

## Section 14 Draft Climate Adaptive Design

Energy Efficiency Options (all Tax Credit Projects)	
New Construction	
NJ Zero Energy Ready Homes (latest edition)	Required
Energy Star Homes Version 3.1	
NJ Pay 4 Performance New Construction	
EnergyStar Multifamily New Construction Versionn1.1	
Rehab	
Home Performance w/EnergyStar	Required
NJ Pay for Performance - Existing Construction	
ASHRAE Level 2 Audit with 15% targeted energy savings	

Energy Benchmarking (all Tax Credit Projects)	
New Construction	
40% of Residential Units plus Common Areas for 3 years post construction	Required
Rehab	
25% of Residential Units plus Common Areas for one-year preconstruction (if possible) and 2 years post construction	Required

Siting Review/Risk Assessment & Emergency Management Plan (all Tax Credit Projects)
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9% Green Options	
Latest program version or version at time of permitting	
Enterprise Green Communities plus 40 pts w/Climate Adaptive selections	4 pts
LEED version 4.1 Silver or Higher w/Climate Adaptive Selections	
ICC/ASHRAE 700/National Green Bldg Standard 2020 Silver or Higher w/Climate Adaptive Selections	
NJ Zero Energy Homes + renewables (latest edition)	
Passive House version 2.0	
Living Building Challenge 3.1	
Enterprise Green Criteria + 40 pts.	3 pts.
LEED version 4.1 Silver or Higher	
ICC/ASHRAE 700/National Green Bldg Standard 2020 Minimum Silver or Higher	

## Required Documents for Energy Efficiency & Climate Adaptive Design:

### **At Application:**

- Signed Letter of Intent provided by NJHMFA
- Signed copy of contract between the applicant and an Energy Consultant.
- Signed Energy Star Partnership Agreement

### **Prior to Construction** (at Commitment for Agency Construction-financed projects):

- All Design Review documents, audits, chosen criteria and pre-build checklists, recommended energy conservation measures, and any energy models required, per chosen Path.
- Architect certification stating all energy efficiency measures have been incorporated into the drawings and specifications.

### **Post Construction** (for 8609 package):

- Certificates for chosen path, showing HERS rating of each unit, issued by NJ Clean Energy Program, participating HERS rater, or issued by the EPA; final reports listing completed ECM's; completed checklists/workbooks/verification reports and supporting documentation.

## Benchmarking Initiative:

### **At Application:**

- Signed Letter of Intent – Benchmarking

### **Post Construction** (for 8609 package):

- Signed energy benchmarking utility release form
- Signed Energy Benchmarking tenant utility release forms as part of lease agreement (minimum of 40% new construction; minimum of 25% rehab)
- Energy Benchmarking Survey Form
- Complete the following steps to create a property in Energy Star Portfolio Manager:

*(All of the following steps will be reviewed and approved prior to the release of the Post Construction Authorization Letter)*

- 1.) Create Property Account - Name file as per NJHMFA Letter of Intent - Energy Star.
- 2.) Create 1 property building entry, not individual buildings.
- 3.) Input individual unit entries: minimum of 40% of units New Construction; minimum of 25% Rehab.
- 4.) Create individual unit utility meter entry(s) for electric and/or gas *(Example: 40 units with individual electric & gas meters = 80 meter entries)*.
- 5.) Send invite to NJHMFA c/o Pamela DeLosSantos (njhmfa1) to share property and review created PM property.
- 6.) When all Portfolio Manager data is approved, NJHMFA Post Construction Authorization Letter will be released.

## Required Documents for Site/Risk Assessment & Emergency Management Plan

### **At Application:**

- Site and Risk Assessment Review Report with resiliency recommendations.

### **Prior to Construction** (at Commitment for Agency Construction-financed projects):

- All Design Review documents showing incorporated resiliency measures.
- Architect certification stating all resiliency measures have been incorporated into the drawings and specifications.

