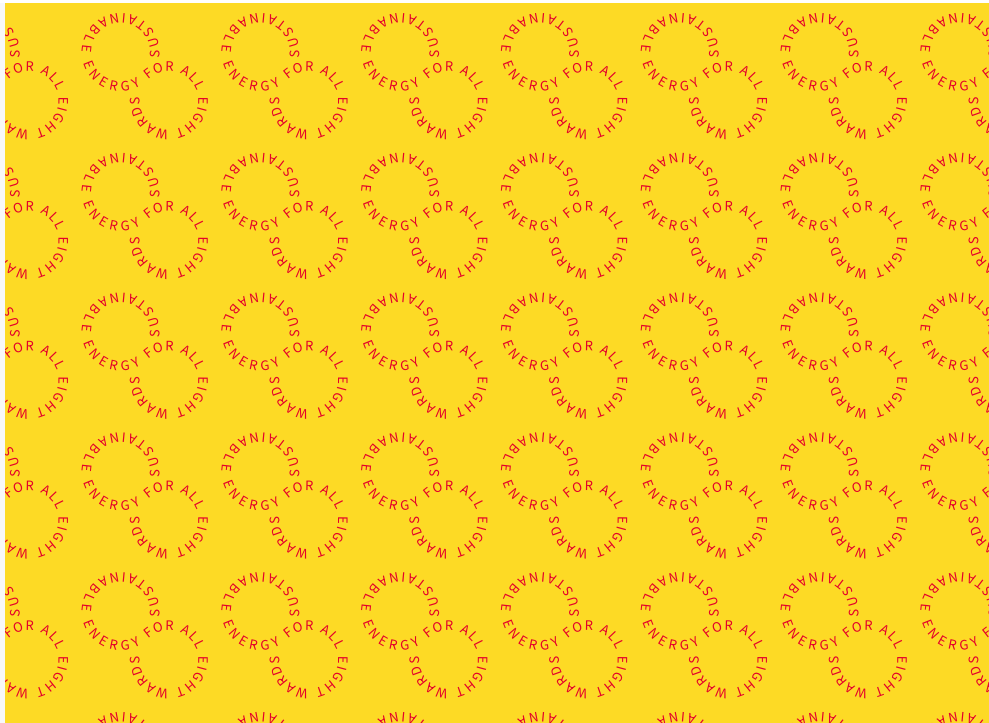
FY 2027 Income Qualified Efficiency Fund (IQEF) Information Session

