.

Table 2-6. Participation in the Residential Energy Tax Credit Program

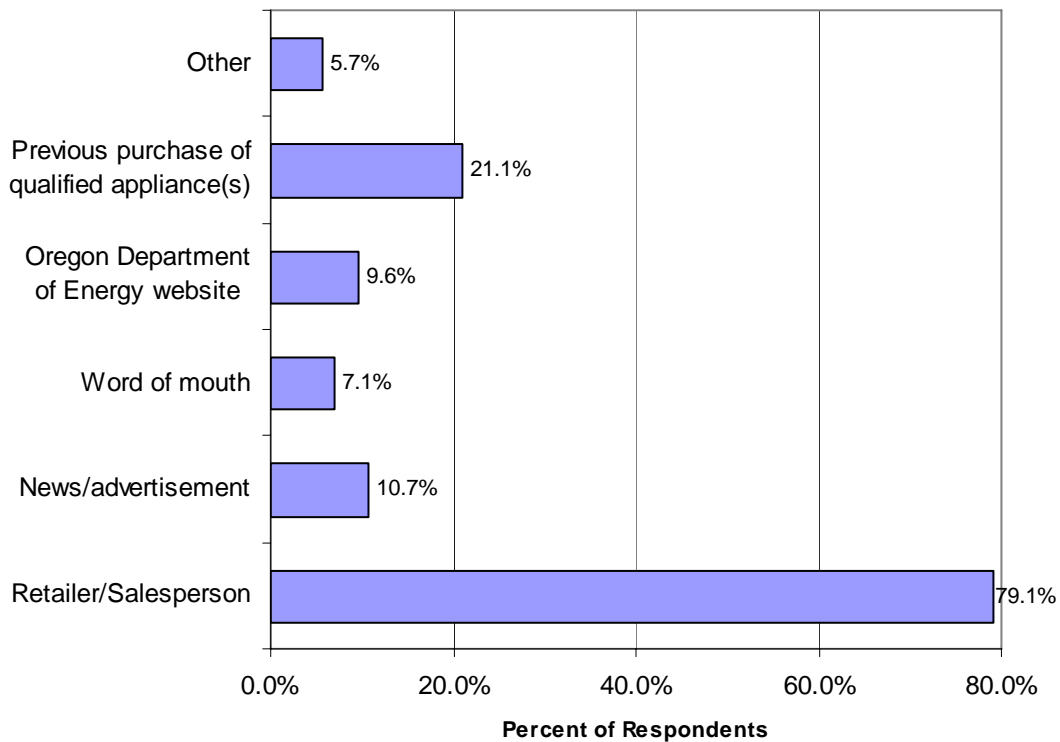
Criteria	Poor		Fair		Good		Excellent		Don't know	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Timeliness (n=518)	5	1.0%	34	6.6%	243	46.9%	200	38.6%	36	6.9%
Accuracy (n=517)	6	1.2%	22	4.3%	184	35.6%	254	49.1%	51	9.9%
Helpfulness (n=509)	6	1.2%	11	2.2%	130	25.5%	93	18.3%	269	52.8%
Expertise (n=507)	3	0.6%	12	2.4%	114	22.5%	84	16.6%	294	58.0%
Availability of information (n=513)	20	3.9%	52	10.1%	212	41.3%	121	23.6%	108	21.1%
Overall service (n=514)	5	1.0%	30	5.8%	253	49.2%	161	31.3%	65	12.6%

Source: RETC Participant Survey, CPW 2007

Residential Energy Tax Credit program

Respondents were asked for general feedback on the Residential Energy Tax Credit Program. The survey asked respondents in what ways they learned about the Residential Energy Tax Credit program and respondents were allowed to select more than one option. Figure 2-2 shows that almost 80% learned from the retailer/salesperson and 21% had previously purchased qualified appliances. Eleven percent of respondents learned through the news or an advertisement, and 10% learned from ODOE website.

Figure 2-2. How respondents learned about RETC



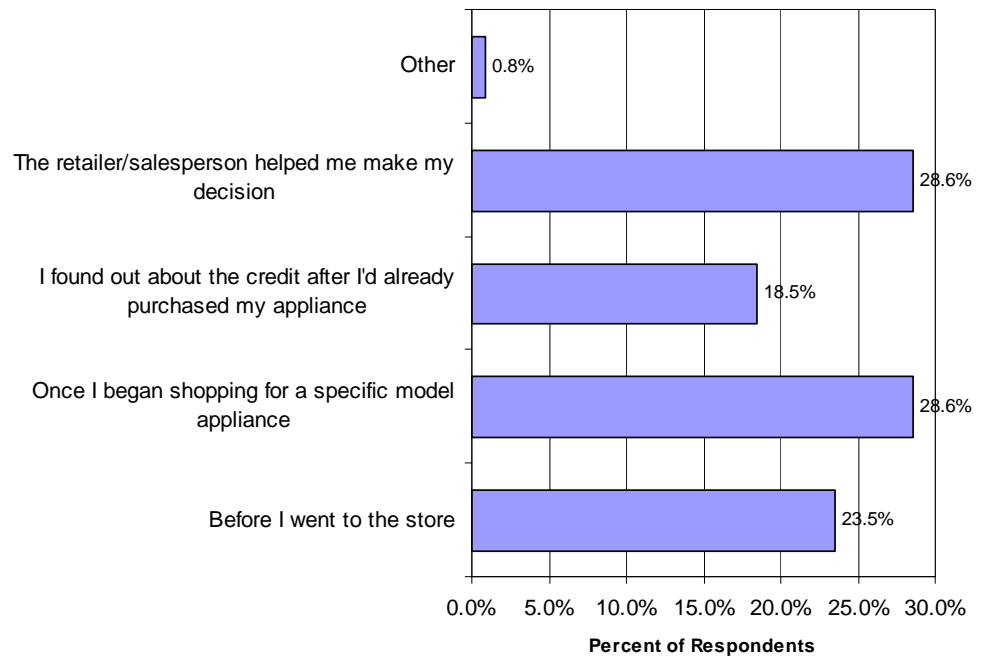
Source: RETC Participant Survey, CPW 2007

When asked whether respondents were aware that Energy Star qualified appliances did not necessarily qualify for the Oregon Residential Energy Tax Credit, 53% of respondents stated yes, while 47% were not aware.

Respondents were asked at what point in their purchase decisions they considered buying a tax credit eligible appliance. Figure 2-3 shows that 29% of respondents found about the program after they began shopping for a specific

model appliance, while 29% were assisted by the retailer/salesperson when making their decision. Twenty-four percent of respondents considered a tax credit eligible appliance before going to the store, while 19% found out about the credit after they purchased their appliance. Of the respondents that were assisted by the retailer/salesperson when making their decision, 93% stated that the retailer did not provide them accurate information on the RETC program.

Figure 2-3. Point in decision-making when respondents considered purchasing a tax credit eligible appliance



Source: RETC Participant Survey, CPW 2007

Approximately 50% of survey respondents indicated that the Residential Energy Tax Credit program influenced their decision with respect to which appliance they chose to purchase. The survey requested that respondents indicate reasons why the RETC program influenced their purchase decision. A complete list of responses is listed in Appendix B.

The survey asked respondents to rate the importance of a variety of factors in making their purchase decisions. Table 2-7 shows that over 90% of respondents thought that energy efficiency and product functions were important or very important. Over 80% of respondents thought that the price, product brand name and the water saving capability were important or very important. Over 70% of respondents thought that product availability, product design/appearance and residential energy tax credit qualification were

important. Sixty-nine percent of respondents felt that the physical size of the appliance was important or very important, while 56% of respondents purchased a higher efficiency appliance because of their concern for global warming and because of other tax credit/monetary incentive qualifications. A small percentage of respondents thought that word of mouth was an important or very important influence.

Table 2-7. The importance of certain factors in influencing purchase decisions

Factor	Very		Neither Important Nor		Very	
	Unimportant	Unimportant	Unimportant	Important	Important	Don't Know
Price (n=461)	2.8%	3.5%	10.4%	49.7%	33.6%	0.0%
Product brand name/ manufacture's reputation (n=440)	4.1%	1.4%	6.1%	46.4%	41.4%	0.7%
Product availability (n=437)	4.3%	5.5%	15.8%	43.2%	30.0%	1.1%
Physical size of the appliance (n=436)	4.6%	5.0%	20.4%	37.6%	31.2%	1.1%
Product design/appearance (n=433)	4.6%	4.4%	17.3%	46.4%	27.0%	0.2%
Product functions (n=429)	4.7%	0.0%	3.5%	37.1%	54.3%	0.5%
Energy efficiency (n=440)	3.6%	0.5%	2.3%	29.5%	63.4%	0.7%
Water saving capability (n=437)	3.7%	1.1%	4.3%	30.2%	58.8%	1.8%
Residential Energy Tax Credit qualification (n=443)	2.7%	3.6%	17.4%	46.5%	28.4%	1.4%
Word of mouth (n=431)	8.6%	17.2%	41.1%	20.4%	4.4%	8.4%
Concern of global climate change (n=449)	9.1%	9.1%	21.8%	28.5%	27.2%	4.2%
Other tax credit/monetary incentive qualifications (n=446)	4.7%	7.6%	25.3%	38.1%	17.7%	6.5%

Source: RETC Participant Survey, CPW 2007

Note: Due to a problem with the online survey, response rates to this question were slightly lower. The lower response rates do not affect the overall statistical validity of the results.

Respondents were asked if the energy efficient appliance that they ended up purchasing cost more than the appliance they originally considered when shopping for an appliance. Forty-four percent of respondents stated the appliance did not cost more, while 39% of respondents believed it did. Table 2-8 shows that 31% of respondents stated that their appliance cost \$100-\$199 more, 24% of respondents paid \$200-\$299 more, and 27% of respondents paid over \$400 more. Despite the increased costs, when asked if they thought the investment was worth the higher initial cost, 86% of respondents replied yes.

Table 2-8. Estimate of increased cost of energy efficiency appliances

Additional Cost				All Appliance Types	
	Clothes Washer	Dishwasher	Refrigerator	Number	Percent
\$1-\$99	5.7%	14.3%	30.0%	17	10.0%
\$100-\$199	29.5%	48.6%	10.0%	52	30.6%
\$200-\$299	23.8%	17.1%	20.0%	40	23.5%
\$300-\$399	11.4%	2.9%	20.0%	15	8.8%
\$400 or more	29.5%	17.1%	20.0%	46	27.1%
Total	100.0%	100.0%	100.0%	170	100.0%

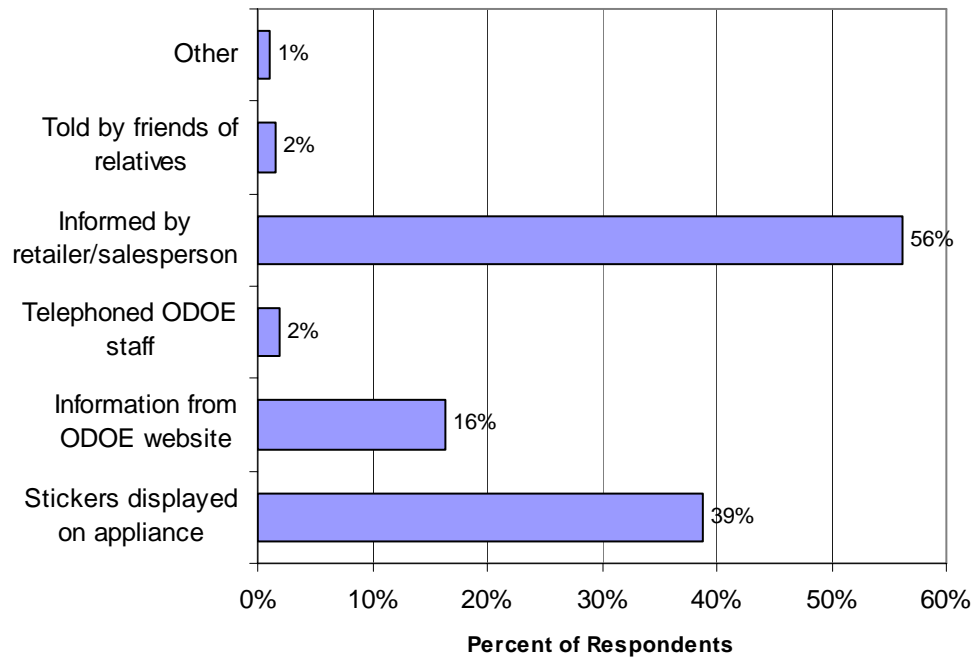
Source: RETC Participant Survey, CPW 2007

Program satisfaction

Figure 2-4 shows how respondents found out whether or not the appliance they purchased qualified for the RETC program. Approximately 56% of respondents indicated they received information from the retailer or salesperson where they purchased their appliance.

Stickers displayed on appliance were the second most frequently cited response, and 39% of respondents indicated getting information from this source. Sixteen percent of respondents indicated they were informed about the program from the Oregon Department of Energy Web site. Only 2% of respondents telephoned ODOE staff and 2% heard about it from friends or relatives.

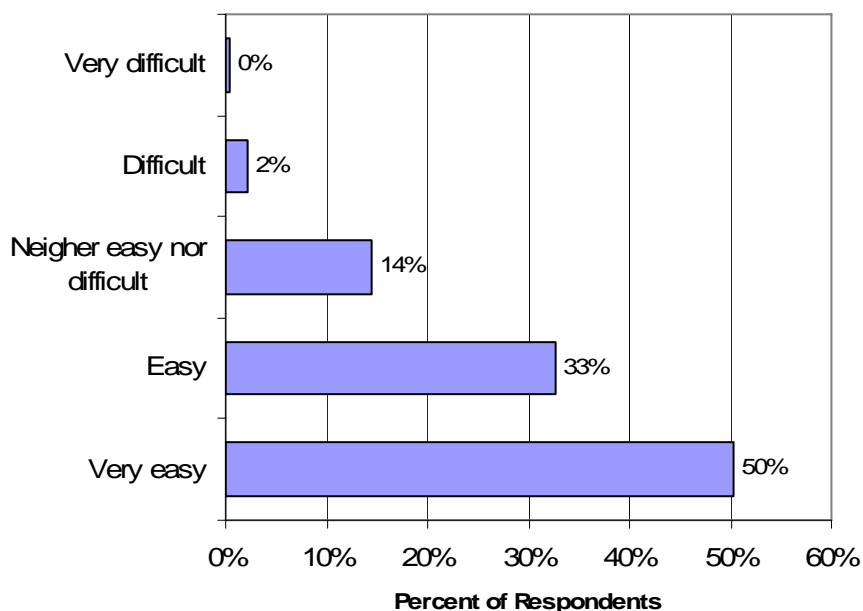
Figure 2-4. How respondents learned their appliance qualified for RETC



Source: RETC Participant Survey, CPW 2007

Respondents were asked how easy it was to find out whether or not the appliance they had purchased qualified for the RETC. Figure 2-5 shows that approximately 88% of respondents thought that it was very easy or easy to find out if their appliance qualified for the RETC program. Only 3% thought it was difficult.

