

Alachua County Energy Efficiency Program

*State and Local Fiscal Recovery Funds
2024 Work Plan, Full Program*

Alachua County, Florida

2024 Work Plan: Energy Efficiency Full Program

TABLE OF CONTENTS

TABLE OF CONTENTS	1
I. Purpose	3
II. Background	3
III. Pilot Program Overview	4
IV. The Full Program	5
A. Program Goals	5
B. Use of Funds	5
C. Eligibility Requirements	5
1) Unit Eligibility Requirements	5
2) Resident Eligibility Requirements	6
3) Administrative Requirements	6
D. Eligible Upgrades	7
1) Envelope Upgrades	7
2) Appliance Upgrades	7
3) Lighting Upgrades	8
4) HVAC Upgrades	8
5) Domestic Hot Water Upgrades	8
6) Other	9
E. Affordability Commitment	9
1) Affordability Overview	9
2) Rental Increases	9
F. Program Process	10
1) Applying to the Program	10
2) Pre-Assessment Tune-Ups	10
3) The Upgrade Work Order	10
4) Deed Restriction Paperwork and Upgrade Installation	11
5) Maintaining the Affordability Commitment	11
G. Additional Program Requirements	11
1) Miscellaneous Program Fees	11
a) Document Filing Fee	11

b)	Pre-Assessment Tune-Up	11
c)	Diagnostic Fees	12
2)	Manufactured Homes	13
a)	Definition	13
b)	Age of Homes	13
c)	Home Value	13
d)	Home Insurance	13
3)	Electric Versus Natural Gas: Water Heaters & Ovens	13
a)	Background	13
b)	Electric vs. Natural Gas	13
i.	Electric to Electric	13
ii.	Natural Gas to Electric	14
iii.	Natural Gas to Natural Gas	14
c)	Solar-Powered and Tankless Water Heaters	14
4)	Annual Qualified Census Tracts (QCTs) Changes	14
a)	Background	14
b)	Qualifying by QCT	15
5)	Small Business Participation	15
a)	Small Business Definition	15
c)	Participation Qualifications	15
H.	Community Engagement	15
I.	Performance Reporting	16
1)	Performance indicators output measures	16
V.	Pilot to Full Program Transition	16
A.	Eligibility	16
B.	Program Transition	17

I. Purpose

This work plan is intended to be the final Alachua County Energy Efficiency Program (ACEEP), building off the pilot work plan adopted by the Alachua County Board of County Commissioners (BOCC) on December 6, 2022, and as amended on June 27, 2023. Upon final approval from the Board, this plan will serve as policy for the continued implementation of ACEEP.

ACEEP is an affordable housing program which blends County housing priorities with climate resilience goals, to tackle housing insecurity by reducing the energy burden of low-income residents, build community resilience to anticipated climate-related heat impacts, and bring down the total greenhouse gas emissions of Alachua County residencies.

II. Background

Originally funded through American Rescue Plan Act (ARPA) funding in response to the COVID-19 pandemic, this project was designed to bring long-term affordable housing relief to communities with limited financial resources. By using energy efficiency improvements and weatherization to address the high costs of utilities on renters and leveraging these improvements to secure affordability commitments, this program seeks to lower short-term tenant costs, reduce greenhouse gas emissions, and maintain existing affordable housing stock in Alachua County.

ACEEP allocates up to \$15,000 per rental unit for eligible rental property owners within the unincorporated areas of Alachua County and smaller municipalities. This funding can be used for energy efficiency and weatherization improvements (as described in Section IV(D): Eligible Upgrades) in order to bring down energy usage and thus utility costs for low-income residents. In order to qualify, resident families must be at or below 50% Area Median Income (AMI) for their household size or qualify through their participation in other federal programs aimed at low-income residents. These and other qualifying conditions are discussed more in Section IV(C) of this document.