Shyaam Simpson, Low-Income Program Manager

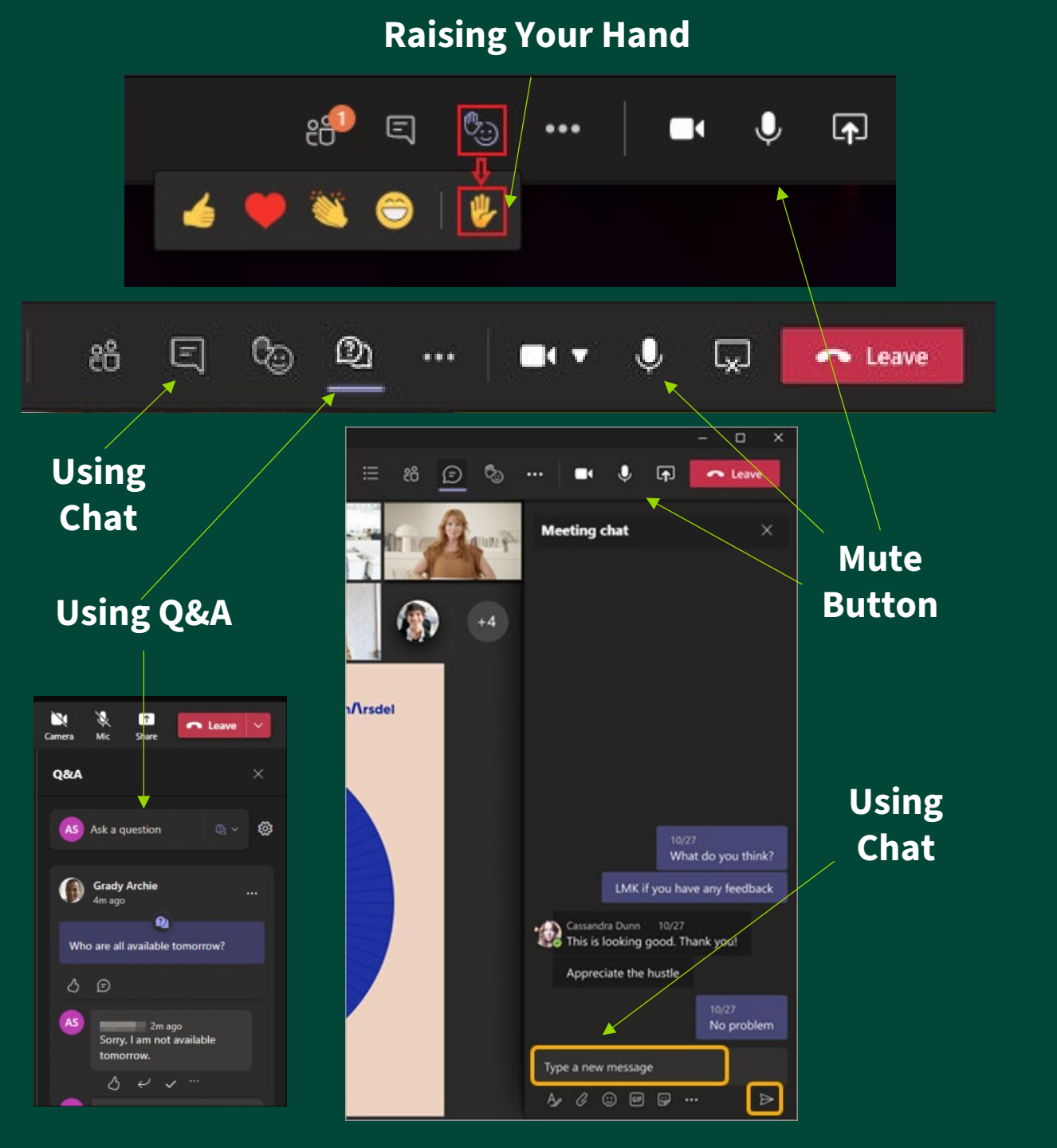
November 17, 2026

DISTRICT OF COLUMBIA SUSTAINABLE ENERGY UTILITY



Asking a Question

- Q/A will begin at the end of the presentation
- Please let us know in the chat section if you are having technical difficulties or difficulty hearing the presentation.
- To submit a question, please use the chat/Q&A to write out your question or use the ‘raise hand’ feature (see photo). Once your hand is raised the moderator will call on you to come off mute to give an auditory response
- Please put all questions in the chat/Q&A and we will address as many as possible.
- A recording of this presentation will be posted on our [resource library](#)and sent to you and anyone who registered.



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Agenda

1. **Welcome and about the DCSEU**
2. **Affordable Housing & Low-Income (LI) Program Offerings**
3. **Property Income Qualification**
4. **IQEF Overview**
5. **IQEF FY 2027 Timeline**
6. **How to Apply**
    1. Required Documents for IQEF Grading
    2. FY 2027 IQEF Application
    3. IQEF Data Intake Tool
7. **IQEF Project Selection Criteria**
8. **Other opportunities from the DCSEU**
9. **Q & A**

Ben Burdick

Managing Director,

DC Sustainable Energy Utility



DCSEU

About the DCSEU

The District of Columbia Sustainable Energy Utility (DCSEU) is a community-minded organization committed to making energy efficiency and clean energy more accessible to every person and business in the District. Since 2011, we have helped District residents and business generate more than $2.2 billion in lifetime energy cost savings. We provide the industry-leading learning opportunities, expert hands-on assistance, and vital financial support that save our communities both energy and money.



