SITE VISIT PREPARATION

LOGISTICS
- Exchange cell numbers and email addresses with site contact person
- Parking instructions/options
- Intercom codes for entrance to facility

SELECTION OF SAMPLE UNITS
- Select sampling of units representative of unit types, conditions, sizes, and locations of no less than 10% units
- Work with Green Retrofit Program to identify which commercial spaces will be inspected
- Arrange access with residents through property representative

RESIDENT NOTIFICATION/INVOLVEMENT
- Formal notification of residents regarding inspection
- Formal notification of commercial space tenants
- Select best approach to obtain resident input: individual interviews, resident representative/s, or small group

DEVELOPER
- Representatives from property management, O&M and resident services to attend kick-off meeting.
- Staff person to accompany inspection team on visits to residents’ units
- Translator if needed to conduct interviews with residents
- O&M staff person who is most knowledgeable about the building and its service history available for interview
SITE VISIT PREPARATION

INFORMATION NEEDED AT SITE VISIT

- As-buils; one copy to review at the site (do not require a separate copy).
- Any specifications manuals
- Physical Needs Assessments conducted within the past 10 years
- Description and Costs (actual or estimates) of each retrofit, remodel, or improvements within the past 5 years
- Renewable energy feasibility assessments i.e. solar PV, HW
- All meter locations and areas they cover
- Operations & maintenance records/logs/protocols
- HVAC equipment and control systems information
- HVAC equipment repair records/log
- Pest management protocols and product information (MSDS sheets)
- Past 24 months of utility consumption and cost

ACCESS REQUIRED DURING SITE VISIT

- All mechanical rooms and all HVAC, domestic hot water, cogeneration equipment
- Elevator room/s
- Roof/s
- Sampling of residential units (see above)
- Recycling/waste disposal areas
- Electrical panel/s
- Basement
- Attic
- Commercial spaces
- Access to ladder appropriate to reach each of these spaces