### **Post Construction** (for 8609 package):

- Emergency Management Plan

## **Site Assessment**

In keeping with the State of New Jersey's 2021 Climate Resilience Strategy, all Tax Credit projects shall perform a Risk Assessment prior to application. A report with site specific risk factors and resiliency recommendations shall be reviewed by Agency staff during application review. Developers are encouraged to review and utilize the following in preparation of the report:

**Resilient NJ:** <https://www.nj.gov/dep/bcrp/resilientnj/>

**American Institute of Architect's Hazard Mitigation Design Resources:**

<https://www.aia.org/pages/69771-hazard-mitigation-design-resources:56>

**First Street Foundation:** <https://firststreet.org/>

**Risk Factor:** (use an adjacent single-family home address): <https://riskfactor.com/>

**FEMA's Flood Mitigation Measures for Multi-Family Buildings:** [https://asfpm-library.s3-us-west-2.amazonaws.com/General/FEMA\\_Multi-FamilyGuidance\\_2019.pdf](https://asfpm-library.s3-us-west-2.amazonaws.com/General/FEMA_Multi-FamilyGuidance_2019.pdf)

**NJ Flood Mapper:** <https://www.njfloodmapper.org/>

**NJ Future Developer's Green Infrastructure Guide:** <https://developersguide.njfuture.org/>



**Identify your hazard exposure.... Assess your risks.... Determine your resilience strategies.**

*Examples: Riverine or coastal flooding, Extreme Temperatures, Severe High Winds, Fire, Explosions.*

## **Emergency Management Plan**

At Post Construction, the Developer shall submit an Emergency Management Plan to address site specific risk hazards, to be better prepared for disaster. Developers are encouraged to review and utilize Enterprise Community's **Business Continuity Toolkit for Affordable Housing Organizations**, and to work with their local and county Offices of Emergency Management.

[https://businesscontinuity.enterprisecommunity.org/?\\_ga=2.116612806.1539360055.1653079842-1220958008.1641914417](https://businesscontinuity.enterprisecommunity.org/?_ga=2.116612806.1539360055.1653079842-1220958008.1641914417)

## **LETTER OF INTENT – ENERGY BENCHMARKING INITIATIVE**

Please email a signed copy of this page to NJHMFA Technical Services and include in Tax Credit Application.

By signing this document, I certify the following (“we” refers to the applicant organization):

1. We have received and reviewed the Program’s materials, consisting of the ‘LIHTC Green Point Requirements 2023’ and ‘Energy Benchmarking Technical Manual’, which includes the letter of intent, building utility release form and survey, and tenant utility release form.
2. We understand that a meeting with NJHMFA’s Technical Services Division is required within three (3) months of the Tax Credit Award Date.
3. We understand that prior to issuance of the 8609 we will submit a signed energy benchmarking utility release form for all common area meters (gas, oil, and electric, etc.), provision of certain project data (square footage per building, mechanical systems installed, etc.) and signed energy benchmarking utility release forms for a minimum of **40%** of tenants rented up for new construction, or a minimum of **25%** of each unit type for renovation projects, at time of 8609 issuance.
4. We understand for the next three years after new construction, we will ensure that at least **40%** of tenants have viable utility release forms; or for renovation projects, for 1 year prior and 2 years after the work is completed, we will ensure that for at least **25%** of each unit type, we will collect the utility data from the applicable utility company on a semi-annual basis.
5. We understand that Clean Energy Program compliance is a prerequisite to participation in the LIHTC Green Point program. I will comply with ENERGY STAR, or other applicable requirements, as indicated in the LIHTC QAP section (c) 8 and **2023** ENERGY STAR letter of intent.
6. If requested we will allow NJHMFA staff access to the project site pre, during and post construction for the purpose of but not limited to project monitoring, performance testing, interviews, surveys and photographs.
7. I am an authorized representative of the organization.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name of signer: \_\_\_\_\_

Title: \_\_\_\_\_

Project Name: \_\_\_\_\_

Parent Organization (not LLC): \_\_\_\_\_

## **BUILDING OWNER UTILITY RELEASE FORM**

### ***Authorization for NJHMFA to Receive Customer Utility Data***

Date: \_\_\_\_\_

To Whom It May Concern:

By signing this release form, the property owner (Owner) grants the New Jersey Housing and Mortgage Finance Agency (NJHMFA) and its designee, a consultant for this initiative, permission to access utility data information for the past one (1) year of (if applicable) and for the following three (3) years from this date for the development/building referenced below. The utility data includes energy consumption, energy demand, energy cost, as well as associated fees and taxes for each billing period. This information will be used to track energy efficiency and consumption of the building indicated below for the express purpose of measuring the success of past energy upgrades, comparing building performance to similar building types and determining need for future energy efficiency improvements.

