



2025 CBSA Webinar #4

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Agenda

1. Background
2. Westat Update
3. Michaels Energy Update
4. Ways to engage
5. Q&A



Background



NEEA's Business Plan: Stock Assessments



Commercial



Multi-family

“This will be the first cycle that **natural gas funding** supports the stock assessments.”



CBSA Workgroup

Purpose: The Commercial Building Stock Assessment (CBSA) Work Group will provide NEEA with decision support and coordination on key components of the study's design and implementation.

- Avista
- Bonneville Power Administration
- Cascade Natural Gas
- Clark PUD
- Energy Trust of Oregon
- Idaho Power
- Northwest Natural Gas
- Northwest Power and Conservation Council
- Portland General Electric
- Puget Sound Energy
- Regional Technical Forum
- Seattle City Light
- Snohomish County PUD

Commercial Building Stock Assessment (CBSA)

Vision Statement:

“Support the region's energy efficiency, resource planning, and utility objectives through a regionally representative, statistically rigorous, and comprehensive assessment of commercial and multi-family buildings.”

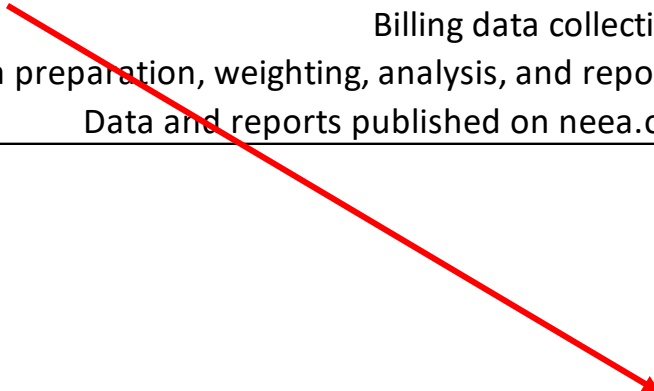


Westat Update



Study Planning

| | 2023 | 2024 | | | | 2025 | | | | 2026 | | | |
|---|------|------|----|----|----|------|----|----|----|------|----|----|----|
| | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 |
| Study planning | | | | | | | | | | | | | |
| Building characteristic data collection (site visits) | | | | | | | | | | | | | |
| Billing data collection | | | | | | | | | | | | | |
| Data preparation, weighting, analysis, and reports | | | | | | | | | | | | | |
| Data and reports published on neea.org | | | | | | | | | | | | | |

- 
- Recruitment prep & launch
 - Data collection prep & launch



Recruitment Activities



Recruitment Timeline

| | 2023 | 2024 | | | |
|---------------------------------|------|------|----|----|----|
| | Q4 | Q1 | Q2 | Q3 | Q4 |
| Preparing recruitment materials | | | | | |
| Reviewing sample | | | | | |
| Regional utility communication | | | | | |
| Remote locating | | | | | |
| Initial recruitment | | | | | |



Recruiting



- Locating and identifying building respondent(s)
- Explaining the study
- Gaining cooperation
- Giving instructions for participation
- Ensuring respondents complete all survey tasks

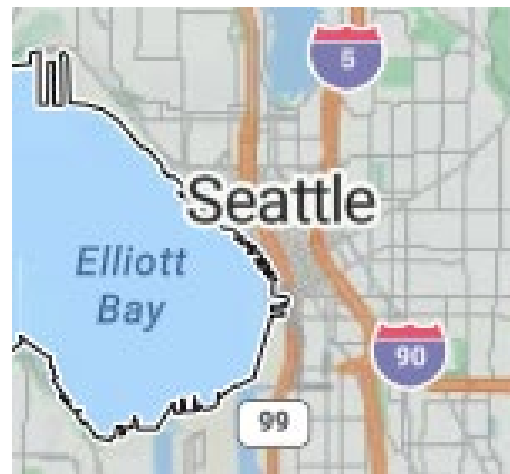


Advance/Remote Locating

- Dun and Bradstreet
 - Contacts for 6% of cases
- Web scraping for contact information
 - Contacts for 73% of cases
 - BUT primarily general numbers
- Experienced tracing team
 - Mixed results
- Ongoing tracing by recruitment specialists
 - Requires iterative effort

