

Low-Income Multi Family Energy Retrofit Grant Program Preliminary Program Description & Application Process

PROGRAM DESCRIPTION

Beginning in 2010, utilities in Massachusetts will offer a new, multi-million dollar energy efficiency retrofit grant program for existing low-income multi-family properties (five or more units) owned by public housing authorities and non-profits.

The program will provide owners direct services that will include benchmarking a development's energy use and in most cases an energy assessment. This "whole building" assessment will evaluate all energy-saving opportunities in a building, regardless of fuel source and whether the owner or tenant pays metered usage. Grants will be offered to implement the most cost-effective measures (to reduce gas and electricity usage, and possibly, oil); in some cases, a co-payment may be required.

The program will be administered by the utilities in collaboration with LEAN (Low-Income Energy Affordability Network), advised by a committee that includes MA Dept of Housing & Community Development, public housing authorities (PHAs), community development corporations (CDCs) in conjunction with the Massachusetts Association of CDCs, other non-profit entities that own or operate low-income non-institutional multi-family housing (non-profits), a representative of tenant organizations, and Community Action Program ("CAP") agencies.

PROGRAM ELIGIBILITY

A development is eligible for the program if:

1. 50% of the households of the development have a household income of at or below 60% of the Area Median Income, **and**;
2. a. the owner is a Public Housing Authority (PHA), or;
b. the development is owned and operated by a non-profit or a non-profit controlled entity.

APPLICATION PROCESS

The program anticipates accepting applications in February or March 2010. **Applicants will fill out and submit applications on-line and applications will be accepted on a rolling basis.** Owners will be required to submit property specific information about developments in order to determine the current energy performance of each building and to benchmark its utility usage among similar building types. Poorer energy-performing buildings will be prioritized, as well as buildings with significant opportunities for cost-effective implementation of energy efficiency measures (e.g., during renovation or building upgrades).

DON'T WAIT TO BEGIN ASSEMBLING THE SIGNIFICANT AMOUNT OF INFORMATION NEEDED FOR THE APPLICATION! The pages that follow include a list of the types of information that will be required for every building in the development. Typically the most challenging data to gather is accurate information about the building square footage (any heated space including common areas and hallways needs to be included) and technical information on heating/ cooling / hot water systems.

WHAT SHOULD I DO TO PREPARE TO APPLY?

1. Choose one or more buildings or developments that have high energy costs, are scheduled for renovations where energy upgrades may be incorporated and/or need energy improvements.
2. Gather the other information that will be required for the application process, which is listed in the pages to follow. This will include utility bills for the properties.
3. Collect any energy, heating, or water audits completed for buildings
4. Review the Capital Needs Assessment for project needs related to energy.

WHOM CAN I CONTACT FOR MORE INFORMATION?

Program Administrators

- John Wells, ABCD; wells@bostonabcd.org & David MacClellan, ABCD; Maclellan@bostonabcd.org
617-348-6414
- Elliott Jacobson, Action Inc; elj@actioninc.org

Public Housing Authorities

- Debra Hall, MA Department of Housing and Community Development; Debra.Hall@state.ma.us
- Dan Helmes, Boston Housing Authority; Dan.Helmes@bostonhousing.org

Community Development Corporations

- Noah Maslan, Urban Edge; nmaslan@urbanedge.org
- Jane Carbone, Homeowners Rehab; jcarbone@homeownersrehab.org
- Craig Marden, HAP; cmarden@haphousing.org

Other Non Profit Multi Family Property Owners

- Toby Ast, Preservation of Affordable Housing; tast@poah.org

Tenants and Tenant Organizations

- Soledad Boyd, Community Labor United; Soledad@massclu.org

INFORMATION REQUIRED FOR PROJECT REVIEW AND ENERGY BENCHMARKING

**This is not the official application. Do not fill this out and submit it.
The list below is intended to identify information that will be required when you fill
out the online application.**

1. Building Address: _____
2. Year built (to nearest decade, if unknown): _____
3. Resident type: ___ Elderly ___ Family ___ Mixed ___ No Type
[Note: institutional uses are not eligible, e.g., nursing homes, hospitals, dorms]
4. Building structure (Check one): ___ Wood or steel frame ___ Modular ___ Solid concrete ___
Masonry, ___ Structurally insulated panels (SIPS), ___ Other type _____