Figure 2-5. Ease of finding out if appliance qualified for RETC

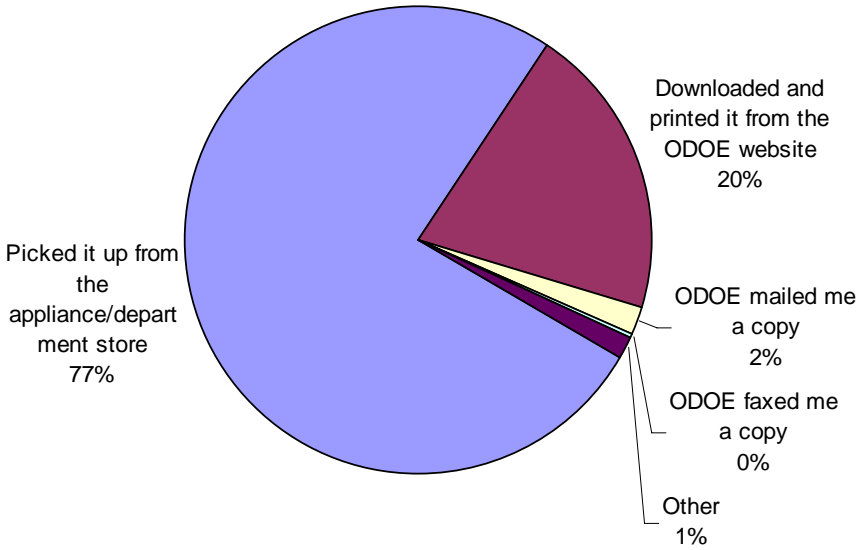


Source: RETC Participant Survey, CPW 2007

Respondents were asked how they received their application for the RETC program. Figure 2-6 shows that 77% of respondents picked it up at the appliance/department store while 20% downloaded and printed the application from the ODOE website. Only 7% of respondents had to request more information. Of the 7% of respondents who requested more information, 38% requested technical assistance, 29% requested a list of RETC qualifying appliances and 18% requested a tax credit application form. Thirty-eight percent of respondents stated that they requested other information, and a complete list of these requests can be found in Appendix B.

CPW finds it interesting that 77% of respondents got the forms from the retailer yet 93% said they were misinformed by the retailer. This suggests that many respondents get their applications from other sources. The bigger implication of this finding is that most respondents indicate that retailers provide inaccurate information.

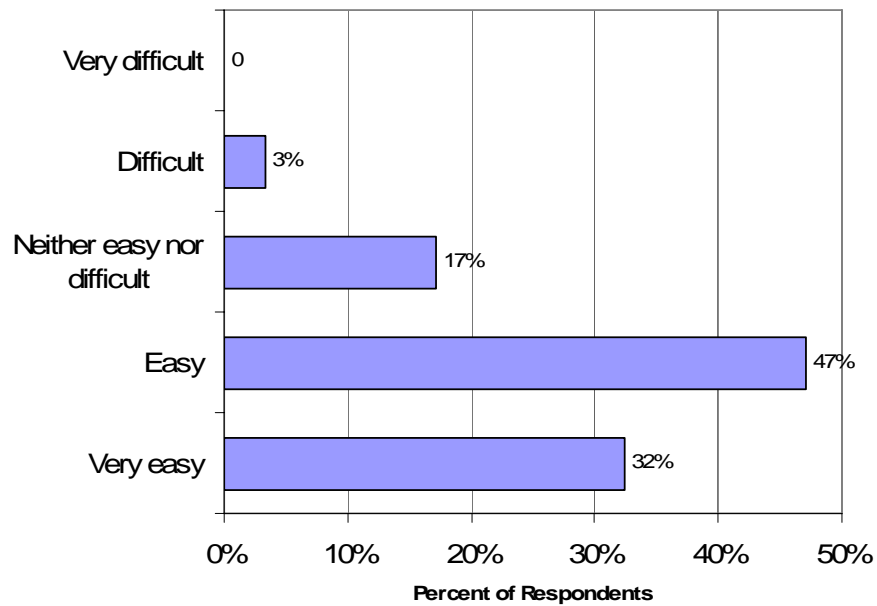
Figure 2-6. Where respondents received RETC application



Source: RETC Participant Survey, CPW 2007

Figure 2-7 shows respondent’s perceptions of the ease of using and understanding the Residential Energy Tax Credit application. The results are favorable: nearly 80% of survey respondents rated the application process “easy” or “very easy.” Only 3% of respondents rated the application process as “difficult” or “very difficult.” Seventy-one percent of respondents stated they would be interested in an online application process.

Figure 2-7. Respondent perceptions of ease of using and understanding the Residential Energy Tax Credit application



Source: RETC Participant Survey, CPW 2007

Department of Energy staff were interested in whether RETC participants were using the ODOE Website as a resource. About 34% of survey respondents indicated they had visited the ODOE Website. The survey did not explore the reasons why respondents used or did not use the ODOE Website. It did, however, ask those respondents that had visited the Website to evaluate the Website of four characteristics. Table 2-9 shows the results.

The results indicate the majority of respondents that had visited the ODOE Website rated it as either “good” or “excellent” on all four characteristics. The survey asked respondents to provide suggestions on how ODOE could improve its Website. See Appendix B for a transcript of the comments.

Table 2-9. Respondent evaluation of the Oregon Department of Energy Website

Characteristic	Below				
	Excellent	Good	Average	Average	Poor
Ability to find desired information (n=174)	12.6%	50.0%	28.7%	6.3%	2.3%
Clarity of information provided (n=171)	14.0%	52.6%	26.3%	5.8%	1.2%
Usefulness of information provided (n=169)	17.8%	58.0%	22.5%	1.2%	0.6%
Overall ease of use (n=178)	14.0%	55.1%	24.2%	2.2%	4.5%

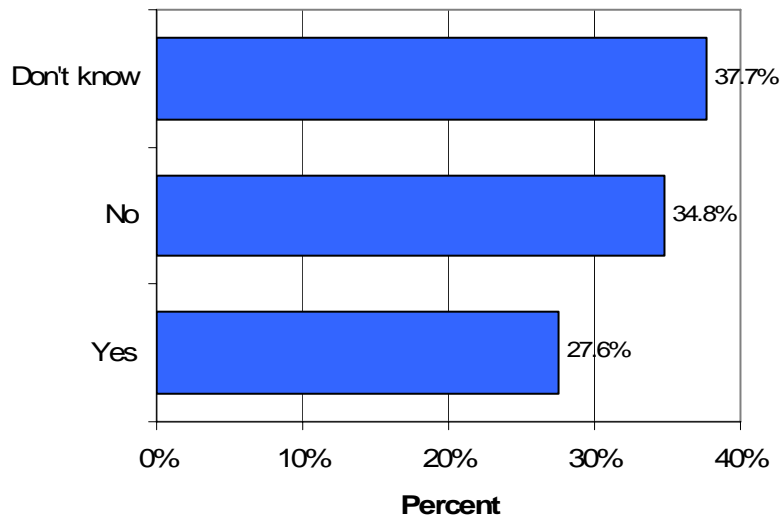
Source: RETC Participant Survey, CPW 2007

Note: Due to a problem with the online survey, response rates to this question were slightly lower. The lower response rates do not affect the overall statistical validity of the results.

Satisfaction with appliance

Oregon Department of Energy staff were interested in participants' satisfaction with their appliance itself. The survey asked respondents whether they had noticed a reduction in their electric bill since the purchase of their energy efficient appliance. Figure 2-8 shows that less than 30% of the respondents noticed a reduction in their electric bill. Thirty-five percent of respondents did not notice a reduction in their electric bill, while 38% indicated that they did not know if their appliance had reduced their electric bill. Given that the use of any particular appliance might be only a small part of a household's overall utility cost, it's not surprising that the energy savings might be masked by seasonal changes of utility costs.

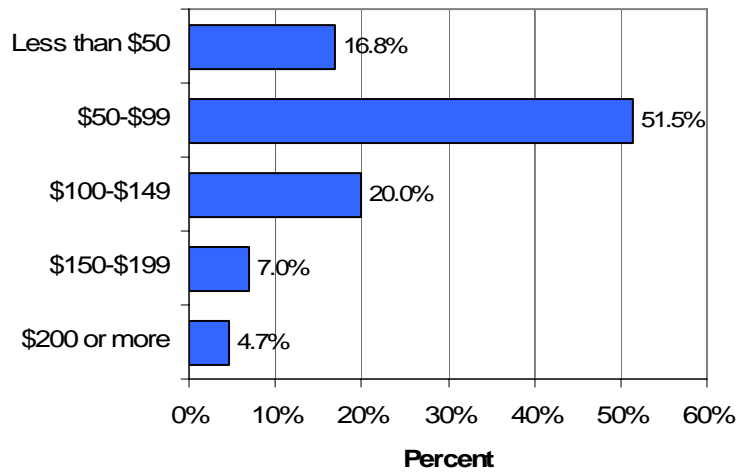
Figure 2-8. Responses to the question “have you noticed a reduction in your electric bill or electric use since you purchased your appliance?”



Source: RETC Participant Survey, CPW 2007

The survey asked respondents to indicate the minimum amount of tax credit that would make the RETC program attractive to survey respondents. Figure 2-9 shows that over 50% indicated that \$50-\$99 would be sufficient incentive for them to participate in the program. Twenty percent indicated that a credit between \$100-149 would be sufficient, while 17% stated that less than \$50 would be a sufficient incentive.

Figure 2-9. Minimum tax credit that would make the RETC attractive to survey respondents



Source: RETC Participant Survey, CPW 2007

Over 92% survey respondents indicated they would use the Residential Energy Tax Credit program again. About 7.4% indicate that future use of the program would depend on various factors. Those factors included having better information on the program, knowing the amount of the tax credit before purchasing their appliance, or whether they would need a new appliance.

Chapter 3

Analysis of Denied Survey Results

This chapter presents the denied survey results. It is organized into the following sections consistent with the survey instrument:

- Participation in the Residential Energy Tax Credit program
- Satisfaction with program administration

Appendix C contains a copy of the survey instrument and Appendix D includes a transcript of written responses to the open-ended questions.

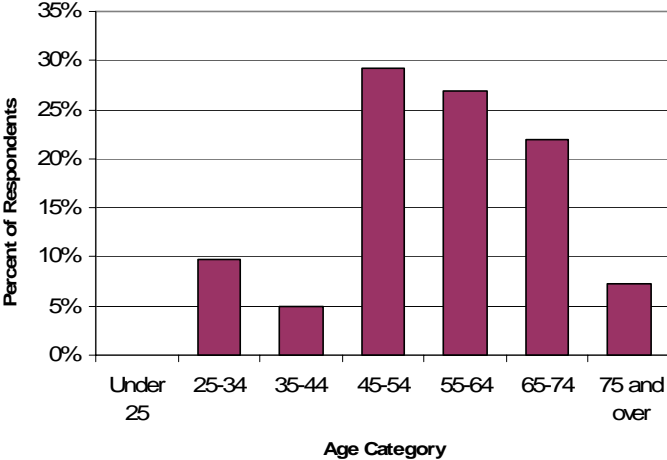
CPW surveyed 700 individuals who had applied for a tax credit but were denied tax credit. They were sent a postcard with a link to the online survey. We received 42 valid responses for a response rate of 6%. This response yields a margin of error of $\pm 14.8\%$ at the 95% confidence level. What this means is that responses should fall within $\pm 14.8\%$ of the population mean. This is a high margin of error; **CPW encourages reviewers to use caution in interpreting the results.** Given this margin of error, we would characterize the results as *anecdotal* rather than *statistically valid*.

Characteristics of survey respondents

One of the objectives of the survey was to find out more about the characteristics of individuals that were denied a credit from the residential energy tax credit program. Key variables include age, gender, household size, housing tenure, and household income.

About 47% of the survey respondents were female and 53% were male. Figure 3-1 shows the age of survey respondents. Survey respondents ranged from 28 to 89. The average age of survey respondents was about 56 years while the median age was 57 years. About 56% of survey respondents were between the ages of 45 and 64.

Figure 3-1. Age of survey respondent



Source: RETC Participant Survey, CPW 2007

An overwhelming majority of respondents own their home while a small percentage of respondents were living in rentals (95% vs. 5%). This is consistent with program requirements that appliances be installed in a primary or secondary residence. Household sizes of respondents ranged from one to five persons. The average household size was slightly more than two persons.

Table 3-1 shows the location of survey respondents and program participants at the 3-digit zip code level. CPW received survey responses from 34 different zip codes in Oregon. We compare the zip areas of survey respondents with the location of program participants to validate whether the responses are consistent with participants. A comparison of the two data sets shows that the percentage of survey respondents by zip code has some significant differences. This is probably a result of the small number of respondents.

