DOE/R 3/40425-T1

NATIONAL AFV TELECONFERENCE

FINAL REPORT

July 1994

SUBMITTED BY

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HIGHLIGHTS

Summary

- ** A total of 46 states and territories participated in the teleconference.
- ** At least 84 downlink sites were in operation throughout the country. New York reported the greatest number, nine sites, and a total attendance of 280.
- ** Confirmed attendance totaled 3,015 (bringing the Department of Energy's investment to less than \$34 per person); Montana reported the lowest attendance, 6.
- ** Overall, the teleconference received high ratings: Excellent -- 18 percent; Very Good -- 53 percent; Good -- 24 percent; Fair -- 3 percent; and Poor -- 1 percent.
- ** A majority of the audience, 66 percent, had never previously participated in a teleconference.
- ** Larger majorities felt the presenters were effective (96 percent), the content of the presentations was informative (96 percent), and they would use the information provided by the teleconference (97 percent).
- ** Eighty-five percent of the viewers felt the teleconference had met their needs and expectations; 79 percent felt their questions were answered satisfactorily.
- ** Most viewers learned about the teleconference from an invitation (78 percent). Others got involved by word-of-mouth (10 percent), newspaper (10 percent) or other means (2 percent).
- ** Most, 87 percent, indicated that they knew more about the Clean Air Act Amendments of 1990 and the National Energy Policy Act of 1992 after viewing the teleconference; some, 55 percent, indicated they were already taking steps toward compliance; few, 30 percent, indicated the requirements would pose a great burden to their organizations.
- ** A majority reported their downlink facilities were appropriate (97 percent) and that their on-site facilitators kept the sessions interesting (88 percent).

INTRODUCTION

Background

The United States is currently in a period of transition. Issues of resource sustainability, energy independence and environmental quality have combined to force the transportation sector to find alternative fuels. At the national level, the Clean Air Act Amendments of 1990 (CAAA) and the Energy Policy Act of 1992 (EPACT) place new requirements on the use of alternative fuel vehicles throughout the country. The need for public information, particularly for those fleet owners and managers who will be affected in the near term, is critical.

Individually, states cannot identify and pursue every appropriate technology that a fleet manager may wish to consider when faced with making a change to alternative fuel(s); the same is true of industry. States must choose among competing proposals to select a limited subset for initiation or continuation; again, the same is true of industry. The competition for shrinking resources makes it imperative that avenues are presented to share information and publicize alternative fuel strategies that work. That is why the Pennsylvania Energy Office (PEO) requested funding from the U.S. Department of Energy (DOE) Region 3, Philadelphia Support Office (PSO) to conduct a National Alternative Fuel Vehicle (AFV) Teleconference, the necessary vehicle for sharing a great quantity of information with a large, interactive audience.

The scope and nature of services required to produce a National AFV Teleconference included a sound understanding and knowledge of a broad array of advanced communications techniques, the AFV requirements mandated by the CAAA and EPACT, existing federal and state AFV programs, and current AFV technologies. The PEO's ability to meet these requirements was based on experience in scripting, directing and producing numerous award winning video productions; developing and, since 1988, conducting an AFV program for both private and government fleet owners; and maintaining an active role on numerous committees of the Commonwealth's Clean Air Inter-Agency Task Force. In addition, the PEO's executive director was then serving as chairman of the National Association of State Energy Officials' (NASEO) Alternative Fuels Task Force and as a member of the President's Federal Fleet Conversion Task Force.

All of these factors combined to make the PEO a desirable candidate to produce an AFV teleconference for the PSO and DOE.

Project Management

As an agency charged with developing energy policy for this state as well as being a subsidiary of a fleet operator who must comply with the EPACT and CAAA mandates, the PEO understood the need for a quality teleconference which would provide practical and realistic information. To this end, the PEO assembled an in-house support staff experienced in conducting teleconferences, public awareness campaigns and contract management. The project manager was the primary interface with PSO, provided direction to the team and was accountable for work performance and delivery of services.

This report describes the teleconference production and delivery process. Copies of the materials referenced in this report are included in the Appendices. (Note: for purposes of this report PSO will refer to the Region 3 Philadelphia Support Office and DOE will refer to Department of Energy headquarters.)

PROGRAM EXECUTION

Program Initiation

In July 1993, the PEO submitted an unsolicited proposal to the PSO, requesting \$100,000 to conduct, in collaboration with the PSO, a National AFV Teleconference that would take place in May of 1994 (*Appendix A-1*). After receiving verbal confirmation from the PSO later in July 1993 that DOE was interested in pursuing this project, the PEO requested authorization to incur up to \$44,000 in pre-award costs (*Appendix A-2*). Authorization in the form of a \$44,000 Letter of Credit was granted on July 30, 1993 (*Appendix A-3*). August 1, 1993, DOE acknowledged receipt of the proposal (*Appendix A-4*). On September 27, 1993, the PEO received the Notice of Financial Assistance (*Appendix A-5*). On November 3, 1993, PSO increased the PEO's Letter of Credit to \$100,000 (*Appendix A-6*).

