

# APPENDIX D: Recruitment Script

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CEC-200-2023-017-APD

## Telephone call script

The following is a version of the call script to solicit business to participate in the CEUS survey.

### 1. FINDING A VALID CONTACT AND SURVEY-SITE VALIDATION

*To the person who answers the phone when there is no known survey-site contact name:*

Hello. I am calling on behalf of The California Energy Commission and [Utility]. Could you please tell me the name of the (manager, building engineer, property manager) for your business at this location [service address]? Are they available?

*To the person who answers the phone and there is a known contact name:*

Hello. Is [Survey-Site Contact Name] available?

*To Survey-Site Contact:*

Hello, my name is \_\_\_\_\_ with ADM. I'm calling on behalf of the California Energy Commission and [Utility]. The Energy Commission recently sent you a letter or email about an energy survey of your commercial establishment. Did you receive it? (if no, then offer to email them a copy after you end the phone call).

The Energy Commission is conducting equipment and facility surveys of commercial customers in the area. This will provide the Energy Commission with information which they can then use to plan future energy needs for California. Would you be able to participate in this survey?

If the caller inquires, direct them to the CEUS specific ADM website. Inform them that the field surveyors' photos are on the website.

*If the survey-site contact does not want to participate, note the reason.*

If the survey-site contact is willing to participate but wants to talk to a utility representative, then give the following contact information and tell them to reference the CEC CEUS project:

CEC Website: <http://www.energy.ca.gov/ceus>

[UTILITY]: [Utility Contact Name] [Utility phone number]

ADM's website at [www.admenergy.com/ceus.html](http://www.admenergy.com/ceus.html)

*If the survey-site contact is willing to participate, ask the pre-qualification questions.*

Thank you for agreeing to participate in the survey. I would now like to ask you a few specific questions about your business.

(Verify the business name and location)

Is the name of your business [Business Name]? \_\_\_\_\_

Is your business located at [Service Address]? \_\_\_\_\_

If the customer name is different (and not just a different version of the name or a DBA) but service address is the same (i.e., business has changed): I'm sorry, but your business facility does not meet the requirements for the survey. Thank you for your time. (Note the disposition as "different business/customer" and explain in comments)

## 2. PRE-QUALIFICATION SCREENS

*Now establish if the survey-site meets the "minimum building criteria," i.e., is a commercial building and not a non-building (e.g., stand-alone parking garage, radio tower, pump, etc.):*

Is more than 50% of this floor area devoted to manufacturing, industrial, or agricultural activities or residential living areas? \_\_\_

Is the space occupied by your business less than 100 square feet? \_\_\_\_\_

*If the above survey-site meets either of these criteria, ("Yes" answers to either question) then:*

I'm sorry, but your business facility is outside the scope of this survey. Thank you for your time. (Disposition the survey-site as a non-commercial or non-building survey-site and explain in comments.)

*Next ask the survey-site contact about survey-site accessibility, criteria are that more than 50% of survey-site must be accessible to surveyors or information on that section can be provided by the survey-site contact:*

To do the survey, a surveyor from [ADM, Matrix, or DAV] will come to your facility. They will be collecting information on your facility's operation, survey-site activities, and equipment. This is a detailed survey, so we will need access to all spaces to measure square footage. We would also like to have some time to talk with the building technical staff or maintenance people, if possible.

Is the majority of your survey-site accessible to a surveyor (i.e., no high-security or limited access areas such as clean rooms)?

*If the above survey-site would not be accessible to a surveyor or they won't provide information about more than 50% of survey-site, then drop:*

I'm sorry, but your survey-site is outside the scope of this survey. Thank you for your time. (Disposition: this survey-site has limited access.)

*Identify if the assigned NAICS code is correct or ask questions to find a better NAICS description.*

We have your business listed as a [ADM NAICS description]. Is this correct or is there a better description? If they have a better description, then type it in and use the CEUS Tool™ lookup for the code number. Enter the NAICS code number.

### 3. SCHEDULE THE APPOINTMENT

*If the survey-site passes the above screens:*

I would like to set up an appointment to survey your business.

I have an opening in my schedule for \_\_\_\_\_ or \_\_\_\_\_. Would one of these times be better for you?

*Set up an appointment date, time, and place and then verify the following with the survey-site contact:*

*Survey-Site Contact name spelling*

*Survey-Site Contact telephone number(s)*

*Survey-Site Contact email address*

*Business name and spelling*

*Service address*

*Special instructions for the survey-site visit (where to meet, badging required, etc.)*

### 4. GET ADDITIONAL INFORMATION NEEDED TO ASSESS SURVEY TIME

*Ask about survey-site configuration:*

I just have two more questions to ask you. Which of the following best characterizes your business facility?

- a) A suite or suite in a strip-mall;
- b) Tenant in a multi-floor/high-rise building;
- c) An entire building;
- d) A multiple building business or campus;
- e) Building owner with some space leased to tenants; or
- f) Other (describe) \_\_\_\_\_.

If the answer is (d) then the site will be classified as an assigned site and assigned to an engineer.

*Ask what is the major type of business activity conducted at this location:*

Compare customers answer with utility NAICS code and if different make a note for the surveyor.

*Get estimate of business size/total floor area:*

Can you give me a floor area estimate for the space your business occupies?

\_\_\_\_\_

*Before ending the conversation, request that blueprints or floor plans and a copy of one month's energy bills are available on the day of the survey. Energy bills will be used to validate multiple accounts grouping. Also, make sure they have a copy of the Recruitment Letter, and if they don't, be sure to email them a copy.*