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DCSEU Goals

DISTRICT OF COLUMBIA SUSTAINABLE ENERGY UTILITY





Reduction in Energy, MTCO2e





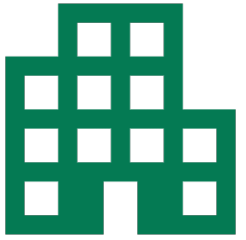
Green Jobs



Local Economic Development



Low-Income Spending



Renewables with EE



Deep Energy Retrofits



Affordable Housing & Low-Income (LI) Program Offerings

Programs & Qualifications

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DCSEU Affordable Housing & Low-Income (LI) Programs Overview

Income Qualified Efficiency Fund (IQEF)

- Competitive bidding process, open to affordable multifamily, clinics, shelters, churches
- Contractors **are** under contract with the DCSEU
- Project cost > $10k
- Minimum **30% contribution** from owner/property manager

Low Income Comprehensive

- Non-competitive
- Contractors **are not** under contract with the DCSEU
- Gut Rehab/New Construction
- Custom incentives based on energy savings

Low Income Energy Kits

- Air purifiers, power strips, smart plugs, shower heads
- Distribution site is under a participation agreement with the DCSEU
- Income-qualified multifamily buildings
- Food banks, shelters, clinics

Affordable Housing Retrofit Accelerator

- Application, targeting buildings **above 50k sqft**
- Contractors **are** under contract with the DCSEU
- Support with BEPS and electrification
- **80-100% of costs** provided by the DCSEU

Affordable Home Electrification Program for Multifamily Buildings

- Application, targeting **2-20 unit** multifamily buildings
- Contractors **are** under contract with the DCSEU
- Electrification support only
- **80-100%** of costs provided by the DCSEU

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Income Verification for Affordable Housing, Shelters & Clinics

- The building must feature restrictions or other covenants requiring that at least 50% of all units are occupied by households with incomes less than or equal to 80% of the Area Median Income (AMI).
- Shelters & Federally-approved Clinics also qualify for IQEF.
- Multifamily buildings (50% households meet 80% AMI guidelines)

View our **Affordable Housing, Shelters & Clinics Pre-Qualification Guide** for more information.

Please note that other DCSEU programs like the Affordable Housing Retrofit Accelerator (AHRA) and Affordable Home Electrification Program for multifamily buildings (AHEP) have additional/separate income qualifications.

Rental Limits for FY 2027

Bedrooms	Maximum Rent
Efficiency	$2,170
1 br	$2,480
2 br	$2,780
3 br	$3,400
4 br	$4,020

Income Limits for FY 2027

Household Size	Maximum Annual Income
1	$91,800
2	$104,900
3	$118,000
4	$131,100
5	$144,200
6	$157,300
7	$170,400
8	$183,500

Acceptable Forms of Documentation
Rent Roll
Tax Credit Letter (DC Government Agency or Internal Revenue Service),
Covenant Letter, (i.e. DCHA, DCHFA, DHCD, Habitat for Humanity)
Medicaid Program Enrollment Form
Company Annual Report

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Program overview, timeline, application, and efficiency/selection criteria

FY 2027 Income Qualified Efficiency Fund (IQEF)

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IQEF Importance in the District

- Preserve affordable housing in the District
- Diversify and expand DCSEU's pool of contractors
- Better value of projects for rate payers
  - Energy savings
  - Number of low-income residents served
- Target larger and more comprehensive projects

FY 2027 IQEF Overview

- **Budget**
  - **~$1.9 Million**
- **Project Type – Typical**
  - HVAC upgrades, including heat pumps and heat pump water heaters, chillers. HVAC upgrades to heat pump technology that require electrification can be considered.
  - Lighting controls, fixtures, and systems
  - Advanced thermostats
  - Variable Frequency Drives (VFDs)
  - Sealing or insulation
  - ENERGY STAR certified appliances such as refrigerators, dishwashers, heat pump dryers, and clothes washers
- **Who Can Apply:**
  - Contractors
  - Property Owners/Managers

Efficiency Requirements

HVAC:

- 17 SEER2 minimum for heat pumps serving apartments
- HVAC equipment must be AHRI certified