The PEO recognized that both it and the PSO had specific capabilities and resources that, when combined, could provide a quality program. However, the issues related to producing a national teleconference are highly complex and, although the depth of the PEO and PSO staff experience is substantial, the PEO decided to collaborate with the Pennsylvania Public Television Network (PPTN) and its Harrisburg affiliate, WITF, to ensure delivery of the highest quality production possible. PPTN is respected nationally -- though many may not be familiar with its name -- for its contribution to national children's television, *Mr. Rogers' Neighborhood*. A memorandum of understanding was issued to PPTN in October 1993 (*Appendix B-1*). PPTN's

Harrisburg affiliate, WITF, had been previously recommended to the PEO by the network (Exhibit B-2).

After consultation with PPTN, the PEO recommended Tuesday, May 17, 1994, as the date of the teleconference. The PEO proposed starting the teleconference at noon Eastern Time (ET) [9:00 a.m. Pacific Time (PT)], breaking for 60 minutes at 1:30 p.m. (10:30 a.m. PT), continuing from 2:30 p.m. (11:30 a.m. PT) until 3:30 p.m. (12:30 p.m. PT). The PEO recommended that the 60-minute breakaway be used by local downlink sites for concentrated discussions on AFV issues affecting those areas.

The PSO held all meetings it deemed necessary with the teleconference advisory committee (*Appendix C-1*). This committee had been created by the PSO in June 1993 (*Appendix C-2*). Other than the initial meeting, the PEO was unable to attend any of those meetings (*Appendix C-3*) because of commitments to other DOE programs. However, the PEO did provide copies of all pertinent correspondence to the advisory committee as directed by the PSO.

Program Promotion

Stimulating awareness of this teleconference was a tremendous undertaking. In order to convince the state energy offices (SEOs) that this was an effort they should support, the PSO took an active role to elevate it to a top priority among the support offices. PSO brought together representatives who had been charged with teleconference promotion from each support office and kept them apprised of activities through conference calls and monthly faxed up-dates (*Appendix D*).

To maximize participation by the states and encourage a successful project, PEO used its executive director's positions with the NASEO Alternative Fuels Task Force and the President's Federal Fleet Conversion Task Force to promote, to encourage and to develop state involvement in this project. The PEO executive director made a presentation about the May 1994 National AFV Teleconference at the September 1993 NASEO meeting to encourage states to be active in the delivery process (*Appendix E-1*). In October 1993, the PEO drafted a letter for the DOE Acting Assistant Secretary's signature to each SEO director, requesting a single staff member be named as contact for the teleconference. This letter included a fax form to aid and to simplify the SEOs' responses (*Appendix E-2*). Eventually, 46 SEOs participated in the AFV teleconference (*Appendix E-3*) and a number of them operated more than one downlink site in their states (*Appendix E-4*).

As soon as Tuesday, May 17, 1994, had been selected and the target audience had been refined, the PEO began preparing materials for the SEOs to use in soliciting participation by the identified targets and, later, to locate an appropriate downlink site. Each month, December 1993 through May 1994, the SEOs received a newsletter prepared and distributed by the PEO (*Appendix F*). The SEOs were responsible for identifying and soliciting participation by targets within their states.

The PEO prepared advertising materials and distributed them to national organizations such as NASEO, national utility and fuel provider organizations, *Conservation Update*, *Energy User News*, *The Energy Report*, etc., to solicit support and wider participation (*Appendix G-1*). *Appendix G-2* illustrates how this information was used. The PEO also prepared a flyer for use by the support offices and the SEOs (*Appendix G-3*).

When DOE commissioned the National Alternative Fuels Hotline to produce 5,000 copies of a special package of alternative fuels information that would be distributed by the SEOs on the day of the teleconference (*Appendix H-1*), the PEO worked with PSO to develop a means of allocating equitable portions to each SEO. Because the SEOs reported that their expected attendance would exceed the amount available, a formula based on transportation energy consumption by state was used to determine the quantity each state would receive (*Appendix H-2*). The PEO also provided each SEO with appropriate quantities of a special edition of the agency's *ENERGY* magazine which was dedicated to alternative transportation fuels (*Appendix H-3*).

Finally, the PEO promoted the AFV teleconference by following up with SEOs at each step via fax and telephone to maximize involvement. SEOs calling with questions received responses the same day the inquiry was received.

Production

Simultaneously, the PEO worked with WITF to develop the teleconference video package. The PEO worked with WITF's producer in all facets of program development, including organization and scripting. The PEO and PSO provided the assigned producer with all necessary graphics and related information to aid in the construction of the teleconference.

