

Section I: General Information

Grant agreement number:

Grantee Organization:

Grant Description:

Project Category/Intervention Type(s) (select all that apply):

<i>Energy Efficiency Retrofits</i> <input type="checkbox"/>	<i>Financial Model</i> <input type="checkbox"/>	<i>Behavioral Modification</i> <input type="checkbox"/>	<i>Data Modeling</i> <input type="checkbox"/>
--	--	--	--

Organization Address:

Grant Manager:

Cumulative EIF Funds Drawn Through End Date of Grant:

Section II: Grant Summary

A. Project Narrative:

1. *Provide a brief description of your grant and the specific problem/question that it was designed to address.*

2. *What were the key findings of your grant? Include a brief description of any barriers addressed, innovations used, or lessons learned over the course of the project*

3. How was the grant supposed to be innovative and replicable? After completion of the grant, did your answer change? If so, how?

4. How did you monitor the effectiveness of the grant during its implementation? Based upon your monitoring, did you make any small or significant changes mid-grant?

B. Project Inputs:

Please provide the necessary total project data, where applicable. If the appropriate metric is not shown, please describe the project inputs in the comments section.

Number of Housing Units Retrofitted _____ units

Cost of Retrofits, per Unit _____ \$US per unit

Tenants receiving intervention(s)¹ _____ tenants

Units receiving intervention(s) _____ units

Program cost, per Unit _____ \$US per unit

Financing provided per Unit _____ \$US per unit

Additional Comments:

C. Project Outcomes:

Please provide monthly and annual data for all of the following, where applicable. For both monthly and annual data, provide the time period (ie June, 2014 or June 1, 2013-May 31, 2014). If available, provide separate data for common areas and occupied units. If some of the data is not available, please indicate the reason.

Pre-Rehab Data

¹ "Receiving" the intervention includes all tenants taking part in program by receiving, surveys, financing, behavioral modification methods, retrofits, etc.

Energy Consumption _____ kWh per unit (electricity)
_____ MMBtu per unit (natural gas)

Energy Cost _____ \$US per unit
_____ \$US per tenant

Water Consumption _____ gallons per unit

Post-Rehab Data

Energy Consumption _____ kWh per unit (electricity)
_____ MMBtu per unit (natural gas)

Energy Cost _____ \$US per unit
_____ \$US per tenant

Water Consumption _____ gallons per unit

Average energy cost savings _____ \$US per unit
_____ \$US per tenant

% decrease in total energy consumption _____ %, overall (all projects/portfolio)
_____ %, per unit

% decrease in total water consumption _____ %, overall (all projects/portfolio)
_____ %, per unit

D. Project Outcomes Narrative:

Describe the types of energy and/or water efficiency measures implemented. Indicate the actual energy/water savings compared with expectations, as pulled from actual facility-level data. Include analysis as to why “actual” did or did not match “expectations”. Please bear in mind that the goal at the beginning of each grant was 20% energy savings.

Section III: Budget

A. Please provide the total dollar amount of:

Funding Type	Total	End of Grant	Unspent
HUD Grant - Federal			
Matching - Non-Federal			
Leveraging - Fed/Non-Fed			
Total			

B. Total Grant Income

Discuss total grant income as per applicable program income rules as stated in the terms and conditions of the grant agreement.

Section IV: Program Detail

A. Phases

For each project, please provide the following summary information:

- 1) Funds Allocated
- 2) Funds Spent as of (final reporting/closing date)
- 3) New Target Completion Date (if received extension)
- 4) Goal for units/projects to be retrofitted at beginning of grant
- 5) Actual units/projects retrofitted by end of original grant period
- 6) Total units/projects retrofitted by end of original grant period plus any extension

B. Building-level Data

Provide the following property-level data (or portfolio if so maintained), where applicable:

- 1) Project Name:
- 2) Location/Address:
- 3) Building Description:
- 4) Climate (zone and notable characteristics):
- 5) Ownership type:
- 6) Square footage:
- 7) Background: process for identifying the opportunity, defining the project, and deciding to proceed:
- 8) Time period (start, duration, completion):
- 9) Project Cost (total):

- 10) Expected annual savings upon implementation (in terms of units of energy, EUI, or percent):
- 11) Expected cost savings (in terms of dollars or percent):
- 12) Expected other results (Energy STAR rating, green building certification, other):
- 13) Photos (attach):

Section V: General Program Q&A

Please answer the following questions, providing as much detail and supporting data as possible. It is understood that some of these questions may not apply to all grantees.

1. How did the project demonstrate solutions to the primary and longstanding challenges to implementing energy efficiency (including behavior modification, where applicable) and renewable energy improvements, in existing affordable multifamily properties?
2. How did the project leverage private capital and additional public funding to demonstrate “proof of concept” of specific models?
3. How did the project conduct applied research to document and disseminate mainstream, scalable approaches to retrofitting affordable multifamily properties? For grants that involved behavior modification, how was the modification carried out and documented? Were the results of such modification scalable?
4. How did the project reduce energy consumption in multifamily residential properties, with resulting savings for families, property owners, and in some cases the Federal government, and lower greenhouse gas emissions? For behavior modification, how successful was the change in reducing energy consumption? Were the changes temporary or permanent?

5. How did the project increase private investment to support energy efficiency in the properties?

6. How did the project generate green jobs in construction, property management, and technical analysis (e.g., energy audits, building commissioning), including job opportunities for low-income people? How many jobs were created?

7. Provide analysis of data on the costs, benefits, challenges, and opportunities associated with retrofitting such properties or behavior modification.

8. Explain approaches for retrofitting such properties or behavior modification that can be scaled up, applied more widely and adopted by other parties.

9. Explain how approaches addressed solutions to the disparity among the parties when their financial or other interests are not the same, such as the difference in perspective when utilities are paid only by the ownership or only by the tenants, i.e., the so-called “split incentives” issue.

Section VI: Program Feedback

In the spirit of continuous improvement, we would great appreciate your feedback on the grant program:

1. What aspect(s) of this Grant program worked well?
2. What aspect(s) of this Grant program could be improved?
3. Where you how satisfied were you with the administration of the Grant Program?
4. Additional comments: