

## MULTI-FAMILY PROJECT PREPARATION CHECKLIST

**Buildings with twenty-five or more dwelling units may not be weatherized without obtaining a waiver from the Department of Energy through TDHCA.**

Name of Property:	_____	City	_____
Address of Property	_____	Zip Code	_____
Property Owner(s):	_____	Phone #	_____
Property Manager	_____	Phone #	_____

### I. Landlord Consent and Contribution

- A. Landlord's consent for assessment must be obtained and placed in the Project Master File.  
Project may not continue without consent.
- B. Is landlord making a financial and/or in-kind contribution? ☐ Yes ☐ No  
If no, please provide detailed explanation. \_\_\_\_\_  
\_\_\_\_\_  
1. If the landlord is making a financial contribution, please state the total dollar amount: \_\_\_\_\_  
2. If the landlord is making an in-kind contribution, please describe the contribution: \_\_\_\_\_  
\_\_\_\_\_
- C. Landlords/Owners may provide financial assistance to complete the Weatherization activities on their properties. The Landlord contribution may be calculated as a percentage of the overall investment, percentage of WAP investment or by some other formula. Typically, subgrantees will use the contribution to either "buy down" measures that do not achieve an SIR of 1 or greater or use to offset some of the costs to complete cost-effective measures while staying under the allowable cost per unit thresholds for the applicable program year.

### II. Application

- A. Agency Application must be completed to include all required demographic information on all occupied dwelling units for reporting purposes such as elderly persons, persons with disabilities, families with children, high residential energy users, households with high energy burdens,
- B. A completed, signed and dated application, along with income documentation for all individuals who are 18 years of age or older, must be placed in the unit/client file.

### III. Income Eligibility

- A. In order to meet income eligibility, the following must be obtained:
1. For each occupied unit, income documentation must be verified and placed in the unit/client file.
  2. For each individual who is 18 years of age or older, income documentation must be verified and placed in the unit/client file.
  3. If individual(s) has no income or proof of income is unobtainable, then applicant(s) must complete and sign a Declaration of Income Statement (DIS) and must be notarized when Department of Energy (DOE) funds are applicable and placed in the unit/client file.
  4. When a multifamily property is on one of the HUD/USDA posted lists and are deemed categorical eligible by the U.S Department of Energy (DOE) the subgrantee must document in the project file which lists the property appears on and the corresponding eligible unit

percentage.

- B. Income eligibility for each dwelling unit will be determined using the criteria set forth in Texas Administrative Code (10 TAC Chapter 6).

#### **IV. Building Eligibility**

- A. Total number of units in this building: \_\_\_\_\_
- B. Total number of eligible dwelling units in this building: \_\_\_\_\_
- C. Total number of vacant dwelling units included in this building: \_\_\_\_\_
- D. Total number of over-income dwelling units included in this building: \_\_\_\_\_

#### **V. Energy Audit or Priority List**

In accordance with 10 TAC Chapter 6 Subchapter D Rule §6.414 (i) For any Dwelling Unit that is weatherized using funding provided under DOE WAP, all Weatherization measures installed must be justified with an approved Energy Audit or with the DOE approved Priority List. If using the Energy Audit, all allowable Weatherization measures needed must be entered. Weatherization measures will be performed in order of highest SIR to lowest depending on funds available. If using the Priority List, included Weatherization measures must be addressed according to the instructions in the Weatherization Contract, Priority List criteria, and the Department's DOE Priority List policies and procedures (if applicable).

## MULTIFAMILY PROJECT BUILDING DATA CHECKLIST

Building # \_\_\_\_\_

#	Unit Number	Income verified & documented?		Documented Household Income \$	Number of persons in household	% of Poverty Income	Income Eligible?		Projected cost (\$) of individual unit based on TAC Rule §6.416 (a)
		Yes	No				Yes	No	
1		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
2		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
3		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
4		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
5		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
6		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
7		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
8		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
9		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
10		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
11		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
12		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
13		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
14		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
15		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
16		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
17		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
18		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
19		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	
20		<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	

### Calculations:

The building is eligible if the percentage of eligible households is 66% or greater.

The formula for calculating the percentage of eligible units per building divides the number of WAP eligible units by the total number of units in each building.

Number of WAP eligible units in this building \_\_\_\_\_ ÷ Total number of units in this building \_\_\_\_\_ = \_\_\_\_\_ % Percentage of all units

Total amount of funds available for this building equals the total number of eligible units multiplied by the maximum allowable expenditure per dwelling unit.

Total number of eligible units in this building		X	Maximum dollar amount allowed per unit		=	\$	Maximum allowed for this project
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Prepared by: \_\_\_\_\_ Date: \_\_\_\_\_

## MULTIFAMILY PROJECT COMPLETION CHECKLIST

Name of Property: \_\_\_\_\_ Building #: \_\_\_\_\_

### I. Landlord Contribution

If landlord made a contribution (financial or in-kind), has it been provided? ☐ Yes ☐ No

If no, provide explanation: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

### II. The building is eligible if eligible units equal 66% or greater.

If a vacant or over income unit was weatherized, the client file must be maintained. For Vacant units, the application must be marked "VACANT", and all required forms except income documentation must be signed by the property manager or owner. Work may start on a "VACANT" unit & may be counted as eligible if it is expected to meet eligibility requirements within 180 days from the start of weatherization work. If the 180-day passes and the vacant unit is still vacant or rented to a non-eligible tenant, the agency must ensure the building percentage criteria is still met to avoid disqualifying the entire building. For over-income units, the application must be marked "OVER-INCOME". All weatherized units must contain a completed Building Weatherization Report in order to assist with the tracking of expenditures.

### III. Client files/Audit

- A. Every client file must contain all the required data in the DOE and LIHEAP contracts.
- B. Each individual dwelling unit in all buildings must be assessed using either an approved Energy Audit or an approved Priority List.
- C. An approved Energy Audit or an approved Priority List must be completed, signed, dated, and placed in each client file.

**Project Completion/Verification.**

**Project Completion Date:** \_\_\_\_\_

I have reviewed all pertinent data related to the multifamily project described above. I have determined that all units meet all requirements and all buildings weatherized meet the 66% income eligibility rule. All documentation has been reviewed and weatherization service was provided in accordance with all current regulations and guidelines. All units have received final inspection and meet the requirements for closure and final payment.

**Signature:** \_\_\_\_\_ **Printed name:** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_