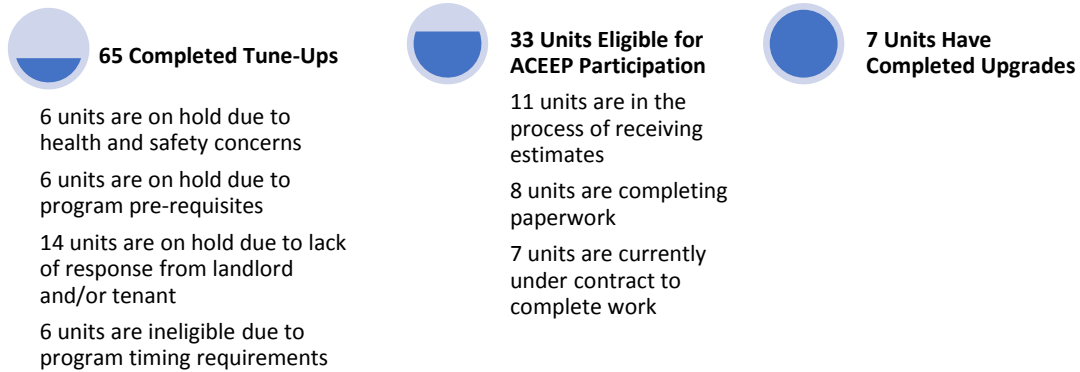
On December 6, 2022, Alachua County BOCC budgeted \$3 million in ARPA funding (now Revenue Recovery funding) for ACEEP, with approximately \$337,000 designed for the pilot program, which ran from January 2023 until September 2023, and later an additional \$500,000 to continue the pilot, with some programmatic adjustments, until March 2024. Alachua County contracted with Rebuilding Together North Central Florida (RTNCF) and the Community Weatherization Coalition (CWC) to identify applicants, vet contractors, and complete individual projects. The full agreement between Alachua County and RTNCF can be found in the associated Professional Services Agreement.

In January 2024, Alachua County received the Energy Equity for Renters technical assistance award from the American Council for an Energy Efficiency Economy (ACEEE). This award allowed County staff and RTNCF contractors to reach out to Alachua County renters and landlords directly through surveys and focus groups to ask them for feedback on the existing program, and to envision what the final program could look like. ACEEE also connected Alachua County to other cities and counties across the country operating similar programs. Staff was able to connect directly with managers of these other programs to understand how they worked and to ask question about how other teams had overcome challenges with program design, implementation, and outreach. The Board approved an extension of the pilot until

December 2024 in order to take advantage of the award. The learning produced by this process is reflected in this work plan, and the specific outcomes of the grant are included in a separate associated report.

III. Pilot Program Overview

The second, updated version of the program was run from September 2023 until November 2024, with an extension approved in April 2024 in order to take advantage of the ACEEE Energy Equity for Renters technical assistance grant. In that time, seven (7) homes completed the entirety of the upgrade component of the program, fifteen (15) homes completed signed work agreements, and sixty-five (65) homes completed energy efficiency tune-ups. Of the sixty-five (65) tune-ups, thirty-three (33) units are eligible for ACEEP participation without delay, with seven (7) of these units having completed their upgrades.



Of the \$837,000 allocated to the second pilot program, approximately \$400,000 has been spent as of October 25, 2024. The difference is due primarily to a significant delay that the pilot program experienced from April until September 2024 due to a change in the nature of the funds, namely that the funding source changed from American Rescue Plan Act (ARPA) federal funding to Revenue Recovery funding, which is County dollars. The original program was set up to place mortgage liens (a “zero-interest, forgivable loan”) on participating properties for the extent of the affordability commitment. When the funding source changed, County-funded programs could no longer be operated as loan-based programs, requiring the switch to Land Use Restriction Agreements (LURAs) to secure the County’s investment. This paperwork had to be developed and a method put in place to process the paperwork before new landlords could sign up. While County staff worked to resolve this issue, contractor staff worked with ACEEE on the technical assistance grant.