Wave 1 Recruitment

- 23% of sample
 - Seattle
 - 12 census tracts
 - 934 buildings
 - Portland
 - 7 census tracts
 - 373 buildings





Wave 1 Recruitment

- Remote recruiting
 - Initial mailings
 - Call guides for telephone outreach
 - Email templates for email outreach
- In-person recruiting
 - Locating & building eligibility
 - Recruiting & in-person follow-up

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Web Survey

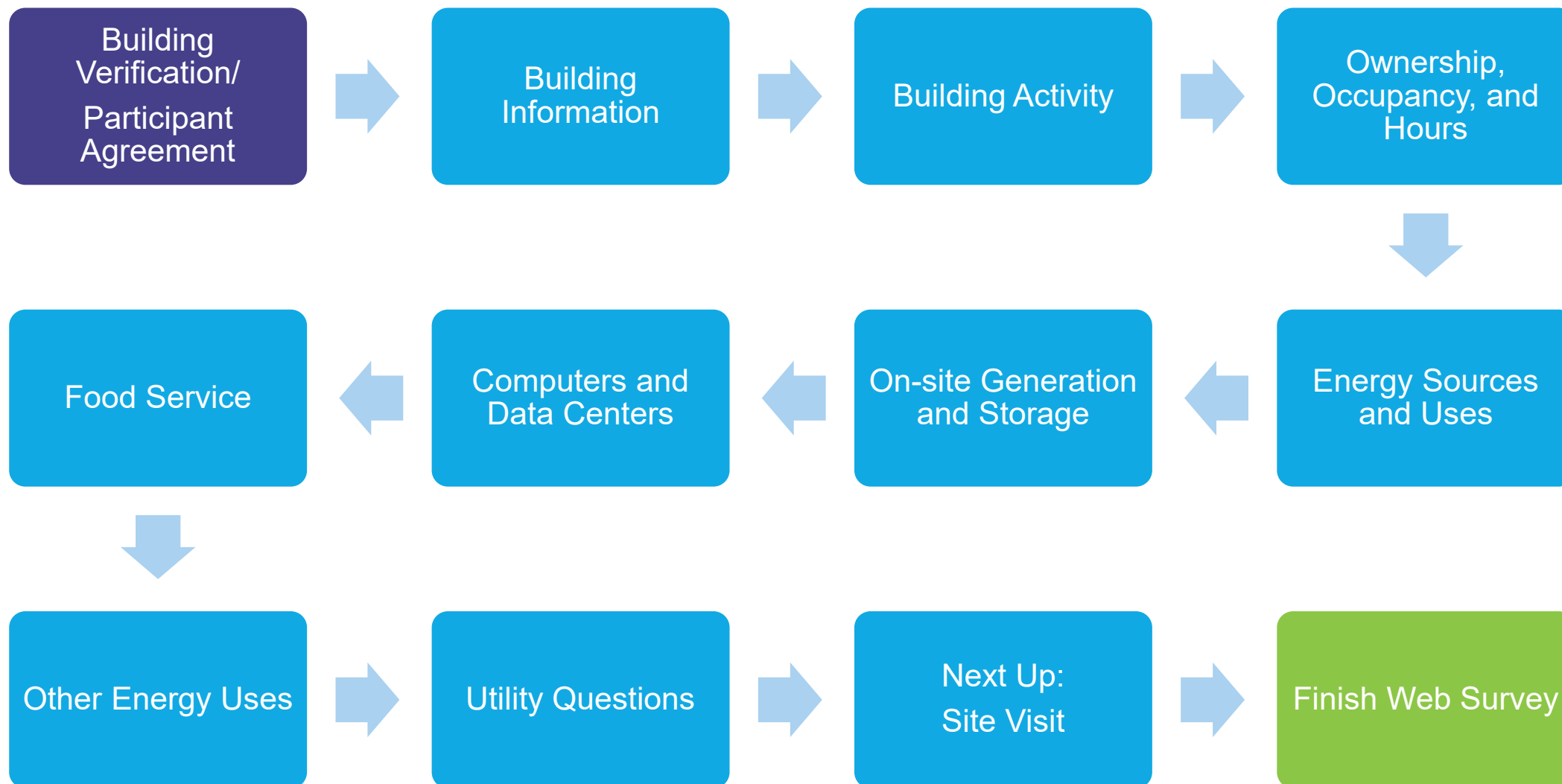
2025 CBSA Web Survey



Web Survey

- Respondent(s) at building use their own device to access and complete survey
- Self-administered questionnaire with items formatted as standard Q&A
- Web survey must be completed before site visit is scheduled

Web Instrument Flow





Billing Data



Billing Data Collection

- After site visits are completed, collect billing data directly from EL/NG utilities
- Identify utility name(s) in web questionnaire
- Collect account number and consent after web survey completion





Billing Data Authorization Process

- Manually email authorization form to identified building contact upon completion of web survey
- Use DocuSign to record electronic signatures for billing data authorization form
- Follow up with hard-copy form, if DocuSign is outstanding at time of site visit





Production Update



Wave 1 Production Update

- Cases worked
- Web completes
- Billing release completes
- Site visit completes
- Ineligible cases





Site Visits

Agenda