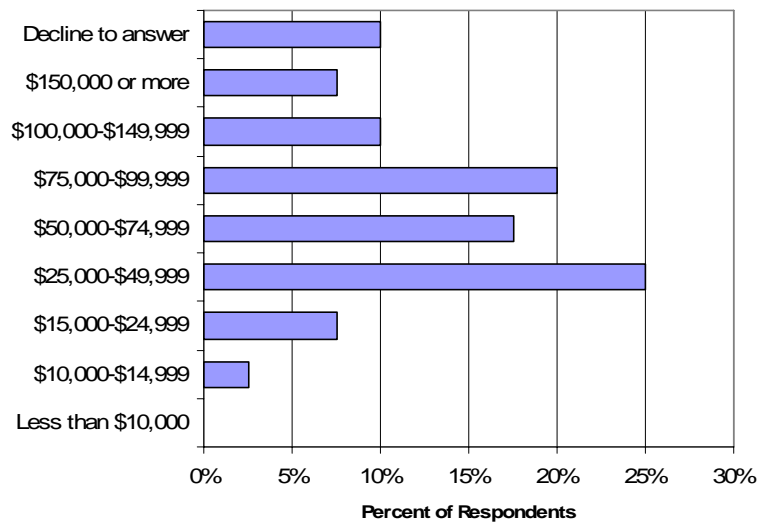
Table 3-1. Location of survey respondents and program participants

3-Digit Zip	Survey respondents		Total participants	
	Number	Percent	Number	Percent
970 - N. Coast	6	14.6%	220	23.5%
971 - Central Coast	2	4.9%	80	8.5%
972 - Portland Metro	5	12.2%	202	21.5%
973 - Mid-Valley	14	34.1%	151	16.1%
974 - South Valley/Mid-Coast	8	19.5%	138	14.7%
975 - Southern Oregon	4	9.8%	61	6.5%
976 - South Central Oregon	0	0.0%	11	1.2%
977 - Central Oregon	1	2.4%	50	5.3%
978 - Northeastern Oregon	1	2.4%	24	2.6%
979 - Southeastern Oregon	0	0.0%	1	0.1%
Total	41	100.0%	938	100.0%

Source: RETC Participant Survey, CPW 2007

Respondents were asked to estimate total household income for the year 2006. Figure 3-2 shows that 25% of respondents estimated their total household income to be between \$25,000-\$49,999 and 20% of respondents estimated a total household income between \$75,000 and \$99,999. The next largest percentage of respondents estimated their total household income between \$50,000 and \$74,999 (17%).

Table 3-2. Total household income, 2006



Source: RETC Participant Survey, CPW 2007

Analysis of survey results

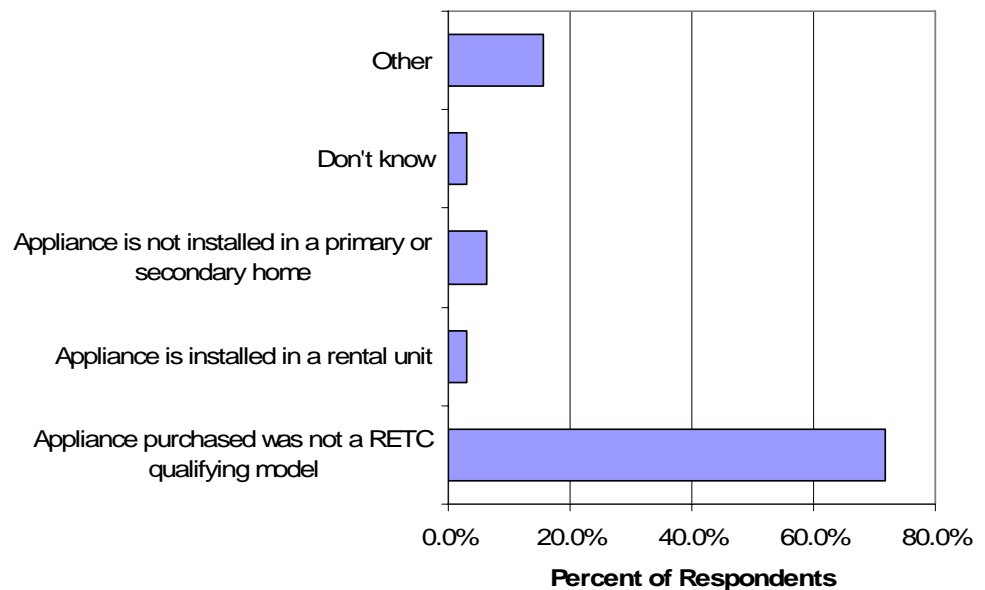
The first question on the survey asked respondents when they learned about the RETC program. About 79% indicated they knew of the RETC program before they purchased their appliance, while 21% learned of it after their purchase.

The survey then asked respondents to indicate when they initially contacted the Oregon Department of Energy. Nearly 48% indicated that it was after they purchased their appliance. About 52% indicated that it was after they received a denial letter from ODOE.

Figure 3-3 shows the reasons respondents indicated their application was denied. About 72% indicated they were denied because their appliance was not a RETC qualifying appliance. A small percentage of respondents indicated that they installed their appliance in a rental unit or someplace other than their primary or secondary home. A number of respondents listed other reasons including: they thought Energy Star appliances qualified, they received bad information from the retailer, they submitted their application after the list of qualifying appliances changed, and they purchased a new appliance that had not yet been included in the list of qualifying appliances.

CPW provides an observation: the latter two responses reflect the consumer's understanding of the program but indicate a fundamental misunderstanding of the way the way the program operates – an appliance is approved/denied on the basis of whether it qualified at the time of purchase not the time when the application is submitted. When an application is received for an appliance not on the ODOE list, staff research whether it is an existing nonqualifying model or whether it is a new model that does qualify. If the appliance is found to qualify, ODOE staff add the appliance to our list and approve the application. When performance standards are raised, despite ODOE staff's efforts to provide plenty of lead time to consumers and retailers there is an inevitable period of confusion.

Figure 3-3. Reasons for RETC application denial



Source: RETC Denied Survey, CPW 2007

As a follow up to reasons respondents were denied, the survey asked respondents if the appliance they purchased was not a Residential Energy Tax Credit qualifying model, what led them to believe that it was. Table 3-2 shows that a significant percentage of the respondents were provided misleading information by retailers—either from store displays or from a salesperson. Over 21% of the respondents indicated they thought Energy Star appliances qualified, while 14% thought their appliance was listed as qualifying on the ODOE website.

Table 3-2. Reasons respondents believed their appliance was a RETC qualifying appliance

Reason	Percent
In-store sales display, advertisement, or sticker on the appliance	31.0%
Got incorrect information from an in-store salesperson	26.2%
Got incorrect information from a friend or relative	0.0%
Got incorrect information from the ODOE staff	4.8%
Thought that the model I purchased was listed on the ODOE website as a qualifying appliance	14.3%
Thought that all Energy Star models qualified for the RETC program	21.4%
Wasn't sure if model I purchased qualified or not, but applied for the tax credit anyway	2.4%
Don't know	0.0%
Other	4.8%

Source: RETC Denied Survey, CPW 2007

Next, the survey asked respondents what information or format would have better helped them determine which appliance models qualified for the Residential Energy Tax Credit (Table 3-3). Respondents could check as many options as they wanted. The results show that respondents believe that efforts at the point of sale would be most effective. Nearly 65% indicated more knowledgeable or “honest” salespeople would be helpful, and 48% indicated better in-store advertising or product displays would be helpful. About 24% of respondents indicated that having a printable list of qualifying appliances, or a quick web search function on the ODOE website would be helpful. The ODOE website does have printable lists of appliances, but it is several layers down from the home page so apparently these people were not aware of it.

Table 3-3. What information or format would have better helped respondents determine which appliance models qualified for the Residential Energy Tax Credit

Response	Percent
Printable list of qualifying appliances on the Oregon Department of Energy's website	23.8%
Quick search function for qualifying models on the Oregon Department of Energy's website	23.8%
Better in-store advertising or product displays	47.6%
More knowledgeable/honest in-store salespeople	64.3%
Other	28.6%

Source: RETC Denied Survey, CPW 2007

About 81% of the respondents indicated that the RETC program encouraged them to look for a more energy efficient appliance. Moreover, 86% of respondents indicated that they would apply for the RETC program in the future.

In summary, it appears that individuals that were denied tax credits are supportive of the program but need better information at the point of sale. Additional efforts by ODOE to provide easy to find and print lists of qualifying appliances would also be helpful.

Appendix A

Survey Instrument

This Appendix presents the various instruments used in the administration of the Residential Energy Tax Credit participant survey. As stated in the Purpose and Methods section of Chapter 1, the survey administration process consisted of (1) mailing out an initial postcard informing participants they would receive a survey, (2) sending an initial survey with a cover letter explaining the purpose of the survey, (3) sending a reminder postcard to non-respondents, and (4) sending a second survey to participants that had yet to respond after the reminder postcard.

Specifically, this appendix includes the:

- Program participant survey instrument
- Denied survey instrument

Residential Energy Tax Credit Survey

Instructions: The Oregon Department of Energy is sponsoring this survey to better understand the effectiveness of the Residential Energy Tax Credit Program. The Oregon Department of Energy wants to assess your satisfaction with the Residential Energy Tax Credit program for energy efficient appliances. Your answers will help identify ways to make the program more effective. The survey has been sent to a randomly selected sample of 1,200 participants.

The person that completed the Oregon Residential Energy Tax Credit application should complete the survey.

Please read each question carefully and answer to the best of your ability. Answer the questions for the most recent appliance you purchased that qualified for a Residential Energy Tax Credit. Please take a few minutes to complete the survey and return it in the enclosed postage-paid envelope by **Monday, November 5th, 2007**. Thank you for your time!

Note: Your participation is voluntary and your returned survey indicates your willingness to take part in the study. If you have questions regarding your rights as a research participant, please contact the Office of Human Subjects Compliance, University of Oregon, 5219, Eugene, OR 97403, or call (541) 346-2510.

First, we'd like to ask some questions about your participation in the Residential Energy Tax Credit program:

Q-1. **Timeliness** – How do you rate the timeliness of the services provided by the Oregon Department of Energy?

- Poor
- Fair
- Good
- Excellent
- Don't Know

Q-2. **Accuracy** – How do you rate the ability of the Oregon Department of Energy to provide services correctly the first time?

- Poor
- Fair
- Good
- Excellent
- Don't Know

Q-3. **Helpfulness** – How do you rate the helpfulness of the Oregon Department of Energy employees?

- Poor
- Fair
- Good
- Excellent
- Don't Know

Q-4. **Expertise** – How do you rate the knowledge and expertise of the Oregon Department of Energy employees?

- Poor
- Fair
- Good
- Excellent
- Don't Know

Q-5. **Availability of Information** – How do you rate the availability of information at the Oregon Department of Energy?

- Poor
- Fair
- Good
- Excellent
- Don't Know

Q-6. **Overall Service** – How do you rate the overall quality of services provided by the Oregon Department of Energy?

- Poor
- Fair
- Good
- Excellent
- Don't Know

Next, we'd like to ask some questions about the Residential Energy Tax Credit program:

Q-7. How did you learn about the Residential Energy Tax Credit program? (Check all that apply)

- Retailer/Salesperson
- News/advertisement
- Word of mouth
- Oregon Department of Energy website
- Previous purchase of qualified appliance(s)
- Other, please specify: _____

Q-8. Are you aware that Energy Star qualified appliances do not necessarily qualify for the Oregon Residential Energy Tax credit?

- No
- Yes

Q-9. At what point in your purchase decision did you first consider buying a tax credit eligible appliance?

- Before I went to the store
- Once I began shopping for a specific model appliance
- I found out about the tax credit after I'd already purchased my appliance
- The retailer/salesperson helped me make the decision (**if you check this box, please proceed to Q-10**).
- Other, please specify: _____

Q-10. If you checked "retailer/salesperson helped me make the decision" in Q-9, did he or she accurately describe the Residential Energy Tax Credit program to you? (i.e. qualifying models, tax credit amount, application procedure, etc.)

- No
- Yes

Q-11. Did the availability of the tax credit influence your decision in any way towards the type of appliance you chose to purchase?

- No
- Yes, please explain: _____

Q12. Please rate the importance the following factors had in making your purchase decision. (1=Not important at all; 5 = Very important, DK = Don't Know)

Factor	Very Unimportant	Unimportant	Neither Important Nor Unimportant	Important	Very Important	Don't Know
Price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product brand name/ manufacture's reputation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical size of the appliance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product design/appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product functions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energy efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Water saving capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Residential Energy Tax Credit qualification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Word of mouth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concern of global climate change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other tax credit/monetary incentive qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q-13. Did the energy efficient appliance that you ended up purchasing cost more than the appliance you originally considered when shopping for your appliance?

- No (skip to Q-16.)
- Yes
- Don't Know

Q-14. If you answered "Yes" to Q-13, please estimate how much more it cost: \$ _____

Q-15. If you answered "Yes" to Q-13, do you think the investment is worth the higher initial cost?

- No
- Yes
- Don't Know

Q-16. Please indicate the type of appliance you most recently purchased that qualified for the Residential Energy Tax Credit program?

- Clothes washer
- Dishwasher
- Refrigerator

Q-17. What other appliance(s) did you purchase between July 2006 and June 2007 that qualified for the Residential Energy Tax Credit program? (check all that apply)

- Clothes washer
- Dishwasher
- Refrigerator
- None

Now, we would like to ask some questions about your satisfaction with the tax credit process:

Q-18. How did you find out whether or not the appliance you purchased qualified for the Residential Energy Tax Credit?

- Stickers displayed on the appliance(s)
- Information from the Oregon Department of Energy's website
- Telephoned Oregon Department of Energy staff
- Informed by retailer/salesperson
- Told by friends or relatives
- Oregon Department of Energy Web site
- Other, please specify: _____

Q-19. How easy was it for you to find out whether or not the appliance you purchased qualified for the Residential Energy Tax Credit?

- Very easy
- Easy
- Neither easy nor difficult
- Difficult
- Very difficult

Q-20. How did you get your application form for the Residential Energy Tax Credit program?

- Picked it up from the appliance / department store
- Downloaded and printed it from Oregon Department of Energy website
- Oregon Department of Energy mailed me a copy
- Oregon Department of Energy faxed me a copy
- Oregon Department of Energy Web site
- Other, please specify: _____

Q-21. Did you request additional information or assistance from an Oregon Department of Energy employee?