IV. The Full Program

A. Program Goals

- a) Reduce energy insecurity for renters in Alachua County, particularly for the most vulnerable residents, including marginalized communities. These residents include low-income, elderly, youth, and housing-insecure populations, and will reflect a broad racial and ethnic demographic.
- b) Promote affordable housing by addressing the largest household expense after rent payments.
- c) Build climate resiliency and energy independence in traditionally underserved areas by reducing the burden on energy infrastructure.

B. Use of Funds

The Alachua County Board of County Commissioners will allocate \$3 million for weatherization and energy efficiency improvements for qualifying households, designed to combat energy insecurity in the county. The post-pilot Alachua County Energy Efficiency Program will start in January 2025 and is focused on low-income communities of renters who make 50% Area Median Income or less.

Alachua County will work through a contractor to distribute funds. As such, funds will be used to support contractor staff time spent on this program, as well as an appropriate amount on supplies and overhead, as outlined in the contract. The majority of the funds will go towards tune-ups and upgrades for participants in the program, with a maximum of \$15,000 per unit.

C. Eligibility Requirements

1) Unit Eligibility Requirements

- a) Buildings must be located within Alachua County, FL
- b) Participating landlords cannot improve more than 8 units total through ACEEP funding, as defined by the number of properties under an ACEEP-related lien. There is otherwise no limitation on the size of building that may participate so long as other eligibility requirements are met.
- c) Properties with structural and life-safety issues are not eligible.
- d) Properties with leaking roofs are not eligible.
- e) Properties that would require significant electrical panel and wiring improvements in order to take advantage of Section D Eligible Upgrades are not eligible to participate.
- f) Properties must have a functioning sewer and or septic system.
- g) Property must be current on and in compliance with its:
 - i. Homeowners insurance
 - ii. Rental License, if applicable

- iii. Property taxes
- h) Property cannot have a non-mortgage lien
- i) Unit must be being used as a rental and cannot be owner-occupied, and any homestead exemptions in non-sale years must reflect this
- j) Properties in a flood zone must carry flood insurance

2) Resident Eligibility Requirements

- a) Tenant must pay utilities
- b) Tenant household must make some income (ACEEP is not a zero-income program)
- c) Tenant must qualify in one of the following ways:
 - i. Make an annual income at or below 50% Area Median Income (AMI). AMI is determined using the rate for Alachua County as a whole, and not individual Census tracts.
 - ii. Live in a Qualified Census Tract as defined by the U.S. Department of Housing and Urban Development
 - iii. One or more residents of the rented household are enrolled in one of the following programs:
 1. Temporary Assistance for Needy Families (TANF)
 2. Supplemental Nutrition Assistance Program (SNAP)
 3. Free- and Reduced-Price Lunch (NSLP) and/or School Breakfast (SBP) programs
 4. Medicare Part D Low-Income Subsidies
 5. Supplemental Security Income (SSI)
 6. Head Start and/or Early Head Start
 7. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
 8. Section 8 Housing Choice Voucher Program
 9. Low-Income Home Energy Assistance Program (LIHEAP)
 10. Pell Grants

3) Administrative Requirements

- a) Properties must be available for pre- and post-assessments and utility bill tracking.
- b) Residents must engage in a utility bill review and education opportunity.
- c) Property Owners must agree to keep the units affordable for a specified period after improvement installation per Section E: Affordability Commitment.
- d) Property Owners must agree to repay the cost of the improvements plus a 10% early withdrawal penalty if they change the unit's affordability or sell it to a party that discontinues participation.

D. Eligible Upgrades

The following lists all upgrades which are eligible for ACEEP. Alachua County reserves all rights to rebates which may apply to program upgrades. Any rebates which accrue will be directed back into ACEEP account lines for future program upgrades.

