

# WEATHERIZATION/ELECTRIFICATION SITE VISIT GUIDE

The purpose of this document is to facilitate comprehensive documentation of site visits when integrating electrification into conventional energy audits and home weatherization activities. While extensive, visits are not meant to be intrusive. It is crucial to maximize the information gathered in a single visit, thereby minimizing the need for multiple disruptive visits. Certain details can be obtained via phone conversations with homeowners when scheduling appointments.

While energy audits are well-established for weatherization, the practice of combining weatherization and electrification is relatively new. This tool can establish the needs assessment as rebates become available for home weatherization & equipment upgrades.



**Pre-Visit Preparations:** If possible, include general contractors or trade allies in initial visit.

*Key data points to collect:*

- Location of home, owner's name address and contact information
- Measurements and photos of home, rooms, and appliances for future reference
- Days that should be avoided on site visit(s)
- Types (electric, gas, propane) of energy use and billing history
- Annual cost of utilities



## Weatherization Assessment

*Key data points to collect:*

- HVAC system, location, type, shape, condition
- Insulation needs (i.e. units and duct work)
- Removal of any old units?



## General Home Assessment

*Key data points to collect:*

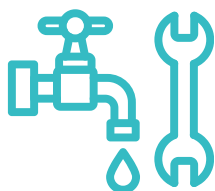
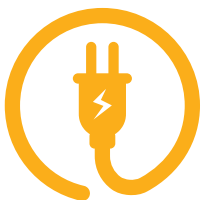
- Number of rooms & type
- Year built, square footage, exterior type, and home foundation
- Room measurements & floor plan
- Note areas that are not conditioned by heat or A/C



## Electrical & Plumbing Assessment

*Key data points to collect:*

- Electrical panel location, condition, and capacity or repair needs
- Electric meter condition or replacement needs
- Water heater type, fuel source, and location
- Laundry washer, dryer, and fuel source
- Former gas lines need to be capped?
- Removal of fuel storage?



## Flues, Vents, & Fireplaces Assessment

*Key data points to collect:*

- Take pictures and note location of flues so that professionals can understand how the systems will (or will not) operate with new electric equipment.



**A CHECKLIST MAY BE USEFUL DURING THE ENERGY AUDIT. THIS RESOURCE IS ONLY MEANT AS A GUIDE**