- No (**skip to Q-23.**)
- Yes

Q-22. If you answered "Yes" to Q-20, what additional information or assistance did you request?

- A list of Residential Energy Tax Credit qualifying appliances
- A tax credit application form
- Technical assistance
- Others, please specify: _____

Q-23. Please rate the ease of use and understanding of the Residential Energy Tax Credit application form.

- Very easy
- Easy
- Neither easy nor difficult
- Difficult
- Very difficult

Q-24. Would you be interested in an online application process?

- No
- Yes

Q-25. If you have visited the Residential Energy Tax Credit section of the Oregon Department of Energy's website, please rate the following elements:

Characteristic	Poor	Below Average	Average	Good	Excellent
Ability to find desired information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clarity of information provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Usefulness of information provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall ease of use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q-26. Do you have any suggestions for improvement of the Residential Energy Tax Credit website?

Next, we would like to ask some questions about your satisfaction with your energy efficient purchase:

Q-27. Have you noticed a reduction in your electrical bill or electrical use as a result of the purchase of your energy efficient appliance?

- Yes
- No
- Don't know

Q-28. What level of tax credit would be the **minimum per appliance** for you to participate in the Residential Energy Tax Credit program?

- Less than \$50
- \$50-\$99
- \$100-\$149
- \$150-\$199
- \$200 or more

Q-29. Would you use the Residential Energy Tax Credit program again?

Yes, why? _____

No, why? _____

It depends, why? _____

Finally, we would like to ask you some questions about yourself:

Q-30. Please tell us your zip code. _____

Q-31. What is your age? _____ years What is your gender? Male Female

Q-32. How many people live in your household, including yourself?

_____ Adults (18 and over) _____ Children (17 and under)

Q-33. Do you rent or own your home? Rent Own

Q-34. For the purposes of comparison with U.S. Census data, please estimate your total household income for the year 2006:

- | | |
|--|--|
| <input type="checkbox"/> Less than \$5,000 | <input type="checkbox"/> \$50,000-\$74,999 |
| <input type="checkbox"/> \$5,000-\$9,999 | <input type="checkbox"/> \$75,000-\$99,999 |
| <input type="checkbox"/> \$10,000-14,999 | <input type="checkbox"/> \$100,000-149,999 |
| <input type="checkbox"/> \$15,000-\$24,999 | <input type="checkbox"/> \$150,000 or more |
| <input type="checkbox"/> \$25,000-\$49,999 | <input type="checkbox"/> Decline to answer |

Q-35. Please share any other comments you have about your participation in the Residential Energy Tax Credit program in the space below.

ALL RESPONSES WILL BE KEPT CONFIDENTIAL
Thank you for completing the Residential Energy Tax Credit survey

Instructions: The Oregon Department of Energy is sponsoring this survey to better understand the effectiveness of the Residential Energy Tax Credit Program. The Oregon Department of Energy wants to assess your satisfaction with the Residential Energy Tax Credit program for energy efficient appliances. Your answers will help identify ways to make the program more effective. The survey has been sent to a randomly selected sample of participants.

The person that completed the Oregon Residential Energy Tax Credit application should complete this survey. Please read each question carefully and answer to the best of your ability. Thank you for your time!

Note: Your participation is voluntary and your returned survey indicates your willingness to take part in the study. If you have questions regarding your rights as a research participant, please contact the Office of Human Subjects Compliance, University of Oregon, 5219, Eugene, OR 97403, or call (541) 346-2510.

First, we'd like to ask some questions about your participation in the Residential Energy Tax Credit program:

1. At what point did you learn about the Oregon Residential Energy Tax Credit program?

- Before I purchased the appliance
- After I purchased the appliance
- During tax season from my tax preparer

2. When was your initial contact with Oregon Department of Energy?

- After I purchased my appliance
- After receiving a letter denying my tax credit application

Next, we'd like to ask some questions about the Residential Energy Tax Credit program:

3. Why was your application for the Residential Energy Tax Credit denied?

- Appliance purchased was not a Residential Energy Tax Credit qualifying model
- Appliance is installed in a rental unit
- Appliance is located out of state
- Appliance is not installed in a primary or secondary home
- Appliance received a Business Energy Tax Credit and can't also get a Residential Energy Tax Credit
- Appliance was not purchased new
- Appliance was returned to the retailer
- Previously awarded tax credits total the maximum allowable \$1,000 per dwelling per year
- Appliance cost was not paid for by applicant
- Submitted application was incorrect and/or incomplete
- Don't know
- Other (please specify)

4. If the appliance you purchased was not a Residential Energy Tax Credit qualifying model, what led you to believe that it was? (Please check all that apply)

- In-store sales display, advertisement, or sticker on the appliance
- Got incorrect information from an in-store salesperson
- Got incorrect information from a friend or relative
- Got incorrect information from the Oregon Department of Energy staff
- Thought that the model I purchased was listed on the Oregon Department of Energy's website as a qualifying appliance
- Thought that all Energy Star models qualified for the Residential Energy Tax Credit program
- Wasn't sure if model I purchased qualified or not, but applied for the tax credit anyway
- Don't know
- Other (please specify)

5. What information or format would have better helped you determine which appliance models qualified for the Residential Energy Tax Credit? (Please check all that apply)

- Printable list of qualifying appliances on the Oregon Department of Energy's website
- Quick search function for qualifying models on the Oregon Department of Energy's website
- Better in-store advertising or product displays
- More knowledgeable/honest in-store salespeople
- Other (please specify)

6. Did the availability of the Residential Energy Tax Credit program encourage you to look for a more energy efficient appliance?

- Yes
- No
- Don't Know

7. Would you apply for the Residential Energy Tax Credit program for another appliance again in the future?

- Yes
- No
- It depends

(please explain why you answered yes, no, or it depends)

Finally, we would like to ask you some questions about yourself:

8. Please tell us your zip code.

9. What is your age?

10. What is your gender?

Male

Female

11. How many people live in your household, including yourself?

Adults (18 and over)

Children (17 and under)

12. Do you rent or own your home?

Rent

Own

13. For the purposes of comparison with U.S. Census data, please estimate your total household income for the year 2006:

Less than \$5,000

\$5,000-\$9,999

\$10,000-14,999

\$15,000-\$24,999

\$25,000-\$49,999

\$50,000-\$74,999

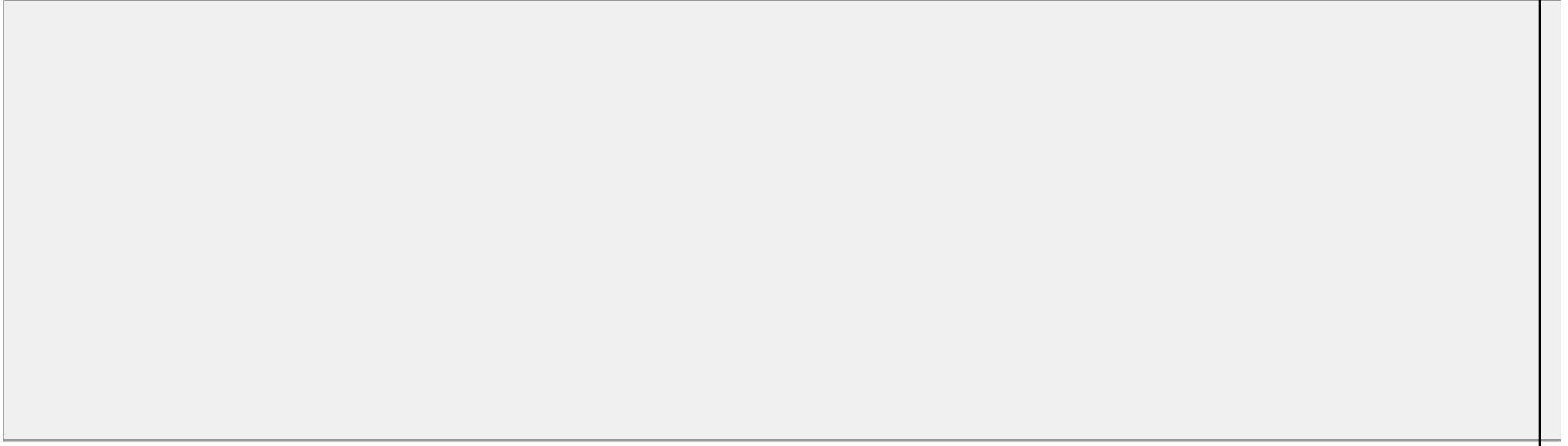
\$75,000-\$99,999

\$100,000-149,999

\$150,000 or more

Decline to answer

14. Please share any other comments you have about your participation in the Residential Energy Tax Credit program in the space below.



Appendix B

Transcript of Written Survey Comments

Background

The survey included opportunities for respondents to provide written comments. Several questions requested specific written input or comments from respondents.

The survey also solicited general comments. Specifically, Q-31 stated “Please share any other comments you have in the space provided below.” Following is a transcript of written comments provided by survey respondents. The comments are presented by question.

Transcript of written survey comments

Q7. How did you learn about the Residential Energy Tax Credit Program? (Other, please specify)

- Tax preparer
- Real estate agent
- Heard also from accountant
- Tax book
- Turbo Tax
- I'm a tax preparer
- From Oregon Tax form 40S
- Was aware of the program through previous purchases
- Sticker on appliance
- NW Natural Gas
- Utility company
- Common knowledge
- A friend who just bought a washing machine & dryer.
- Tax forms previous year
- Accountant
- Energy Trust

Q9. At what point in your purchase decision did you first consider buying a tax credit eligible appliance? (Other, please specify)

- Had nothing to do with the final decisions
- I know I wanted a front loading washing machine getting a credit did not make my decision. It was just an A+
- The tax credit wasn't a priority being green was
- Just wanted something "green", credit was a bonus.

- Not interested
- The tax credit was a consideration into which product to choose
- As soon as we started comparing models

Q11. Did the availability of the tax credit influence your decision in any way towards the type of appliance you chose to purchase? (Yes, please explain)⁴

- High efficient equipment usually means high quality equipment
- Major selection factor
- It helped me make the purchase price fit into my budget
- Made my choice more competitive
- Wished for an energy-efficient appliance
- One, i believe likes to save energy
- My home burned to the ground. When replacing my appliances i tried to get energy-efficient appliances
- It let us purchase a more efficient, but more expensive appliance
- A model that was qualified for tax credit should be more energy efficient
- Even though it was more expensive to purchase, it would save us money monthly and we would receive a rebate
- At least in part
- Save money on energy etc.
- We always use energy efficient appliances
- Limited choice for the tax credit appliances
- Decreased the cost of the appliance
- Helped offset the cost
- It saves energy
- saves both energy and the price
- We assumed it was better for the environment as well as our pocket book
- The deduction was an added incentive. Plus we liked buying a more energy efficient machine
- The rebate made the price more attractive
- Saving energy! Some do and some are not so good
- Confirmed environmental quality of product
- Price factor
- Was a definite factor in our decision
- Buying the qualifying appliance cost only a little that the non-qualifying after the credit
- I picked the one out of similar models that had the tax credit
- Any help with the credit/rebate helps
- Big motivation-always want to save money
- Save on energy and environment and get tax credit
- Price inducement and incentive
- On one item of several we thought the tax credit did not apply which the sales clerk had advised us to buy
- An added plus

⁴ Note: several comments address an initial problem with the online survey form. The problem was quickly resolved and affected Q-12 and Q-25. CPW noted the response rates on those questions. They do not significantly affect the statistical validity of the data.

- I need any break i can get! We are retired, living on a fixed income!
- I believe in energy savings
- We get money back and discounts are good
- Only in so far as it supplemented our desire to buy a more efficient appliance
- Made me aware of value to all of buying energy efficient appliances
- Savings!
- Every little bit helps me and the planet
- On fixed income
- Made it less expensive compared to another model
- Money savings
- Lower electric bill
- It helped me decide
- Price break and more efficient appliance
- Made it affordable
- The tax credit was a good incentive
- I was looking for energy-efficient models
- Good deal
- Costs are so high- anything is a help
- Considered the tax credit like a manufacturer's rebate
- Defray the cost of purchase
- Front load washer-lower water use
- Sealed the deal
- More efficient and saves money
- I bought a more expensive type but it was the type i wanted for energy reasons
- Made the appliance more affordable
- We generally look for more efficient appliances, the tax credit availability is usually a guide as to which units to look for
- Save money and energy in the long run
- Energy efficient and cost saving
- Incentive to buy
- Higher cost offset by tax credit
- Energy conservation
- I could afford a better appliance
- First it was a break and secondly i figured that if it qualified for the tax credit it was probably a qualified model.
- Considerable credit
- It made the appliance more competitively priced
- You give me tax credit for appliance
- Planned to purchase energy efficient- credit helped choose type
- Save energy in long run and reduce sales price
- Made better model more affordable after considering rebates and water/electricity efficiency
- I preferred ones with the credit
- It helps buy a better product
- Encouraged to do the right thing
- Better quality and efficient appliance
- Preferred to get something more energy efficient
- A rebate is appearing alongside energy efficiency
- Want to use energy as efficiently as possible
- Green!
- Helped justify initial higher price
- Anything i can do to save money
- Assumed energy star equaled tax credit

- It allowed for purchase of front loading machine
- The best and highest tax credit compared to my budget allowed for the purchase
- Might have purchased cheaper model otherwise
- When figuring out the cost we deducted all the credits we would be receiving to figure out the actual cost
- Only a little
- I knew the appliance would be more efficient
- Bigger savings and lower energy bill
- Conservation with higher efficiency
- It made the purchase of the washing machine more affordable
- I appreciated the refund and knowing i was purchasing a more efficient appliance
- To save money and energy
- More efficient appliance for similar dollar amount
- Would not buy one that didn't qualify
- We purchased a more efficient dishwasher to qualify for the credit. The credit offset the additional cost.
- When i learned there was a tax credit i started focusing on energy efficient models
- Savings to offset higher cost
- Made the purchase less expensive in the long run
- Slanted us toward energy tax credit products
- Made a more expensive purchase affordable
- Win/win situation
- Brought cost down
- Might not have bought the appliance without tax credit
- Its good to see that your choice qualifies
- Money!
- Wanted quality product and money saving tax credit
- It made a higher end model more affordable
- Less money
- Tipped the balance toward the appliance qualifying for the credit
- I went looking for the appliance that qualified
- It made the appliance more affordable
- Quality of appliance, energy star and energy trust, and energy usage all keys in purchasing appliances, furnaces, water heater, etc.
- Cost to operate
- I want the most efficient appliance, also one with tax credit
- After discount the qualifying appliance was the same (or close)
- I chose the most environmentally friendly appliance i could find in my price range
- I wanted to save energy and be compensated for that
- Made cost comparable with high energy appliances
- Wanted to buy appliance with credit
- It helped offset the cost on more expensive appliance
- More attractive to buy
- Yes, i checked for each of my appliances before i completed the purchases
- If not for the tax credit i would have purchased less efficient and less expensive appliances
- I only chose energy star appliances
- If there is a tax credit there must be a significant energy savings on the appliance
- Because the credit applies to the most energy efficient appliances.
- We like money as much as the next person
- Slightly
- It reinforced our decision.