Lighting:

- >20% wattage reduction for lighting
- Lighting must be listed on DLC or ENERGY STAR
- Screw-in lamp upgrades are ineligible

Appliances:

- ENERGY STAR certification for advanced thermostats, heat pump water heaters, appliances, and exhaust fans



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Key IQEF Dates & Deadlines in FY 2027

Applications Open

November 2, 2026

Submission Deadlines

Early bird submission deadline:
December 18, 2026

Applications close:
January 15, 2027

Decisions Announced

March 12, 2027

Agreements Issued /Project Completion

Incentive agreements / work orders issued by:
March 31, 2027

Desired project completion:*
August 30, 2027

**If proposed project(s) cannot be completed by August 30, 2027, please note this in your application.*

DCSEU

How to Apply

DCSEU Approved Contractors

1. Download the FY 2027 **contractor cover page & application** (.pdf) and **Data Intake Tool** (.xlsm) and complete.
2. Submit your completed FY 2027 application to **IncomeQualified@dcseu.com** before January 15, 2027.
3. Projects selected for funding will be notified on or after March 12, 2027 (pending virtual remote pre-inspections & analysis review).

Visit IQEF Webpage for links to:

- IQEF Application
- Data Intake Tool
  - **Watch Data Intake Tool Info Session**
- How to Request a Property Walkthrough

New Contractors

1. The FY 2027 IQEF program is only open to contractors that have current subcontracts with the DCSEU.
2. The DCSEU does not have plans to issue an RFQ for FY 2027 .

Property Owners/Managers

1. **Request a property walkthrough and project review** with a DCSEU Approved Contractor.
2. Please provide the following:
   1. Property Owner / Manager name(s)
   2. Provide Low-income verification
   3. Number of units on property
   4. Mechanical/Electrical Engineer project
   5. Point of Contact
3. The DCSEU will schedule an Approved Contractor to perform a site visit for your project. Property owners/managers may get proposals from multiple Approved Contractors and submit the proposal of their choice.
4. Download and submit your **contractor cover page & application** and **Data Intake Tool** with a DCSEU Approved Contractor to **IncomeQualified@dcseu.com** before January 15, 2027.
5. Projects selected for funding will be notified on or after March 12, 2027 (pending virtual remote pre-inspections & analysis review).

Selection Criteria

- **Energy Savings:** Projects with significant energy savings ($/MTCO2e) will receive preference.
- **Matching Funds:** DCSEU is requesting a Minimum 30% customer contribution. Projects with customer contributions of 70% or greater will receive preference and be prioritized.
- Projects with contractors or property owners that have active CBE/SBE certification in FY 2027 will receive preference.
- **Early Submission date (December 18, 2026):** Customers and contractors who submit their project applications on or before December 18, 2026, will receive preference.

Scoring Guidelines

<table>
<tr><th>Selection Criteria</th><th>Max Points
(100 total)</th><th>Rules</th></tr>
<tr><td>Emissions Savings</td><td>40</td><td>
<table>
<tr><th>Points</th><th>Lighting</th><th>Electric-to-electric HVAC & WH</th><th>Gas-to-electric HVAC & WH</th></tr>
<tr><td>40</td><td><$600/MTCO2e</td><td><$4,000/MTCO2e</td><td><$2,500/MTCO2e</td></tr>
<tr><td colspan="4">Points scale down with increasing costs per emissions saved…</td></tr>
<tr><td>0</td><td>>$2,400/MTCO2e</td><td>>$10,000/MTCO2e</td><td>>$10,000/MTCO2e</td></tr>
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<tr><td>Matching Funds</td><td>25</td><td>
<table>
<tr><th>Points</th><th>Customer Contribution to Costs</th></tr>
<tr><td>25</td><td>65%</td></tr>
<tr><td colspan="2">Points scale down with less customer contribution</td></tr>
<tr><td>0</td><td>30%</td></tr>
</table>
</td></tr>
<tr><td>Certified Business Enterprise (CBE) Preference</td><td>25</td><td>Full points for registered & active CBEs.</td></tr>
<tr><td>Early Submission</td><td>10</td><td>Full points for submissions earlier than December 18, 2026.</td></tr>
</table>

