

HPD FUTURE HOUSING INITIATIVE: PROGRAM STEPS		
Phase	Key Tasks	Assigned Party
Acceptance	HPD issues acceptance email with accompanying documents	HPD Sustainability
	Developer signs <i>Participation Agreement, W-9</i>	Project Team
	Upon acceptance, NYSDERDA pre-encumbers funds	NYSDERDA
Kickoff Meeting*	HPD schedules the kickoff meeting	HPD Sustainability
	Developer ensures all relevant members of their team can join	Project Team
	Developer prepares documents for kickoff and sends in advance to HPD Sustainability: Signed <i>Participation Agreement, W-9, Contract with Passive House Consultant, Project Team and Roles, Design Schedule, Current Design/Construction Documents, Budget Worksheet</i>	Project Team
	In the meeting: introduce all team members; review FHI process, <i>Design Review Checklist</i> , and <i>FHI Technical Requirements</i> ; discuss current design, passive house questions, electrification, budget, design schedule and next steps.	All
Design Meeting #1*	HPD schedules design meeting	HPD Sustainability
	Developer ensures all relevant members of their team can join	Project Team
	Developer prepares documents for meeting and sends in advance to HPD Sustainability: <i>Design Schedule, HPD BLDS Project Summary, Design/Construction Documents</i> addressing <i>FHI Technical Requirements, Passive House Feasibility Energy Modeling Report, Passive House Registration Confirmation, Passive House Certifier Review</i> (if available).	Project Team
	In the meeting: review design and TAP comments on <i>Design Review Checklist</i> ; discuss <i>Passive House Feasibility Energy Modeling Report</i> and challenges; discuss budget impacts; discuss items for <i>Design/Construction Documents</i> ; next steps.	All
Design Meeting #2 (Optional)	HPD schedules design meeting	HPD Sustainability
	Developer ensures all relevant members of their team can join	Project Team
	Developer prepares documents for meeting and sends in advance to HPD Sustainability: <i>Design Schedule, HPD BLDS Project Summary, Design/Construction Documents</i> addressing TAP's <i>Design Review Comments, Passive House Feasibility Energy Modeling Report, Passive House Certifier Review</i> (if available).	Project Team
	In the meeting: review design and TAP comments on <i>Design Review Checklist</i> ; discuss <i>Passive House Modeling Report</i> and challenges; discuss budget impacts; discuss required items for <i>Design/Construction Documents</i> ; next steps.	All
Construction Document Meeting	HPD schedules design meeting	HPD Sustainability
	Developer ensures all relevant members of their team can join	Project Team
	Developer prepares documents for meeting and sends in advance to HPD Sustainability: <i>Design Schedule, Design/Construction Documents</i> with all TAP comments resolved, <i>Budget Worksheet if applicable, Passive House Final Design Energy Modeling Report and Energy Model</i> (if available), <i>Passive House Feasibility Energy Modeling Report</i> (if final design report is not yet completed), <i>Passive House Certifier Review, Passive House Precertification Letter</i> (if available).	Project Team
	In the meeting: review HPD/TAP comments and ensure all design comments from <i>Design Review Checklist</i> can be closed out prior to bidding; discuss budget impacts; confirm FHI requirements in the design/construction documents; review <i>FHI Rider</i> and confirm it will be included in bid; next steps.	All
Bidding & Bid Review	Bidder Support: The TAP is available to support bidders and contractors that may need assistance with any aspects of the Future Housing Initiative Program and Requirements.	TAP
	Assess Bids: Assist team in evaluating bids if necessary.	TAP
	Value Engineering: Assist with value engineering, if necessary.	TAP
Pre-closing (3-4 weeks required for final NYSDERDA approval & issuance of Final Incentive Letter)	Send <i>Closing Checklist</i> to Project Team showing remaining items required to be submitted prior to the release the <i>Final Incentive Letter</i> .	HPD Sustainability/TAP
	Developer prepares and submits final documents to HPD Sustainability: <i>Finalized Budget Worksheet, Total Final Project Budget</i> with detailed cost breakdown, <i>HPD Commitment Letter, Final Construction Documents, Final Construction Contract, FHI Rider signed by Owner & GC, Milestone Payment Schedule</i>	Owner
	Contractor submits confirmation of Passive House 101 training.	GC
Week of Closing	Issue signed <i>Final Incentive Letter</i> which fully encumbers funds.	NYSDERDA
Construction Kickoff Meeting	Information is forthcoming	
Construction	Information is forthcoming	
Project Completion & Closeout	Information is forthcoming	

* Fast track projects (projects with anticipated closings in 2023) will have a combined kickoff+design meeting #1, followed by the CD meeting
 All emails from Project Team should be sent to futurehousing@hpd.nyc.gov and copied (cc'd) to your HPD Project Manager (PM)