



# BEST PRACTICES HEA

Home Energy Assessments (HEAs) are often the first in-person contact between customer and program. These are opportunities to build trust, gather accurate information, educate and set expectations for successful energy upgrades. The way these assessments are conducted directly impacts a homeowner's comfort, confidence and willingness to move forward with improvements. These best practices are designed to help inform partners on recommendations for HEAs in a professional, safe and customer-focused manner. While the guidelines below reflect proven approaches, every home and community interaction is unique. Partners are encouraged to use their best judgment in each situation, adapting these recommendations as needed to meet the homeowner's needs, ensure safety and reflect cultural considerations.

## 1. PREPARATION

**Schedule appointment:** Always schedule visits in advance and at a convenient time for the homeowner. Provide a clear window of time when you will arrive.

**Identification:** Always identify yourself and who you work for when visiting a home. Homeowners need to verify who you are for their safety and peace of mind.

**Dress appropriately:** Avoid wearing loose clothing that can get stuck in tight spaces. Wearing a shirt that clearly identifies your organization is strongly encouraged.

**Bring necessary tools:** Ensure you have all necessary tools and equipment for the assessment, fully operational and in good condition.

## 2. PROFESSIONALISM

**Explain the process:** Begin by clearly explaining the purpose of your visit, what you will be doing during the assessment, how long it is expected to take and any outcomes or next steps after the visit.

**Consent and permission:** Make sure to obtain explicit permission before entering restricted areas, moving furniture or handling homeowner belongings. Always communicate beforehand what rooms or areas you will need access to.

**Address homeowner concerns:** Listen to any concerns the homeowner may have and address them respectfully. Be open to answering questions throughout the process.

**Pets:** Always ask the homeowner if they have any pets; if so, ask them to keep any pet locked up or secured for the duration of the assessment.

### 3. CONDUCTING THE ASSESSMENT

**Footwear:** Always ask the homeowner if they would like you to remove your shoes. If you are not comfortable with removing your shoes, wear shoe/boot covers.

**Thorough inspection:** Conduct a thorough and careful inspection without rushing.

**Data accuracy:** Record data accurately on the HEA. Use a checklist if available to ensure all necessary information is captured.

**Respect privacy:** Be mindful of the homeowner's privacy and space. Always ask permission if you need to take photos.

### 4. SAFETY FIRST

**Follow safety protocols:** Adhere to all the safety protocols of your organization to protect yourself and the homeowner. This includes wearing the proper personal protective equipment.

**Maintain cleanliness:** Keep the assessment area as tidy as possible. If you move anything, return it to its original position.

**Electrical:** Assume all wires are live and avoid contact.

**Insulation:** Always wear an N95 mask or respirator when entering or opening an attic or crawlspace. Look for any signs of animals/rodents. Avoid entering if you see signs of animals/rodents or asbestos.

**Whereabouts:** Always communicate with someone about your location and the duration of the assessment. If you know which upgrades you want to pursue, bring a trusted contractor.

**When in doubt:** Always be ready to walk away if you do not feel comfortable entering any property.

### 5. POST-ASSESSMENT PROCESS

**Provide immediate feedback:** Offer a brief overview of your findings to the homeowner at the end of assessment. Let them know about any immediate concerns or recommendations.

**Resource and guidance:** Provide the homeowner with resources or guidance on how to proceed with any recommended actions, including how to access financial assessment and marketing collateral.