

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, NYSERDA pre-encumbers funds and issues <i>Incentive Eligibility Letter</i>	NYSERDA
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</i>	Project Team
	In the meeting: introduce all team members; review FHI process incl. TAP <i>Design Review Workbook, FHI Technical Requirements, & FHI Closing Checklist</i> ; discuss current design, Passive House questions, Systems (space HPs, DHW, ERV) design, schedule and next steps.	All
CD Submission	Project Team submits updated <i>Construction Documents</i> (100% DD or 50% CD plus Specification workbook) to TAP for review. CDs should incorporate PH/FHI Scope upgrades.	Project Team
Design Meeting #1*	HPD schedules design meeting	HPD Sustainability
	Developer ensures all relevant members of their team can join	Project Team
	Project Team prepares documents for meeting and sends in advance to TAP: <i>Passive House Registration Confirmation, Passive House Energy Modeling Report, Passive House Certifier Review(s)</i> , if available.	Project Team
	In the meeting: review design and TAP comments on <i>Design Review Workbook</i> ; discuss <i>Passive House Energy Model & Review comments</i> . Review next steps.	All
CD Submission	Project Team submits CDs ready for bidding with all <i>FHI Design Review Workbook</i> comments resolved.	Project Team
Design Meeting #2 (Optional)	HPD schedules design meeting	HPD Sustainability
	Developer ensures all relevant members of their team can join	Project Team
	In the meeting: As needed, discuss outstanding TAP comments; Passive House challenges; budget impacts & VE; next steps.	All
Pre-closing	Send <i>FHI Closing Checklist</i> to Project Team showing remaining items required to be submitted prior to the release the <i>Incentive Award Letter</i> .	HPD Sustainability/TAP
	Developer prepares and submits final documents to TAP: <i>Final Construction Documents, Closing Budget Worksheet, Final Construction Contract (Draft acceptable), FHI Rider</i> signed by Owner & GC, <i>HPD Commitment Letter, Passive House Pre-Certification Award Letter</i>	Owner
TAP Memo (should be issued 4 weeks ahead of closing)	TAP Issues Memo to NYSERDA referencing successful completion of <i>FHI Closing Checklist</i>	TAP
Week of Closing	NYSERDA Issues signed <i>Incentive Award Letter</i> to take to closing.	NYSERDA
Construction Kickoff Meeting	HPD schedules kickoff meeting	HPD Sustainability
	Contractor submits confirmation of Passive House 101 training.	GC
	Project Team submits <i>Final Construction Contract</i> -signed; revised <i>Construction Schedule</i> incl. PH testing and verification; identify <i>Construction Team Project Champion</i> .	Project Team
	In the meeting: present <i>FHI Full Document Checklist</i> for milestone completion; review final <i>Construction Documents</i> ; discuss submittal, RFI, and inspection process, air sealing and refrigerant management priorities, and TAP inspections.	All
Construction	See <i>Full Document Checklist</i>	
Project Completion & Closeout	See <i>Full Document Checklist</i>	

* Fast track projects (projects with anticipated closings in 2024) will have a combined kickoff+design meeting #1

All emails from Project Team should be sent to futurehousing@hpd.nyc.gov and copied (cc'd) to your HPD Project Manager (PM)