In December 1993, the PEO's executive director first approached Sec. O'Leary with a request for her to tape a message for inclusion in the teleconference (*Appendix I-1*). In March 1994, DOE requested the PEO survey the states to determine the composition of the expected audience as a means of designing the Secretary's message

(Appendix I-2). This survey was completed via fax and telephone and the data was forwarded to DOE (Appendix I-3). Having had no confirmation from DOE as to when the Secretary would be available to tape, in April 1994 the PEO requested that Assistant Secretary Christine Ervin tape both opening and closing messages to be used in the event the Secretary would not be made available. Ervin's messages were taped in April 1994. In May 1994 the Secretary was able to tape an opening message.

Starting in January 1994, the PSO invited nationally recognized experts to appear on the AFV teleconference broadcast; most panelists were confirmed by March 1994 (Appendix J-1). In February, the program agenda was roughed out (Appendix J-2). After numerous discussions, the PEO offered a revised program in March, which was accepted and implemented. The PSO provided material to be used during the "Fact Breaks" (Appendix J-3). The final program was revised in May due to staff changes at DOE (Appendix J-4). The PSO contacted and made arrangements with five *Clean Cities* participants to take part in the teleconference (Appendix J-5).

The PEO handled the Harrisburg housing arrangements for all teleconference participants. Numerous communications were necessary to prompt participants to make their reservations (Appendix K-1). The PEO also provided transportation between the Harrisburg hotel and WITF and WITF and the airport (Appendix K-2).

In April 1994, the PEO conducted a survey of all SEOs to determine what information to include in the "State Programs" section of the AFV teleconference (Appendix L-1). A total of 21 states responded (Appendix L-2). The results were used to craft the script for this section (Appendix L-3).

The PEO staffed the 1-800 switchboard at WITF on the day of the teleconference. A total of 28 telephone calls were answered on the air (Appendix M). More telephone calls were actually received, but after screening to determine the theme of the question and origination of the caller, not all calls were accepted. Every effort was made to have all themes answered while preserving a good geographic mix. Calls came from all over the country including Hawaii and the Virgin Islands.

A number of SEOs requested video tapes of the teleconference (Appendix N-1). The PEO made arrangements with WITF to handle distribution (Appendix N-2). Later, DOE decided to make copies of the tape available to each SEO (Appendix N-3).

Evaluation

In February 1994, the PEO evaluation staff developed evaluation forms to be used on the day of the teleconference. PSO accepted the language in March 1994. The forms were color-coded, blue for viewers and gold for facilitators, to ease the tabulation process (*Appendix O-1*). Results of the evaluation are included as *Appendix O-2*. Please note, that although every effort was made to receive data from all participating SEOs (*Appendix O-3*), four -- Arkansas, South Carolina, Texas and Virgin Islands -- did not comply.

From the information returned, a total of 84 down-link sites in operation on May 17, a confirmed attendance of 3,015 and 1,061 (or 35 percent of attendance) completed evaluation forms are documented. From the completed evaluation forms which were returned to the PEO, ratings for presenters' effectiveness, usefulness of information received and presentation content all scored in the 96-97 percentiles. Seventy-one percent of those in attendance gave the teleconference an overall rating of *Very Good* or *Excellent*, 24 percent rated it *Good* and 4 percent rated it *Fair* or *Poor*.

Universally, the audience agreed on the high quality of Rich Adams' performance as moderator and Dr. Brian Davis' presentation. The audience indicated that a teleconference was a good medium for distributing this information and suggested that DOE use this medium again.

The audience was somewhat critical of what it labeled as "bureaucrat" presentations and "pat" responses. Generally, the audience would have preferred more hard information and less program philosophy: a strong need for specific answers was expressed. Most mid-western states indicated more information on biofuels, less on natural gas and electric vehicles would have been appreciated.

The reviews were mixed on the length of the teleconference and on the number and length of breaks. Reactions seem to indicate that these comments are tied directly to the quality and content of local breaks. Those SEOs which offered detailed, well-organized local programs returned evaluations recommending longer breaks; those which offered no or a limited local program returned evaluations recommending the elimination of the break.

Similarly, those SEOs which diligently began making preparations for the teleconference in December 1993 when they began receiving their monthly newsletters reported a better experience than those SEOs which seemed to change personnel assignments on a monthly basis. The former gave high marks to the quality of

information provided; the latter indicated they hadn't had enough time to make preparations.

Although all cost data provided by SEOs has been included (*Appendix O-4*) the numbers do not seem consistent from state to state, therefore, no conclusions have been drawn and the PEO recommends this data not be used. It is included with this report only to demonstrate that the PEO did attempt to collect this data as requested by the PSO.