I am an authorized representative for the development and building listed below and account(s) listed on the following page(s), totaling \_\_\_\_\_ pages, and represent and warrant that I have full authority to execute this release form on behalf of the Owner. Owner understands that the information obtained as part of this initiative may be released by the NJHMFA to other participating developments upon request for comparison purposes. Comparison reports compiled by the NJHMFA for this program and provided to other developments will not include this development's name or address. Owner understands and acknowledges that such information may be subject to release under the Open Public Records Act, N.J.S.A. 47:1A-1 et seq., or other applicable law. Owner understands that each applicable utility provider (Utility) reserves the right to verify this authorization request.

Owner authorizes the Utility to release the requested information on Owner's account or facilities to the NJHMFA or its designee. Owner hereby releases, holds harmless, and indemnifies the NJHMFA and the Utility from any liability, claims, demands, causes of action, damages, or expenses as a result of, but not limited to: 1) any release of information to NJHMFA or its designee pursuant to this Utility Release; or 2) the unauthorized use of this information by NJHMFA or its designee.

Sincerely,

Authorized Representative (signature) \_\_\_\_\_

***Please print clearly.***

Authorized Representative Name: \_\_\_\_\_

Development Name: \_\_\_\_\_

Building Service Address: \_\_\_\_\_

Development Contact: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**ENERGY BENCHMARKING SURVEY FORM (page 1)**

Please complete one Building Data Form for each building in a development.

**BUILDING DATA**

NJHMFA Development Name: \_\_\_\_\_ NJHMFA #: \_\_\_\_\_

Address: \_\_\_\_\_ Year Built: \_\_\_\_\_

Building type (Senior, Family, Mixed): \_\_\_\_\_

Electricity Metering (check one): ☐ Individually Metered / ☐ Master-MeteredGas Metering (check one): ☐ Individually Metered / ☐ Master-Metered

Primary hot water fuel type: \_\_\_\_\_

Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.): \_\_\_\_\_

Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.): \_\_\_\_\_

Total Sq. Ft.: \_\_\_\_\_ Common Area Sq. Ft.: \_\_\_\_\_ # of Buildings: \_\_\_\_\_

# of Elevators: \_\_\_\_\_ # of Floors in each building: \_\_\_\_\_ # of units: \_\_\_\_\_

# of Bedrooms: 1: \_\_\_\_\_ 2: \_\_\_\_\_ 3: \_\_\_\_\_ 4: \_\_\_\_\_

**Past Energy-Efficiency Work Completed (select all that apply and implementation year-****write N/A if not applicable:**

<b><i>Energy-Efficiency Improvement</i></b>	<b><i>Year implemented</i></b>
<input type="checkbox"/> ENERGY STAR Homes Certification	
<input type="checkbox"/> Zero Energy Ready Homes	
<input type="checkbox"/> Pay for Performance	
<input type="checkbox"/> Home Performance with Energy Star	
<input type="checkbox"/> LEED	
<input type="checkbox"/> Enterprise Green Communities	
<input type="checkbox"/> Windows	
<input type="checkbox"/> Lighting	
<input type="checkbox"/> Other (please describe)	

## **ENERGY BENCHMARKING SURVEY FORM (page 2)**

**BUILDING SYSTEM CHARACTERISTICS:** *Please check all that apply:*

Heating System Type	✓	Cooling System Type	✓
Furnace		Chiller	
High Efficiency Condensing Furnace		Wall Unit (in each apt.)	
High Efficiency Condensing Boiler		Cooling Tower	
Hot Water Boiler		Window Unit (in each apt.)	
Steam Boiler		Compressor (mini split)	
Heat Pump		Compressor (ducted)	
High Efficiency Variable Heat Pump		Ground Source Heat Pump	
Ground Source Heat Pump		Package Terminal Air Conditional (PTAC Unit)	
Packaged Terminal Air Conditional (PTAC) Unit		Special Description:	
Cogeneration (CHP)			
Special Description:			