- The tax credit, power company rebate, and store rebate all combined to encourage me to buy a more efficient model than i was considering.
- It is a consideration in justifying the extra price. It adds on top of the "pay back" of saving energy/money.
- We wanted to purchase an energy and resource efficient appliance
- Always interested in power saving
- Amount of credit being applied along with price of appliance
- It was one more good reason to choose the model we chose.
- It effected the total purchase price of the appliance
- Sure, if there are two equal appliances, but one has a tax credit, of course i would buy that one
- Was one factor, along with price, brand, etc.
- The tax credit was incentive, but most of all that it was a product that would save energy even if it was more expensive.
- I wanted to conserve energy and my money, plus support the program.
- I wanted something that had a tax credit and that had an energy star
- Brought the eventual cost of the appliance down
- We wanted highest energy conservation available and that alone influenced our choice
- Wanted the apppliance to be less expensive
- Saved money on the purchase as well as the potential for energy cost savings because of product efficiency
- Although i knew i was going to once again purchase a front loading washer, the tax credit swayed which unit to buy
- Saving money made the purchase more attractive
- It was the "green" thing to do, in addition to the tax credit
- Offset the cost of the appliance
- Extra discount
- Wanted efficient appliance but opted for one on list
- It helped lower the cost of the energy saving appliance and make it more affordable for me to own
- A good reason (among others) to buy that make/model
- Support tax credits applied to energy efficiency
- Perhaps receiving a better model for same or less money.
- Financial help with getting higher quality and efficiency appliance
- Purchased a more expensive, energy efficient appliance
- We are concerned couple about the environment and what to help were we can.
- This is a good incentive to get people thinking about the environment
- Concerned about conservation and efficiency.
- I believe that the existence of the program provides an incentive to participate. In this day and age every little bit helps, both financially from the credit, and in helping to hold down energy use.
- Wanted to be able to conserve energy as well as get quality appliance
- Helped offset cost of purchase
- I went for a more expensive model that was energy efficient because with the addition of the tax credit i saved money
- It must be more efficient if there is a tax credit
- Made purchase more economical
- Yes, i view the rebate as a stamp of approval from the state
- Long term savings/conservation of energy
- Allowed me to spend more on better appliance
- Contrary to pge's propaganda, i know it's cheaper to save energy than it is to expand generation of it. I want to do all i can to avoid the "need" for new energy sources.
- Helped reduce the overall price.
- Allowed us to buy a higher end model
- Bought a better machine due to tax incentive

- It helped bring the price down
- When choosing between two similar appliances, i chose the one with the higher tax credit
- Efficiency is good. Getting a tax credit as well is better.
- Upgraded to a more expensive appliance
- It was the green thing to do.
- I would have bought an energy star product anyway - but the credit was an added benefit.
- Would not have bought an appliance that didn't allow credit
- Save money towards the purchase and i like the idea of reducing electricity bills and helping the environment.
- Purchased more expensive model
- I like to save energy, the rebate is helpful towards savings on items.
- Our family wants to be more eco-friendly
- I became willing to buy a more expensive appliance than i was originally shopping for.
- Low water washer: less water, less money, money back
- The appliance was expensive so it was like a rebate to reduce the cost.
- The water heater i bought was rather expensive; the tax credit made it easier to choose this efficient device and justify the expense.
- Price & model attributes being equal, tax credit swayed the decision
- Every little bit helps
- Although the tax credit did not offset the incremental cost of the appliance, it did incent me to consider the purchase.
- We wanted to purchase an appliance that had a smaller affect on the environment.
- Willing to get a better model
- Any time a consumer can receive additional refunds / credits it's a plus
- Wanted to save energy, but also like saving money.
- It made the purchase more cost effective.
- Lowered cost
- It made me focus upon those appliances which qualified for the credit
- Added bonus
- Store rebates and state rebates factored in to the final decision
- Tax credit shows that the product would be energy efficient
- Since a front-loaded washer is more expensive, this helped off-set the initial cost.
- I believed my appliance was more energy efficient if the state allowed a tax credit for it
- It reduced the overall cost of the appliance so i could afford a better, more efficient washer.
- I factored the various credits into the final purchase price comparisons.
- Made it possible to get a better unit
- Error: question 12 does not allow me to select very important on more than one item.
- Narrowed down my selection to only those appliances that had a tax credit offered
- We try to be energy conscious
- I spent more for an energy efficient appliance.
- Any savings helps with a purchase and we want to conserve energy
- Tax credit definitely influenced specific model choice
- Efficiency and cost
- In the long run i saved money.
- I continually look for any way to conserve energy....so i look for energy star stuff
- Factored into the value-for-price decision to buy
- If i obtain a rebate it would be foolish not to take advantage of it (duh)
- Helped make the purchase less
- It helped to narrow down the choices and choose something truly energy efficient
- It was an expensive item and it was like getting a discount
- Lowered net price for what i wanted anyway
- I assumed that i would get a very energy-efficient appliance if it qualified

- I want to buy "green" whenever i can, even if it costs a bit more
- I was looking for an energy star appliance, but the credit sealed our choice
- I am anticipating reducing tax bill, my energy/water bill - steered/allowed me to buy a better sized unit.
- We factored it into to the overall cost of the appliance
- The credit was a plus for the model we purchased
- Except the program is so narrow, the appliance, though efficient, didn't qualify, which is a ripoff.
- The fact that i was going to get a credit made my purchase decision easier.
- Tax credit helped with purchase of better, more efficient model.
- The tax credit made the appliance more affordable
- It brought the price of the appliance within our budget
- Made me look closer at the type of appliance
- Brought the cost down
- Efficiency most important, then ease of use
- I actually decided upon several appliances which would qualify
- We like energy conservation items. The tax credit allows us to afford them a little easier
- Saves energy, saves money. Note question 12 (of online survey) will not let me check more than once per column.
- We bought a more expensive washer because of offset from tax credit
- Reduced cost of appliance
- I probably would have gone with a less expensive, less efficient appliance if not for the credit
- We upgraded to a more expensive, and more efficient model
- Yes
- I wanted the most energy efficient appliances possible and the RETC helped make those affordable

Q18. How did you find out whether or not the appliance you purchased qualified for the Residential Energy Tax Credit? (Other, please specify)

- Handout brochure
- Utility company information
- Stickers, sales person/retailer...not all stickers warrant a tax credit!?
- Sales person
- I asked my contractor to get a RETC qualified model
- Sticker and salesperson
- Several of the answers above applied except did not call ODE staff
- Rinnai Tankless Hot Water Heater Literature
- Accountant
- I think it was something in the mail or maybe from the Northwest Natural Gas website

Q20. How did you get your application form for the Residential Energy Tax program? (Other, please specify)

- Other, provided by retailer, although form was outdated had to download it from website
- I don't remember

Q22. If you answered "Yes" to Q-21, what additional information or assistance did you request? (Others, please specify)

- Receiving documentation at tax time

- Was not sure difference between the Energy Tax Credit and Energy Star? Why don't they qualify?
- Refund card was destroyed. Replacement was requested for tax purposes
- Credit didn't match what was on the web site
- Explanation of qualifications for appliance
- Confirmation receipt for tax filing
- Forgot we'd already got credit; easy to get an answer though
- Clarification on denial of tax credit application even though appliance was listed online as eligible
- Needed to get our tax credit information for our taxes.
- Amount received was different from amount promised by the retailer.

Q26. Do you have any suggestions for improvement of the Residential Energy Tax Credit website?

- I know I tried to make sure I bought energy-efficient appliance. I was confused by Energy Star and what was actually a tax credit.
- There was a lot to read in the tax credit letter and instructions (as well as a lot about our new machine: how-to's, registrations, etc.) And it was overwhelming. Thus, what I neglected was to mail back the application before tax time! I thought I was supposed to mail in that form with the tax form. If you skipped that step of mailing in the application, it would make the process simpler.
- Everything should be able to be done on the internet
- It is good.
- This is overkill- I sent in a sales receipt and received a check
- Seems to work fine as-is
- Make forms available online or allows the tax credit to be done by a tax accountant. I had a difficult time finding where to go to find the site and difficult time finding out products
- The Department of Revenue requested additional information after I filed our taxes. Not sure why.
- It worked fine for us
- Each brand and all qualified models need to be listed and found easily to users. Some pictures of the brand and models would help a lot
- Provide a search by model function
- Add wood stoves to the program... That might be under DEQ though
- Seemed very easy to use
- Get verification number from sales receipt to eliminate photocopying
- Expand to all types of energy savings (i.e. Windows, stoves, etc.)
- Online application would make it much easier
- More publicity to pass the word
- Online would have made it easier and quicker
- No but we just bought a dishwasher from Lowes that the salesperson said qualified. Site said no. When we complained to Lowes they said, "Sorry. Oops!"
- Make it easier to find the site for energy tax credits and associated forms –link on home page. I remember having to search for longer than seemed necessary.
- Website did not hold the selections I made in Q12 section. Closed website and had to use this form
- HAVEN'T TRIED TO USE IT YET
- No
- None
- Continue to encourage applications to be filled out in the store with the help of the store staff. They know how it should be filled out and it is a service to them and helps them generally sell more expensive appliances.
- Would be nice if retailers had more substantive knowledge of what's on the website to assist consumers to gathering accurate information. My retailer was very vague about the "possibility" of a tax credit and I'm glad I looked, but the retailer should have known which appliances qualify.
- No.

- No
- No.
- No, I have not accessed the website.
- Simplify the language, using fewer words. It was cumbersome to read.
- Have not used it
- Can't remember
- HAVE NOT GONE THERE
- Although I printed off the page from the site when I bought my appliance, I was later told that the credit had changed. One person admitted the site had been updated (with the lower credit) but another person denied that the site had been updated even though I sent a copy of the page that I had printed.
- Make it more publicly known so one knows to look for those appliances
- No
- Program appears to be working well!
- No
- No
- No
- No
- No
- No
- N/A
- A person would need model #'s. It's hard using the website when you know have one.
- No
- Didn't visit the tax site.
- It's been a while since I visited the site, but I recall having to drill down through three or four layers of menus or sub-pages to find the info I needed. It'd have been nice if that navigation had been quicker.
- I'm not familiar enough with the site to make a meaningful comment/suggestion
- No
- Questions 12 and 25 do not allow selection of more than one Excellent, Good, etc.
- No
- No, but I do have a suggestion for this survey. So far, I have been limited to rating only one element in question 12 and 25 in the same column. E.G., if I rate Overall "ease of use" in Question 25 excellent, it will cancel my rating of "Ability to find desired information".
- NONE
- No.
- Publicize the info available on line.
- Make any rebate immediate. Question. Is this an exercise in maintaining employment for state workers? When I used your website to find information on a refrigerator there was no information available because I did not have the model number of the appliance that I asked about. If I supply the name and cubic feet of the appliance you should be able to supply the ratings for that brand; You should really be able to supply a rating for all makes and models if I ask for a comparison of refrigerators. Look at cnet.com as an example on how to provide feed back.
- No
- Sorry no. I have not seen it.
- Yes. It's too clunky. It makes you search for information that should be in plain sight-- on the home page, even. I could design a better website in my sleep!
- No, but your survey doesn't allow for more than one category of answer for the multiple category questions (#12 and #26).
- Can't complete some of your questions as it form only allows me to answer 'important' once even though that answer may apply to more than one question
- I think there is something wrong with your web site because in two of the sections when I checked an answer a previously checked answer came unchecked. It appears that I did not check all the answers when I did.

- I have to admit I have not been to the web site . I was not aware of it.. But I will soon be looking at it.
- This should be a completely paperless process for those who choose to do it that way, with the tax credit being sent to the Oregon Revenue Dept. Just like a W-2 statement; people getting these credits shouldn't have to worry about losing a little postcard and finding it at tax time.

Q29. Would you use the Residential Energy Tax Credit program again?

Yes, why?

- Helps cover the cost of equipment that is usually expensive
- Right thing to do
- Relatively easy to do and helps us acquire a better appliance
- Anything I can do to reduce energy usage
- I like the products; like the tax credit. In past 2 years, we have used the program with washer/dryer, furnace, and dishwasher.
- We seek energy efficient appliances anyway
- It's great
- Save money on already rewarding purchase
- I like the rebate process and it was easy
- Simple and easy to use program with direct relevance to consumers and education on energy efficiency
- If we need to purchase some appliance of course, or course energy saving products would be the first consideration
- When I need and appliance that will help keep costs of operation down
- It's a great way to lessen the bill for something we're having to purchase
- If the appliance is reasonably priced
- I can always use the tax credit
- I think there should be more information at the stores as to what qualifies
- It's allowed us to purchase a more efficient appliance than we otherwise would have not purchased
- Energy efficiency
- Saved taxes
- If I bought something that qualified
- It's a tax credit which is a great incentive
- Savings and environment
- It was easy, fast, and it works. However, it does help if you remember to send in the card with the tax return and actually get the credit
- It was an incentive to buy energy –efficient appliances
- It was easy, promote a greener planet, and got cash incentive
- It's time for everyone to conserve energy anywhere, and this is a good place to start
- Save environment and money
- Save and make a buck, common sense
- Because it encourages the wise use of resources
- If I needed to replace and appliance I wouldn't buy only because of a credit
- Helps offset the cost of appliance and helps to conserve energy
- But I would hope there would not be so much red tape! (i.e., that it was easier to quickly skim and understand). It reminded me of trying to understand the DMV! My life is busy and time is very short to try to understand all of the stuff.
- Concerned about environment
- It was an appliance we needed
- I buy Energy Star appliances. If I qualify for a discount, I will not turn it down!
- Cost savings in the long run, not just the one time credit!

