

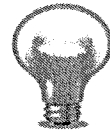
Utility Allowances

December 2022

COLLIER GARDEN APARTMENTS

(NORTHERN ILLINOIS REGIONAL COMMUNITY HOUSING)

Rockford, Illinois



UPDATE REPORT

TAX CREDIT MIXED-FINANCE PROPERTY

UTILITY ALLOWANCE SURVEY AND STUDY

(PUBLIC HOUSING & PROJECT-BASED SECTION 8)

(WITH NEW CONSUMPTION ANALYSIS)

The **Nelrod** Company®

3301 West Freeway 2nd Floor, Fort Worth, TX 76107
Tel: 817-922-9000 / Fax: 817922-9100

Satellite Office: Washington D.C. Metro Area and Houston, Texas
E-Mail Address: ResidentLife@nelrod.com – Web Site: www.nelrod.com
© 2021 The Nelrod Company, Fort Worth, Texas



3301 West Freeway
Fort Worth, TX 76107



Phone: 817-922-9000
Fax: 817-922-9100

Email: ResidentLife@nelrod.com – Website: www.nelrod.com

December 21, 2022

Debra Alfredson, Deputy Director
Northern Illinois Regional Community Housing
3617 Delaware Street
Rockford, IL 61102

Re: Tax Credit Mixed-Finance Utility Allowances Update Report for the Collier Garden Apartments Property (Public Housing and PBS8) (with New Consumption Analysis) - 2022

Dear Ms. Alfredson:

ResidentLife Utility Allowances® is pleased to enclose the draft Tax Credit Mixed-Finance Utility Allowances Update Report for the Collier Garden Apartments Property – December 2022. Please see the Survey and Study Results section of the study analysis for details of changes.

ResidentLife Utility Allowances is putting our seal of compliance on the work we perform for your agency certifying that we have developed your Utility Allowances in compliance with HUD Regulations and guidelines. ***We recommend that you post your adopted utility allowance schedule(s) on your webpage. We have made this process easy for you by providing, by email, an electronic version of your currently updated Utility Allowances in a pdf format that is ready to upload directly to your website.*** This new format displays our Seal of Certified Compliance assuring residents, Agency staff, HUD representatives, or other interested parties, that an approved method was used to efficiently and accurately develop your utility allowances and that the utility allowances are current.

As a reminder, HUD regulations state that, "adjustments to resident payments as a result of such changes" (adjustments made due to a result of rate changes of 10% or more) "shall be retroactive to the first day of the last rate change taken into account in such revision became effective. Such rate changes shall not be subject to the sixty (60) day notice requirement of §965.502(c)."

Please note that notice of the availability of relief from surcharges or payment of utility supplier billings in excess of the allowances for resident-purchased utilities should be included in each notice to residents given in accordance with §965.502(c) and in the information given to new residents upon admission.

Please carefully review this draft report for any identifiable problems, changes, corrections, and/or special needs and let me know if you have any changes or questions as soon as possible. If no changes are requested, this report will serve as a final report as well. **Please see the attached Closure Acceptance Statement, sign and return as soon as possible.** You can contact me at (817) 922-9000 ext 103 or cynthia@nelrod.com. It is a pleasure working with your agency.

Sincerely,

Cynthia Ramirez

Cynthia Ramirez
ResidentLife Utility Allowances® Specialist

Enclosure

Disclaimer: ResidentLife Utility Allowances® will make any necessary corrections to work previously performed prior to submission of final report. It is important to note that many local communities have different rate structures, weather patterns, types of charges, etc. ResidentLife Utility Allowances® has made every effort to be as accurate as possible, but will not be held responsible for changes involving different methodologies, rate structures, regulatory changes, omission and/or misinformation of cost calculation data from utility providers, selection of most advantageous cost calculation methodology in areas with multiple costing methods, and inaccurate allowances resulting from lack of information or data not provided by the agency.

3301 West Freeway
Fort Worth, TX 76107



Phone: 817-922-9000
Fax: 817-922-9100

Email: ResidentLife@nelrod.com – Website: www.nelrod.com

Closure Acceptance Statement

Re: Tax Credit Mixed-Finance Utility Allowances Update Report for the Collier Garden Apartments Property (Public Housing and PBS8) (with New Consumption Analysis) - 2022

Upon signing this Closure Statement, I, _____, on behalf of the **Northern Illinois Regional Community Housing, IL** acknowledge receipt of the draft survey study report.

I, or a member of our agency staff, have reviewed this draft report and have requested edits, changes or additions if needed. Our agency now accepts this survey study report as final. This does not mean that we will adopt these results as our Agency's actual allowances.

Signed

Signature

Title

Print Name

Date

Please sign and return within 30 days
fax to: (817) 922-9100 or email to residentlife@nelrod.com

Job #1021-RU-077

U:\2022\2022 Utility Allowances\2022 Agency Studies\ABC-Other Studies\NIREACH, IL-3 MF Updates 2022\Collier Garden-MF TCwPH & PBS8 New Cons 2022\0001b-Collier Gardens Apts, IL-TCMFPH UP Consumptions-Letter-Dec 2022.docx