Building Type	✓	Unit Appliances	✓
Wood Frame		Clothes Dryer Type:	
Steel Frame		Electric	
Concrete		Gas	
Masonry		Stove Type:	
Modular		Electric	
Structural Insulated Panels (SIPS)		Gas	
Other:		Hot Water Heater	
		Electric	
		Gas	

**Building Meter Information:**

*Complete additional forms as needed when utility information differs by building*

Please include all types of energy used	Electric Utility Name	Gas Utility Name:	Fuel Oil Utility Name:	Other Meters: (renewables, propane, co-gen)
Account #:				

## **TENANT UTILITY RELEASE FORM**

### ***Authorization for NJHMFA to Receive Customer Utility Data***

Date: \_\_\_\_\_

To Whom It May Concern:

By signing this release form, the tenant (Tenant) grants the New Jersey Housing and Mortgage Finance Agency

(NJHMFA) and its designee (a consultant for this initiative) permission to access utility data information for the past two (2) years of (if applicable) and for the following three (3) years from this date for the unit referenced below. Utility data includes energy consumption, energy demand, energy cost as well as associated fees and taxes for each billing period. This information will be used to track energy efficiency and consumption of the building indicated below for the express purpose of measuring the success of past energy upgrades, comparing building performance to similar building types and determining need for future energy efficiency improvements.

I am an authorized representative for the unit and account(s) listed below and represent and warrant that I have authority to execute this release. Tenant understands that the information obtained as part of this initiative may be released by the NJHMFA to other participating developments upon request for comparison purposes. Comparison reports compiled by the NJHMFA for this program and provided to other developments will not include tenant's information or this development's name or address. Tenant understands and acknowledges that such information may be subject to release under the Open Public Records Act, N.J.S.A. 47:1A-1 et seq., or other applicable law. Tenant understands that each applicable utility provider reserves the right to verify this authorization request.

Tenant authorizes the Utility to release the requested information on Tenant's account to the NJHMFA or its designee. Tenant hereby releases, holds harmless, and indemnifies the NJHMFA and Utility from any liability, claims, demands, causes of action, damages, or expenses as a result of, but not limited to: 1) any release of information to NJHMFA or its designee pursuant to this Utility Release; or 2) the unauthorized use of this information by NJHMFA or its designee. Tenant understands that he/she may cancel this authorization at any time by submitting a written request to both the Utility and NJHMFA.

Sincerely,

Authorized Representative (Tenant signature) \_\_\_\_\_

***Please print clearly.***

Representative name: \_\_\_\_\_

Development Name: \_\_\_\_\_

Building Address: \_\_\_\_\_

Unit Number: \_\_\_\_\_ Number of Bedrooms in Unit: \_\_\_\_\_

***Please list utility provider(s) and account number(s):***

9ELECTRIC UTILITY: \_\_\_\_\_ ACCOUNT #: \_\_\_\_\_

GAS UTILITY: \_\_\_\_\_ ACCOUNT #: \_\_\_\_\_



## 2023 NJHMFA Climate Adaptive Design LETTER OF INTENT

By signing this document, I certify the following (“we” refers to the applicant organization):

- 1.) We understand that ENERGY STAR certification or NJHMFA approved alternative, is a prerequisite to participation in the Low-Income Housing Tax Credit program. We agree to complete the applicable NJ Clean Energy Program or DOE path and will comply with the submission requirements listed in the NJHMFA QAP Climate Adaptive Design requirements document.
  - 2.) We have received and reviewed the 2023 LIHTC Climate Adaptive Design Requirements and Documentation, which includes a list of requirements for each Climate Adaptive Design option, forms and related informational material.
  - 3.) We will submit the requested documentation for our selected option, as outlined in the 2023 LIHTC Climate Adaptive Design document.
- WHEN LIHTC IS AWARDED, CONTACT Pam DeLosSantos or John Ternes at NJHMFA, FOR THE NEXT COMPLIANCE STEPS.

*I am an authorized representative of the organization.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name of signer: \_\_\_\_\_

Title: \_\_\_\_\_

Project Name: \_\_\_\_\_

Parent Organization (not LLC): \_\_\_\_\_

CHECK intended NJHMFA Energy Efficiency Choice. For 9% tax credits, also select Climate Adaptive Design option.

