

SAMPLE STRATA COUNCIL CHECKLIST FOR HEAT PUMP INSTALLATION PROJECTS

Disclaimer:

This checklist is intended to provide suggested guidance to unit owners and Strata Councils. Actual requirements may differ, and owners, contractors, Strata Councils, and Property Managers must verify these requirements with all stakeholders and Authorities Having Jurisdiction.

Sample Checklist Purpose:

The purpose of this sample checklist is to provide guidance to Strata Councils on how to prepare for and manage heat pump installation projects initiated by unit owners. The project phases are outlined so Strata Councils know what to expect and what responsibilities they have the body that governs the building. Strata Councils may want to develop checklists for their unique building to provide guidance to current and future council members.

Project Phase Breakdown and Objective:

A summary of each of the 4 major phases and their objectives is provided below.

Phase	Objective
Consultant Engagement Phase	<p>The objective of this phase is for the Strata Council to engage different Consultants to perform studies to review technical feasibility of installing heat pumps. The Consultant’s role is to prepare technical solutions, identify risks, and make recommendations on how to mitigate these risks.</p> <ul style="list-style-type: none"> • Envelope Consultant • Electrical Consultant
Checklist Publishing Phase	<p>The objective of this phase is for the Strata Council to publish a checklist of the required documents required for review and expectations for unit owners electing to install heat pumps in their units.</p> <p>This phase is to be executed once the Consultants have completed their studies and have provided their recommendations. This is to ensure that the Strata Council is equipped with the necessary information to be able to review requests for heat pump installation approvals.</p>

Management Phase	<p>The objective of this phase is to manage approval requests to ensure consistency of installation throughout the building. Unit owners are to submit approval requests through this framework.</p> <p>The Strata Council and the Property Managers will be responsible for reviewing applications and providing unit owners with the necessary information to support the heat pump project.</p>
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Cost Responsibilities:

The Strata Corporation will need to bear the cost of the consultants needed to execute the studies for the envelope and electrical demand studies. This is because the result of the studies will apply to all owners and paves the way for the Strata Council to be equipped with the necessary information to be able review heat pump installation approval requests.

SAMPLE CHECKLIST:

Consultant Engagement Phase	<ul style="list-style-type: none"> □ (1) Strata Council to engage the following consultants to perform studies that are specific to the building: <ul style="list-style-type: none"> □ (1a) Electrical Consultant to perform building demand study to determine if any electrical distribution or power upgrades are required. □ (1b) mechanical Consultant to support the Electrical Consultant by providing typical outdoor condensing unit capacity information. □ (1c) Building Envelope Consultant to review building envelope penetration options and prepare Typical Penetration Details for each penetration type. □ (2) Based on studies and recommendations, the Consultant Team shall prepare Technical Guidelines for adoption into the Strata By-Laws and Rules. These technical guidelines shall include: <ul style="list-style-type: none"> □ (2a) Location of outdoor condensing units. □ (2b) Details in the limits to heat pump unit capacity based on power requirements (if any). □ (2c) Condensate drainage strategy. □ (2d) Library of Typical Penetration Details that will be needed to be submitted to UBC as part of the permit application process by the mechanical contractor.
Policy Adoption Phase	<ul style="list-style-type: none"> □ (3) Strata Council to prepare a draft amendment for adoption into the Strata By-Laws and Rules. This amendment needs to be put to a vote under the procedures outlined in the Strata By-Laws and Rules. This amendment shall include: <ul style="list-style-type: none"> □ (3a) A proposed Resolution for adoption into the Strata By-Laws and Rules for voting by unit owners. □ (3b) Outline the Strata Council Approval Document Package which includes list of all required documents from owners for a heat pump installation approval request. See step (4) for full list. □ (3c) The Technical Guidelines prepared by the Consultant team.

Policy Management Phase	<ul style="list-style-type: none"> <input type="checkbox"/> (4) Strata Council to request the unit owner to provide a Strata Council Approval Document Package which needs to include: <ul style="list-style-type: none"> <input type="checkbox"/> Sketch (CAD Drafted) floor plan with outdoor condensing unit(s) and indoor evaporator unit(s) location clearly identified. <input type="checkbox"/> Heat pump cutsheets <input type="checkbox"/> Copy of mechanical contractor's quote to the unit owner <input type="checkbox"/> Copy of mechanical contractor's Refrigeration contractor License Certificate and Certificate of Liability Insurance <input type="checkbox"/> (5) Provide the owner with a Strata Council Approval Letter to facilitate the permit approval process. <input type="checkbox"/> (6) Provide the owner with Typical Penetration Detail(s) to facilitate the permit approval process.
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