1) Envelope Upgrades

- a) **Wall insulation.** Add insulation to building walls. Preference is given if post implementation R-value exceeds the current building energy code minimum.
- b) **Attic/Roof/Ceiling insulation.** Add insulation to building attic/roof/ceiling. Preference is given if post-implementation R-value exceeds the current building energy code minimum.
- c) **Underfloor insulation.** Add or repair underfloor insulation
- d) **Air sealing.** Seal air leaks with fire caulk to reduce air infiltration. Includes caulking, weather stripping, and sealing around doors, windows, and other locations of uncontrolled airflow. Where feasible, a blower door test should be used to measure air leakage before and after measure implementation.
- e) **Solar film.** Add solar film to windows to reflect solar heat.
- f) **Window replacement.** Replace existing windows with ENERGY STAR certified windows in instances where windows present a clear leak in the building envelope. Preference is given if the U- value of new windows meets the current building energy code minimum. Window replacement cannot be completed for manufactured units.
- g) **Exterior door replacement.** Replace existing exterior doors with ENERGY STAR certified doors in instances where doors present a clear leak in the building envelope. Preference is given if the U- value of new door meets the current building energy code minimum. Door replacement cannot be completed for manufactured units.

2) Appliance Upgrades

- a) **Clothes washer.** Replace existing clothes washer with ENERGY STAR certified clothes washer. Applies only to equipment installed within the dwelling unit; not applicable for equipment in common areas.
- b) **Clothes dryer.** Replace existing clothes dryer with ENERGY STAR certified clothes dryer. Applies only to equipment installed within the dwelling unit, not applicable for equipment in common areas.
- c) **Refrigerator and freezer.** Replace existing refrigerators and freezers with ENERGY STAR-certified equipment.
- d) **Ovens and stoves.** Replace existing oven and/or stove with ENERGY STAR-certified equipment. See Section IV(G)(3) of this document for additional guidance.
- e) **Dishwashers.** Add or replace existing dishwasher with ENERGY STAR-certified equipment.
- f) **Room air conditioners.** Replace existing room air conditioners with ENERGY STAR-certified equipment.

- g) **Advanced power strip.** Install Tier 1 or Tier 1 advanced power strip on an entertainment center or home office equipment. Advanced power strips automatically shut off equipment based on a master load (Tier or occupant sensor (Tier 2)).
- h) **Appliance recycling.** Recycle inefficient room air conditioners, refrigerators, and freezers to take them out of circulation.

3) Lighting Upgrades

- a) **LED Lighting.** Replace existing interior or exterior lamps and/or fixtures with LEDs.

4) HVAC Upgrades

- a) **Central Air Conditioning.** Install an appropriately sized, high-efficiency central air conditioning system that meets or exceeds ENERGY STAR standards.
- b) **Mini-split Air Conditioning.** Install high-efficiency mini-split system meeting or exceeding ENERGY STAR standards.
- c) **Packaged Terminal Air Conditioner (PTAC) or Packaged Terminal Heat Pump (PTHP).** Install high efficiency packaged terminal air conditioner (PTAC) or packaged terminal heat pump (PTHP). The efficiency of new equipment must exceed the current building energy code minimum.
- d) **Ground Source Heat Pump.** Install ground source heat pump system meeting or exceeding ENERGY STAR standards.
- e) **Furnace Blower Motor (ECM).** Retrofit existing furnace distribution system supply fan motor with electronically commutated (EC) motor.
- f) **Smart Thermostat.** Install programmable, learning, or connected thermostats to configure heating and cooling temperature setpoint setbacks.
- g) **Duct Sealing.** Seal air leaks and add insulation to heating and cooling distribution system ducts in unconditioned spaces.

5) Domestic Hot Water Upgrades

- a) **Low-flow water fixtures – Shower.** Install low-flow showerheads. To qualify, the flow rate must be at least 0.5 gallons per minute less than the existing showerhead.
- b) **Low-flow water fixtures – Faucet.** Install a low-flow faucet aerator on bathroom or kitchen faucets. Flow rate must be less than 1.5 gallons per minute for bathrooms and less than 2.2 gallons per minute for kitchens. For instances in which a new aerator cannot be installed, replace faucet fixture.
- c) **Pipe Insulation.** Install insulation on uninsulated domestic hot water distribution piping. Applies only to electric domestic hot water heaters.
- d) **Water Heater.** Install an appropriately sized, high-efficiency water heater that meets or exceeds ENERGY STAR standards. See Section IV(G)(3) of this document for additional guidance.