TABLE OF CONTENTS

Objectives and Methodology 1

Survey and Study Results (Collier Gardens Apartments) 7

 Proposed Monthly Utility Allowances – Chart 1 –Public Housing..... 10

 Proposed Monthly Utility Allowances – Chart 2 – Project-Based Section 8 11

 Comparison of Current and Proposed Utility Allowances – Chart 3 12

 Individual Relief – Medical Equipment Allowances 13

Monthly Consumption Totals & Building Type Descriptions..... 14

Utility Allowance Cost of Consumption Calculations..... 17

Public Housing Units

 Collier Garden Apartments 18

Project-Based Section 8 Units

 Collier Garden Apartments 19

Support Documentation 20

 Utility Provider Rates and Charges..... 21

 Utility Provider Documentation..... 23

 Comparison of Previous and Current Utility Rates 38

 Development Characteristics..... 40

 Customization for Base Ekotrope Models 42

 Development Reports..... 44

 Currently Adopted Utility Allowances 49

 Introduction to Ekotrope Software Program..... 52

 HUD Regulations: 24CFR 965, Subpart E – Resident Allowances for Utilities 56

 Sample Notice and Instructions..... 61

OBJECTIVES AND METHODOLOGY

OBJECTIVES AND METHODOLOGY
TAX CREDIT MIXED-FINANCE PROPERTY
ANNUAL UPDATE 2022
(PUBLIC HOUSING & PROJECT-BASED SECTION 8)
(WITH NEW CONSUMPTION ANALYSIS)

This study was conducted in compliance with HUD Regulations for Public Housing Utility Allowance HUD Regulations 24CFR 965, Subpart E – Resident Allowances for Utilities, and HUD's Utility Allowance Guidebook and Tax Credit Utility Treasury Regulations 1.42-10.

Objective

The objective of this survey and study is to develop new consumption and updated **Tax Credit Mixed-Finance** (which includes Public Housing units and Project-Based Section 8 units) utility allowances for tenant-paid electric utilities for the **Collier Garden Apartments** property. The last consumption analysis was done in 2018. Therefore, it is time to complete **another consumption analysis** for the **Northern Illinois Regional Community Housing, IL**. We will utilize an approved engineering-based methodology which takes into consideration structure type, unit size, and equipment. Additionally, all of the units have energy efficient windows and 100% LED lighting. These utility allowances are based upon a reasonable consumption of an energy conservative family of modest circumstances and to provide for the basic essentials needed for a living environment that is safe, sanitary and healthful. **Note that the Project-Based Section 8 units will include allowances for central air conditioning, but the Public Housing units will not due to HUD regulations (24 CFR §965.505 (e)).**

Methodology

1. *Obtain Utility Rates and Charges*

The following information was obtained by a rate specialist and input in the Utility Providers Residential Rates and Charges document.

Documentation on current residential **electric** summer and winter rates and charges from **ComEd** through their internet website and telephone inquiries.

2. *Comparison of Utility Rates*

A rate specialist created charts comparing the previously applied electric and natural gas rates and charges (**dated: November 2021**) to the current utility rates and charges (**dated: December 2022**). These charts calculate a percentage difference in utility rates. Then the rate specialist analyzed the rate comparisons and emailed the draft charts to the Agency.

This comparison indicated that ComEd's electric summer rates increased 40%, winter rates increased 22%, and monthly charges decreased 3% each. (See "Comparison of Previous and Current Utility Rates" in Support Documentation section of this report.) This does not mean that **utility allowances** will change by the actual percentage values listed above.

3. *Data Gathering*

A utility allowance specialist updated ResidentLife Utility Allowance's **Customization & Energy Efficient Measures for Base Ekotrope Models** forms with criteria provided by the Agency at the last consumption analysis. This form was emailed to the Agency to review, make changes where applicable, and return forms. **The Agency did not make changes.** This completed form contains site-specific information, data, and characteristics which include, but are not limited to, building type, bedroom sizes, approximate age of development, fuel types, construction materials, window types, mechanicals, and energy efficiencies.

4. *Consumption Adjustments*

Customized criteria for each development and bedroom size was input in the new Customization and Energy Efficient Measures for Base Ekotrope Models forms. Current criteria was gathered from the Agency for the existing Tax Credit Mixed-Finance units (which includes Public Housing and Project-Based Section 8 units). **The Agency did not make changes to the criteria.** A ResidentLife utility allowance specialist analyzed the criteria provided by the Agency, and input the site-specific criteria into the software database for the current year.

5. *Modeling Details*

The modeling software program utilized to develop these building structure models is HUD compliant. Sources for developing these models include: HUD Regulations 24 CFR Part 965, Subpart E, Resident Allowances for Utilities, REM/Rate™ Home Energy Rating software program, Energy Conservation for Housing...A Workbook

– 1998, IECC (International Energy Conservation Code) – 2000, Utility Allowance Guidebook – 2008, Calculating Consumptions and Utility Allowances – 1986, Mechanicals – 1992, and PIH Notice 90-8 T.D.C. For more information see Introduction Software Program and Ekotrope Software Default Audit in the Support Documentation section of this study.

HUD regulations for Public Housing (24 CFR 965.505 (e)) do not allow for air conditioning in the utility allowances, therefore air conditioning consumptions were eliminated from the consumption totals and/or models were built without air conditioning mechanicals.

6. *Computation of Average Monthly Consumption*

The following was performed by a utility allowance specialist to develop the utility allowances:

Electric Consumptions

A utility allowance specialist exported and analyzed the reports generated by the ResidentLife Utility Allowance software database. These reports contain consumption usage for **electric** utilities for the **Collier Garden Apartments** property, by building type, and for applicable bedroom sizes. Generated reports are provided in the Support Documentation section at the back of the study.

Next, the utility allowance specialist entered these adjusted monthly electric consumptions into the **Monthly Utility Consumptions Totals** chart and into the **Cost of Consumption** calculation forms, for the **Champion Park Apartments** property.

7. *Computation of Utility Allowances*

The following process was conducted by a rate specialist: **(See Cost of Consumptions)**

ComEd's current residential summer and winter rates and charges for **electricity** usage (kwh) were applied to the monthly average consumption figures to determine an average cost of consumption for each size unit at the Collier Garden Apartments Property. A weighted average was then calculated and applied to

See Chart 1 Proposed Monthly Utility Allowances for Public Housing units and Chart 2 Project-Based Section 8 units found in the Survey and Study Results section of this report.

