

DOCKETED

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Draft HVAC Assessment Report Worksheet

Additional submitted attachment is included below.

CalSHAPE Draft HVAC Assessment Report Worksheet Comments



Date: March 15, 2024

To: CalSHAPE

From: KFI Engineers

Subject: CalSHAPE Draft HVAC Assessment Report Worksheet Comments

See below for comments and questions in response to the updates and changes to the worksheets and HVAC assessment report submission process. Specifically, the draft worksheets that were made available this week.

1. Will the Excel spreadsheet be the only required document to be uploaded? The cover sheet for the draft worksheet still states “These worksheets are intended for optional informational gathering purposes only since the completion of these worksheets does not constitute an HVAC Assessment Report. To comply with grant requirements and be eligible for funding, participants must submit an HVAC Assessment Report electronically by entering the required information through the CalSHAPE Online System as set forth in the most recent CalSHAPE Ventilation Program Guidelines.”

What is an HVAC Assessment Report? Please clarify in writing that the new Excel spreadsheet is the only document that is required to be uploaded.

2. What are the validation and export macros mentioned? Why are they needed? The workbook is not saved as an XLSM file type, so macros can't be present.
3. Why are there so many merged cells in the spreadsheet? Some over 60 merged cells at a time. Merged cells cause problems when copying and pasting data.
4. From the notice of the staff workshop, “The worksheet updates streamline the HVAC Assessment Report Worksheets, which reduce the number of entry fields by 10 percent, and enable the CEC to create an intake feature to upload data into the CalSHAPE Online System using a Microsoft Excel® file.”

However, the draft worksheet is just as cumbersome as the website. The previous assessment form was set up to be horizontal so all units could be entered on one sheet and easily copied, pasted, and viewed. The new draft worksheet is set up to be vertical and only one unit can be viewed at a time and sheets to be duplicated for each unit. If a site has more than 10 units or so, you will not be able to see all the units without scrolling back and forth between sheets. The drag/drop and copy/paste functions that would make the spreadsheet easier to use are lost in this format. Where in the guidelines does it ask for each building of a site to have a separate file? The schools across the state have many buildings and portable buildings and it makes more sense to keep units together for each school. This also makes it more difficult for firms working on this project to gather data and schools to view it if there are multiple sheets within multiple workbooks versus one for each school. (for example, a school that has 50 buildings and over 200 units would have 50 separate workbooks and over 200 sheets within those)

CalSHAPE Draft HVAC Assessment Report Worksheet Comments



5. We have created an Excel spreadsheet based on the pdf draft of the worksheet, and we would be happy to go over it with CEC as it would be much easier format to use in the field, to view by districts, and review by the CEC.
6. Back in October of 2022 we had a meeting with CalSHAPE to go over the original companion document (before the ability to submit for review online) and had the same comments regarding the excel spreadsheet and not making this process too complicated as will firms not complete the document and the information will not be useful.