6) Other

- a) **Low-flow water fixture – Toilet.** Install WaterSense toilet.
- b) **Radon remediation.** This program is under development as of September 26, 2023.

E. Affordability Commitment

1) Affordability Overview

Alachua County is dedicated to ensuring that the housing improved by this program will remain affordable to low-income residents. The affordability commitment is designed to ensure that housing which enters this program as affordable housing remains in the community as affordable housing. Landlords who participate in the program will be asked to sign an affordability commitment with the County in the form of a deed restriction on the property, which commits the owner(s) to maintaining an affordable rental rate for the entirety of their participation in the program. The length of that affordability commitment depends on the amount of award a landlord chooses to accept, as outlined in the table below:

Award Level	Affordability Commitment
Up to \$5,000	3 years
\$5,001 to \$10,000	5 years
\$10,001 to \$15,000	7 years

The affordability commitment amount is set by the Consumer Price Index (CPI) and can be determined using the CPI Inflation Calculator available on the Bureau of Labor Statistics website. However, the full program also builds off Section 8 reasonability standards and can allow for a higher rate raise if the landlord can provide sufficient justification. This process is outlined in more detail in Section G(1).

2) Rental Increases

- a) Rental increases are capped at inflation as a determined by the CPI Inflation Calculator available on the Bureau of Labor Statistics website.
- b) Should a landlord raise their rate beyond inflation, they must provide justification for the raised costs. This justification will be verified rental amounts of three other rentals in the surrounding area which are not owned by or affiliated with the landlord, in order to show that their pricing is in line with the broader market. Property management companies may justify pricing using other properties they manage, as long as they are comparable to the property in question and not owned by the justifying landlord.
- c) What defines a “surrounding area” can be negotiated with program staff, as rural units will likely need to search a much larger radius area than their more suburban and urban counterparts.

- d) Those units which cannot justify the price raise will be required to reset their rental raise to a maximum of CPI's annual inflation rate or else discontinue their participation in the program, triggering the payback condition.

F. Program Process

This section outlines the process for applicants applying to the program, from initial application to final upgrades and long term rental rate monitoring.

1) Applying to the Program

Tenant and landlord applications are currently available, and one or both must be received in order for a unit to be considered for a tune-up. Landlord consent and tenant eligibility is required prior to beginning estimates. Tenant must provide proof of eligibility for the program by providing verification of eligibility via Section IV(C)(2) of this document. In the case of units housing Section 8 voucher holders, landlord may provide proof of tenant eligibility by showing program staff their tenant(s)' voucher.

2) Pre-Assessment Tune-Ups

Once the tenant or landlord has submitted their application and the property has been vetted via property and tax roll data, the home becomes authorized for a pre-assessment tune-up. While all homes are vetted virtually by program staff to determine their eligibility to the program, pre-assessments are completed to ensure the home matches the structural and safety requirements of the program. An energy efficiency tune-up is also completed at this time, which includes inexpensive energy efficiency upgrades like LED lightbulbs, pipe insulation, and tenant energy-use education. Pre-assessments are also used to determine where the largest energy inefficiencies are occurring, to create recommendations for program improvements and ultimately the estimates that RBNCF requests from contractors.

Program staff are not certified home inspectors or structural engineers and have no authority to make determinations of code compliance. For this reason, the property owners of homes which appear to not qualify for the program based on structural or safety concerns are informed of the concern, and they may either hire a certified professional to verify that the area of concern is indeed structurally sound and/or safe, or they may correct the concern in some other way. The unit is allowed to proceed with the program when the concern is addressed in either of these ways.

