MULTIFAMILY ENERGY AUDIT PROGRAM APPLICATION



(Funded by the State Energy Program)

Email the completed application to: abbie.christophersen@jowaeda.com.

SECTION 1: APPLICANT INFORMATION Project Title: Applicant Entity Legal Name: ______ Applicant Entity Primary Address: Telephone Number: _____ Email Address: _____ Project Contact: _____ Title of Project Contact: _____ Website: Unique Entity Identifier: Federal Entity Identification Number/ Tax Identification Number: **SECTION 2: PROPERTY DETAILS** Please complete section two separately for every property requesting audits. Property Name: _____ Property Address: _____ Property Owner: _____ Building Owner(s): _____ Property Management Company: _____

| 1. | What Iowa Finance Authority Program is the property participating in? ☐ Section 8 ☐ Low Income Housing Tax Credit ☐ HOME |
|----|---|
| 2. | Has a qualifying audit been completed on the property in the past 5 years? ☐ Yes ☐ No |
| 3. | Is the property registered as a historic site? ☐ Yes ☐ No |
| 4. | Is the property publicly owned or located on public land? ☐ Yes ☐ No |
| 5. | If the applicant is NOT the sole property manager, property owner <u>and</u> building owner, have all entities with interest in the property (not including renters/tenants) provided permission to complete an audit of the property? \[\subseteq \text{Yes} \] \[\subseteq \text{No; Explain:} \] \[\subseteq \text{N/A} \] |
| 6. | What is the scope of the proposed property audit? |
| | a. What is the approximate square footage of the proposed building(s) receiving audit(s)? |
| | b. How many housing units are in the building? |
| | c. Approximately how many tenants reside on the property? |
| | d. Is the audit property-wide or a subset of units/buildings? If limited, please identify the effected buildings. |

SECTION 3: PROJECT DETAILS

| 7. | Does the project intend to utilize or purchase equipment th ☐ Yes; Explain: ☐ No | at is <u>not commercially available</u> ? | | |
|-----|---|---|--|--|
| 8. | Is the applicant willing to comply with 2 CFR 200? ☐ Yes ☐ No; Explain: | | | |
| 9. | Is the applicant willing to conform to all applicable state, local and federal laws and regulations? ☐ Yes ☐ No; Explain: | | | |
| 10. | Is the applicant committed to reporting on the metrics described | cribed below, as applicable? | | |
| | Metrics include: Number of investment grade audits performed Square footage of buildings/facilities audited Auditor's projection of energy savings Number of projects started based on audits | | | |
| | □ Yes | | | |
| | □ No; Explain: | | | |
| 11. | Fill in the blanks below regarding details about the funding | request and match. | | |
| | IOWA ENERGY OFFICE REQUEST: APPLICAN | NT CONTRIBUTION: | | |
| | Amount: Amount: | | | |
| | % Contribution: % Contribu | ition: | | |
| | | | | |

Applicant contribution must be greater than or equal to (\geq) 50% at time of application. Upon completion of an audit recommendation, this amount may be reimbursed.

SECTION 4: BUDGET

Project completion: _____

| PROJECT BUDGET | | | |
|--|-------------------------------|--|--|
| ANTICIPATED EXPENDITURES | TOTAL | | |
| Example – Energy Audit | | | |
| | | | |
| | | | |
| | | | |
| TOTAL PROJECT COSTS | | | |
| TOTAL FUNDING REQUEST | | | |
| | | | |
| SECTION 5: TIMELINE | | | |
| 1. Audit and upgrade expenditures must be incurred by 6/30/2026 completed by 6/30/2026? ☐ Yes ☐ No | 26. Is the project able to be | | |
| 2. Please provide an estimated completion date (or range of dates) | for the following activities: | | |
| Audit completion: | | | |
| Receipt of audit results: | | | |
| Energy efficiency upgrade cost estimates: | | | |
| Efficiency upgrades chosen: | | | |

SECTION 6: CERTIFICATION & RELEASE OF INFORMATION, SIGNATURE OF LEGALLY AUTHORIZED REPRESENTATIVE

For the purposes of the following questions, "principals" includes any current or prospective officer, director, or owner.

| 1. | Has the applicant entity or any principal been debarred by the federal government? Yes No If yes, please explain the explain the circumstances of the debarment: |
|------|--|
| 2. | Is the applicant entity or principal currently delinquent in the payment of state or local taxes or otherwise in substantial noncompliance with lowa tax law? Yes No If yes, please provide the date and amount of the delinquency: |
| In t | he last five years: |
| 1. | Are there any judgments or court actions, including small claims, currently pending or completed against the applicant entity or any principal? Yes No If yes, please provide the date and a description of each judgment or court action: |
| 2. | Has any principal been accused or convicted of any wrongdoing or felony? Yes No If yes, please provide the date and a description of each charge or conviction: |
| 3. | Have there been, or are there currently any investigations of potential violations of public health, safety (including workplace safety) or environmental laws by the applicant entity or any principal? Yes No If yes, please provide the date and a description of each investigation or violation: |
| 4. | Have there been, or are there currently, any violations of ordinances, permitting requirements, other applicable policies of a city or county by the entity or any principal? Yes No If yes, please provide the date and a description of each violation: |
| 5. | Has the entity or any principal entered a settlement with the lowa Civil Rights Commission or similar state or federal enforcement agency or had a finding of probable cause related to violation of civil rights? This should include, but not be limited to, violations of the Civil Rights |

