



Whole-Building Audit Requirements Checklist

- Preliminary energy use analysis***
 - Summary of existing electricity use, by common area (aggregated or by meter) and by apartments (aggregated)*
 - Aggregated electricity usage may be provided by SOMAH at time of PowerClerk application
 - Summary of natural gas or propane use (common areas/central systems and aggregated apartments)
 - ENERGY STAR® score, energy use intensity (EUI) or other related information provided by Portfolio Manager, in particular, for properties with benchmarking disclosure requirements (AB 802 or local jurisdiction)
- Summarize utility data***
 - Discuss any irregularities in monthly use pattern with suggestions of possible causes and areas of recommended focus for energy consumption reductions*
- Summary of any special problems or needs identified during the walkthrough, for example, possible revisions to operations and maintenance procedures, if applicable***
- Summary of on-site walkthrough of all common areas, central systems and exteriors and a sampling of apartments (see Table 1 below), including identifying:***
 - Existing conditions including equipment types, efficiencies and locations
 - Low- or no-cost upgrade opportunities identified in all areas, where present
 - Other reasonable potential energy upgrade capital improvements
- Identify available incentive programs that the property may utilize for the identified energy upgrade opportunities**
- Identify greenhouse gas reduction opportunities such as electrification of natural gas or propane equipment and EV charging, either of which could be partially or completely offset by solar PV**
- Identify opportunities for owner and tenants to best optimize time-of-use utility rates**
- Summary site photos in report or appendix, including:***
 - Building exteriors
 - Existing central heating, cooling, water heating equipment
 - Existing pool heating and pumping equipment
 - Common area and exterior lighting
 - Sampling of existing in-unit lighting and heating, cooling and water heating equipment

Table 1 Apartment Sampling Guidelines

Total Number of Apartments at Property	Minimum Number of Apartments to Sample in Walkthrough
2-9	2
10-19	3
20-29	4
30-49	5
50-74	6
75-99	7
100-149	8
150-200	9
>200	10