- To save on energy and reduce energy bill
- Good for the environment and saves us money
- Appreciate the reward for being energy efficient
- A tax credit is always an incentive for us
- Value
- Because I am always interested in reducing the cost of living. Reducing the price is good, reducing operating costs is the goal
- It makes sense to save money and the environment at the same time. A “no-brainer.”
- Money
- Price reduction and energy cost reduction
- Sign of an energy efficient appliance
- To support Government initiatives in energy efficiency and environmental awareness
- Everything helps
- Good savings cost/cost aspect. Good indicator of an efficient appliance
- Any program giving you money back for doing the right thing is a win/win
- If I qualified
- Good credit amount and good for environment
- Ease of application. Everyone likes a rebate
- I believe in energy efficiency and appreciate the tax credit
- Why not save money and energy at the same time
- As above, any savings help. Also helps to know we’re using less electricity
- Saves money
- Tax credit
- Reduce my taxes
- If it involved an appliance I wanted
- Save on water and energy used
- Reinforces responsible choice with incentive \$
- Availability and refund
- Need the extra money saved
- Hopefully cost and efficiency of operation will be better
- Nice to get some money back after spending a lot on an energy efficient appliance
- Value added in product
- It is nice to feel rewarded for doing something that has so many benefits for me and the environment
- Save money
- Easy
- Obvious reasons
- Saves money. Promotes using highly efficient appliances
- Nice to get money back
- We have ongoing concerns about energy efficiency in appliance we buy
- It promotes buying energy efficient/environmentally friendly appliances and provides monetary savings as well!
- Saved money
- Savings: identifies efficient appliances
- Saves energy and money
- With sales people that helped me fill it out when I had questions
- Saves money
- To save energy and money
- When purchasing additional appliances
- Because of the savings on the electric bill
- Great idea that felt good
- Compels me to select the most efficient appliance

- Cost savings and energy savings
- Helps offset the cost of getting something new
- To save on used energy and money
- Anything to earn a buck
- It's always nice to save money on taxes; but it's satisfying to know we're using less energy too!
- Money
- Good program
- Encourages people to use more efficient appliances
- It makes sense
- Reduces cost of acquiring a more energy efficient appliance
- To save money
- To save money
- I liked receiving money back and it was an easy process
- Nice to get a return on my purchase
- Every bit of savings help and is good for the environment
- To save money and purchase efficient appliance
- Saving energy (money in my pocket and better for planet) and a tax credit= win/win
- I like to receive money back from purchases
- We are currently building a home, and will be purchasing all new appliances. I want them to be energy efficient and I can save money
- Save money
- Any future purchases will be energy efficient- if a credit applies, I will use it.
- Save money and energy
- Liked trying to save energy and getting paid to do it
- Energy conservation and tax saving
- For the tax credit (tax) and appliance efficiency
- Good program
- Nice to get money back
- Because you need the appliance why not get one that's a tax credit
- Saves money and is usually a choice of more energy efficient product
- If available
- We are looking at purchasing a hot water heater and the tax credit will help us get the best model for our house
- Saves money in the long run
- Reduces tax
- Because I save energy and I will have some credit for deduction tax
- Rebates on purchases are appreciated, however it did not influence our purchase decision
- It is incentive to purchase product
- Anything to save extra money
- It made purchasing the machine more affordable and meant I purchased an energy efficient machine as well
- It helps when the appliance is so much money
- Good incentive to do the right thing and invest in quality product
- Every little bit helps with tax credits
- Benefits everyone
- It makes sense
- Money back in all ways is good
- Beneficial environmentally and provides a financial reward
- To get reduction in income tax
- It rebates money to me
- I support more energy conservation over the long term rather than the short term money savings
- Most energy efficient appliances are money. Having a tax credit helps

- Seems like the responsible thing to do
- Lower taxes and energy efficiency
- Nice to get money back
- Saves money
- Environmental reasons
- For energy savings and tax credit
- Great way to save money and energy
- Good incentive for energy saving
- Anything to save money
- If available on solar items
- Easy money
- Good for the environment and society
- To save money
- We will buy the most energy efficient appliances we can find/afford. They will generally qualify for the tax credit
- It makes sense to have incentive for people to buy/replace energy wasting devices
- I don't need anything new. It's all new
- Money saved on taxes
- Good idea
- Saves money. Someone else did research on earth friendly appliances
- Got a break on my taxes
- It's the right thing to do
- Good return for new items. Helps you decide if something has the credit and if another does not then I would go with the one with the credit
- Because, not only were we buying an energy-efficient appliance but it was more affordable too. It was very easy to apply.
- I feel like I got a deal and made a wiser choice
- If available
- To save money
- Some of the appliances did get the credit
- Saved money, easy to do, fast service, no problems
- If only available with what I buy
- Helps environment and saves money
- If you look at it this way it's like a rebate for the appliance, saving energy and reducing my costs
- Positive for environment and wallet
- If it reduces the cost of an appliance I already decided on buying, why not?
- I would not refuse the opportunity to get money
- It feels good and saved some money
- Money savings together with energy efficiency
- Excellent program to encourage use of efficient appliances. Easy process
- I appreciate being rewarded for doing the right thing
- The state of Oregon is great for recognizing the need of energy efficient appliances
- Saves money
- Deduction on tax forms
- Every bit helps
- Saves money in the long run
- We all need incentives to do the right thing. The credit helps level the financial playing field for the middle class
- It helps defray the cost of the appliance
- I will purchase a more energy efficient model in the future. The tax credit was a good bonus/incentive

- It helps offset the initial cost of purchasing efficient appliances that otherwise might be prohibitively expensive
- Save money and save energy. Encourages more people to conserve energy.
- It allowed me to purchase a nicer more efficient washer for the same out of pocket expense
- Money
- If a rebate is possible, why not?
- It's a good thing to decrease energy use
- Believe in encouraging lower energy use both for money and environment
- Save money (if I lived in Oregon)
- Get energy efficient dishwasher at cheaper price
- Savings
- Energy saving appliances. Easy process to get credit
- I like the tax credit at tax time. Very good appliances
- I believe more needs to be done to conserve energy
- Helps offset the original cost and lower monthly cost
- But unlikely. In 2006 I did complete remodel and purchased 5 new appliances. No new purchases for foreseeable future.
- IT WOULD BE STUPID NOT TO IF IT IS AVAILIBLE
- RETC appliances indicate that they are the most energy efficient, which is very important to me
- We're cheap-saves money up front and in the long run
- As a working person it is always nice to see a tax reduction on your return after needing to replace an appliance at today's prices
- Our appliances are getting up in years and newer ones are more energy efficient and we need to preserve our resources.
- We like to go green. The tax credit can be the difference between being able or not to do so.
- I get rewarded for doing the right thing. We all benefit. If it encourages even a few people to save energy and help our planet we all win.
- To reduce our tax burden as much as possible
- Saved me money and I like the program since it encourages conservation
- If the tax credit is available when I need an appliance I will use it. These appliances usually cost more up front than other appliances and I am sure that is an important factor to most Oregon households...makes sense doesn't it?
- It's a credit off my taxes, regardless of how much, it is still a credit.
- I am currently doing remodel on my home and I am using energy efficient windows. Any future appliance purchases will be energy efficient
- Because I try to take advantage of any ways I can save money
- WITH RISING ELECTRICAL RATES HOW DO YOU SEE ANY REDUCTION IN ENERGY COSTS.
- Any money off of very expensive appliances/taxes is worth having.
- To reduce costs and utility expenses
- Now that I know about it, I will check on the availability of the credit when buying major appliances.
- Anything to save money
- It was easy to do and saved money by using less electricity.
- Like to save energy
- Because it would help the cost of buying what is going to cost you more in the long run
- Because it was so easy and a win - win. (saved energy-water) plus check in my pocket too!
- Any tax savings is acceptable.
- It makes sense to buy something 'green' and it costs less long-term. What's not to like?
- I plan to buy efficient devices anyway; if the RETC can help me save money on them, I figure I might as well choose RETC qualified models.
- If in the future I need other appliances
- Not hard, saves outlay

- Any time I can save money AND protect the environment that's a WIN WIN
- Like the incentive to save resources
- It saves money on things that reduces the use of our resources (water, electricity).
- Tax credit reduced the price
- Well, it's nearly free money for an appliance I would purchase anyway.
- It's a good incentive to "do the right thing"
- I want to do my part to conserve energy and like the idea of getting reimbursed for extra cost of energy efficient appliances.
- Certainly will be a factor in next purchase, if it offsets high initial cost of high efficiency appliance
- Saving money while fostering responsible energy awareness
- Like to save money on taxes and use energy efficient appliances
- If continued use helps keep the program going and the program causes more people to buy energy-efficient appliances, then I'm all for it.
- Why not use a simple program which saves money? It only makes sense.
- In combination with the Energy Trust rebate, it made the appliance affordable for us.
- For Price
- Why not, only unpleasant part is waiting for this survey to load
- I worked fine for us and gave us an offset against our taxes
- It's always good to save money

No, why?

- Energy is not the only important feature in purchasing an appliance
- I don't think I would buy an appliance just because it qualified for the tax credit
- I was told I get a credit on a gift appliance. After I sent it in and it was too late to redo it, I was told the gifted person was the one to send it in.
- We did a complete remodel and don't expect to buy more appliances in the near future
- To save money

It depends, why?

- The washer and dryer (new) are not saving time or energy or money, Frigidaire (ATF 6000 ES1 and AEQ 6000 ES2)
- If it was offered on an appliance I was interested in
- Because we can use the money, and no, because the calculation used on the site showed we have gotten more money back than we actually did. I was a huge misleading lie!
- Depends upon the function and desirability of the particular product
- It depends on the appliance and amount
- It depends on what we need to replace
- If credit is enough to the time involved in application
- If we needed an appliance and it was part of this program
- Senior citizen don't need too many more purchases
- The tax credit was not a major factor in this purchase-rebate and energy savings were
- Didn't quite understand it
- It the device I wanted had it
- If it was on an appliance I liked and would buy
- Got forms late, didn't get on tax return so lost out on rebate. Why bother with process?
- Depends on the quality of appliance
- If it was offered on the appliance I wished to purchase

- If it only applies to high-end, expensive appliances, I wouldn't spend a premium just to get a \$50 discount
- It's a good idea and program, but not the only factor in purchasing
- If what I need is available with the tax credit
- To lesson our dependence on foreign imports
- If I would like to buy a specific model only, then I might buy it, whether or not I get residential energy tax credit
- On the dollar amount of the rebate and what appliance is needed.
- Depends on the cost of the appliance
- It depends more on the specific appliance being purchased than the existence of the credit. In other words, the credit, though nice, will not sway a purchase decision for me.
- If what I was interested in buying qualified.
- If it's a hassle, and I pay several hundred dollars more for an efficient appliance and get 50 bucks, it's hardly worth it. And give me cash, not a tax credit.
- If the program continues to be so cumbersome I would probably not apply
- On weather purchase qualified and I knew about it. Also how much pain for the \$\$ pay off
- I wouldn't choose an appliance solely on the Energy Credit for a decision
- Depends on the amount offered and the price of the appliance.

Q35. Please share any other comments you have about your participation in the Residential Energy Tax Credit program in the space below.

- I participated because it was there when I purchased my washing machine. I have used front loader washing machines since 1949 and will continue to use them. The credit was an unexpected bonus.
- It encourages people to purchase high efficient equipment, no matter what their motive or cares.
- I love this program. It is a great incentive. Should be more widely disseminated.
- State Department Energy Representatives were very helpful in persuading a vendor to provide the necessary paperwork to conform to submission deadlines.
- I bought everything I could that was energy-efficient. I think for the extra money spent on these items should be a much bigger tax credit. I bought a hybrid Honda also and when I figured up the gas, versus the extra cost. It will take me 5 years before I realize the savings are not that big of a refund. For being responsible for the environment and when it comes time to replace my battery in 5 years, I may come out a loser. I also feel there should be a tax credit for Energy Star appliances regardless of brand.
- Q1 to Q6. Rated based on experience in Department of Energy through work. No way to answer based on buying an appliance
- I would like to see some form of tax incentive for whole house air infiltration testing including new home purchase. We recently bought a new home and it has infiltration issues. I will attempt to find a COMPETENT company to test our home. You may want to consider this. Additionally, for new construction, you may want to consider and incentive for those who upgrade their insulation above the Oregon standards. I tried doing this on your website, but if, for instance, clicked "important" on an item and tried to click "important" on the next item, it would erase all the others of the same rating. Would like to see tax credit for home solar energy.
- Thank you for doing all manner of energy tax credits.
- Should make more Energy Star products qualify for a Tax credit
- More solar powered appliances/items (i.e. Roof vents) should also be part of the program, which now includes "Solar tubes" to reduce using lights during the day, or electric powered roof vents. New home buyers should also be eligible for a credit when they purchase a new home with energy efficient windows, appliances and insulation, instead of the contractor /builder getting the credit. We're the ones paying the costs for those things.
- I would like to see this program continued. It is an additional incentive for people to by more earth-sensitive products
- Not really user friendly-washer qualifies but dryer doesn't?

