

# Whole-House Assessments Best Practice

## Observations:

- Exclusive or habitual use of the ‘Priority List’ for facilitating house assessments may result in:
  - Using the Priority List in lieu of a valid, complete whole-house assessment to evaluate dwellings for the WAP program. This is causing omissions, inconsistencies, and unnecessarily narrowing the scope of the assessment. The Energy Audit program or the Priority List is NOT a checklist for assessment and should be used AFTER a complete whole house assessment to help determine what improvements are within the scope of the program (ranks with an SIR  $\geq 1$ , etc.).
  - Missed opportunities to increase the energy savings for our clients.
  - Overemphasis or under-emphasis on some aspects of the house which could be better addressed after a whole-house assessment and a complete evaluation.
  - Failure to identify inefficiencies or deficiencies requiring additional work.
- What follows is a decision-tree to assist subrecipients in determining whether use of the energy audit program or the Priority List should be used in particular situations to maximize the value to our clients and best expend allocated funds.

**Whole-House Assessment Process** decision-tree to assist subrecipients in determining whether use of the energy audit or the Priority List should be used in particular situations to maximize the value to our clients and best expend allocated funds.

Income Qualification

Conduct a whole-house assessment\*

Based on assessment results, choose the process that best serves the client

**Energy Audit:** DOE or DOE/LIHEAP leveraged

Use considerations:

- Completeness is a priority
- Time is not as critical
- Maximizes holistic, efficient result for home
- Maximizes quality expenditures
- Effective application of weatherization science
- Maximizes energy savings for our clients

**Priority List:** LIHEAP or LIHEAP/Utility Vendor leveraged

Use considerations:

- Max time efficiency
- Multiple dwellings (repetitive)
- High confidence (experience) in whole-house assessments

\*= TDHCA recommends use of the assessment checklist available on the energy audit program or the assessment form on the TDHCA website. Subrecipients are free to develop their own forms as long as they meet the whole-house assessment criteria.