Site Visits



Training



Site Visit Status



QA/QC



Thoughts from the field



Q&A

Site Visits – The Big Why

- What is a site visit?
 - Tours of facility to info about capture energy-using equipment
- Why a site visit?
 - Web Survey Data validation
 - Confirm, adjust, or omit
 - On-site Data
 - Web surveys are high-level
 - In-depth, up-to-date data collection
 - Additional information
 - What was missed
 - Exit interview



Site Visits – Equipment

- Stepstool/ladder
 - If possible
 - Site contacts *may* provide
- Insulated screwdriver set
- Laser distance meter
- Safety gloves
- Eye protection
- Head lamp or flashlight
- Pen light



Site Visit – Photos



Site Visits – Field Training

- 8 days
 - 7 sites
 - 4 Multifamily
 - 1 Public Assembly
 - 1 Retail
 - 1 Office



Site visits - Status



SEATTLE

- 11 complete
- 2 scheduled
- 10 recruiting

- 8 complete
- 1 scheduled
- 3 recruiting

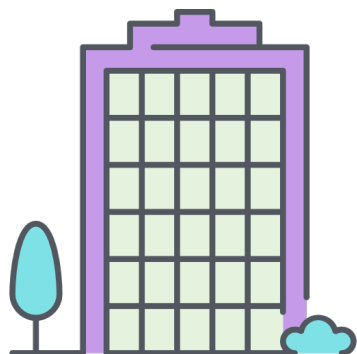


PORTLAND

Completes by Type



2



2



1



1



9



2



1



1

Scheduled by Type



1



1

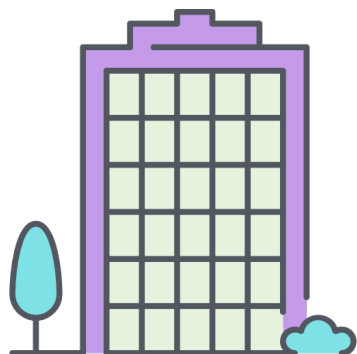


1

Recruiting by Type



1



1



1



3



4



1



1



1

Quality Assurance & Quality Control

Workbook Checks

- Export data into Excel workbook
- Perform automated checks using Excel formulae
- Perform manual checks with photos as needed

Review and Updates

- Give feedback to field techs and request updates
- Submit updates
- Maintain change log

Some thoughts...