8. *Utility Allowance Schedule*

Public Housing Utility Allowance Schedules are not subject to approval by HUD before becoming effective, but will be reviewed in the course of audits or reviews of Agency operations (24 CFR 965.202(d)).

The **Tax Credit** utility allowance schedule was prepared and submitted in accordance with Tax Credit requirements.

For more details, instructions, and requirements see Texas Administrative Code-Compliance Monitoring Rules found in Title 10, Chapter 60, §60.109.

9. *Notification, Display and Comment Period (Public Housing)*

Per HUD Public Housing regulations (24 CFR 965.502(c)), the Agency shall give notice to all tenants of proposed allowances, scheduled surcharges, and revisions not less than 60 days before the proposed effective date of the allowances. The Agency should provide all tenants an opportunity to submit written comments during a period expiring not less than 30 days before the proposed effective date of the allowances.

Additionally, for your convenience we have provided a SAMPLE tenants notice for the agency to adjust to their needs. See sample and instructions in the back of the study.

10. *Support Documentation*

Per HUD **Public Housing** regulations (24 CFR 965.502(b)) the Agency must maintain a record that documents the basis on which allowances and scheduled surcharges, and revisions thereof, are established and revised. Such record shall be available for inspection by tenants (24 CFR 965.502(c)).

Per **Tax Credit** regulations (Utility Treasury Regulations 1.45-5), the building owner must retain any utility consumptions estimates and supporting data as part of the taxpayer's records for purposes of §1.6001-16.

This report contains a copy of all such supporting documentation, including a copy of HUD Regulations: 24CFR 965.501-508, Subpart E – Resident Allowances for Utilities.

11. *Annual Update*

HUD **Public Housing Utility Allowance** regulations (24 CFR 965.507(b)) state that housing authorities shall **review allowances at least annually** and revise allowances established if there has been a **10% increase or decrease in utility rates** and charges. If an annual adjustment is not made to the current utility allowances, the agency must monitor utility rates and charges to see if a rate has changed, by itself or together with prior rate change, not adjusted for, resulting in a change of 10% or more since the last utility allowance update. This interim adjustment helps Agencies avoid costly back charges and rent adjustments. ResidentLife Utility Allowances® provides a quarterly Rate Monitoring Service.

For **Tax Credit**, the building Owner must review and adjust the utility allowances once a calendar year. They must submit copies of the utility estimate and simultaneously post the utility allowances in a common area of the leasing office at the property for a 90-day period.

12. *Individual Relief (Public Housing)*

We have included Individual Relief Medical Equipment Allowances in the Survey and Study Results section of this report.

Please note that notice of the availability of relief from surcharges or payment of utility provider billings in excess of the allowances for tenant-purchased utilities should be included in each notice to tenants given in accordance with §965.502(c) and in the information given to new tenants upon admission. Agencies should have written procedures regarding Individual Relief in their Admission and Continued Occupancy (ACOP) policies.

SURVEY AND STUDY RESULTS

SURVEY AND STUDY RESULTS

TAX CREDIT MIXED-FINANCE PROPERTY

ANNUAL UPDATE 2022

(PUBLIC HOUSING & PROJECT-BASED SECTION 8)
(WITH NEW CONSUMPTION ANALYSIS)

Utility Allowances were calculated for the Tax Credit Mixed-Finance property, **Collier Garden Apartments**, (which includes Public Housing units and Project-Based Section 8 units) located in **Rockford, IL** with updated **Customization & Energy Efficiency Measures criteria** and current utility rates and charges, for electricity. Additionally, all of the units have energy efficient windows and 100% LED lighting. **Note that the Tax Credit units will include allowances for central air conditioning, but not the Public Housing utility allowances, per HUD regulations.** See Proposed Monthly Utility Allowances for Public Housing units and Project-Based Section 8 units on the following pages. Total utility allowances are shown below.

Public Housing Units (do not include air conditioning)

UNIT SIZE	1 BR	2 BR
Collier Garden Apartments	\$43.00	\$49.00

Non-Public Housing Units (includes air conditioning)

UNIT SIZE	1 BR	2 BR
Collier Garden Apartments	\$47.00	\$54.00

Comparison of Utility Allowances

A comparison of the Agency's currently adopted monthly utility allowances (effective date: 2021) and the proposed monthly utility allowances from this study are shown in Chart 3.

Results of Utility Allowance Comparison

Chart 3 shows increases in proposed utility allowances for all bedroom sizes. Increases range from \$15.00 to \$20.00 and are due to a rise in ComEd's electric rates. Note that the

increase in rates offset the decrease in the monthly charge. Changes are also due to a new consumption analysis.

U:\2022\2022 Utility Allowances\2022 Agency Studies\ABC-Other Studies\NIREACH, IL-3 MF Updates 2022\Collier Garden-MF TCwPH & PBS8 New Cons 2022\0200b-Collier Gardens Apts, IL-TCMFPH UP Consumptions-Survey Results.docx



**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY
PUBLIC HOUSING UNITS**

**PROPOSED MONTHLY UTILITY ALLOWANCES
Chart 1**

UPDATE 2022

Building Type: Apartment/Multi-Family

Collier Garden Apartments IL (Boiler H & WH) (EE Equip: Win,LED)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A,F)		\$43.00	\$49.00			

Does not include Air Conditioning

A monthly average cost of the summer and winter adjustments were used for the electric costs.

L&A= Lights & Appliances
F= Fan Motor for heating
H= Space Heating
WH= Water Heating

EE Equip= Energy Efficient Equipment
Win= Windows
LED= 100% LED Lighting

Note: These utility allowances are calculated similar to method used by each utility provider. They are not calculated by end use (like the Section 8 HCV Program), but by total usage for each utility type.