| | Act of 1964, the Age Discrimination in Employment Act of 1967, the Americans with Disabilities Act Amendments Act of 2008, and the Fair Housing Act and regulations. Yes No If yes, please provide the date and a description of each violation: | | | |
|-----------------------------|---|--|--|--|
| 6. | Is the applicant aware of any conflicts of interest that exist with any lowa Energy Office members? Yes No | | | |
| | For a definition of conflict of interest, please see lowa Code Chapter 469(8). Please list the Energy Office member in which you believe a conflict exists, and what you believe is the nature of the conflict: | | | |
| For-Profit Applicants Only: | | | | |
| 1. | Have there been any current or past bankruptcies on the part of the applicant entity (or predecessor entities), or on the part of any principal or in any business dealings of any principals of the applicant entity? Has the applicant entity ever been subject to foreclosure? Yes No If yes, please provide the date and a description of the outcome of any bankruptcy or foreclosure: | | | |
| 2. | In the last five years, have there been, or are there currently any violations of antitrust laws by the applicant entity or any principal? Yes No If yes, please provide the date and a description of each violation: | | | |

All applicants must complete the following certification:

The undersigned representative of the Applicant gives permission to the IEDA to research the Applicant, make credit checks, contact the Applicant's financial institutions, insurance carriers, and perform other related activities necessary for reasonable evaluation of this application.

The undersigned authorizes the lowa Department of Revenue (IDR) to provide to IEDA state tax information pertinent to the Applicant's standing with IDR, including but not limited to information related to state income tax, sales and use tax, state withholding, and state tax credits claimed. The undersigned representative of the applicant further authorizes the IDR to access tax incentive information pertinent to the responsibilities of IDR, including but not limited to information IDR is required to report to the Iowa General Assembly and information required to process tax incentive claims. The undersigned authorizes other state entities to provide IEDA information pertinent to the application and standing, including but not limited to, the Iowa Department of Natural Resources, the Iowa Department of Public Safety, Iowa Attorney General, and Iowa Workforce Development.

I understand that all information submitted to IEDA related to this application is subject to lowa's Open Record Law (lowa Code, Chapter 22). Information contained in this application will be available for public inspection unless confidential treatment is requested, and concurrently redacted documents are provided to the office for public evaluation.

I understand this application is not an award or promise of financial assistance and that appropriation of money is subject to the actual receipt of monies by the lowa Energy Office. I understand this application is subject to approval by IEDA. Furthermore, I am aware that financial assistance will not be disbursed until a contract has been executed by the principal officer of the Applicant and the Director of IEDA and all terms, conditions, and requirements of this program and the contract have been satisfied. I understand that eligible uses of the funds awarded may be limited, at the Energy Office's discretion.

I understand that IEDA reserves the right to negotiate the financial assistance and additional information may be requested at any time. The Energy Office may obtain a third party technical, scientific or financial review of a proposal which may wholly or partially come at the applicant's expense. Technical reviews provided by the applicant do not guarantee funding.

I hereby certify that all representations, warranties, or statements made or furnished to IEDA in connection with this application are true and correct in all material respect. I understand that it is a criminal violation under lowa law to engage in deception and knowingly make, or cause to be made, directly or indirectly, a false statement in writing for the purpose of procuring economic development assistance from a state agency or subdivision.

| For the Applicant: | | |
|-----------------------------------|------|--|
| Signature | Date | |
| Name and Title (typed or printed) | | |

IEDA will not provide assistance in situations where it is determined that any representation, warranty, or statement made in connection with this application is

incorrect, false, misleading or erroneous in any material respect. If assistance has already been provided prior to discovery of the incorrect, false, or misleading representation, IEDA may initiate legal action to recover incentives and assistance awarded to the Applicant.

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OFFICE USE ONLY

Application Requirements:

- Application is complete and submitted to Program Manager by the applicable deadline;
- ☐ Applicant is eligible for the program;
- ☐ Applicant demonstrates willingness to comply with 2 CFR 200;
- Applicant certifies willingness to conform to all applicable state, local and federal laws and regulations.
- Applicant commits to reporting on all applicable metrics listed in the Reporting section of the Policies and Procedures document;
- □ 50% cost share is secured;
- Total eligible costs are greater than or equal to \$5,000;
- ☐ Funding request meets eligible project and eligible cost requirements; and
- Project will be completed by 6/30/2026. Project completion is defined in the Timeline section of the Policies and Procedures document.