



## DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT

### Funding Announcement

# Customer Investment Fund Multifamily Housing Energy Efficiency Retrofit Program

The Maryland Department of Housing and Community Development (Department) is announcing the availability of grant funds for energy conservation retrofit work in eligible properties in the Baltimore Gas & Electric utility service territory.

#### **What is this opportunity?**

This opportunity offers multifamily facilities in the Baltimore Gas & Electric utility service territory to receive Energy Conservation Retrofit funding. The Department will provide a Department-contracted project manager to act as the recipient's project manager and as the single point of contact throughout the project. This coordinated approach will greatly reduce the legwork required by recipients to undertake and realize the capital benefit of this type of energy retrofit project.

#### **What are the energy efficiency funds for?**

The Department will grant funds to successful applicants for the cost and installation of energy conservation measures.

#### **What are the eligibility requirements for energy efficiency funding?**

- A. The property must be located in the Baltimore Gas & Electric utility service area.
- B. 80 Percent of the occupants' (tenants') income must be at or below 60 % of the Area Median Income (AMI).  
The applicant must enter into a written agreement committing to maintain such income restrictions for a minimum of five years.
- C. Acceptable utility metering:
  - 1. Preference is given for master metering (all utilities paid by the property owner through the owner's commercial account).
  - 2. Mixed metering (typically heating and cooling and water utilities paid by the property owner / unit electrical plug receptacle and lighting utilities paid by the tenant).



D. The following building types may be served:

1. Single-room-occupancy (SRO) in shared housing facilities with five (5) or more units
2. Townhouse developments
3. Garden style apartments
4. Mid-rise apartments
5. High-rise apartments

New construction projects are not eligible.

**What is the funding period?**

Funding is available until the earlier of June 30, 2017, pending State approval, or until funds have been fully committed.

All installation work must be completed by April 30, 2017; all invoices for payment must be submitted by May 15, 2017.

**How much funding is available for energy conservation measures?**

Up to \$3,700,000 total funding.

The amount of funds available for individual grants depends upon the total cost for project management and energy auditing and quality control inspections, which are provided through the Department pursuant to a separate procurement process. Those costs will be deducted from the total \$3.7 million available.

**How will the Department determine which energy efficiency projects to fund?**

Applications will be reviewed on a first come first served basis and the following considerations will also apply:

- A. Priority for master metered utilities.
- B. Properties in the Department's portfolio take precedence over non-portfolio properties.
- C. Owner agrees to provide a letter of intent, at *application*, to enter into a grant agreement with the Department, executed by all of the entity principals and debt service entities.

**What is the maximum amount each grantee can receive per project?**

There is no set limit; the funds, however, will be distributed across multiple projects.

**What are the eligible uses for grant funds under this announcement?**

- A. Eligible uses include energy conservation and renewable energy measures with a minimum cumulative project savings to investment ratio of 1.1 for:
  1. Electricity
  2. Natural gas
  3. Propane
  4. Oil / Kerosene
  5. Water & Sewage

**How will organizations receive funding?**

The Department-contracted project manager will prepare and submit owner-executed monthly payment requisitions to the Department for installed energy conservation work.

Details of the program, including reimbursement level and eligibility requirements, are subject to change without prior notice. Contact Thomas Walz at [thomas.walz@maryland.gov](mailto:thomas.walz@maryland.gov) or call 301-429-7737.

# Customer Investment Fund

## Multifamily Housing Energy Efficiency Retrofit Program

### Application Form

**Note:** Information about the Maryland Multifamily Energy Efficiency Improvement Funding Rental Program can be found at <http://dhcd.maryland.gov/HousingDevelopment/Pages/EnergyEfficiencyWeatherization.aspx>

**Please consult the program information web link before completing this application form.**

<b>Type of Application:</b>		
<input type="checkbox"/> Pre-Application (Eligibility Screening): Complete Sections 1-3 and 7, attach Exhibits 2 & 4		
<input type="checkbox"/> Energy Improvement Funding Application: Application should be completed in its entirety		
<b>1. Contact Information for Person Completing this Application on Behalf of the Sponsor</b>		
Name:		
Telephone:	Cell Phone:	Title:
Email:		