**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY
PROJECT-BASED SECTION 8 UNITS**

**PROPOSED MONTHLY UTILITY ALLOWANCES
Chart 2**

UPDATE 2022

Building Type: Apartment/Multi-Family

Collier Garden Apartments IL (Boiler H & WH) (EE Equip: Win,LED)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity* (L&A,A/C)		\$47.00	\$54.00			

*Includes Air Conditioning

A monthly average cost of the summer and winter adjustments were used for the electric costs.

L&A= Lights & Appliances
A/C= Air Conditioning
F= Fan Motor for heating
H= Space Heating
WH= Water Heating

EE Equip= Energy Efficient Equipment
Win= Windows
LED= 100% LED Lighting

Note: These utility allowances are calculated similar to method used by each utility provider. They are not calculated by end use (like the Section 8 HCV Program), but by total usage for each utility type.

**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY**

**COMPARISON OF CURRENT AND PROPOSED UTILITY ALLOWANCES
Chart 3**

PUBLIC HOUSING UNITS

UPDATE 2022

Development	Bedroom Size	Current Allowance	Proposed* Allowance	Difference**
Collier Garden Apartments IL-083	1	\$28.00	\$43.00	\$15.00
	2	\$32.00	\$49.00	\$17.00

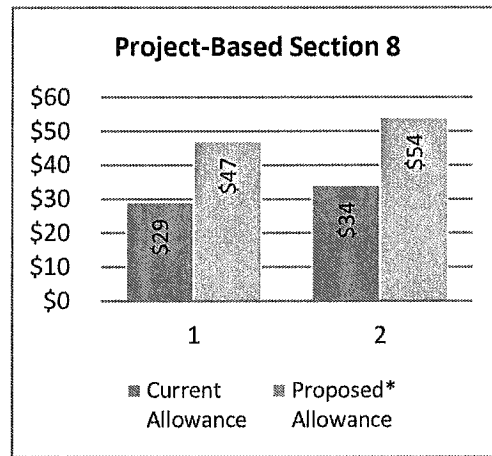
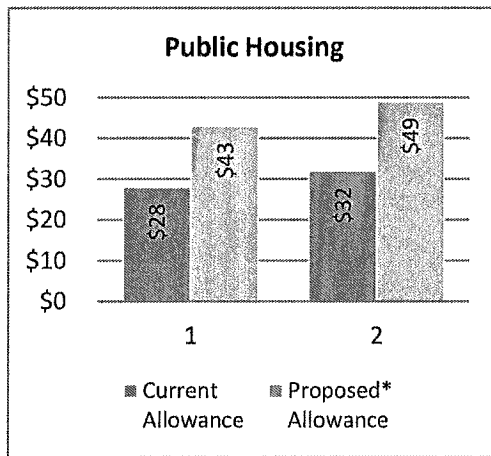
PROJECT-BASED SECTION 8 UNITS

Development	Bedroom Size	Current Allowance	Proposed* Allowance	Difference**
Collier Garden Apartments IL-083	1	\$29.00	\$47.00	\$18.00
	2	\$34.00	\$54.00	\$20.00

Proposed allowances include the average for electric summer and winter months.

*Proposed allowances were rounded to the nearest dollar.

**After rounding.



**Individual Relief - Public Housing
Medical Equipment Allowances**

Electric Provider: ComEd (wtd avg)

Item	Hours per Day	Wattage	Monthly kWh	Energy Charge	Utility Allowance
Oxygen Concentrator	18	400	223	0.140352	\$31.00
Nebulizer	2	75	5	0.140352	\$1.00
Electric Hospital Bed	0.2	200	1	0.140352	\$1.00
Alternating Pressure Pad	24	70	52	0.140352	\$7.00
Low Air-Loss Mattress	24	120	89	0.140352	\$12.00
Power Wheelchair/Scooter	3	360	33	0.140352	\$5.00
Feeding Tube Pump	24	120	89	0.140352	\$12.00
CPAP Machine	10	30	9	0.140352	\$1.00
Leg Compression Pump	24	30	22	0.140352	\$3.00
Dialysis Machine/Equipment	2	710	44	0.140352	\$6.00

Oxygen Concentrator

Use per day varies, assume 12-14 hours a day.
The 5-Liter model uses 400 W, the 3-Liter model uses 320 W.

Nebulizer

A medicine delivery system used mostly for pediatric care.
Used 4-6 times a day for 20 minutes at a time at 75W.

Semi/Fully Electric Hospital Bed

Use depends on adjustments. 200 W.

Alternating Pressure Pad

An air-filled mattress overlay.
Used 24 hours a day for someone who is bed-ridden.

Low Air-Loss Mattress

Takes the place of mattress - air -filled pressurized mattress.
Cycles air around every 15-20 minutes.

Power Wheelchairs and Scooters

Need to be charged approximately 8 hours every 3 days.
Batteries are 120 V, 3 Amp, 360 W.

Feeding Tube Pump (Continuous Feed)

A pump delivers a constant amount of formula throughout the day or night.

CPAP Machine

Used for Sleep Apnea. Machines run only at night for people who have a tendency to stop breathing at night. At maximum pressure use is 40 Watts. On average - 30 Watts.

Leg Compression Pump

Provides intensive compression therapy. Use varies, generally from 8-24 hours daily.

Dialysis Machine/Equipment (Small/Portable)

Filters a patient's blood to remove excess water and waste products. Used 2 hours daily.