3) The Upgrade Work Order

Once a home has passed the pre-assessment, RTNCF coordinates between the property owner, the tenant, and local contractors to put together a list of quotes for energy efficiency upgrades based on the pre-assessment report. If there are multiple upgrades recommended, multiple contractors may need to be coordinated in order to secure the appropriate quotes.

Once these quotes are complete, RTNCF goes over the estimates with property owners to determine which upgrades make the most sense for them based on their affordability commitment preferences and which projects can make the biggest energy efficiency difference for their tenants.

4) Deed Restriction Paperwork and Upgrade Installation

Once a property owner has made a final decision on which upgrades they are interested in and the appropriate work order is developed, an appointment is scheduled with Alachua County Community Support Services (CSS) to complete the paperwork. This paperwork, a deed restriction, commits the property owner to the affordability commitment, and the clock starts on that commitment the day the paperwork is signed.

Once the paperwork is signed and the right-to-cancel has expired, the upgrades can proceed. Upgrade timing is coordinated between the contractor, property owner, and tenant, with RTNCF facilitating as needed.

5) Maintaining the Affordability Commitment

Completing the deed restriction and contract paperwork commits the property owner to periodic affordability checks of their lease amounts. This takes the form of updating program staff when a lease has been updated and submitting a copy of the new lease to staff for verification. In addition, all new leases must include a document informing the tenant of the landlord's participation in the program, including what the upgrades were, and what the original lease amount was, as well as explaining what the affordability commitment is and how it works.

G. Additional Program Requirements

1) Miscellaneous Program Fees

a) Document Filing Fee

The affordability commitment is a legal lien on the participating property. Because the award has a payback condition if the property owner should sell or leave the program early, deed restriction paperwork is completed in order to formalize this agreement, and this paperwork has to be filed at the County Clerk's office. This fee will be paid as a necessary administrative cost of ACEEP through funding set aside for this program and is outside the agreement with the property owner.

b) Pre-Assessment Tune-Up

Pre-assessments are conducted prior to signing the deed restriction with the property owner. This process is used to verify that the property is structurally sound per program requirements and has no clear safety issues. For those who complete the program, the

pre-assessment tune-up is considered part of their total award amount and subject to the affordability commitment.

Should structural or safety concerns be identified during the pre-assessment tune-up, the unit will be determined ineligible for participation until the concerns are resolved. Should property owners correct the area(s) of concern, the unit may continue in the program. Should the property owner not make necessary corrections, the cost of the tune-up is incurred without a clear link to an associated deed restriction document.

This full program work plan specifies that ACEEP funds can be used for all pre-assessment tune-ups for eligible tenants in which program staff reasonably believed prior to the pre-assessment that the unit would qualify for the program, and that the landlord intended to enroll. While this will likely result in ACEEP dollars leaving the program through upgrades without an affordability commitment attached, the upgrades are low-cost and directly benefit applicants who have already been verified as eligible (living at or below 50% AMI), which qualifies them for the program per BOCC programmatic goals.

c) Diagnostic Fees

In some instances, contractors will charge a diagnostic fee for their time going to a residence and completing a quote. As of the writing of this work plan, that amount is typically \$150. This amount is charged regardless of whether the contractor ends up being hired, and the fee is incurred prior to the signing of a deed restriction with the property owner. Because often multiple contractors are needed to provide quotes for different types of energy efficiency upgrades, there is strong potential for the fee will be incurred multiple times for a single unit.

This fee is incurred after a significant investment of program staff hours, including vetting the applicant and landlord for interest and eligibility, completing a pre-assessment tune-up, and hiring multiple contractors to create quotes for possible upgrades. The total investment of staff time and tune-up costs at the time this fee is incurred is between \$1,000 and \$2,000 of ACEEP program funds, and the tenant has only received very minimal energy efficiency upgrades.

For the full program, ACEEP will cover the diagnostic fee as an administrative fee for property owners who continue through the program, as a necessary administrative cost of ACEEP through funding set aside for this program and will be outside the agreement with the property owner.