EXPENDITURES

Personnel Hours

The PEO personnel time necessary to deliver this program was greater than the 919.2 hours that were anticipated or budgeted. As of June 10, 1994, the PEO had dedicated 1,316.5 hours to this program (*Appendix P*). Those numbers represent only time expended in the production of the teleconference. They do not include the hours spent by PEO in delivering the teleconference to targeted viewers within Pennsylvania.

Costs

As of June 30, 1994, the PEO had expended \$98,728.79 of the \$100,000 awarded. There are still pending expenses: personnel time to collect and analyze data from the SEOs, to prepare the final report, etc. Because Pennsylvania's budget process requires that all money which is to be expended by a Commonwealth agency, regardless of its source, be appropriated by the General Assembly, the PEO was not able to spend any of the \$100,000 awarded by DOE through the PSO in September 1993 until June 15, 1994, when it was finally appropriated to the PEO by the General Assembly (*Appendix Q-1*). This is why the three quarterly financial status reports (FSRs) submitted in January, April and June show all outlays charged to the PEO's state appropriation, rather than the federal award (*Appendix Q-2*). The next FSR, to be filed in October 1994, will reflect the shift from the PEO's state appropriation to the federal award.

(Note: The final Federal Assistance Program/Project Status report is included as *Appendix Q-3*. Because of the cooperative nature of this project, it was agreed between the PSO and PEO project managers that there was no need for quarterly reports because the two managers were, by the implicit requirements of teleconference production, working so closely together.)

PROGRAM RESULTS

Findings

The PEO believes that it provided the DOE with a quality program that was practical and responsive to DOE's needs: all activities were efficiently planned and executed; all work, particularly the integration of ongoing and concurrent efforts with PPTN, WITF and PSO, was well coordinated, monitored and controlled, and resulted in professional and timely delivery. Potential problems and corrective actions were addressed at the earliest point in the process.

Major program findings:

1. Teleconferencing is an excellent means of delivering information that is needed by a large number of people who are spread throughout the United States. The majority of people who viewed the AFV teleconference and completed the evaluation forms recommended that DOE continue to use this medium.
2. In general, we are a nation of sophisticated television viewers. Therefore, in order to hold the audience's attention it is important to use familiar video tools (ie. the video packages which introduced each segment were reminiscent of television magazine production; use of a professional production company and a professional anchor provided the level of sophistication one expects when watching serious television).
3. Use of the fax to distribute information when all SEOs are involved greatly improves delivery of information. Each SEO receives its information on the same day. Less time is lost in the delivery.
4. SEOs prefer to receive information (hand-outs, flyers, etc.) in the 8.5"x11" format. That way, if DOE cannot provide enough copies of a particular item to meet a state's demand, it is possible for the state to make attractive copies in-house.
5. Even starting at noon Eastern Time creates a challenge for participation by Alaska and Hawaii where it is only 6:00 a.m. A 1:00 p.m. start time would be better.
6. Viewers prefer to hear more from the "Do-ers" and less from the policy-makers.

7. The quality of the relationships between the Support Offices and their SEOs varies greatly around the country: some states had no idea who their teleconference contact was; others had already spoken with their contact before it was recommended that they do so.

Recommendations

1. DOE should create a master calendar of activities being conducted by the states on its behalf. Numerous times throughout the course of this contract the PEO found itself in the position of being expected to deliver multiple programs (ie. a regional Energy Emergency seminar, the National Energy Awards program, the Green Room Hearings, preparations for Motor Challenge, and the teleconference) on conflicting/overlapping schedules, where a simple shift of one or two days may have resulted in a superior product. At other times, Headquarters staff would make commitments for the same day to several projects in opposite ends of the country, resulting in conflict among the support offices or SEOs. Using a master calendar could help eliminate this conflict.
2. DOE should create a video masters library in which a high quality (1-inch, Beta Max, or the current industry equivalent) copy of all of the programs produced by the agency are kept. When the PSO and PEO requested a broadcast quality copy of the recently produced *Clean Cities* tape, none of the principals involved with that project were able to produce the tape. As a result, the program could not be broadcast. Creation of a central repository may eliminate this problem, thus eliminating the costly need to replicate original work.
3. Interest in alternative fuels was far greater than originally anticipated by the PSO or PEO. DOE should offer additional teleconferences, concentrating on specific details which were mentioned in this program; ie. *Clean Cities*, the conversion process, available vehicles, etc.
4. If DOE or PSO anticipates that it may wish to work with the PEO during a subsequent state fiscal year (July 1--June 30) on a project for which additional funding will be provided, the PEO should be apprised of this prior to June 1. This will enable the PEO to have the funding projections included as part of its up-coming appropriation from the General Assembly, thus diminishing potential financing difficulties. Should the

project not come to fruition, no penalties would be assessed against either PEO, DOE or PSO.