**MONTHLY CONSUMPTION TOTALS
& BUILDING TYPE DESCRIPTIONS**

**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY**

MONTHLY UTILITY CONSUMPTION TOTALS

Consumptions updated using an engineering method - 2022

PUBLIC HOUSING UNITS

Building Type: Apartment/Multi-Family

Collier Garden Apartments IL (Boiler H & WH) (EE Equip: Win,LED)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (kWh) S(L&A,F)		229	277			
Electricity (kWh) W(L&A)		224	272			

PROJECT-BASED SECTION 8 UNITS

Building Type: Apartment/Multi-Family

Collier Garden Apartments IL (Boiler H & WH) (EE Equip: Win,LED)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (kWh) S(L&A,F,A/C)		317	374			
Electricity (kWh) W(L&A)		224	272			

L&A= Lights & Appliances

F= Fan Motor for heating

A/C= Air Conditioning

H= Space Heating

WH= Water Heating

EE Equip= Energy Efficient Equipment

Win= Windows

LED= 100% LED Lighting

S= Summer

W= Winter

Summer: June - September (4), Winter: October - May (8)

Seasons based on ComEd's summer & winter months.

Building Type (Structure) Descriptions

1. **Apartment/Walk-Up/Condominium/Garden Apartment/Low-Rise/Flat (Apt)**

- a. Building with a group of 3 individual **units** with common walls; attached to other units; separate entrances, and may have common staircases.
- b. Each **building** may have an end unit, inside unit, top unit, bottom unit, etc. **Building** will have 2 or more stories.
- c. Usually, but not always, there will be units on both sides of building.

2. **High Rise Apartment (H-R)**

A multi-unit building; 5 or more stories; sharing one or more common entrances. May have an elevator.

3. **Row House/Townhouse/Triplex/Fourplex/Multiplex (RH)**

- a. An individual unit attached to other individual units; 2 or more common walls; separate ground level entrances; 1 or 2 story **units**.
- b. Each building will have end units and inside units.
- c. Fourplex units usually share 2 common walls; can be square-shaped or L-shaped.
- d. Triplex building can be V-shaped.

4. **Semi-Detached/Duplex (S-D or SD)**

Building with 2 individual housing units; with separate entrances; one common wall; 1 or 2 story units.

5. **Detached House (DH)**

A detached building intended to house one family; sits on its own piece of land; not attached to another dwelling.

UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS

**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY
PUBLIC HOUSING UNITS**

UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS

ELECTRICITY - ComEd (Commonwealth Edison Company)

UPDATE 2022

Collier Garden Apartments IL

(Boiler H & WH)

Building Type: Apartment/Multi-Family

Monthly Average Unit Consumption kWh for all bedroom types - Summer	0BR	1BR	2BR	3BR	4BR	5BR
		229	277			
Total Monthly Charges Per Month \$10.95		\$10.95	\$10.95			
Total Energy Charges Per KWH 0.149152		\$34.16	\$41.32			
Total Monthly Cost - Summer		\$45.11	\$52.27			

Monthly Average Unit Consumption kWh for all bedroom types - Winter	0BR	1BR	2BR	3BR	4BR	5BR
		224	272			
Total Monthly Charges Per Month \$10.95		\$10.95	\$10.95			
Total Energy Charges Per KWH 0.135952		\$30.45	\$36.98			
Total Monthly Cost - Winter		\$41.40	\$47.93			

Averaging Months	0BR	1BR	2BR	3BR	4BR	5BR
Summer Annual Avg 4		\$180.44	\$209.08			
Winter Annual Avg 8		\$331.20	\$383.44			
Total Monthly Cost (Based on Annual Average)		\$42.64	\$49.38			

Does not include air conditioning

Summer: June - September (4), Winter: October - May (8)

Seasons based on ComEd's summer & winter months.

**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY
PROJECT-BASED SECTION 8 UNITS**

UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS

ELECTRICITY - ComEd (Commonwealth Edison Company)

UPDATE 2022

**Collier Garden Apartments IL
(Boiler H & WH)**

Building Type: Apartment/Multi-Family

Monthly Average Unit Consumption kWh for all bedroom types - Summer*	OBR	1BR	2BR	3BR	4BR	5BR
		317	374			
Total Monthly Charges Per Month \$10.95		\$10.95	\$10.95			
Total Energy Charges Per KWH 0.149152		\$47.28	\$55.78			
Total Monthly Cost - Summer		\$58.23	\$66.73			

Monthly Average Unit Consumption kWh for all bedroom types - Winter	OBR	1BR	2BR	3BR	4BR	5BR
		224	272			
Total Monthly Charges Per Month \$10.95		\$10.95	\$10.95			
Total Energy Charges Per KWH 0.135952		\$30.45	\$36.98			
Total Monthly Cost - Winter		\$41.40	\$47.93			

Averaging Months	OBR	1BR	2BR	3BR	4BR	5BR
Summer Annual Avg 4		\$232.92	\$266.92			
Winter Annual Avg 8		\$331.20	\$383.44			
Total Monthly Cost (Based on Annual Average)		\$47.01	\$54.20			

*Includes air conditioning

Summer: June - September (4), Winter: October - May (8)
Seasons based on ComEd's summer & winter months.