For property owners who choose to discontinue with the program after this fee has been incurred, the property owner will need to cover this fee(s) themselves, in order to avoid additional losses to ACEEP which could otherwise have gone towards energy efficiency improvements.

Property owners will be made aware of this policy on the landlord application.

2) Manufactured Homes

a) Definition

For the purpose of this document, the term “manufactured homes” includes manufactured, prefabricated, mobile, and modular homes.

b) Age of Homes

The age of the home is one of the clearest indicators of whether a manufactured or mobile home will be structurally sound. Even for well-maintained structures, homes which were manufactured over ten (10) years ago were not subject to the same code and structural standards as modern units and can experience significant wear and tear that can ultimately disqualify a unit for program participation. For this reason, no units over ten (10) years old at the time of the first application will be allowed to participate in the program.

c) Home Value

In accordance with SHIP guidelines, manufactured and mobile homes will be limited to 50% of the assessed value of the unit for program participation, up to a maximum of \$15,000, with all the affordability commitments and other funding-associated requirements remaining the same.

d) Home Insurance

Manufactured and mobile homes will meet the same home and liability insurance requirements that apply to similar homes that participate in SHIP. These requirements must be met prior to participation in the program.

3) Electric Versus Natural Gas: Water Heaters & Ovens

a) Background

As of the passing of this work plan, significant evidence exists that natural gas-powered appliances can often be lower cost to use than electric appliance. While the County remains committed to supporting electrification and reducing greenhouse gas emissions with county boarders, there is cause to believe that a move to electrify certain appliances could result in a higher energy bill for the County’s lowest income residents. For this reason, certain excepts have been included in order to weigh utility bill considerations against electrification goals, as discussed in this section.

b) Electric vs. Natural Gas

i. Electric to Electric

In situations in which current appliances are electric, new appliances installed through this program must also be more efficient electric appliances. In no circumstances should an existing electric water heater, oven, and/or stove be replaced by a natural gas appliance.

The decision on the exact nature of the electrical upgrade will be left to the discretion of the contractors and the property owner in their conversations around what makes the most sense given the needs of the home and affordability commitment terms.

ii. Natural Gas to Electric

In situations where the gas water heater, oven, and/or stove is the only gas appliance in the unit, switching out the natural gas appliance would result in fully electrifying the home, eliminating all hook-up fees which are associated with natural gas use and charged to customers every month, regardless of their total use of natural gas. For ovens and/or stoves, new ACEEP appliances should be electric in these circumstances.

With regards to water heaters, this program strongly recommends that a switch from natural gas to electric water heater be made in situations where the natural gas unit is the only gas appliance, but it leaves ultimate discretion to the contractors and property owner in their conversations around what makes the most sense given the needs of the home and affordability commitment terms.

iii. Natural Gas to Natural Gas

In instances in which the ACEEP-replaced appliance(s) are *not* the only natural gas appliance in the home, tenants would not receive the benefit of a total disconnection from natural gas, and could, per the expert panel's opinion, see higher energy costs on their bills as a result of such a switch. In these circumstances, a more efficient natural gas water heater can replace the existing natural gas water heater, in order to ensure tenants are not experiencing higher utility bills after participation in the program.

c) Solar-Powered and Tankless Water Heaters

After consulting with the expert panel, the conclusion of staff regarding solar and tankless water heaters is that these items are, in most instances, not a cost-effective solution for this program. However, this work plan remains open to the possibility of their use in future situations as technology improves and becomes less expensive, if program staff believe the technology to be the best choice for the unit.

4) Annual Qualified Census Tracts (QCTs) Changes

a) Background

Each year the U.S. Census Bureau updates its list of Qualified Census Tracts to reflect the latest demographic trends. Because QCTs are used as a qualifier for tenant program participants, changes in these tracts can affect whether a tenant qualifies for the program or not.

b) Qualifying by QCT

County staff monitor annual changes to Qualified Census Tracts (QCTs) to ensure that the latest map applies to new applicants. If QCT boundaries change to no longer include an in-progress applicant, their eligibility will be determined based on the initial application submission date, whether it's a landlord or tenant application. Regardless of QCT status, applicants can always qualify for the program through other income-based verification methods.

