A green and red logo

Description automatically generated with low confidenceHomeowner Questionnaire

Many considerations go into choosing a home heating/cooling or water-heating system and installer. Your answers to the questions below will help your coach provide advice. To be most helpful to you, we ask that you please respond to all questions. If not applicable, simply note that as your response.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name(s): | Best Phone#(s): | | Best Email(s): | |
| Street Address: | | City/Town: | | Date: |

|  |  |  |
| --- | --- | --- |
| # | Tell us about your home | Your Responses |
| 1 | Describe your home style/type, e.g., colonial, ranch, etc. How many living levels? Year built? |  |
| 2 | How many sq ft of heated/cooled area? |  |
| 3 | Do you Seek assistance with heating/cooling, water heating, or both? |  |
| 4 | Do you have any current comfort issues, e.g., uneven heating/cooling or uneven room temperatures, hot/cold spots or drafts, etc? |  |
| 5 | Has your home had a Mass Save or other energy audit? If so, when was it conducted? |  |
| What were the findings, i.e., what actions were recommended? |  |
| Have you completed or do you plan to complete these actions? |  |

|  |  |  |  |
| --- | --- | --- | --- |
| # | Tell us about your heating/cooling equipment | Your Responses | |
| 7 | What is your current heating fuel, e.g., oil, natural gas, propane, electricity? |  | |
| What is the age of your existing heating system? Is the system functioning well? |  | |
| How is heat distributed in home, air ducts, hot water radiators or baseboards, radiant floors, steam radiators, other? |  | |
| What temperature do you typically set your thermostat for heating? Do you use a setback? |  | |
| 7 | Does home currently have central A/C? |  | |
| What is the age of your existing central A/C system? Is the system functioning well? |  | |
| What temperature do you typically set your thermostat for cooling? Do you use a setback? |  | |
| 8 | How urgent is your need to replace your current heating/cooling equipment? |  | |
| 9 | What fuel is used for domestic hot water, e.g., gas, oil, propane, electricity? Is it integrated with a boiler for space heating? |  | |
| What is the age of your existing water heater? |  | |
| How urgent is your need to replace your current water heater? |  | |
| # | Tell us about you and your plans/priorities | Your Responses | |
| 10 | Please rank order the following potential decision factors, from 1 = most important to the least important. Ties are OK. | ⬜ | Add air conditioning to my home |
| ⬜ | Minimize changes to the aesthetics of my home |
| ⬜ | Minimize ongoing heating/cooling energy costs |
| ⬜ | Minimize upfront cost of new system |
| ⬜ | Reduce carbon footprint |
| ⬜ | Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 11 | Do you plan an addition or major renovations or changes to room layout/configuration? |  | |
| 12 | How long do you plan to stay in this house? |  | |

|  |  |  |
| --- | --- | --- |
| # | A few more questions | Your Responses |
| 13 | If you know, what is the current electric service to your home [typically 100A – 250A]? |  |
| 14 | Do you have/plan to add solar photovoltaic panels to your home? |  |
| 15 | Do you have/plan to add a backup electrical generator? If you have one now, what is the capacity of your current backup generator? |  |
| 16 | Your coach can assist with a ‘Heat Load Analysis’ to provide an independent estimate of the heating/cooling capacity a new system would require. Do you have heating fuel bills for one or more recent years and are you willing to share this information with your coach? |  |
| 17 | Any questions or concerns not already covered in this questionnaire?  Any other guidance that you would like to provide? |  |

**Thank you for your responses**.