SUPPORT DOCUMENTATION

UTILITY PROVIDER RATES AND CHARGES

**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
(Collier Garden Apartments)
TAX CREDIT MIXED-FINANCE PROPERTY**

**Utility Providers Residential Rates and Charges
As of December 2022**

ELECTRICITY

UPDATE 2022

Source: ComEd (Commonwealth Edison Company)

800-334-7661

www.comed.com*

Summer (June - September) (4)		(Rate RDS)
Winter (October - May) (8)		(Rate RDS)
Customer Charge *	Per Month	\$7.07
Standard Metering Service Charge*	Per Month	\$3.35
Energy Assistance Charge (RCA)	Per Month	\$0.48
Renewable Energy Charge (RCA)	Per Month	\$0.05
Total Monthly Charges	Per Month	\$10.95
	Tiers	All
Distribution Facilities Charge (DFC)*	Per KWH	0.030997
Illinois Electricity Distribution Tax (IEDT)*	Per KWH	0.001245
Purchased Electricity Charges (<i>Summer</i>)	Per KWH	0.09738
Purchased Electricity Charges (<i>Winter</i>)	Per KWH	0.08418
Purchased Electricity Adj Factor (PEA)	Per KWH	-0.005
PJM Service Charge (PE)	Per KWH	0.01347
Environmental Cost Recovery Adj (ECR)	Per KWH	0.00041
Energy Efficiency Adjustment	Per KWH	0.00233
Renewable Energy Adjustment (REA)	Per KWH	0.00502
State Utility Excise Tax	Per KWH	0.0033
Total Energy Charges (<i>Summer</i>)	Per KWH	0.149152
Total Energy Charges (<i>Winter</i>)	Per KWH	0.135952
Year Round Weighted Average		(Rate RDS)
Energy Charge (wtd avg)	Per KWH	0.140352

*These Charges include the IDUFs charge of 1.0038

UTILITY PROVIDER DOCUMENTATION

Illinois Taxes

Summary of Illinois Taxes

Tax

City add-on tax \$0.01

Sales 5% state/1.25-2% local

Electricity State utility tax is based on kilowatt hours used. Rates are \$.00330 declining to \$.00202; large users can opt to self-assess tax at 5.1% of cost; in addition, Rock Island, East Moline & Silvis tax all residential electric use, and any non-residential use where the electricity is purchased from a non-local supplier, on a kWh basis using the state's kWh bands above. All use is taxed on a kWh basis regardless of supplier. Per kWh rates are: RI \$.004561 to \$.002243.

Natural Gas State utility tax is lower of 5.1% or \$.024/therm; in addition, East Moline & Silvis impose a muni-tax 5.15%; Rock Island imposes a muni-tax of 3.2%; Rock Island taxes any gas not subject to regular muni-tax @ \$.015/therm.

Telecommunications State Telecommunications Excise Tax of 7% applies to all services which originate or terminate in IL & are billed in IL; State Additional Charge of .1% applies for revenue derived from calls and services within IL; State Infrastructure Maintenance Fee of .5% applies to gross charges; Municipal Infrastructure Maintenance Fee of 1% applies to gross charges; in addition, Rock Island, East Moline and Silvis impose a tax of 5.15% on intrastate calls and services within Illinois. 3% Federal Tax applies to local service.

Property per \$1,000 of market value (IL QC Average) \$29.00

Unemployment Compensation 4.70%

(New employer rate) First \$10,500 paid each employee

Average Workers Compensation (per \$100 of payroll) Overall - \$2.62
National Average - \$3.50

DELIVERY SERVICE CHARGES

Supplement to Rate DSPP (1)

RESIDENTIAL DELIVERY SERVICE CHARGES.

	For Service Provided Beginning with the January 2021 Monthly Billing Period and Extending Through the December 2021 Monthly Billing Period (2) (5)	For Service Provided Beginning with the January 2022 Monthly Billing Period and Extending Through the December 2022 Monthly Billing Period (2) (6)
Residential Single Family Without Electric Space Heat Delivery Class		
Customer Charge (CC)	\$9.72 x IDUF _R	\$9.69 x IDUF _R
Standard Metering Service Charge (SMSC)	\$3.64 x IDUF _R	\$3.34 x IDUF _R
Distribution Facilities Charge (DFC) (\$/kWh)	\$0.03567 x IDUF _R	\$0.03847 x IDUF _R
Illinois Electricity Distribution Tax Charge (IEDT) (\$/kWh)	\$0.00121 x IDUF _R	\$0.00124 x IDUF _R
Residential Multi Family Without Electric Space Heat Delivery Class		
CC	\$6.94 x IDUF _R	\$7.04 x IDUF _R
SMSC	\$3.64 x IDUF _R	\$3.34 x IDUF _R
DFC (\$/kWh)	\$0.02890 x IDUF _R	\$0.03088 x IDUF _R
IEDT (\$/kWh)	\$0.00121 x IDUF _R	\$0.00124 x IDUF _R
Residential Single Family With Electric Space Heat Delivery Class		
CC	\$11.11 x IDUF _R	\$11.17 x IDUF _R
SMSC	\$3.64 x IDUF _R	\$3.34 x IDUF _R
DFC (\$/kWh)	\$0.01717 x IDUF _R	\$0.01683 x IDUF _R
IEDT (\$/kWh)	\$0.00121 x IDUF _R	\$0.00124 x IDUF _R
Residential Multi Family With Electric Space Heat Delivery Class		
CC	\$7.56 x IDUF _R	\$7.71 x IDUF _R
SMSC	\$3.64 x IDUF _R	\$3.34 x IDUF _R
DFC (\$/kWh)	\$0.01745 x IDUF _R	\$0.01620 x IDUF _R
IEDT (\$/kWh)	\$0.00121 x IDUF _R	\$0.00124 x IDUF _R

(Continued on Informational Sheet No. 25)

Filed with the Illinois Commerce Commission on
December 7, 2021. Issued pursuant to the
Illinois Commerce Commission Order dated
December 1, 2021, in Docket No. 21-0367.