- It would be nice to see a reduction in utility bills. With rates going up, bills are higher than they have ever been. The credit information was mailed to me within 5 days-excellent service!
- I lost the first check and they were great about replacing it. I found it weeks later under a seat in my car and destroyed it.
- Thank you for the program
- Don't bother sending out blue postcards-waste of money for no gain
- Because of the program, I researched more efficient appliances. I like to save energy beyond the economic incentive
- The tax credit is nice and I wouldn't pass it up. But it really offers no incentive to me. My main goal is Energy Star, energy/water use reduction and decreasing my carbon footprint.
- The salesperson was very helpful. She told us about it, explained it, and helped check it over after I filled it out to be sure it was done right before I sent it in. It went smoothly, and I received the check back in a timely manner. I feel like it made a big difference in my decision
- Keep doing it!
- I spent a long time getting the proper paperwork to apply for the tax credit. The owner of the store where I purchased the appliance helped me. He was very gracious, however, I felt sorry for all the time he took. As it turns out, we didn't submit the proper amount of money because when the tax papers came back we didn't request enough and could have gotten a larger refund
- Credit is the preferred choice. I would have liked a little higher amount. It does influence my purchase. I do what I can to help the environment I am happy that Oregon takes the lead in many areas to take care of the environment. I am willing to pay a little more for services if it shows that it will benefit our quality of air, water, etc.
- It's a good program. Thanks!
- After we purchased our appliance the retailer told us about a tax credit but did not tell us they had the form for us to fill out. We found this out by our tax accountant. Once we got the form, I had to get online to fill out the form correctly and put in the dollar amount we were supposed to get back according to your site. Your site was not easy to get clear instructions from. We purchased a \$3,000 refrigerator and should have gotten at least \$600 back. We only got back \$50 for our dishwasher. For some stupid reason, our ENERGY EFFICIENT refrigerator did not make your list to qualify. If it has the EF tag, it should qualify no exceptions. Otherwise, don't put the tag on the product.
- I think there should be more items included in the RETC Program. We found the process easy to use and it helped us make the right decision for our environment and our family.
- You pay more to start, but you probably save over time
- Reduces price of appliance
- Stickers should have information that you must request tax credit at time of purchase with website and addresses. Many people bring sticker to Tax man when it is too late.
- Great project idea
- My home is newly constructed and is LAADS certified. There was no big decision or fact finding needed to install the most energy efficient appliances available
- Keep up the good ideas and work!
- I would consider more energy saving items; windows, etc., solar heat is greater saving credits available
- In recent years we have received tax credits for a hybrid car, refrigerator, dishwasher, clothes washer, solar-thermal and photo-voltage panels. We are very happy with the program. It is important that the state encourages people to conserve energy.
- This survey is too long
- Conservation-efficiency and savings are all good reasons
- "Participation" is too strong of a word. The credit had nothing to do with my decision and I'm not even sure if I got it. If you want to influence decisions, you should let the retailer just discount the price in the first place.
- I was disappointed I didn't get the tax credit because I bought my daughter two appliance because of the credit
- It was difficult in including this in my 2006 taxes. I don't know if I got the credit or not. Make that part easier.

- The program could benefit from targeting low-income home owners. This would benefit the community as a whole. Perhaps have a sliding benefit scale for lower income people. Make information more easily available to everyone.
- We will encourage our kids to participate
- It should be easy and straightforward to apply for the tax credit. And it should not require access to the web. Obviously, it wasn't easy for me to find out about the process, and it requires access to the net.
- We are not "old." But elderly people may have difficulty accessing the website. Please be sure to remain paper friendly.
- I might fill out this survey if it didn't from a stupid school, such as the University of Oregon Quackers!
- Good program-keep it up!
- Manufacturers should be require to "signage" the tax credit information as part of their marketing information for consumers. Information should be included as part of "energy rating sign" that is on all appliances now.
- It's a good program, but we were not informed of the process for verifying our credit purchase. I found out the need of sending in my receipt into the DOE and it delayed my filing for a refund. I think that it would be nice if retailers were required to include paperwork for the tax credit with the bill of sale. That would help ensure a timely filing of the tax credit paperwork.
- I would not have known about this program if it had not been for a Salesperson at Standard Appliance who handed me the paperwork, filled in the model number, date, etc., and explained the process. I already knew I wanted to purchase another Kitchenmaid, so the tax credit was just a nice bonus.
- We replaced windows in 2005. When we had the 90+ degree days in July and August, we didn't have to use the A/C – heat pump. The fall PGE cane and replaced our meter saying it was broken. We saved \$200+ on our electricity that year. However, the windows did not/or were not listed on the website for the energy tax credit.
- I'm glad the store filled out the form for me like the appliance number, etc. The list of appliances listed was too difficult to match up to the ones available.
- Thanks for the money, but the tax credit had nothing to do with my purchase. Reliability, size and shape were my only considerations. AND, I am not happy with the washer. It uses so little water that the clothes all wrinkle and now I have to iron! Some energy savings!
- Please continue to offer more-incentives work!
- Put more appliances on tax credit forms for tax purposes. Maybe a little more tax credit at tax time. Good program, thanks!
- Manufacturers should be required to make all appliances as energy efficient as possible
- I recently replaced my old electric water heater with a new gas water heater. The gas water heater is much more efficient and I am saving money in energy bills. However, there are no tax credits on water heaters. You should encourage people who already have gas hook-ups to convert to gas water heaters when they have to buy a new one.
- Great idea! I have urged others I know buying appliances to consider getting appliance that meets program requirements
- Thank you for your excellent work to make purchasing energy efficient appliances more affordable and attractive. I appreciate utilizing your knowledge to know which models are most efficient. Thank you! Keep up the good work.
- I wish they gave Tax Credits for more appliances, I had purchased a new dryer and washer, but could only get a credit for one of them. Both appliances use a lot less energy than my old ones did..
- Retailers should be better informed. If the State is going to do this, then the State should coordinate with the local power companies to help train retailers on total credits and rebates available per appliance. I felt better about spending more money on a more efficient machine once I realized that the credit, power company rebate, and the manufacturer rebate at the time combined to make it a simple decision to buy a more efficient/more expensive appliance. I will now take this type of information into consideration the next time I need a washer, dryer, refrigerator, and range. I don't think many people know about these programs and, if they hear about it, they don't know

where to go for accurate information. At the very least, the retailers should have a summary of credits and rebates available to hand out to customers to help this process.

- I do my shopping research, check to make sure the appliance is on the list at the web site, and feel good about my purchase. The times I have used it have been very easy and the place of purchase (Sears) is always helpful in getting and using the forms.
- I think it's a good incentive for people to buy energy efficient appliances.
- It pleases me that there is an incentive-based program to help guide consumers to energy-efficient appliances. We want and need this type of assistance. Thank you!!!
- I think its a good program. I support efforts to encourage conservation of energy and natural resources.
- Many people have problems with the impact of the purchase price of appliances since it is often not a planned purchase. Since some, if not a large majority of, people cannot afford, or credit qualifications limit their ability to purchase energy saving machines, it would be nice if the rebate was at purchase. This would influence more people to go green. Perhaps a state funded discount on these machines at the time of purchase would help.
- I wish it were a little easier to know for sure that an appliance definitely qualifies ... That's the only part that seems a bit tricky, and your department could end up looking like the bad guys, if someone in good faith thinks they got a great, energy-efficient appliance, and you then deny their tax credit request.
- The last item we purchased was a tankless water heater. We thought we would see a reduction in our gas usage, but, we haven't seen one yet.
- Thank you for your program and future improvements.
- Please continue to spread the word. There should be information clearly spelled out at stores so that customers are aware of their choices. Salespeople, too, should have this knowledge. Maybe an article in newspapers explaining the program would help to raise awareness. Thanks for what you're doing.
- The sales person sold me a dishwasher that was not on your list but told me it was. I would have bought another brand that qualified if I would have gotten the correct information. It was from Sear's in Baker City, OR I was not very happy with the sales person!
- It would be easier to answer survey questions immediately, rather than 6 or 8 months after I participate in the program. Us old folks don't remember stuff so good when it's not fresh.
- I felt frustrated that the initial info that I had (from the salesperson and the web site) indicated a \$90.00 credit. When I submitted the application the credit issued was \$70.00. When I called for an explanation I was treated with little respect and somewhat accused of making up the \$90.00 credit even though I sent a copy of the printed page to the supervisor of the department. The first person that I spoke to said it should be \$90.00 yet after she re-submitted the application, it still came back as \$70.00. I felt that I just couldn't get anyone to listen to my argument.
- We found it easy, have used it for more than one appliance, and appreciate being able to be "greener" at home at a lower cost.
- I've been satisfied with the program.
- I think that it is an important program to help defray the higher purchase costs typical of high efficiency appliances. It is also helpful in sorting out genuine performance from what may be just "green" marketing claims.
- Program is great, however, when our tax credit form came in the mail my Social Security was shown visibly on the front of the envelope just below by name. I think this needs to be corrected immediately as it is an excellent way for the unsavory to steal your identity.
- It's a good thing.
- Energy saving products are a farce. I have wash my work pants twice to get them clean. The refer. On the outside is bigger but the inside is smaller them my old refer.. I had to buy another small refer. To put in the garage to hold the overflow. So in the end I will be using more energy.
- IT WAS A LITTLE HARD TO REMEMBER DETAILS SINCE I PURCHASED MY WASHER IN AUGUST 2006 AND RECEIVED MY ENERGY CHECK IN SEPT 2006.
- None
- I am glad you have this program. It's full of information and services. I like buying smart and saving so tax money at the same time

- I support state and federal programs that encourage environmental sustainability.
- I feel that this is a very worthwhile program to encourage energy conservation and, ultimately, the preservation of our environment. It has encouraged me to look into replacing other appliances before they would otherwise need replacing. I may be filing for additional tax credits before very long, as I can afford to make the changes.
- A positive experience overall, no negatives to mention. Certainly easier to manage than lots of government programs.
- Thanks that's all !!
- I bought a natural gas powered tankless water heater, which wasn't mentioned as a choice in your earlier questions. I bought it for reasons of efficiency and space-savings while I was adding a small "granny house" to my property. It is hard to tell whether it is saving money or energy because, now that the project is complete, that one water heater services two households, whereas the previous one served only one. Comparisons are hard to make because different users are involved. But I knew of the RETC when my project was being planned, and I told the general contractor to choose a tankless model that could serve two households and also appeared on the RETC list. Ultimately this reduced the price of hardware from roughly \$1400 to \$1100. Because I'm interested in energy efficient devices as an environmentalist, I will be glad if the RETC can apply to me again.
- When I was told that there would be a residential energy credit, I did not understand the process. I thought I would receive a check but instead will receive a tax credit.
- Was disappointed our hot water heater was not included in the program as it is very energy efficient
- All I know about the program is that it gives you tax credit for purchasing energy efficient appliances. It sounds good and that's all I needed to know. If the program is more involved and requires participation by individuals, I would have liked to see that information provided with this survey. If the program is as simple as I had envisioned, I don't believe my response is very useful.
- Great program. We just moved to Oregon last year and it was very easy to use and understand. Keep up the good work!
- I received a residential energy tax credit without a problem in 2005 and was quite pleased with the ease of the process. My experience in 2006 however, was terrible. There was originally some confusion on the eligibility of the DCS dishwasher I purchased because Fisher & Paykel manufactures the DCS dishwasher but they were not listed separately on your website at that time. I contacted your office via e-mail before sending my application and was assured that it was eligible and I would receive approval without a problem. I sent in my application in Sept 2006 and received a letter that it did not get approved in Dec 2006. After receiving the letter, I left several messages with Deby Davis in the OR Department of Energy office to receive clarification since the DCS model I purchased was now listed on the website as a qualifying appliance. My messages were unanswered for the next four months. On April 10th, I called repeatedly and finally got on the line with Deby. After a short conversation in which she was very rude in tone and verse to me, Deby ultimately cut me off and hung up on me. I then contacted her manager Suzanne Dillard. Suzanne was able to take care of my question, concluded that the appliance did qualify, and issued a tax credit to me the following day so I was able to file my taxes on time. I felt the need to explain this in detail because I want to clarify that my complaint is not with the confusion over the eligibility of the appliance I purchased. It is with the timeliness and professionalism with which it was resolved. In my opinion, I never should have had to wait over 6 months for an accurate response from your department. But, more importantly, the fact that I was unable to directly contact the person listed on your letter during business hours and that numerous voicemail messages were ignored, is completely unacceptable. I should never have had to contact a manager with a complaint in order to get a response. I encourage you to evaluate the customer services skills of those employees you refer to the public and suggest you implement further training and service standards so future issues are resolved in a timely manner.
- A Rebate from the Energy Trust program also played an important part in the selection of the energy efficient appliance.
- As the three appliances I bought were for a new house, I cannot compare savings on electric bills, so the answers above may not reflect correct information. Also, all three were bought before July 2006, and I couldn't indicate that above. This survey doesn't allow a way to answer for more than one appliance. The actual RETC program is excellent, and needs to be continued. It is a good incentive to get the better equipment. Ashland's additional incentive helped, too.