Energy Efficiency Program	New Construction	✓	Rehab	✓
	NJ Energy Star Homes V.3.1		ASHRAE Level 2 Audit	
	Energy Star MF New Construction V. 1.1		Home Performance with Energy Star	
	Pay 4 Performance New Construction		Pay 4 Performance Existing Construction	
	Zero Energy Ready Homes (latest edition)		Utility Program	

9% Climate Adaptive Design	4 Point Options	✓	3 Point Options	✓
	Enterprise Green Communities plus 40 pts with Climate Adaptive selections		Enterprise Green Criteria + 40 pts.	
	LEED version 4.1 Silver or Higher w/Climate Adaptive Selections		LEED version 4.1 Silver or Higher	
	ICC/ASHRAE 700/National Green Bldg Standard 2020 Silver or Higher w/Climate Adaptive Selections		ICC/ASHRAE 700/National Green Bldg Standard 2020 Minimum Silver or Higher	
	NJ Zero Energy Homes + renewables (latest edition)			
	Passive House version 2.0			
	Living Building Challenge 3.1			

## 4 Point Options with Climate Adaptive Selections

The below is a non-exhaustive list of possible selections from 3 national green building programs. Developers are encouraged to discuss choice selection with NJHMFA.

**Site Resilience** – Pick at least one site sensitive options over and above the requirements.

Enterprise Green Communities:

- 1.6 Resilient Communities: Multi-Hazard/Vulnerability Assessment & 2.1 Sensitive Site Protection
- 3.5 Surface Stormwater Management
- 5.9 Resilient Energy Systems: Floodproofing

LEED:

- SSc1: Site Assessment
- SSc3: Open Space
- IPpc99 Pilot Credit: Design for Enhanced Resilience

National Green Building Program:

- 613 Resilient Construction & Enhanced Resilience
- 503.4 (3), (4) Stormwater Management: Green infrastructure, Permeable materials
- 503.4 (3), (4) Stormwater Management: Green infrastructure, Permeable materials
- 505.2(2) Vegetated roofs

**Healthy Futures** – Pick at least two options over and above the requirements

Enterprise Green Communities:

- 7.6 Smoke-Free Policy, mandatory and optional
- 7.7 Ventilation
- 7.4 Garage Isolation
- 7.3 Combustion Equipment
- 7.9 Construction Pollution Management
- 2.15b Access to Broadband: Connectivity
- 4.3 Water Quality: Optional
- 6.4 Healthier Material Selection
- 6.1 Ingredient Transparency for Material Health
- 5.10 Resilient Energy Systems: Critical Loads
- 1.5 Health Action Plan & 7.11 Active Design: Promoting Physical Activity
- 2.12 Access to Fresh, Local Foods
- 7.13 Healing-Centered Design
- 1.5 Design for Health and Well-Being: Health Action Plan
- 7.11 Active Design: Promoting Physical Activity

LEED:

- EQc Indoor Air Quality Assessment
- EQp Environmental Tobacco Smoke Control
- EQp Minimum IAQ Performance AND EA Fundamental Commissioning & Verification
- EQc Enhanced Indoor Air Quality Strategies
- EApc66 Pilot Credit: Community contaminant prevention- airborne releases
- Pilot Credit - Safety First: Building Water System Recommissioning
- MRc Building Product Disclosure and Optimization - Material Ingredients
- IPpc100 Pilot Credit: Passive Survivability and Back-up Power During Disruptions
- IPpc89 Pilot Credit: Social equity within the community
- IPpc108 Pilot Credit - Integrative Process for Health Promotion
- SSpc82 Pilot Credit: Local Food Production
- LTc4 Surrounding Density and Diverse Uses

National Green Building Program:

- 505.9 Smoking Prohibitions
- 606.1 Biobased Products
- 904 Indoor Air Quality
- 901 & 902 Pollutant Source Control
- 802.9.2 Reverse Osmosis water treatment systems
- 505.5 Multifamily & Mixed-use community gardens; 503.6 (1), (2), (3)
- 505.10 Exercise & Recreation Area