Date Effective: December 8, 2021
Issued by T. R. Donnelly, President and COO
Post Office Box 805379
Chicago, Illinois 60680-5379

INCREMENTAL UNCOLLECTIBLE COST FACTORS

Supplement to Rider UF (1)

Incremental Distribution Uncollectible Cost Factors (IDUFs) (2)		
	IDUFs Applicable Beginning with the June 2022 Monthly Billing Period and Extending Through the August 2022 Monthly Billing Period (5)	IDUFs Applicable Beginning with the September 2022 Monthly Billing Period and Extending Through the May 2023 Monthly Billing Period (5)
IDUF _R	1.0041	1.0038
IDUF _N	0.9985	0.9983
IDUF _A	0.9998	1.0003
Incremental Supply Uncollectible Cost Factors (ISUFs)		
	ISUFs Applicable Beginning with the June 2022 Monthly Billing Period and Extending Through the August 2022 Monthly Billing Period (6)	ISUFs Applicable Beginning with the September 2022 Monthly Billing Period and Extending Through the May 2023 Monthly Billing Period (6)
ISUF _R (3)	0.9941	0.9948
ISUF _N (3)	0.9936	0.9958
ISUF _A (3)	0.9941	0.9669
ISUF _{SYS} (4)	0.9940	0.9941

NOTES:

- (1) This informational sheet is supplemental to Rider UF - Uncollectible Factors (Rider UF).
- (2) IDUFs are applied as shown in the Delivery Service Charges Informational Sheets (Informational Sheet No. 24 through Informational Sheet No. 31) and in accordance with the provisions of the Zero Standard Credit subsection of the Monthly Credit and Charge section of Rider ZSS - Zero Standard Service (Rider ZSS).
- (3) ISUFs are applied in accordance with the provisions of the Monthly Charges section of Rate BES - Basic Electric Service (Rate BES).
- (4) ISUF_{SYS} is applied in accordance with the provisions of the Monthly Charges section of Rate BESH - Basic Electric Service Hourly Pricing (Rate BESH).
- (5) IDUFs incorporate a Distribution Balancing Factor (DBF) in accordance with the provisions in Rider UF.
- (6) ISUFs incorporate a Supply Balancing Factor (SBF) in accordance with the provisions in Rider UF.

GENERAL TERMS AND CONDITIONS

(Continued from Sheet No. 129.1)

DEFINITIONS (CONTINUED)

MSP

MSP means Metering Service Provider. An MSP is a retail provider of Metering Service, other than the Company, taking service under Rate MSPS, certified by the ICC, and authorized to engage in the provision of Metering Service to retail customers taking service under Rate RDS - Retail Delivery Service (Rate RDS).

MW

MW means megawatt and equals 1,000 kW. A MW is a unit measurement of the demand for electricity or rate at which electricity is used.

MWh

MWh means megawatt-hour and equals 1,000 kWh. A MWh is a unit measurement of the amount of electricity used.

NERC

NERC means North American Electric Reliability Corporation or any successor agency, commission, or department.

Nonresidential Retail Customer

Nonresidential retail customer means a retail customer in the nonresidential sector as described in the Sectors section of the Retail Customer Categorizations part of these General Terms and Conditions.

Nonsummer Period

Nonsummer Period means the January, February, March, April, May, October, November, and December monthly billing periods.

OATT

OATT means Open Access Transmission Tariff.

On-site

On-site means at the premises of the Company's retail customer.

* **Opt-out Group**

Opt-out Group means the designation applicable to eligible large private energy customers, which subsection 8-103B(l)(1) of the Act identifies as retail customers, except for federal, State, municipal, and other public retail customers, using electric power and energy located at a single premises that each established a thirty (30) minute demand that exceeded 10,000 kilowatts (kW) during at least one month in the twelve (12) consecutive monthly billing periods immediately preceding the start of the applicable energy efficiency plan approved by the Illinois Commerce Commission for the Company in accordance with Section 8-103B of the Act, and that have successfully opted out of such energy efficiency plan for the applicable period in accordance with the requirements set forth in subsection 8-103B(l) of the Act. Notwithstanding the previous sentence, for a business entity with multiple sites located in the State, where at least one of those sites qualifies as an eligible large private energy customer, then any of that business entity's sites, properly identified on the form for notice, prescribed by the Illinois Commerce Commission pursuant to 220 ILCS 5/8-103B(l)(2), shall be considered eligible large private energy customers for purposes of Section 8-103B(l).

(Continued on Sheet No. 131)

GENERAL TERMS AND CONDITIONS

(Continued from Sheet No. 132)

DEFINITIONS (CONTINUED)

Staff

Staff means the Staff of the ICC.

Station Power

Station Power means electric power and energy used for station stand-by, station start-up, and station auxiliary power requirements to operate the electric equipment at the premises of an electric generating facility or for other end use at the premises, including heating, lighting, air-conditioning, and office equipment needs, related to the operation, maintenance, or repair of such facility. Station Power does not include any electric power and energy used at a service connection (a) to power a synchronous condenser operating under the provisions of a tariff establishing rates for such condensing that is on file with the FERC, or (b) for pumping at a pumped storage facility, or (c) in association with the restoration of the transmission system located in the Company's service territory, or to provide system black start service in the event that restoration of the transmission system is required.

Summer Period

Summer Period means the June, July, August, and September monthly billing periods.

Temporary Service

Temporary service means electric service provided to a retail customer for an abbreviated period that usually extends for less than one year in duration. For a situation in which temporary service is provided at a construction site, such service terminates when construction is completed. Temporary service is also provided for specific events or operations with predetermined durations. Company facilities required for the provision of temporary service in excess of standard facilities are provided in accordance with the provisions for providing nonstandard services and facilities. In addition, all installation and removal costs incurred by the Company to provide temporary service are provided in accordance with the provisions for providing nonstandard services and facilities.

Transmission Facilities Located in the Company's Service Territory

Transmission facilities located in the Company's service territory mean transmission facilities located in whole or in part within the Company's service territory and owned or operated (a) by the Company and/or (b) by PJM.

