

Homeowner 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.

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

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| --- | --- | --- |
| # | 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? |  |
|  6 | Is your home within the Old and Historic Districts? |  |

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| # | 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 (describe)? |  |
|
| 8 | Does home currently have central A/C? |  |
| What is the age of your existing central A/C system? Is the system functioning well? |  |
|
| 9 | How urgent is your need to replace your current heating/cooling equipment? |  |
| 10 | 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 |
| 11 | 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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 12 | Do you plan an addition or major renovations or changes to room layout/configuration? |  |
| 13 | How long do you plan to stay in this house? |  |

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| # | A few more questions | Your Responses |
| 14 | If you know, what is the current electric service to your home [typically 100A – 250A]? |  |
| 15 | Do you have or are you planning to add an EV charging station? |  |
| 16 | Any questions or concerns not already covered in this questionnaire? Any other guidance that you would like to provide? |  |

**Thank you for your responses**.