



2026 WINTER TRAINING CONFERENCE

"Rooted in Hope"



**From Priority List to
Completion: A Roadmap
for Scaling Weatherization
in Multi-Family & Rental
Housing**

www.nascsp.org



From Priority List to Completion

Presented by Ryan Harry & Jason Foy

Presenters



- Jason Foy
 - Weatherization & Housing Director
 - 9+ Years in Weatherization
- Ryan Harry
 - NASCSP Consultant
 - 11+ years in Weatherization



Benefits of Multi Family

- Reaching Many Clients at Once
- More Efficient Use of time and resources compared to single family
- Lower ACPU



- Engaging Clients who may be challenging to reach
- Spending Down IJJA funds
- Serving people who are statistically underserved
- Improving old Multifamily housing for comfort and energy bills
- Increasing tenant retention for owners

Challenges

Images provided by TCCAP



MultiFamily Challenges

- DOE Approval for Priority list
- Subgrantee buy in
- Identifying potential projects
- Engaging with property owners / managers
- Performing pre-weatherization activities

Davis Bacon / Other

- Installing Measures
- Scaling multifamily service provision
- Davis-Bacon / Prevailing Wage LPC Tracker

Priority List Approval

Images provided by TCCAP



What is a priority List ?

- What is the process for approving the priority list?
 - A formal written request is made to DOE to adopt one or more PLs
 - Specific PL rare based on the region served
 - Written policies and procedures are required for the energy audit and final inspection when the PL will be used
 - See WPN 22-8 for detailed information

Training Needs ?

- Multifamily energy modeling / identifying measures on priority list
- Multifamily Quality Control Process
- Blower door / scaling for the future

Subgrantee Buy-in

Images provided by TCCAP



How do grantees convince subgrantees to do Multifamily ?

- Utilize Multifamily Weatherization Guide
- Create policy that makes stepping into Multifamily easier
- Provide one on one support to those interested and meet with them frequently



Which Subgrantees will be successful with multifamily projects?

- Provide training and see who you can generate interest in
- Provide Multi Family QCI training to those who are ready
- Start small and scale to large buildings

Subgrantee Buy-in



- Benefits to subgrantees
 - Lower ACPU
 - Spend down of IJA
 - Property Management helps deal with tenant's vs single family property owners
 - This means less follow up with tenant's post weatherization as they all have a main contact point of property management

- Policies owner / subgrantee friendly
 - Owner Contribution?
 - Great but will be a barrier
 - Tenant required documents and information?
 - Simplify, not all tenants will be interested in weatherization
 - QCI
 - Provide guidance and a check list, this is new for many auditors they will need support!





Multifamily Weatherization

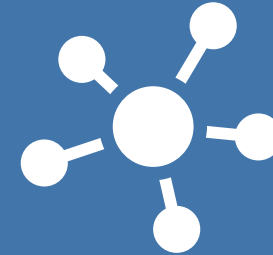
The Road Map is here!



Project Identification & Property Engagement



Networking / Open
Communication with
owners / stake holders
Let the fun begin!!



Identify if this project is
viable and move
forward with approvals
to get work orders
prepared for bid

Identify Projects

1. HRAs
2. Non-Profits
3. HUD eligibility list

The first visit on site!

1. Bring Value
2. Be Confident
3. Provide more resources



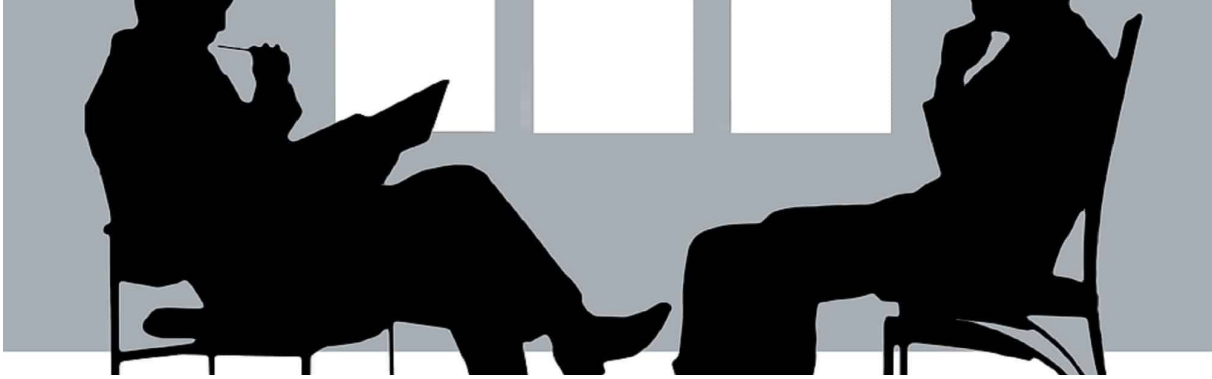


Image provided by TCCAP

Identify Properties

- HUD eligibility list
 - Property management websites
 - Local HRA
 - Li Heap Application Data
-
- Calling / Emailing and Inviting to one-on-one meeting
 - Non-Profits / HRAs will be easier to engage
 - Private owners will take a more unique approach
 - Private property management will be a bigger barrier
 - Utilize Property Owner Talking Points

