

Serving Renters and Landlords

The purpose of this memo is to emphasize the importance of accurately recording how renter-occupied homes are served by the Mass Save program. Effective December 3, 2018 all contractors will use the "Renter Visit" and "Landlord HEA" site visit types when scheduling customers who are renters.

Summary of Renter Visits and Landlord HEAs

Renter Visit should be selected when the customer is a renter and the landlord is uninvolved or uninterested in the visit.

- Visit fee is \$100.
- Similar to an SHV: Install ISMs; No CST or Energy Modeling.
- Look for opportunity to convert customer to a Landlord HEA: explain program offerings, identify opportunity and roadblocks, provide rebate and HEAT Loan forms.
 - If opportunity exists and the landlord becomes available and interested, change visit type from Renter Visit to Landlord HEA if possible and then continue the assessment as with a standard HEA: create the Wx project and scope of work.
 - If landlord is unavailable/uninterested at the time of the visit and scoping the work does not make sense, keep the Renter Visit visit type *but make a note on the project that there is opportunity*. Should the landlord later decide to move forward, they can be served by requesting a follow up Landlord HEA.
- Renter visits are removed from the conversion calculations.

Landlord HEA should be selected when a visit is completed for a renter and the landlord is prospectively involved.

- Visit fee is \$175.
Same as a standard HEA - includes everything an HEA does, but is specifically for renter-occupied units with Wx opportunity.
- The Landlord HEA visit type can also be used as a 2nd visit for a customer, if there is opportunity but it was not scoped at the initial Renter Visit. But every effort should be made to involve the landlord prior to completing the Renter Visit in order to avoid two visits.
- Landlord HEAs are not actually for Landlord-occupied units; Actual Landlords would receive a standard Home Energy Assessment.
- Landlord HEAs are included in conversion calculations.

How to Identify Renters at Customer Intake

The Mass Save application has questions designed to identify renter-occupied homes in accordance with Mass Save goals. The wording of one question was ambiguous depending on whether the customer was the landlord or the renter (do *you* own your home or are *you* renting from someone), so this has been changed:

Q: Is the home renter-occupied?"

where No = not renter-occupied and Yes = renter occupied.

The answer to this question will determine the Site Visit types available at the Scheduling stage in Energy Savvy.

How to Schedule Renter Visits and Landlord HEAs

Whenever the customer is the owner, even in the case of an owner-occupied apartment within a multi-family, the owner should be scheduled for a standard Home Energy Assessment. There is no need to ever schedule an owner-occupied home/unit for a Landlord HEA.

Whenever the occupant of a property is the renter, then one of two visit types should be selected:

- *Renter Visit* – should be scheduled as the default when dealing with a renter unless it is clear that the landlord is involved.
- *Landlord HEA* – this is appropriate whenever the landlord is involved and a complete assessment will be conducted including CST and Weatherization recommendations if any.

How to Change Site Visit Types

At the Assessment the Energy Specialist has the ability to change Renter Visits to Landlord HEAs and vice versa without contacting the Lead Vendor. Simply click "*This Task Cannot Be Completed*" at the Site Visit stage and select "*Site Visit type Needs to be Changed*" as the reason. Remember that when an audit project is rolled back, any site visit data entered will need to be re-entered. The information is never gone (it is available in the timeline as an archived task), but it is inconvenient to have to re-enter data. Therefore, it would be advisable at a Landlord HEA or Renter HEA to try to determine the correct visit type before entering any data into Savvy.

After a Renter Visit is Completed no change is needed to the visit type. Some customers will need a follow up Landlord, though this should be rare.