**Home Performance Assessment and Retrofit Report**

This report: Summarizes assessment findings,

Identifies opportunities to improve the performance of your home,

Prioritizes recommended improvements, and

Identifies energy conservation measures that have been completed by volunteers.

Customer Name: Volunteer Names:

Address:

Phone: Assessment Date:

E-Mail: Retrofit Date:

|  |  |  |  |
| --- | --- | --- | --- |
| **Air Sealing:**  | **Needs Sealing?****Yes, No, NA, or Not Checked** | **To be completed by** **Volunteers, Professional Contractor, or Resident?** | **Date Completed** |
| Crawlspace / basement ceiling |  |  |  |
| Attic hatch(es) or attic door(s) |  |  |  |
| Attic floor |  |  |  |
| Fireplace dampers and gaps around chimney |  |  |  |
| Electrical outlets and switch plates |  |  |  |
| Unfinished spaces behind cupboards/closets |  |  |  |
| Window frames  |  |  |  |
| Around window-mounted air conditioners |  |  |  |
| Around exterior doors  |  |  |  |
| Baseboards/top molding |  |  |  |
| Plumbing penetrations |  |  |  |
| Outdoor faucet  |  |  |  |
| Dryer vent |  |  |  |
| Kitchen exhaust fan |  |  |  |
| Chases  |  |  |  |
| Recessed lights  |  |  |  |
| Dropped soffits  |  |  |  |
| Plumbing vent stacks  |  |  |  |
| Duct registers |  |  |  |
| Ductwork in unconditioned space\* |  |  |  |
| Other/Comments: |  |  |  |

Description of ductwork condition and recommendations/actions taken:

|  |  |  |  |
| --- | --- | --- | --- |
| **Insulation:**  | **Yes or No** | **If No, Correction Recommendations**  | **Date Corrected** |
| Attic: Amount \_\_\_\_\_\_\_ Adequate amount? R-Value \_\_\_\_\_\_\_ Proper R-value? Installed correctly? |  |  |  |
| Knee Walls:Amount \_\_\_\_\_\_\_ Adequate amount? R-Value \_\_\_\_\_\_\_ Proper R-value? Installed correctly? |  |  |  |
| Basement and/or crawlspaceAmount \_\_\_\_\_\_\_ Adequate amount? R-Value \_\_\_\_\_\_\_ Proper R-value? Installed correctly? |  |  |  |
| Ductwork in unheated areas insulated? |  |  |  |
| Other: |  |  |  |
| Insulate water heater if in unheated location and older than 5 years |  |  |  |

**Heating / AC System: Assessment team will facilitate homeowner in getting inspection/tune-up and will investigate rebate offers through utility company.**

Main heating system is a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ System efficiency \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Age \_\_\_\_

Condition: \_\_\_\_Good \_\_\_ Needs tune-up \_\_\_ Need repair \_\_\_\_ Needs replacing

Prog therm? Y/N Filter Condition \_\_\_\_\_\_\_ Filter size \_\_\_\_\_\_ Condensate line blocks Y / N Leaks Y / N

Condensate line repaired/replaced? Y / N Filters cleaned/replaced? Y / N

2nd heating system is a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ System efficiency \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Age \_\_\_\_

Condition: \_\_\_\_Good \_\_\_ Needs tune-up \_\_\_ Need repair \_\_\_\_ Needs replacing

Prog therm? Y/N Filter Condition \_\_\_\_\_\_\_ Filter size \_\_\_\_\_\_ Condensate line blocks Y / N Leaks Y / N

Condensate line repaired/replaced? Y / N Filters cleaned/replaced? Y / N

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| --- | --- | --- | --- |
| HVAC maintenance and tune-up | Date of Last Inspection\_\_\_/\_\_\_\_/\_\_\_\_ | Date of Next Inspection\_\_\_\_/\_\_\_\_/\_\_\_\_\_ | Completed?Yes or No |

Additional recommendations for resident:

|  |  |  |
| --- | --- | --- |
| Install a programmable thermostat | Completed on \_\_\_/\_\_\_\_/\_\_\_\_ | Does This Apply Y / N |
| Add **yearly** reminder to calendar - “Annual HVAC maintenance and tune-up” | Done \_\_ |
| Add **monthly** reminder to calendar - “Check HVAC filters & clean or replace as needed” | Done \_\_ |

|  |  |
| --- | --- |
| **Refrigerator** | **Completed? Y or N** |
| Ensure that the refrigerator door seals well  |  |
| Clean refrigerator coils periodically |  |
| Check the temperature of refrigerator (37° to 40°F for the refrigerator and 0°F for the freezer section) |  |

|  |  |  |
| --- | --- | --- |
| **Equipment/Appliances:** | **Completed? Y or N** | **Number Installed** |
| Buy and use a smart power strip(s) |  |  |
| Install timers, photocells, or occupancy sensors |  |  |
| Install a chimney balloon in the fireplace  |  |  |
| Install tempered glass doors on the fireplace  |  |  |
| Install CFL or LED bulbs  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Water Conservation:** | **Apply?** | **Number Installed** | **Notes:** |
| Install low-flow showerheads  | Y or N |  |  |
| Install faucet aerators | Y or N |  |  |
| Replace older toilets with water efficient toilets  | Y or N |  |  |
| Use native plants in yard  | Y or N |  |  |
| Reduce grass/lawn areas with drought resistant plants or groundcover | Y or N |  |  |
| Install a rain barrel  | Y or N |  |  |

**Other suggestions for resident:**

* During winter, open curtains or blinds on your south-facing windows during the day to allow sunlight to heat your home and close them at night to reduce the chill from cold windows
* During warmer weather, close curtains/blinds during the day to insulate your home more effectively
* Unplug equipment that continues to use energy when not in use (i.e. computers, chargers, printers)
* Turn off the lights in rooms that are not in use
* Use task lighting to focus light where you need it, rather than brightly lighting an entire room
* Keep your fireplace damper closed unless a fire is going
* Do not place lamps or other heat sources near your thermostat
* Cover liquids and wrap foods. (Uncovered foods release moisture, making the compressor work harder.)
* Keep the refrigerator and freezer full, even if only with water jugs. Mass stays cold more easily than air
* Change bedding as appropriate for seasons (i.e. remove comforters/blankets for summer)
* Wash clothes in cold water
* Make sure thermostat settings/programs are appropriate for seasons and occupancy schedules
* Check/Lower the temperature on your water heater(s) to 120 degrees.