

Initial Day Setup Checklist: First Multifamily Weatherization Audit

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This checklist is designed to help audit teams prepare for and execute the first day on-site at a multifamily property. The focus is on organization, tenant coordination, data collection, and setting the foundation for a comprehensive and accurate scope of work.

1. Establish a Base of Operations

- Identify a common area, vacant unit, or open unit to use as a staging and setup space for the day
 - Ensure the space has:
 - Electrical access
 - Adequate lighting
 - Room for equipment, paperwork, and brief meetings
 - Use this space as the central check-in point for staff and property representatives
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2. Diagnostic Testing Preparation

- Anticipate running a blower door test and zonal pressure diagnostics
- Confirm:
 - Power availability
 - Door locations and unit layout compatibility
 - Equipment calibration and setup procedures
- Review roles and testing sequence with the audit team before starting

Best Practice: Practice setup and teardown early to minimize tenant disruption.

3. Tenant Disruption Mitigation

- Prepare snacks, beverages, and informational handouts for tenants
- Use handouts to explain:

- Why the audit is happening
 - What work may occur later
 - How tenants benefit from weatherization
 - Keep interactions respectful, brief, and informative
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4. Property Coordination

- Confirm the property manager has posted notices in advance
 - Ensure the property manager and maintenance staff are onsite
 - Review the day's plan with them, including:
 - Unit access schedule
 - Attic and utility room access
 - Safety considerations
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5. Unit Access Strategy

- Aim to access:
 - Most units if layouts are similar, or
 - All units when possible and appropriate
 - Track units accessed and note any that were unavailable
 - Identify patterns that can be extrapolated across the building
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6. Attic Verification

- Verify:
 - Attic access points
 - Existing insulation levels and condition
 - Air sealing opportunities
 - Ventilation configuration

- Photograph all attic conditions clearly
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7. Refrigerator Assessment

- Check refrigerators in each accessed unit:
 - Age and condition
 - Size and configuration
 - Energy efficiency indicators
 - Document model numbers when available
 - Note replacement eligibility
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8. Tenant Documentation

- Have tenants sign required documents, such as:
 - Audit consent forms
 - Program disclosures
 - Access acknowledgments
 - Verify forms are complete and legible
 - Secure documents immediately after signing
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9. Documentation and Photography

- Photograph and document everything:
 - Unit conditions
 - Mechanical systems
 - Attics and basements
 - Common areas and exterior
- Maintain organized photo naming and notes
- Collect enough detail to generate comprehensive bid forms later

10. Building Systems Review

- Check and document:
 - Interior and exterior lighting
 - Electrical panels (unit-level and common)
 - Utility rooms and mechanical spaces
 - Ventilation equipment and controls

End-of-Day Wrap-Up

- Debrief with audit team
- Confirm next steps and data gaps
- Communicate preliminary findings with the property manager
- Secure all equipment, documents, and photos

Key Reminder

The first day sets the tone for the entire project. Being organized, visible, and respectful builds trust with tenants, property staff, and owners while ensuring the data collected supports accurate scoping and successful project delivery.