<b>2. Information about the Sponsor</b>		
Legal Name of Sponsor :		
Legal Structure (check one): <input type="checkbox"/> For-Profit Corporation <input type="checkbox"/> Non Profit Corporation <input type="checkbox"/> Limited Partnership <input type="checkbox"/> General Partnership <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other:		
Business address:		
City:	State:	Zip:
Main Telephone:	Main Fax:	Website:
Total Number of Residential Units Under Management::	State of Incorporation/Partnership:	
Is the Sponsor or any of its officers involved in any regulatory proceedings or other legal action, including lawsuits, with the State of Maryland or any other entity involving the business? <span style="float: right;"><input type="checkbox"/> No <input type="checkbox"/> Yes</span>		
If yes, explain:		
Has the Sponsor or any of its officers been involved in bankruptcy or insolvency proceedings? <span style="float: right;"><input type="checkbox"/> No <input type="checkbox"/> Yes</span>		
If yes, explain:		

### 3. Information about the Property and the Property Owner

Property Name:			
Property Address:			
City:	State:	County:	ZIP Code:
<b>Property Owner:</b> Legal Name:			FEIN:
Legal Structure (check one): <input type="checkbox"/> For-Profit Corporation <input type="checkbox"/> Non Profit Corporation <input type="checkbox"/> Limited Partnership <input type="checkbox"/> General Partnership <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Sole Proprietorship Other:			
Property Owner's Business Address : Street:			
City	State:	Zip:	
Main Telephone:	Main Fax:	Website:	
<b>Signature Block and Notice Address:</b>			
<b>Property Information:</b> Year Building Built: Date of Last Major Rehab: Rehab Planned Over Next Five Years?: <input type="checkbox"/> Yes <input type="checkbox"/> No		Number of Floors: Number of Buildings: Building's Total Gross Square Footage: _____ s.f. Total Square Footage of Residential Units: _____ s.f. Total Square Footage of Common Areas and Other Spaces: _____ s.f.	
Building Addresses and Unit Numbers:			
Total Number of Residential Units: _____ Number of Residential Units by Type: SRO: _____ Studio : _____ 1 BR: _____ 2 BR: _____ 3 BR: _____ 4 BR: _____ Other: _____			
Target Resident Population : <input type="checkbox"/> Elderly <input type="checkbox"/> Family <input type="checkbox"/> Disabled <input type="checkbox"/> Special Needs <input type="checkbox"/> Other:			
Occupancy Restrictions of Project (show number of units): _____ 30 % AMI    _____ 31-40% AMI    _____ 41%-50% AMI _____ 51%-60% AMI    _____ 61-85% AMI			
<b>Utility Provider:</b> Electric _____ Account #: _____ Gas _____ Account #: _____ Oil _____ Account #: _____ Water _____ Account #: _____			<b>Meter Set up:</b> <input type="checkbox"/> Master Metered <input type="checkbox"/> Individual Metered <input type="checkbox"/> Mix Metered <input type="checkbox"/> Sub-Metered

**Responsibility for Energy Costs:**

Space Heating:  included in rent  Paid by tenants in separate utility accounts  Other: Explain  
 Air Conditioning:  included in rent  Paid by tenants in separate utility accounts  Other: Explain  
 Water Heating :  included in rent  Paid by tenants in separate utility accounts  Other: Explain  
 Electricity :  included in rent  Paid by tenants in separate utility accounts  Other: Explain

**Property's Income:**

Sources of Income	Total Units	Annual Gross Income	Years Sustaining Occupancy	Annual Trending	Trended Income
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Low Income Units:		\$		%	\$
Market Rate Units:		\$		%	\$
Nonresidential Units:		\$		%	\$
Total:		\$		%	\$

**4. Information about the Energy Project**

**Project Type:** ( check one)  Energy Retrofit in Existing Building  Major Rehab of Existing Building

**Has the property previously participated in any utility programs (i.e. Quick Home Energy Check-up, Smart Savers, Business Energy Solutions)?**

Yes  No Name of program: \_\_\_\_\_ Date Work Completed: \_\_\_\_\_

Work completed under this program:

Has a DHCD Pre-Audit been completed?  Yes Date: \_\_\_\_\_  No  In process

Has an energy audit been performed to demonstrate the project's potential energy savings?  Yes  No  In Process