DCSEU

Project Application Expectations

- All applications must be submitted in full, with:
  - Signed IQEF application
  - Data Intake Form
  - Specification sheets w/ all measures
  - Photos of existing equipment
  - W9 Tax Form From Both Contractors & Building Owners
  - PEPCO Bill
  - Washington Gas bills for Fuel Switch projects
  - Rent Roll
  - Customer contribution
  - Full customer information

Contractor Expectations

- Pre-project and post-project photos to be provided
- Projects over $100k DCSEU will carry out midway inspections
- Inform of any material or deadline changes of scope of work. It must be approved before purchase/installation
- Submit clear itemized paid materials invoices (with model, unit prices, and total amount paid purchased by due dates in contracts)
- Schedule all inspections by the date outlined in the work order
- For electrical panel upgrade project, provide photos of the panel before and after the upgrade
- Provide DOB inspection forms before the work order expires

Contractor Information

- **All contractors**
  - Must be under contract with the DCSEU for FY 2027
  - Priority will be given to CBE/SBE
  - Insurance – additional insurance required for in-unit projects
- **Green Jobs**
  - Monthly data submission online is required
- **How to become a DCSEU Contractor**
  - Must apply for Request for Qualifications (RFQ) -Attachment 2 – *opening soon*

Additional workforce development opportunities with the DCSEU

Green means go, Train Green in FY 2027 with the DCSEU

DCSEU

Overview of DCSEU Train Green Program

Workforce Development Focus
Train Green equips individuals with skills and certifications in energy efficiency and sustainable building sectors.

Industry-Recognized Certifications
The program offers training for LEED and BPI certifications, vital for careers in green construction and energy auditing.

Hands-On Learning Approach
Participants engage in practical exercises to apply green building principles and energy auditing in real-world scenarios.

Career and Networking Support
Train Green provides networking, job placement resources, and career guidance aligned with sustainability goals.



DCSEU

Enrollment in Train Green Courses

Step 1 – Request a Program Access Code

https://www.dcseu.com/train-green#train-green-program-access

Complete this form it takes less than 3 minutes (Name, Address, Contact Info, and Employer)

DO THIS TODAY!

Step 2 – Review Upcoming Courses

https://www.dcseu.com/train-green#train-green-trainings

Three (3) Skill Levels:
(Introductory, Basic, and Advanced)

Six (6) Pathways:
Energy Efficiency
Sustainability & Health
Building Operations
Heating, Ventilation, & Air Conditioning (HVAC),
Renewables & Solar
Design & New Construction

Step 3 – Sign Up for Alerts

https://www.dcseu.com/train-green#get-training-session-updates

This will provide you both updates for trainings and contractor relevant opportunities.

DCSEU

Get up to $100k in self-service rebates for your affordable multifamily building, shelter, or clinic

Business Energy Rebates

DCSEU

Up to $100k in Business Energy Rebates



Standard Rebates

- Lighting
- Motors (ECM circulator pumps and VFDs)
- HVAC
- Refrigeration
- Food Service & Vending
- Electric Lawn Care
- Electronics (TVs & Desktop Computers)