5) Small Business Participation

a) Small Business Definition

The definition of a small business is set by the Alachua County Equal Opportunity Office through their Small Business Enterprise Program. Note that regardless of the business's location within the small business enterprise zone, only rental units within Alachua County can participate in ACEEP.

b) Small Business Program Goals

In order to improve access to affordable housing in Alachua County, small business owners looking to add energy-efficient affordable housing to the market are eligible to participate in ACEEP under the same terms and conditions as occupied units, with the exceptions listed in Section IV(G)(6)(c).

c) Participation Qualifications

For the full program, ACEEP will be open to landlords with empty units under the following circumstances:

- i. The unit otherwise meets eligibility requirements for the program, including but not limited to structural and safety requirements, number of units, and appropriate insurance.
- ii. The landlord will be subject to the same affordability commitment tiers as traditional participants, including payback conditions, which begin the day the lease is signed by an eligible tenant.
- iii. The first tenant to occupy the unit (and set the initial lease amount) must be a Section 8 voucher holder and meet Section 8 reasonability requirements for rent.
- iv. In order to ensure that this program is helping new units enter the market, participating units must be made available to rent within 3 months of the upgrades being completed.

H. Community Engagement

Community engagement requirements for the program will follow Alachua County BOCC policy on community engagement. For the purposes of this program, this will include, but is not limited to:

- 1) Publish and maintain a website with information targeted to landlords and renters. This website will meet all BOCC accessibility requirements.

- 2) Promote the program on all partner's respective social media and/or website(s)
- 3) Attend community meetings in qualifying neighborhoods
- 4) Build relationships with neighborhood leaders
- 5) Canvass prioritized neighborhoods
- 6) Assist with application completion as needed
- 7) Coordinate with other local organizations to help identify program candidates

I. Performance Reporting

The RTNCF and the CWC will collect contact information and record output measures. The CWC will use this contact information to follow up periodically over the year following each respective upgrade installation to measure the following outcome and Treasury Required Performance Indicators.

1) Performance indicators output measures

- a) Number of homes assisted with total family members served
- b) Number and type of improvements made
- c) Number of time-sensitive utility housing concerns addressed by the services.
- d) Decrease in energy insecurity as reported by families, through a qualitative satisfaction survey post-upgrade
- e) Utility Consumption and Cost Reduction Post Intervention in kWh, kGals, Therms, and related metrics
- f) Estimated carbon offset resulting from 1) education and utility bill management awareness, and 2) home efficiency improvements.
- g) Increase in the safety and independence of elderly and or disabled residents served by the services
- h) Rental cost of home and post improvement verification that the rental cost is still affordable per the program terms
- i) Support for local, minority, and women-owned businesses via subcontracted services

V. Pilot to Full Program Transition

This policy outlines the process for transitioning clients who qualified for a program during the pilot phase.

A. Eligibility

The objective of this policy is to ensure that eligible clients, who were part of the pilot phase, can continue to participate in the program as long as:

- 1) The tenant and/or landlord application were completed and dated within the dates of the pilot program
- 2) The tenant and the building are eligible under pilot- or full-program criteria

Program staff will conduct a comprehensive assessment of each new client's eligibility based on the requirements of the full program.

B. Program Transition

Upon completion of the eligibility assessment, the program staff will develop individualized transition plans for each qualified client. Transition plans will outline any steps required for clients to meet the new requirements of the full program. The plans will consider the unique circumstances and needs of each client, aiming to minimize disruptions and facilitate a smooth transition.

By offering support and flexibility, Alachua County aims to maintain the eligibility of qualified clients while facilitating their successful integration into the full program.