

MULTI-FAMILY PROJECT PREPARATION CHECKLIST

For each building containing 5 or more dwelling units.

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: _____

II. Application

A. Application must be completed on all occupied dwelling units.

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 obtained and placed in the unit/client file.

2. For each individual who is 18 years of age or older, income documentation must be obtained and placed in the unit/client file.

3. If individual(s) has no income, then a Statement of No Income must be provided and placed in the unit/client file.

B. Income eligibility for each dwelling unit will be determined using the criteria set forth in Texas Administrative Code (10 TAC Chapter 5).

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

An Energy Audit must be performed on all dwelling units in the building.

MULTIFAMILY PROJECT BUILDING DATA CHECKLIST

For each building containing 5 or more dwelling units.

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 energy audit |
|----|-------------|-------------------------------|--------------------------|--------------------------------|--------------------------------|---------------------|--------------------------|--------------------------|--|
| | | 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.

$$\begin{array}{rclclcl}
 \text{Number of WAP} & & \div & \text{Total number of} & & = & & \text{Percentage} \\
 \text{eligible units in} & & & \text{units in this} & & & \% & \text{of all units} \\
 \text{this building} & & & \text{building} & & & & \\
 \hline
 & & & & & & &
 \end{array}$$

Total amount of funds available for this building equals the total number of eligible units times 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 |
|---|--|----------|--|--|----------|----|----------------------------------|

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 completed. Applications for a vacant unit must be marked "VACANT" and all required forms excluding income documentation must be signed by the manager or owner. Applications for over income units 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. An audit must be conducted on each individual dwelling unit in all buildings
- C. An audit 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 multi family 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:** _____

For multifamily buildings with more than ten (10) units, the Department will require the signature of the Executive Director.

Signature of Executive Director: _____ **Date:** _____