Instant Rebates

- Lighting

Bulk Appliance Rebates for Multifamily Housing

- Dehumidifiers
- Refrigerators
- Clothes washers and dryers

Visit dcseu.com/business-rebates to view all rebates

Incoming Rebate

- $50 off smart thermostats coming in 2027

How to apply

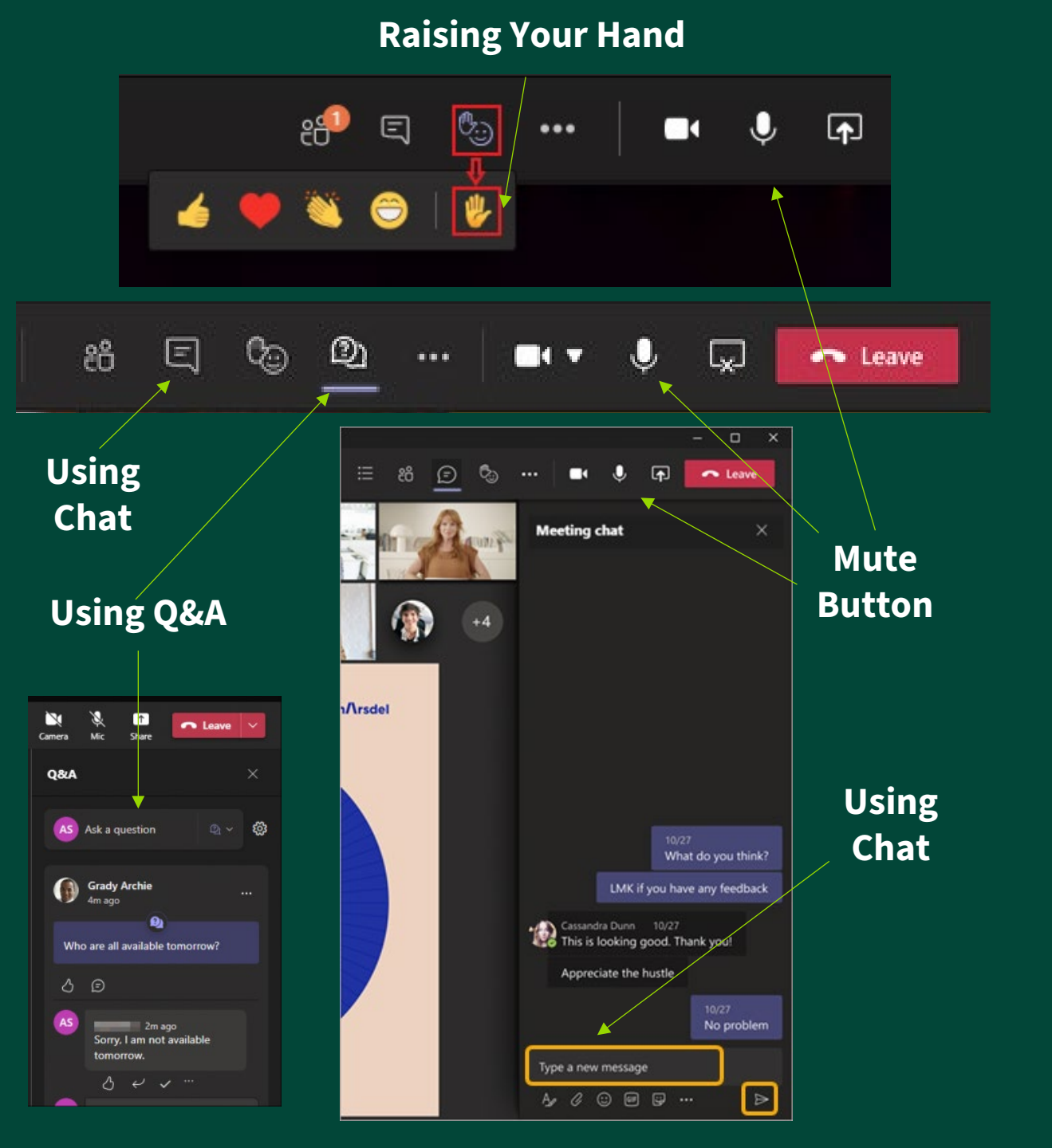
1. Gather your documentation
2. Apply for your rebate
3. Confirmation & get your pre-approval letter
4. Complete project & submit invoice
5. Customer review & sign off
6. Get inspected
7. Get paid

Visit dcseu.com/business-rebates/apply to start the pre-approval process

Q&A

Asking a Question

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DISTRICT OF COLUMBIA SUSTAINABLE ENERGY UTILITY

Thank You

Shyaam Simpson

Low-Income Program Manager

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202-770-6008

DEPARTMENT OF ENERGY & ENVIRONMENT

GOVERNMENT OF THE DISTRICT OF COLUMBIA
MURIEL BOWSER, MAYOR