



SITE VISIT PREPARATION

LOGISTICS

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

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INFORMATION NEEDED AT SITE VISIT

- As-builts; 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