



# ON-SITE VISIT GUIDELINES

## AUDITOR CONDUCT STANDARDS

The Auditor shall comply with applicable professional standards for ethics as defined by the HERS Code of Ethics and/or Building Performance Institute Code of Ethics.

## SCHEDULING THE SITE VISIT AND TENANT NOTIFICATION

The Auditor shall schedule the site visit(s) with the designated person(s) at a time that is convenient for the project contact person(s) and that will cause minimal disruption to the tenants and neighbors at the project.

Notification of tenants whose units will be inspected as part of the audit site visit will be the sole responsibility of property owner or their representative. Tenant language, safety, or behavioral issues should be addressed in coordination with the Owner or Property Manager.

## SITE VISIT PREPARATION

**C** The auditor shall complete the site preparation tasks as described in **Site Visit Preparation** (*Attachment C*).

Review 24 months of prior utility bills (including gas, electric and water) to know annual utility consumption and cost by fuel type and seasonal variations. Analyze per building space usage (residential/common space/commercial).

Review as-built drawings (if available) and any other pertinent information about the site, and the building and its systems. Review any other PNAs or Energy Audits conducted on the building.

Analyze vacancy rates (current and past 24 months)

Obtain information on any changes to the building, its systems, and its occupancy over the past 24 months.

Review Operations & Maintenance, service calls and equipment servicing records over the last 24 months.



Note: The attachments referred to in this section can be found at [www.enterprisecommunity.org/retrofittoolkit](http://www.enterprisecommunity.org/retrofittoolkit)

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## SITE VISIT

- Project Interview(s). Auditor to interview at least one of the following designated person(s): Property Manager; Maintenance Director or maintenance staff; Owner or owner representative
- Purpose of the interview(s) is to: Discuss project energy and water performance; Discuss tenant comfort, health and safety and agree on a tenant synopsis for the site visit; Discuss operations and maintenance procedures; Discuss project maintenance concerns; Address any other stakeholder questions or concerns.
- Interview to include questioning on operations and maintenance issues and will address the issues including but not limited to those in Section D. If any project team member wishes their responses to remain confidential, the Auditor shall respect those requests.

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### Safety and Code Observations at the Site Visit.

- If, during the course of the site visit, the Auditor observes building code violation or a potential threat to health or safety, the Auditor shall immediately notify the designated person(s) in the project application and/or any individuals that are present representing the owner.

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### Visual Inspection and Diagnostic Testing Protocols

- The site visit shall involve visual inspections and **diagnostic testing** of the building envelope, HVAC, combustion safety, and lighting systems. All items listed in
  - ❶ **Diagnostic Testing Guidelines** (*Attachment I*), as applicable, will be performed during the site visits.
  - Auditor shall identify and record **equipment specifications** listed on the form
    - ❷ attached as **Equipment Specifications Worksheet** (*Attachment F*). The equipment specifications will be used in the energy modeling and analysis phase of the audit.
  - If Operating parameters of HVAC equipment or lighting system are not known to a high degree of confidence and are necessary for accurate energy cost savings analysis, the auditor may suggest short term monitoring of the systems to measure the actual operating conditions. The intent is to better inform the energy cost savings analysis. The Auditor must decide what is to be observed and measured and with what confidence and precision.

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## **Dwelling Unit Sampling Protocols**

- At least one in seven of every dwelling unit type (defined as having same/similar floor plan), with representation from differing building floors and location on floor (corner/middle and orientation) shall be inspected. In no case shall the inspection of units be less than 10% of total units. A larger sampling may be necessary depending upon funding source needs and other special circumstances.
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## **Renewable Energy**

- The on-site inspection will also examine, evaluate and propose recommendations for the incorporation of renewable energy opportunities, including but not limited to, photovoltaics and solar hot water. The solar thermal analysis to estimate the amount of DHW that can be potentially offset with a solar thermal system can be performed with the proprietary F-chart software or RetScreen. PV Watts is to be used to estimate the potential electricity offset by utilization of photovoltaic panels. Utilization of other calculation tools or approaches based on accepted engineering principles is acceptable but must be approved prior to use.