5. Basement (Y/N): _____
6. Climate controlled basement (Y/N/NA) _____
7. Basement area (square feet): _____
8. Total building area (square feet): _____
9. Total apartment area (square feet): _____
10. Number of stories: _____
11. Number of apartments: _____
12. Number of bedrooms (studios count as one bedroom): _____
13. Environmental certification (Check one): _____ LEED Certification level, _____ EPA Energy Star Homes, _____ NAHB Green Standards, _____ None, _____ Other _____
14. Are Apartments individually metered (Y/N) for Electricity _____, Natural Gas _____, Fuel Oil _____, Water _____?
15. Heating fuel type: _____ Electricity, _____ Natural Gas, _____ Fuel Oil
16. Heating system type: _____ Furnace, _____ High Efficiency Condensing Furnace, _____ Hot Water Boiler, _____ High Efficiency Condensing Boiler, _____ Heat Pump, _____ High Efficiency Variable Heat Pump, _____ Steam Boiler, _____ Ground Source Heat Pump, _____ PTAC Unit, _____ Cogeneration (CHP) Special Description _____
17. Cooling system type: None, Chiller, Wall Unit (each Apt.), Cooling Tower, Window Unit (each Apt.), Compressor (mini-split), Compressor (ducted), Ground Source Heat Pump, PTAC Unit
18. Estimated age of boiler/furnace/heating system (see Capital Needs Assessment) _____
19. Fuel for hot water: Electricity _____ Natural Gas _____ Fuel Oil _____
20. Domestic hot water system: _____ Solar _____ Cogeneration (CHP) _____ On-Demand _____ Stand alone hot water heater _____ Indirect zone off central boiler to storage tank _____ Dedicated boiler to storage tank, other _____
21. Common laundry facilities in building (Y/N) _____
22. Fuel for dryers? :Electricity _____ Natural Gas _____
23. Number of elevators: _____
24. Parking garage? (Y/N) Parking garage with ventilation (Y/N): _____
25. When was the most recent upgrade and at what level. _____
26. Gut-Rehab _____ Mod- Rehab _____ Unit by Unit upgrades _____ Common Area Upgrades _____ Other _____
27. Have there been any energy or water audits conducted in past for this development/building? Y/N _____
28. If so, what were the top three recommendations for the building. _____
29. Is any major work planned and funded in the next year (w/o funds from this program)? _____

30. Gut-rehab _____ Mod-rehab _____ Roof Replacement _____ Boiler/Furnace Replacement _____ Lighting Upgrade _____ Insulation _____ Other _____
31. Is any major work planned in the next three years (w/o funds from this program)?
32. Gut-rehab _____ Mod-rehab _____ Roof Replacement _____ Boiler/Furnace Replacement _____ Lighting Upgrade _____ Insulation _____ Other _____
33. Do you have capital reserves at this building that can be used to supplement grant funding sources that might be offered by this program?

SAMPLE UTILITY ACCOUNT DETAIL

There is often more than one electric, heating, and water account for each building. Please collect all utility account detail info for all accounts that are paid for by the applicant. For example, a CDC or Public Housing Authority pays for heat, water and common area electric at a 40-unit building where tenants pay their own electric bills for their unit. The applicant would not be expected to submit information about the 40 tenant electric bills, but would submit account detail information for its:

- natural gas heating account
- natural gas account for laundry dryers
- common area electric account, and
- water account

UTILITY ACCOUNT DETAIL

Electric Account Detail (Copy and Paste for multiple electric accounts)

Building street address: _____
 Meter number: _____
 Account number: _____
 Utility company: _____
 Online account username: _____
 Online account password: _____

Spaces account includes (Check one):
 Entire Building Only Common Areas
 An Individual Apartment

If account is for an individual apartment, apartment number: _____
 Number of buildings account covers: _____
 Account includes heating (Y/N): _____
 Third Party supplier name: _____
 Cost of supply (\$/kWh): _____

Natural Gas Account Detail (Copy and Paste for multiple natural gas accounts)

Building street address: _____
 Meter number: _____
 Account number: _____
 Utility company: _____
 Online account username: _____
 Online account password: _____

Spaces account includes (Check one):

Entire Building Only Common Areas
An Individual Apartment

If account is for an individual apartment, apartment number: _____
Number of buildings account covers: _____
Account includes heating (Y/N): _____
Third Party supplier name: _____
Cost of supply (\$/therm): _____

Fuel Oil Account Detail (Copy and Paste for multiple fuel oil accounts)

Building street address: _____
Meter number: _____
Account number: _____
Oil company name: _____
Number of buildings account covers: _____
Account includes heating (Y/N): _____
Cost of supply (\$/gal.): _____

Water Account Detail (Copy and Paste for multiple water accounts)

Building street address: _____
Meter number: _____
Account number: _____
Utility company: _____
Online account username: _____
Online account password: _____
Spaces account includes (Check one):

Entire Building Only Common Areas
An Individual Apartment Irrigation

If account is for an individual apartment, apartment number: _____
Number of buildings account covers: _____