- Most our site contacts are helpful, some know more than others, building plans can be helpful

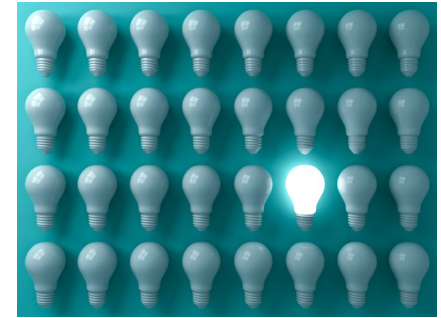
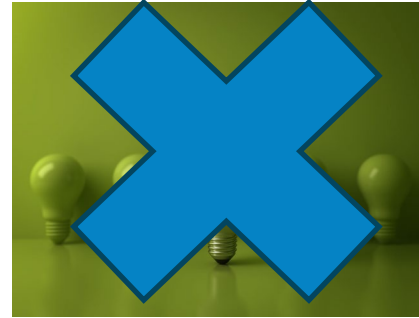
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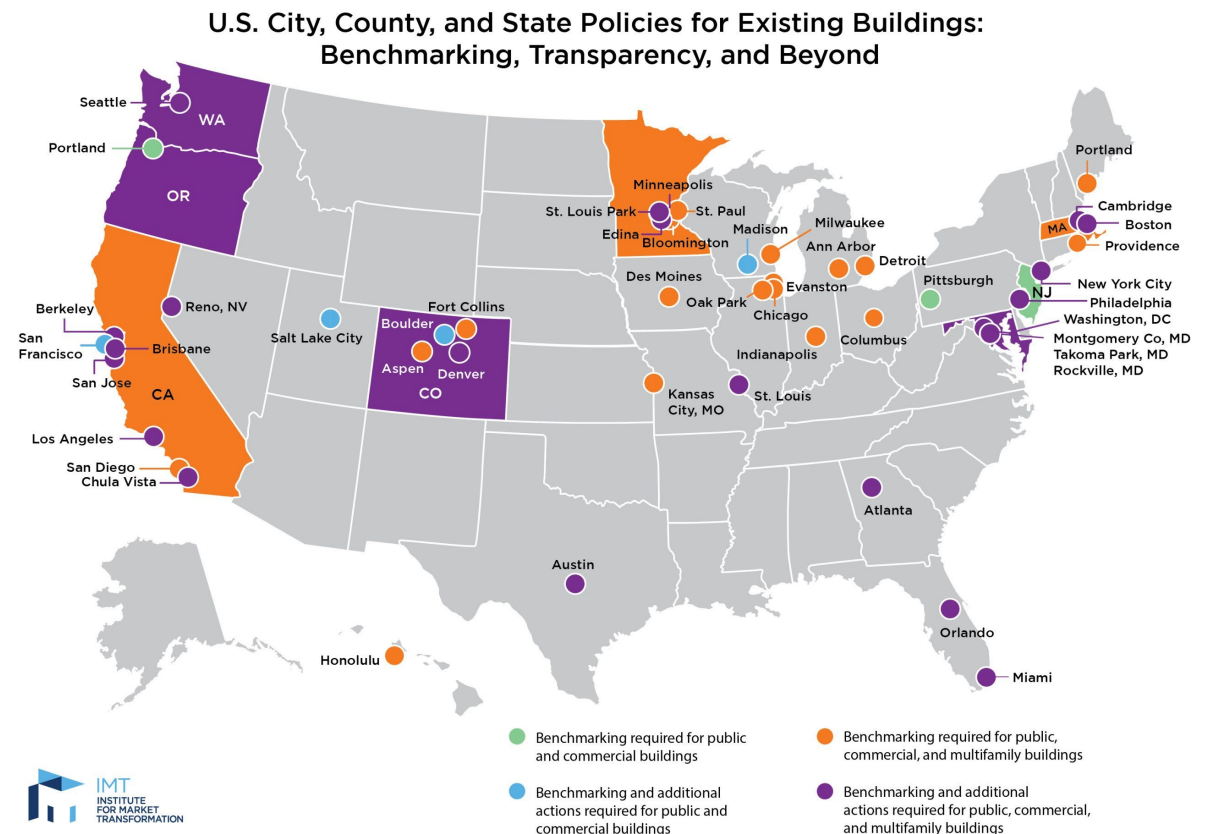


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- Most our site contacts are helpful, some know more than others, building plans can be helpful
- We've had a few grumpy participants
 - As energy use benchmarking and building performance standards become more common, possibility for confusion and likelihood of refusal increase



