

Wisconsin 2027-28 Qualified Allocation Plan

Appendix W: Energy Efficiency and Sustainability

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WHEDA Energy Efficiency & Sustainability Guidelines

Introduction/Overview

Sustainable design and energy efficiency strategies will be customized based on the development type, location, and available resources. WHEDA recognizes a range of green building certifications and renewable energy options, allowing projects to choose the most appropriate approach. The requirements and scoring process will focus on the following components:

1. Threshold Requirements
 - a) Energy Design Assistance
 - b) Green Building Certification
 - c) HERS Index Scores for Rehabilitation Projects
2. Scoring Elements
 - a) Green Building Certification
 - b) Renewable Energy (for New Construction only)

The scoring matrix applies separate criteria for rehabilitating existing buildings and new construction to evaluate each project appropriately. Both rehabilitation of existing residential buildings and adaptive reuse of nonresidential buildings converted to residential are eligible for the criteria for rehabilitation projects. Project teams should carefully review certification options to determine whether a new construction or rehabilitation certification fits their development.

WHEDA encourages project teams to engage with utility companies early in the process of deciding which points to pursue. This helps determine whether plans are feasible and if a waiver from the Public Service Commission (PSC) might be required. **Projects requiring a PSC waiver to meet the scoring criteria are not eligible for points in the category they claim.**

1. Threshold Requirements

Energy Design Assistance (EDA)

All successful Tax Credit Awardees are required to participate in the Focus on Energy—Energy Design Assistance (EDA) Program. An equivalent Energy Co-op program may be used for properties outside the Focus on Energy service area. It is strongly recommended that the EDA process be started early to meet program timelines and Housing Tax Credit deadlines. **Refer to the attached Schedule 1 for the Schedule of Required Documentation and Timeline.**

Projects must be at least 5,000 square feet and have four or more units to qualify for Focus on Energy Design Assistance. Scattered site projects will need to meet with Focus on Energy to determine eligibility. The EDA requirement is waived without penalty if a project is not eligible for Focus on Energy or another Energy Design Assistance program.

Project teams should follow the process and requirements of their selected energy design assistance program. Projects utilizing design assistance programs outside the Focus on Energy service area may

have slight timeline and documentation variations that might not align with Schedule 1. WHEDA encourages project teams to engage with energy efficiency programs early to ensure they meet Tax Credit Program deadlines. Please communicate any variations in documentation or deadlines to WHEDA early to determine any necessary adjustments or waivers.

Focus on Energy – Energy Design Assistance and Timeline

FOCUS ON ENERGY® provides technical and financial support to design professionals, builders, developers, and owners throughout the design and construction process. The best time for WHEDA Housing Tax Credit Projects to begin the Energy Design Assistance (EDA) process is during the design development stage. Projects will submit designs for review and collaborate with the EDA team to select energy efficiency strategies and set goals.

Each project will receive a Bundle Requirements Document (BRD) detailing the energy efficiency plans and projected cost savings. The BRD must be included in the 2027-28 Application Two Submission. Focus on Energy will issue a final verification report upon project completion, which must be submitted to WHEDA before the final 8609 issuance.

Applicants may choose to participate in an Energy Design Assistance program before being awarded, but it is not required and does not offer an advantage in the selection process. Projects must resubmit to Focus on Energy for an updated BRD if EDA services are used before the design development stage.

Income Qualified Housing (IQH) track

WHEDA Housing Tax Credit Awardees for New Construction Developments will participate in the specialized Income Qualified Housing (IQH) track of the Energy Design Assistance program. The IQH offering is a valuable resource for developers, particularly those new to energy efficiency, as it helps integrate energy-saving strategies early in the design process for greater impact and cost savings. This track involves more detailed consulting to developers of affordable housing projects, such as financial metrics, water savings, solar analysis, and carbon emission analysis.

Projects should allow ten weeks to complete the initial consultation and obtain the necessary program documentation, including the Bundle Requirements Document (BRD), which must be submitted as part of the 2026 Application Two Submission.

Project teams start the process by submitting an application and initial energy model through Focus on Energy's New Construction Online Tool. The applicant will be prompted on several building parameters. The initial energy model is built in real time based on the input characteristics. Be sure to indicate that the project is a WHEDA Housing Tax Credit project by selecting "Yes" to the prompt "Does this project include income qualified dwelling units?" in the online application. Project teams will then meet with a consultant to review opportunities for energy efficiency.

Incentives from Focus on Energy for IQH projects are paid based on a per dwelling unit rate. Additional incentives for design teams are also offered.

WHEDA Housing Tax Credit Awardees for Rehabilitation Developments

Projects consisting of rehabilitation of existing multifamily housing will work with a Focus on Energy Energy Advisor to evaluate the scope of work and connect developers with eligible incentives. After reviewing the project plans, Capital Needs Assessment, and other assessment reports, Focus on Energy will recommend scope of work upgrades and available incentives. In lieu of a Bundle Requirements

Document, WHEDA will require confirmation from Focus on Energy that the evaluation and recommendation has been completed.

For additional information regarding FOE applications and program, applicants may contact Jesus Rangel at jesus.rangel@focusonenergy.com.

Green Building Threshold Certification

At a minimum, each project must be built to the Wisconsin Green Built Home Standard (score of 200 or more).