- Make solar energy and hydrothermal energy part of the program.
- I recently had a home audit by the Energy Trust of Oregon. I found lots to be done! I also located an impressive list of allies...have chosen one (after getting another estimate) and am now in the process of new double windows (and all that means), air and heat duct sealing (and all that means). I feel good about making my home more energy efficient and comfortable. The tax credits and rebates are only incidental to what I am doing. I am, now, thinking about solar panels...and a new AC system...some time down the road.
- None.
- The program is a good idea. But get to work and earn your salary.
- Low interest loans to be able to upgrade major systems such as heating, cooling and water heaters would be of benefit. For example: My mother, an elderly widow, needs a new heat pump and furnace, but is on a fixed income and cannot afford to fix or replace the system in her home. Her monthly energy costs are higher for one elderly woman than they are at my house with a current family of 3, because my appliances and heating/cooling system are more efficient than hers. However, there is no way that she can replace any appliances or systems due to her limited income from social security.
- Thank you very much for providing the Residential Energy Tax Credit program.
- Tax credit program is great. Have used it in past also.
- I would like to emphasize my desire to have the application/submission available totally online. Should be able to fill out and submit the form online. Should be allowed to scan in documentation and submit it electronically, leaving paper and snail mail out of the equation altogether.
- I don't like this page of questions.
- Again, you leave out appliances that are much more efficient than the ones I replaced, but they don't qualify for anything. That's a ripoff. Also, send me a check. Waiting for a tax credit in April is crap and it's aimed at keeping people from taking advantage of the program. It's worse than those chintzy rebate deals that some manufacturers pull.
- I applied for the credit for a major purchase of two(2) energy efficient gas furnaces and because some serial numbers were left off, the app was denied and my retailer was unable to get the required info in time so the credit was not available to my family.
- This questionnaire didn't work properly. There were a few places where I was unable to check all the descriptors that I wanted to. I could only check one.
- Your survey site is broken. On multiple select question I can only select one of each "satisfaction" category, there after subsequent selections of the same category on different question lines removes previous entries. Using vista 64bit IE7
- Some of the questions that involved ratings (average, important, etc.) Are not working properly. I could not use the same rating for more than one item.
- I think it provides an incentive to purchase more energy efficient appliances. I do not know the source of your funding though. What does it cost the taxpayers?
- I think the program is very good. Easy to use and though our goal is to have our entire house full of energy efficient appliance.. We would still have those goals with out a tax credit. We just feel it should be our priority to cut down on energy consumption as well as keeping our bills at the lowest we can get them.
- Your online survey is flawed and less than functional. On questions #12 and #25 which should allow multiple boxes to be checked the online form only allows one box to be checked for each item. Therefore, your survey results will be distorted and not of much value to the Dept. Of Energy for those questions.
- Question #12 you can only choose one out of each column. If you choose "Important" for something, you can't choose it for something else.
- The grids on this online form are useless. More than one option may be rated excellent, good, etc., but the radio buttons only allowed for one "excellent", one "good", etc.
- Your questions # 12 and #25 don't work on the web survey. Overall it seems to work pretty easily. Have never had any issues. May depend on the sales person, but those i've used in the past are very knowledgeable.
- Amount received was different from amount promised by the retailer. RETC employees did not respond to my questions about this.

- We need to kick this program up to the next level by promoting smart appliance purchasing for everyone by doing the math for them as much as possible. In particular, we should seek a statute or a regulation that requires anyone selling appliances required to disclose energy data at point of sale (the yellow tags) must include that same information in all electronic and published or broadcast media ads that mention price. So, for example, instead of just "Refrigerator, \$1299" the dealer would have to put "Refrigerator, \$1299/\$58," which would allow customers to compare it to the other refrigerators being advertised for \$899, because it would probably be "Refrigerator, \$899/\$95" -- OR require that the second number be the lifetime cost over a standard lifetime -- so, for example, if washers are expected to be replaced every twelve years, then you have the purchase price as the first number and then the 12-year energy cost, so that customers can compare the total costs over the standard lifetime. So a typical high-efficiency washer might have to say "\$799/\$600" as compared to a cheaper model that would have to say "\$599/\$900" because of its higher energy cost.

Appendix C

Denied Survey Instrument

This Appendix presents the various instruments used in the administration of the Residential Energy Tax Credit denied participant survey. Specifically, this appendix includes the:

- Survey instrument
- Postcard

INSERT DENIED SURVEY HERE

Appendix D

Transcript of Written Comments on RETC Denied Survey

Background

The survey included opportunities for respondents to provide written comments. Several questions requested specific written input or comments from respondents.

The survey also solicited general comments. Specifically, Q-31 stated “Please share any other comments you have in the space provided below.” Following is a transcript of written comments provided by survey respondents. The comments are presented verbatim by question.

Transcript of written survey comments

Why was your application for the Residential Energy Tax Credit denied? (Other responses)

- Newly introduced energy efficient model not covered by the tax credit program
- submitted appliance after qualifying listing had changed.
- Purchased item because it had an Energy Star sticker and assumed it would be eligible for tax credit
- I was told due to the low price of the appliance, it must be used, even though receipt showed it as a new purchase from Sears
- We were told a Fischer Paykel did not qualify and would never qualify and when Kelly's talked to the State it did qualify but for only \$115.00 not the \$150.00 we were told it would qualify for so we missed the tax deadline in 2006. The Fischer Paykel is twice the Washer & Dryer the so called efficient Maytag side by side was and it spins 1100 rpms not 900 as most do and it holds more. Our wonderful Maytag lasted only 5 years of filthy water and problems so we could have so called American energy efficiency.
- Model qualified the year before purchase
- the way the credit was explained it may or may not qualify it was questionable
- Home Depot said appliance qualifies - ODE said it did not qualify for Energy Tax Credit
- Was told by dealer that unit was qualified and they gave me the paperwork to be filled out, so I guess they lied to make the sale.
- appliance was not qualified, being too small

If the appliance you purchased was not a Residential Energy Tax Credit qualifying model, what led you to believe that it was? (Other responses)

- I had not heard about the energy credit program or I would have bought a different appliance
- Was energy star, but did not qualify. This is confusing.

What information or format would have better helped you determine which appliance models qualified for the Residential Energy Tax Credit? (Other responses)

- More time to submit.
- This appliance (on-demand hot water heater) was eligible. The impression I was left with was the rebate scheme was set up like a retail rebate, i.e. designed to deny payouts while making the initial purchase attractive
- A OR Dept. of Energy website that was clear and user friendly
- Test the Models yourself first then make a list of American and other country models that qualify, Fischer Paykel only takes the water it needs to wash and it constantly measures the water, it has no belts, its direct drive & there's no weight control & it washes better than any machine I have ever had and I am 66 years old. I've given the US plenty of time to get it right. I will stick with what I have even though you don't think it really qualifies.
- Was told I might be able to get the credit even though I was purchasing for use in my business.
- let the stores know when the appliances are no longer a model that has a tax credit
- Accurate information from dept. staff, who told me my dishwasher did qualify for the credit over the phone
- printable list AND better in-store documentation
- My product was said to qualify so don't know why it didn't
- more knowledgeable Oregon Dept. of Energy staff!
- I don't think I ever heard about this program from a salesperson- a friend told me
- Do not understand why it says energy star when it is not energy efficient enough for tax credit.

Would you apply for the Residential Energy Tax Credit program for another appliance again in the future?

- Yes, I have already done so successfully and was surprised I got rejected on this one appliance.
- But I'd be more wary (and perhaps more tenacious) in submitting my application.
- If I knew what the Dept. of Energy accepted ahead of the purchase
- If you don't just have the usual ones, such as Maytag (Whirlpool), LG, Whirlpool, the so called major brands, and not check the foreign brands such as New Zealand, My top load Dryer, dries most of my clothes in 20 minutes except jeans. That's better than any other brand I have had. Did any one check Fischer Paykel out, before saying it isn't as good or better or is every so prejudice they can't.
- but I won't buy from that store again
- if I feel like wasting my time just to be told sorry
- Next time I won't trust the stores display, or the salesperson. They did say that you guys changed which ones are covered so to mail it in immediately. I mailed it the same day.
- I feel that we pay high real estate taxes and spend a fair amount of \$ in the Oregon economy so why were we denied?
- I purchased a unit which exceeded the defined energy saving parameters but it was not a listed model?

- I shop for energy efficient products
- It's just a come on.
- yes, now that I know about the program
- I BELEIVE WE NEED IT
- Whether appliance will be used in a rental or primary residence
- Since we try to be more energy minded with some of the things we use and not use in our home in the lighting we use and not using a clothes dryer, and a timer on the water heater for the past 25years and other energy savings.
- To get the credit

Please share any other comments you have about your participation in the Residential Energy Tax Credit program in the space below.

- I love the idea of having tax policy reflect our need to be more efficient with energy usage but find the tax credit program frustrating. The most expensive [and needlessly fancy and complicated]appliances seem to be those that qualify, how about a partial credit for appliances that almost qualify but are much less expensive and very efficient. I recently purchased both a refrigerator and a washing machine and wasn't able to get either to qualify as those that did were prohibitively expensive and once again loaded up with fancy gee-gawks that I don't use and don't consider to be very energy efficient.
- A qualifying listing for a longer period of time would have been helpful. I got busy with other things, and by the time I got to it, the list had been updated and my product was no longer listed.
- My impression is the system is designed to make it difficult to gain the promised credit. My contractor submitted the application with the sub-contractor's assistance. Yet it still came back to me denied. Either this was a aberration or the system is faulty.
- When I received the denial, I attempted calling to discuss. Was unable to reach anyone, nor did I get a call back. The rationale for the denial didn't make sense, but decided it wasn't worth the battle.
- After I was denied the credit, I called to verify the information. The woman I spoke to was very helpful and pleasant. She clarified the reason my claim was rejected without making me feel like a "dummy". I appreciated her knowledge and patience in taking the time to speak with me.
- It was very confusing as to what the Dept. of Energy was looking for. We have a newly constructed home, and bought the most energy efficient appliances we could find and afford, and none were accepted. We contacted the builder for information on our heat pump, and that was not accepted either. Your tax credit program is a joke!
- I am so angry at the Oregon Department of Energy. I bought the First energy efficient Maytag to come out as did my Twin sister. We paid lots of Money for them. We received \$150.00 tax credit no problem. They fell totally apart within 5 years. I then looked for another washer and dryer that was energy efficient and was told at Kelly's home appliances in Salem, Oregon that the Fischer Paykel was truly one of the Best and it didn't have any belts, it was direct drive and in all other country's except the U.S. had 10 years warranty, but the US wouldn't allow it because of too much competition with theirs, so we only got 3 years warranty. We received an energy card for \$150.00 just as we did before except the energy department turned it down and said that it wasn't energy efficient because it was a top loader. Kelly's called someone at the Energy dept and we wound up with a letter for \$115.00 instead. This Washer and dryer is twice as efficient as our Maytag it lowered out Gas (water) and electricity substantially. I was raised being very careful with Earth's gifts (such and water, electricity and have always washed cans out and smashing them to save waste) We were always, always, raised to only take 5 minute showers no matter what and conserve everything and I still do, so I do no when something is energy efficient. Oregon really blew it on this one. Now I have the letter and it is 2007 and I won't be able to use it

even though it is only for \$115.00 instead of the \$150.00, because I received it too late to use. Thank you very much for letting me vent.

- I was unhappy to learn of the denial for my refund. I own a day spa and was looking to replace my very old washer/dryer with an energy saving set so I could more efficiently do a large portion of my laundry at the spa (rather than sending it out to a laundromat). I was told by the store salesperson that, while it was a residential program, I should go ahead and apply even though I'd be using the equipment at my business. I also suggest that it would be nice to offer a similar program to small businesses like mine so we could receive the same benefit for purchasing energy saving appliances. Thank you for this opportunity.
- Would be good to know with certainty prior to purchase and installation if tax credit applied.
- i was very disappointed to find out that the washer, dryer and dishwasher that i purchased didn't qualify after being told by a store person it would. The tax credit was part of the reason i purchased the items i did thank you
- We did this in Washington State and had no problems at all. In fact they told us of another refund we were eligible for and how to apply for it. It seems to me that you'd have a better system in place. If once an appliance is eligible for a tax refund that shouldn't change. If the standards change there should be some leeway for the last model. The least you could do is make sure everyone knows which ones are eligible, especially the stores.
- Again, we pay our share of the tax burden by owning property in Oregon and supporting your programs. We encourage tourism and spend a considerable amount of money and time in your state. So, just because we don't live there full-time, you denied us the benefit of your program, Thank you.
- It was very disappointing to be turned down because the sales person made an error. Initially, the loss of the rebate (about \$50) was difficult, as I budgeted into my low income. Even more disappointing was knowing I would live with this appliance for many years and not have the energy savings I expected (both in saved resources and in lower energy bills). Energy efficient appliances are solo expensive and so much more expensive than bottom of the line non-efficient ones. It was a spending more than I could afford and yet still not getting something up to Oregon's standards. I am not that familiar with the Residential Energy Tax Credit, but it seems as though you have to have a substantial amount of income to participate. What about low income people who would like to be green, too?
- I called the department with the model number of my dishwasher and was told that it was on an updated list of appliances eligible for the credit. When I filed my application, my dishwasher was denied on the grounds that it was not listed. What gives?!!
- i WAS DISMADE TAHT i WAS TURNEDDOWN. i THINK i WOULD HAVE CHOSEN A CHEAPER MODLE HAD i KNOWN THIS ONE DID NOT QUALIFY.
- I purchased both a hot water heater and a new side by side refrigerator. The refrigerator had an energy savings sticker on it in the Sears showroom and I was assured by the salesman that the model qualified. They assisted with copies of the sales receipt and the application form to submit to the State. I was informed later that the water heater qualified but that the refrigerator did not. It wasn't like they were giving me cash - they were giving me a break on the outrageous amount of tax that they collect.
- I bought the product in full belief that I had purchased my freezer from Jerry's with a State of Oregon Energy rebate coming back to me.
- Why have a program that doesn't really work? Did anyone really ever get a tax credit? Who sponsors these, the store or the state.
- whatever it takes to get people informed-
- we found after we bought a tankless water heater it didn't meet the program because it was electric instead of gas, on the dish washer they said it didn't save enough energy,

but the store said we would get a credit. that one of the reasons we bought it as we try to conserve energy thank you for your interest.

- Would not have applied had I known was not available for owners of rental units. Was recommended by unknowledgeable sales person. Told the store owner after credit was denied that employees should be better trained. Also, do not understand why the credit is denied a landlord. The rental equipment is better quality than I have in my own home. I could have installed it in my home and given them my used appliance, but chose not to.
- We try our best with what we have and afford.
- Very disappointed that the owner of the store where I purchased the appliance used this information to sell me the product when I suspect he knew full well the product did not qualify.
- Model numbers change frequently -- therefore, eligible appliance list needs frequent updating. I think that's why my application was denied, as my appliance had an equal or better STAR rating than several on the list. Also, a bit more explanation of the denial would be appreciated.
- We did chose our dish washer because it was energy star (more efficient) and was disappointed when it did not qualify for a tax credit. We were further dismayed because we were told by the employee at Home Depot that it would qualify. I believe that it is misleading to not qualify energy star appliances for the tax credit. It is easy to assume that the energy start logo would qualify for the tax credit and as long as there is the energy star logo I believe at least some customers are going to assume it will qualify for the tax credit since it is not clarified otherwise.
- Keep it.