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**Poster Title:** Come One, Come All! Innovative Recruitment Strategies for Residential Fieldwork

**Abstract:** Utilities across the country are increasingly looking to improve the accuracy of their energy savings claims, in particular to update measure load shapes as they seek to better integrate energy efficiency with increasing renewables penetration. Some are conducting primary load shape research, including on-site surveys and equipment monitoring. These research efforts help to ensure peak savings claims are accurate.

This poster will present information on how we successfully managed complicated recruitment efforts for two large-scale residential metering studies undertaken in California and the Pacific Northwest. The main objective of this poster will be to share successes and challenges associated with various recruitment practices across the two studies. We will also share lessons learned associated with adapting recruitment processes, being proactive and using up-to-date software and IT to develop innovative tracking tools.

We developed tailored strategies to meet the recruitment and retention challenges of each study. In both cases the strategies were created to be adaptable to unforeseen circumstances or changes to the study design or schedule. This flexibility allowed us to adjust our procedures based on revelations from the actual recruitment implementation.

Key differences between the two studies led to changes in our initial plans as well as different adaptations over the course of recruitment to-date. Some of the key differences between studies that we will contrast in the poster included:

- Full day vs. half day equipment installations
- Incentive amounts
- Equipment obtrusiveness on in-home aesthetics
- Study objectives
- Initial recruitment outreach (letter versus post card)

Furthermore, both studies involved the same type of initial research pool from which we recruited from – in home equipment and building characteristic surveys. However, for one of the studies the research team was consistent from the survey effort to the energy monitoring effort; in the other study the initial in-home survey was managed and conducted by a different firm. Our initial concern that the a lack of familiarity with our research team would lead to lower recruitment rates (and thus higher costs and potentially increased self-selection bias) led our team to devise new strategies to meet this particular challenge.

This poster will include a flow chart that walks through the two recruitment processes and highlights key differences between the two field studies and recruitment efforts. We will highlight what was adapted and why it was adapted from one field study to the other. We will also share an overview of how we successfully tracked our onsite appointments using an in-depth tool to coordinate all appointment activities including: onsite visit scheduling, engineers schedules and assignments, and electrician coordination. Identifying new and innovative strategies to engage residential customers can help ensure future recruitment efforts are efficient, thereby ensuring efficacious use of resources and reducing concerns about study bias. By comparing two study contexts, the results will be even more useful for other jurisdictions since the contextual considerations vary greatly for field studies.