Additional Threshold Requirements for Rehabilitation of Existing Buildings

Rehabilitation projects using **Threshold Certifications** must meet one of the following requirements:

- **HERS Index score of 80 or less** for properties built in or after 1980 or demonstrate that the energy performance of the completed building will be equivalent to or better than ASHRAE 90.1-2013, using an energy model created by a qualified energy services provider according to Appendix G 90.1–2016.
- **HERS Index score of 100 or less** for properties built before 1980 or demonstrate that the energy performance of the completed building will be equivalent to or better than ASHRAE 90.1-2013, using an energy model created by a qualified energy services provider according to Appendix G 90.1–2016.
- Post-rehab HERS Index score at least 15% lower than the pre-rehab HERS Index score.

Documentation verifying the requirements must be submitted before **8609 issuance**.

Scoring Elements

Projects may select one of the following three levels of green building certifications:

- **Threshold**
- Basic
- Advanced

Applicants must indicate their chosen certification level in their Full Application Submission. Developers are responsible for meeting all certification requirements and obtaining verification upon project completion.

Projects may change certifications if the change does not result in a lower score and is approved by WHEDA before the **Application Two Submission**. A written request to change certifications must be submitted before the **Application Two Submission**. Any changes that reduce the initial category score or substantial modifications after the 2026 Application Two Submission may incur penalties.

Proof of certification must be submitted before the issuance of the Tax Credit Allocation, the completed IRS Form(s) 8609 for Federal Credits, and the Wisconsin Low-Income Housing Credit Allocation Certificate for State Credits. If the selected certification requires monitoring or verification beyond the Application Three due date, applicants should discuss this with WHEDA prior to the Application Three due date.

Basic Certifications Scoring and Point Eligibility

Applicants can earn an additional **10 points** by obtaining one of the following **Basic Certifications**:

1. Eligible New Construction Certifications:
 - Enterprise 2026 Green Communities Criteria
 - LEED Silver Certification
 - Wisconsin Green Built Home Gold
 - Passive House Institute US PHIUS Core – Prescriptive
 2. **Eligible Rehabilitation Certifications** (for existing residential properties or adaptive reuse of nonresidential buildings):
 - Enterprise 2026 Green Communities for Moderate & Substantial Rehab
 - Wisconsin Green Built Homes Gold Certification
 - ~~Passive House Institute US – PHIUS Core Revive~~
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Advanced Certifications Scoring and Point Eligibility

Applicants can earn an additional **20 points** by obtaining one of the following **Advanced certifications**:

1. Eligible New Construction Advanced Certifications:
 - Enterprise 2026 Green Communities Criteria Certification Plus
 - LEED Gold/Platinum Certification
 - Wisconsin Green Built Communities Gold Plus
 - Passive House Institute US PHIUS Core
 2. Eligible Rehabilitation Advanced Certifications:
 - Enterprise 2026 Green Communities for Moderate & Substantial Rehab Certification Plus
 - Wisconsin Green Built Homes Gold Plus
 - Passive House Institute US – PHIUS Core Revive
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Recognition of other Sustainability Energy Certifications:

At WHEDA's discretion, projects may be permitted to obtain alternative sustainability certifications in place of those identified in this document to satisfy threshold or scoring requirements. Written approval must be obtained prior to the Application Two approval.

Renewable Energy (for New Construction only)

New Construction projects pursuing **Threshold**, **Basic**, and **Advanced** certifications can earn additional points by incorporating renewable energy. Applicants pursuing **Stretch Goal – Net Zero Certifications** are not eligible for additional renewable energy points.

Renewable Energy Point Allocation:

- Geothermal HVAC System serving the entire building: **2 Points**
- **Solar*** that offsets 20% or more of the total building's annual electric load OR solar that offsets 70%-80% of the common area annual electric load: **1 Point**
- Centralized Geothermal HVAC System with Solar that offsets at least 20% of the annual energy load: **5 Points**

*Community solar subscriptions is eligible for additional points for solar energy provision with documentation confirming availability of service for the entire project.

Proof of geothermal or solar installation must be provided before **8609 issuance**.

Schedule 1 - Required Documentation and Timeline

Tax Credit Program Milestone	Due Date for 2027/2028	Required Sustainability and Energy Efficiency Documentation
Full Application Submission	Concurrent with Full Application Submission	Applicants must indicate energy efficiency and sustainability points and select their green-built certification
Deadline to Submit Plans to Focus on Energy EDA	At least 10 weeks prior to Application Two submission deadline	Applicants must submit initial development designs to Focus on Energy EDA. Indicate WHEDA Housing Tax Credit Project in 'Special Considerations & Comments Section' Applicants outside of the Focus on Energy coverage should inform WHEDA of any impacts to the EDA process
Application Two Submission	180 days after Reservation Agreement Issuance Date	1. Applicants must submit a Focus on Energy EDA Bundle Requirement Document or another Energy Design Assistance Program Documentation equivalent 2. WHEDA Approval Letter of any energy efficiency and sustainability updates/changes
Application Three Submission	Within 180 days of PIS date	1. Focus on Energy EDA Final Verification Report or another Energy Design Assistance Equivalent 2. Green Building Certification Verification Documentation 3. Renewable Energy Installation Verification Documentation (New Construction Only) 4. Additional Rehab Threshold Requirements (Rehab Only)