Contacting Property Owners



- Use Tax Data, Websites Property Management & Hud Eligibility List or Li Heap Applications to identify owner / Property Manager contact information
- Reach out via phone / Email
 - Keep it Simple
 - Ask for a one-on-one meeting
 - Provide a presentation and simplification of weatherization to create buy in
 - Set an expectation that the property may or may not be eligible after site visit

- Best Practice Advice
 - Simplify weatherization for owners
 - Don't dive deep into the weeds
 - Solar , Heat Pumps , ect may scare owners
 - Do build over each interaction more information
 - Provide a solid approved work order once site visit and bids are completed
 - Understand simple terms in multi family for owners
 - ROI
 - Cash on Cash Return
 - Net Operating Income
 - Tenant turn over

**BEST
PRACTICES**

Best practices building owners

- Property owners view these buildings as leveraged investment and focus heavily on ROI, cash on cash returns, and minimizing tenant turnover costs.
- While insulation and energy efficiency matter, they are often secondary to visible upgrades like kitchens, bathrooms and paint.
- Effective engagement means clearly tying tenant benefits and energy improvements back to financial performance and reduced turnover.



- Tenant Benefits
 - Lower utility costs
 - Increased comfort
 - Housing stability
- Owner Benefits
 - Tenant retention due to lower utility bills
 - Tenant appreciation for increased comfort
 - Tenants turn over reduced will directly impact Net Operating income in a positive way!



Contracts / MOUs



- Property Owner Agreements
 - Can be required per Grantee
 - Can allow for owner contributions
 - Can be a barrier if contribution amounts are too high
 - Have an approval process from Grantee to increase subgrantee confidence
 - Utilize Attached Landlord Agreement

Initial Site Visit



- Provide Resources to those on site
 - SNAP
 - Li Heap
 - CSBG
 - State Programs
 - Utilize Initial Day Setup Checklist

- Make it an Event!
- Setup a table using outreach workers
 - Provide pamphlets for other resources
 - Provide snacks and beverages
 - Provide clients education and get paperwork signed



On Site Visit



- Check Attics and mechanical rooms
- Check ventilation for bath fans / kitchen fans and test equipment
- Look for ways to compartmentalize units
- Utilize property Manager / Maintenance to identify problem areas in the building

- Run blower door If possible!
- Inspect each room while tenant is in a common area getting resources
- Take lots of photos of everything you need to know
- Get Zonal's while blower door is running



Scope of Work



- Pre Weatherization
 - May be required to make the building eligible
- ECM Measures
 - Will be identified on your priority list
 - Fridges
 - Attic / Wall / Other Insulation
 - Air Sealing
 - AC Replacements
- H&S
 - ASHRAE
 - Smoke / CO Detectors
- Scope of Work
 - Will be determined by your priority list
 - Share this information with property owner once bids are completed and prior to bidding
 - Utilize Scope of work to Finalization Multi Family Weatherization Guide



Davis / Bacon



Image provided by TCCAP

- DOE Wage Scale Approval
 - Submit wage scale to DOE for approval
 - DOE approves wage scale
 - Setup Subgrantee as a vendor within LCP Tracker
 - Allow Contractors to upload documents directly for compliance
 - Streamlined process makes Davis Bacon an easy add onto any multi family project

Apps

Access the tools you need by selecting the appropriate application below.



LCPtracker Pro



LCPcertified



Workforce Manager



Active Insights



Case Manager



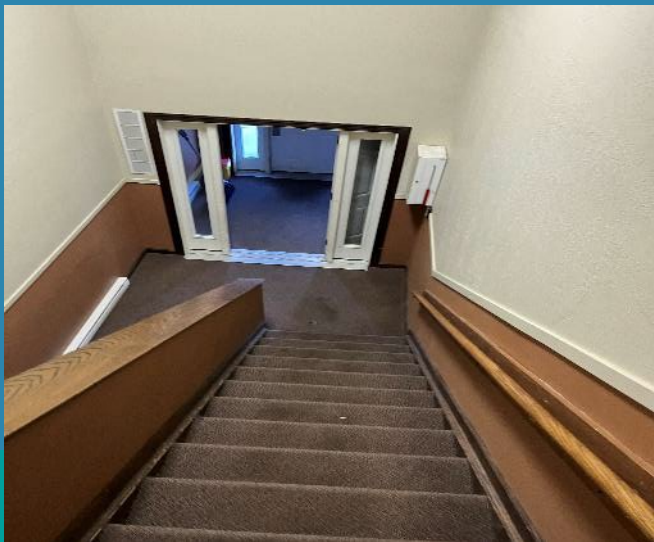
VantagePoint

Screen shot from LCPTracker Dashboard



Bidding Process

- Send solicitations directly to contractors
- Davis Bacon may require project be posted publicly for solicitation, use subgrantee website and newspapers
- Have a scheduled bidding time for all contractors to show up
- Have the energy auditor be on site and property manager on site to ensure full access during bidding process and to answer questions about bid forms
- Ensure all notifications are sent to tenants via property management to gain access to each unit of the building as required



Contract Award



- Finalize and review bids that you received after bidding day
- Award the most competitive bid according to your grantees structure
- Ensure all measures are eligible and get grantee approval to ensure subgrantee is comfortable
- Utilize Multi Family Project Cost Assessment Tool



Installation of Measure's



Schedule a week for installation of measures so property manager can post notices



Follow all local laws for notification tenants.