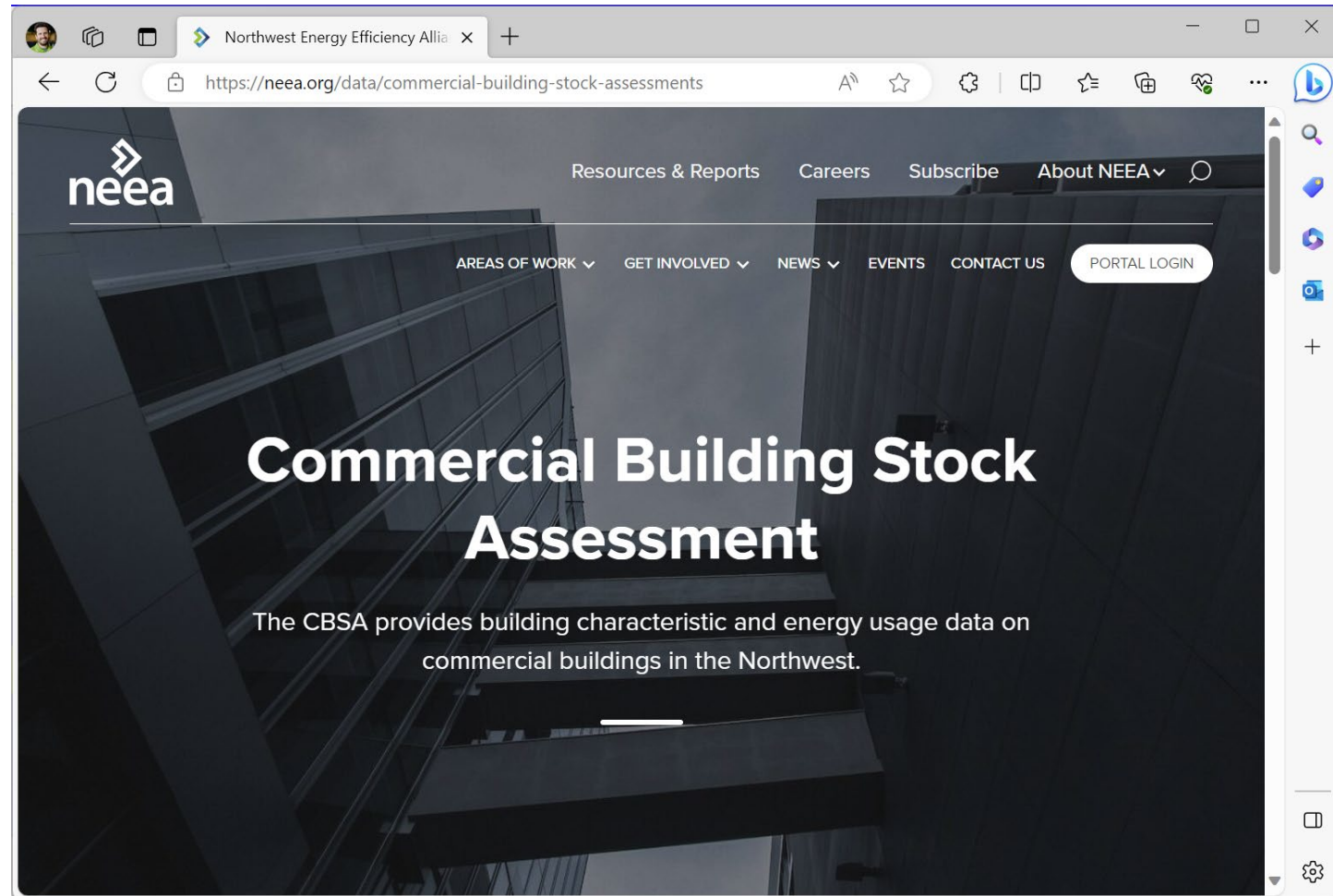


Ways to Engage



Ways To Engage

1. Webinars
2. List serve:
neea.org/subscribe
3. neea.org/cbsa
4. neea.org/cbsa2025



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