Estimated Project Construction Start Date:

Estimated Project Completion Date:

**Energy Project Description/Project Scope Work:**

**5. Energy Project Budget**

Energy Conservation Measure	Budget
	\$
	\$
	\$
	\$
	\$
	\$
Total:	\$
Important Comments about the Project Budget	

**6. Energy Funds Request and Other Expected Sources**

Energy Funds Request: \$			
Other Expected Project Financing:			
	Amount	Source	Status
Applicant Equity	\$		
Other Loan	\$		
Public Grants	\$		
Utility Rebates*	\$		
Other	\$		
Total (Including Energy Funds)	\$		
Important Comments about the Project Financing:			
*Projects who are awarded funding under DHCD's MEEHA-EmPOWER program are not eligible to also receive Utility Rebates for eligible measures.			

**7. Certification, Authorization and Signature**

The undersigned( the “Sponsor”) hereby certifies:

1. That she or he has the legal authority to sign this application on behalf of the Sponsor.
2. That the information contained in this Application and the attached Exhibits is complete, true and correct.
3. That the Sponsor agrees to notify the Maryland Department of Housing and Community Development (“MDHCD”) promptly of any material changes to the Application and the attached Exhibits.
4. That the Sponsor has read the Application Instructions and understands that as part of the underwriting process, MDHCD may require the Sponsor to submit additional documents involving the creditworthiness of the Sponsor and the Property, the financing of the proposed project, and the energy analysis needed to support the estimates of the energy savings that will result from the proposed project, The Applicant agrees to submit these additional materials in a timely manner when requested.
5. That the Applicant hereby authorizes MDHCD to make all inquiries it deems necessary to verify the accuracy of the Application and the attached Exhibits and to determine the Applicant’s creditworthiness. The Applicant authorizes any individual, including the Sponsor’s attorney and accountant, or any credit reporting agency, or any other entity, to furnish MDHCD with any information it possesses with respect to the Sponsor, the Property, this Application and the attached Exhibits.
6. In the event the funding is provided as a loan a additional fee may apply,

Certified and Agreed To this      day of      , 2015.

\_\_\_\_\_

Name:

Title

NOTE:            A complete common energy funding application package consists of the following:

- Mail a paper copy of the completed application form and Exhibits
- One electronic copy of the completed application form.

Applicants should deliver or mail the complete application package to :

Attention: Danielle England  
Maryland Department of Housing and Community Development  
7800 Harkins Road  
Lanham, MD 20706

Email: [MultifamilyEnergy.DHCD@Maryland.gov](mailto:MultifamilyEnergy.DHCD@Maryland.gov)

<b>8. Exhibits That Must Accompany This Application</b>			
<b>Exhibit</b>	<b>Attached</b>	<b>Not Available</b>	<b>Not Applicable</b>
1. Proof of affordability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Organizational Documents (for all entities)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Copy of commercial electric bill	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. DHCD's MBE Form – forms can be located on the program website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. DRAFT Resolutions from Awardee (authorized to enter into the Grant Agreement on the terms & conditions required by DHCD). Please note that the resolutions are different depending on which type of entity is producing the document. Please send a drafted WORD document of these forms prior to execution for legal review- forms can be located on the program website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. DRAFT Incumbency Certificate - forms can be located on the program website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Contractor Bids – cost must identify both labor and material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Owner/Commercial Space Executed Customer Energy Usage Release Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Tenant Executed Customer Energy Usage Release Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Letter of Intent executed by all entity principals agreeing to enter the Loan/Grant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Exhibits That Must be Submitted Prior to Execution of Award</b>			
<b>Exhibit</b>	<b>Attached</b>	<b>Not Available</b>	<b>Not Applicable</b>
11. Executed Resolutions from Awardee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Executed Incumbency Certificate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Executed Contracts, proposals or bids	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Contractor Licenses for each contractor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Permits or signed statement that permits are not required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Detailed schedule of values identifying corresponding approved Scope of Work ECMs and indicating which contractor(s) are responsible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Construction Progress Schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Liability Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Property Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Contractor(s) Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Certificate of Good Standing (must be dated within 30 days of the "closing" / execution of the loan/grant agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>