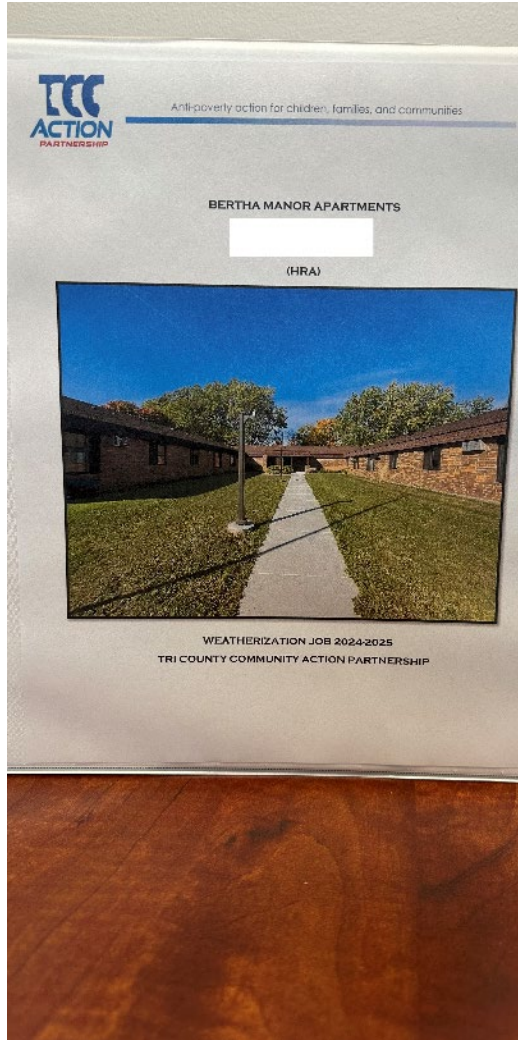


Have your QCI on site each day

Take pictures and pass each unit to ensure tenant has less stress from each visit

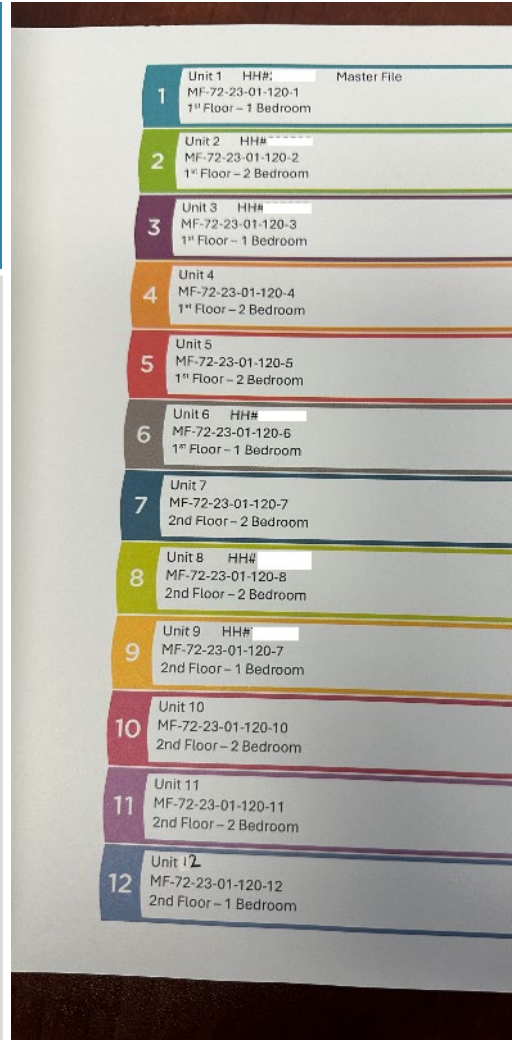


Quality Control Inspection



Create a Binder

- Finalize all paperwork while work is being done
- Meet one on one with authorized signer for the property
- Leave tenants with a copy of all paperwork they signed
- Create a binder to keep all the information in one spot



Have an Index

- Keep lots of Photo documents
- Pre and Post blower door to measure the difference and to prepare for future projects
- All required paperwork for easy Fiscal, Admin and Field Monitoring

Scaling / Future



Ask for referrals

Ask owner / property manager if they have other buildings, you may be able to weatherize

Focus on training and development of staff to take on larger buildings



Prepare staff for larger buildings / moving past priority list by building confidence

Spend down IIA and provide a more robust service to weatherization clients



Final Questions / Contact Information

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Session Evaluation

<https://www.surveymonkey.com/r/GW2J5BC>



Please complete this form for BPI CEUs



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**CONTINUING
EDUCATION**

From Priority List to Completion: A
Roadmap for Scaling
Weatherization



<https://forms.office.com/r/2JYcAb7LNz>