**Project:** Provide project name.

**Grantee/Borrower:** Identify name of legal entity and percentage ownership.

**Referral Organization:** Identify the organization that originated the loan/grant.

**Address:** Provide the full street address, city, and zip code.

**Funding Request:** Provide the total amount requested.

* Loan:
* Grant:

**Special Conditions:** Identify any special conditions unique to this particular transaction.

**Project Eligibility**

**Affordability (Check at least one):**

* Does the building have a current HCR regulatory agreement or similar agreement from another agency? 
  + Regulatory Agency:
    - HTFC/DHCR/HFA:
    - NYC HPD:
    - Other (please specify)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_:
* Is the building located with a HUD Census Tract area?
* Is the building located within a NYSERDA Disadvantaged Communities area?

**Building Condition**

**Provide details on current building systems, including:**

* Heating, Ventilation, Air Conditioning (HVAC) Systems (specify system type/fuel):
* Domestic Hot Water (DHW) System (specify system type/fuel):
* Metering configuration and fuel source for above listed building systems:

**Year Built:**

**Year Last Renovated (if applicable):**

**Number of Units:**

**Number of Bedrooms:**

**Age of Building Systems (Years):**

* HVAC:
* DHW:
* Roof:
* Windows/Envelope:

**Is the building/site historically protected?:**

**Is the building located in a flood plain/flood risk area?:**

**Existing Debt/Financial Condition**

**Does the property have an existing mortgage?:** Yes/No

If yes, provide details (e.g., interest rate, mortgagee, term, UPB, DSCR requirement, etc.).

**Income and Expenses:**

Describe any observations or concerns from financial analysis.

**Summary of Financial Condition:**

**Energy Audit & Property Condition Assessment Summary**

Describe the key findings of the Energy Audit and Property Condition Assessment.

**Estimated on-site carbon reduction that will result from the project scope:**

Provide summary of estimates provided in Energy Audit.

**Observations from Property Site Visit, Engineer Site Visit, and/or Internet Search**

Summarize key observations (e.g., building condition, deferred maintenance, etc.).

**Scope of Work**

Summarize the scope of work.

Indicate which of the options below reflects the scope of work:

* Full Electrification (HVAC + DHW)
* Partial Electrification (HVAC only; DHW not feasible) ☐

**Projected Impact on Tenant Utility Costs**

Describe if/how the scope of work will impact tenant utility costs. How are increases being addressed/mitigated?

**Contractor Information**

**Name of entity:**

**Is the contractor currently listed on the NY State Clean Heat approved contractor list:** Yes/No

**Relevant experience:**

**Property Management**

Provide name of property management entity and describe relevant experience. Note any concerns.

**Recommendation**

Summarize the recommendation.