Wholesale Off-Peak Period

Wholesale Off-Peak Period means all hours other than those included in the Wholesale Peak Period.

Wholesale Peak Period

Wholesale Peak Period means the hours from 6 A.M. until 10 P.M. CPT, Monday through Friday except on days designated as holidays by the NERC.

(Continued on Sheet No. 134)

**RIDER RCA
RETAIL CUSTOMER ASSESSMENTS**

Applicable to Rate BES, Rate BESH, and Rate RDS

**RENEWABLE ENERGY RESOURCES AND
COAL TECHNOLOGY DEVELOPMENT ASSISTANCE CHARGE.**

Pursuant to the provisions of the Renewable Energy, Energy Efficiency, and Coal Resources Development Law of 1997, enacted on December 16, 1997, authorizing the assessment of charges for renewable energy resources and coal technology development assistance on retail customers' monthly bills for electric service, and as amended on August 20, 2021, the Company includes the following Renewable Energy Resources and Coal Technology Development Assistance Charge, as applicable, on each retail customer's monthly bill:

For a residential retail customer	\$0.05
For any other retail customer	
If such retail customer's highest demand during the previous calendar year was less than 10,000 kilowatts (kW)	\$0.50
If such retail customer's highest demand during the previous calendar year was at least 10,000 kW	\$37.50

The Renewable Energy Resources and Coal Technology Development Assistance Charge is assessed through December 31, 2025, in accordance with Illinois Public Act 102-0444.

*

(Continued on Sheet No. 256.1)

Filed with the Illinois Commerce Commission on
January 7, 2022. Issued pursuant to the
Illinois Commerce Commission Order dated
January 5, 2022, in Docket No. 21-0868.
Asterisk (*) indicates change.

Date Effective: January 8, 2022
Issued by T. R. Donnelly, President and COO
Post Office Box 805379
Chicago, Illinois 60680-5379

**RIDER RCA
RETAIL CUSTOMER ASSESSMENTS**

(Continued from Sheet No. 256)

* **ENERGY ASSISTANCE CHARGE
FOR THE SUPPLEMENTAL LOW-INCOME ENERGY ASSISTANCE FUND.**

Pursuant to the provisions of Section 13 of the Energy Assistance Act of 1989, as amended on November 30, 2021, authorizing the assessment of charges for the Supplemental Low-Income Energy Assistance Fund (305 ILCS 20/13) on retail customers' monthly bills for electric service, the Company includes the Energy Assistance Charge for the Supplemental Low-Income Energy Assistance Fund, as applicable, on each retail customer's monthly bill determined in accordance with the following formulas:

For a residential retail customer	BEAC x 1
For any other retail customer	
If such retail customer's highest demand during the previous calendar year was less than 10,000 kW	BEAC x 10
If such retail customer's highest demand during the previous calendar year was at least 10,000 kW	BEAC x 375

Where BEAC is the Base Energy Assistance Charge as specified in 305 ILCS 20/13. The initial BEAC shall be \$0.48 per month. Subsequent BEACs shall increase by \$0.16 per month for any calendar year, provided that at least 80% of the previous State fiscal year's available Supplemental Low Income Energy Assistance Fund funding has been exhausted, not to exceed \$0.96 per month for any calendar year. The effective Energy Assistance Charges can be found in Informational Sheet No. 41.

Pursuant to the provisions of Section 8-105 of the Public Utilities Act (Act), in 2011 the Company must offer programs originally authorized pursuant to the provisions of Section 16-111.5A(e) of the Act for retail customers in need, including a percentage of income payment plan. The Company is reimbursed for costs it incurs in offering such programs from the Supplemental Low-Income Energy Assistance Fund pursuant to the provisions of Section 8-105 of the Act.

The Energy Assistance Charge for the Supplemental Low-Income Energy Assistance Fund is assessed and updated on the Company's monthly billing period cycle through December 31, 2025, in accordance with Illinois Public Act 102-0673.

(Continued on Sheet No. 257)

PURCHASED ELECTRICITY CHARGES

Supplement to Rate BES and Rider PE (1)

Customer Group or Subgroup	Units	Purchased Electricity Charges (PECs) Applicable for the September 2022 Monthly Billing Period	
		Monthly Billing Period (2) (3) (4) (5)	
		Summer PEC (6)	Nonsummer PEC
Residential	¢/kWh	9.704	7.783
Watt-hour Non-Electric Space Heating	¢/kWh	9.784	7.807
Demand Non-Electric Space Heating	¢/kWh	9.963	7.867
Nonresidential Electric Space Heating	¢/kWh	7.742	7.834
Dusk to Dawn Lighting	¢/kWh	3.226	3.851
General Lighting	¢/kWh	7.459	7.560

Customer Group or Subgroup	Units	PECs Applicable Beginning with the October 2022 Monthly Billing Period and Extending Through the May 2023 Monthly Billing Period (2) (3) (4) (7)	
		Monthly Billing Period (2) (3) (4) (7)	
		Summer PEC (6)	Nonsummer PEC
Residential	¢/kWh	9.738	8.418
Watt-hour Non-Electric Space Heating	¢/kWh	9.807	8.438
Demand Non-Electric Space Heating	¢/kWh	9.989	8.502
Nonresidential Electric Space Heating	¢/kWh	8.110	8.465
Dusk to Dawn Lighting	¢/kWh	3.379	4.034
General Lighting	¢/kWh	7.814	8.173

NOTES:

- (1) This informational sheet is supplemental to Rate BES - Basic Electric Service (Rate BES) and Rider PE - Purchased Electricity (Rider PE).
- (2) PECs are designated on retail customer bills as the Electricity Supply Charge pursuant to Rate BES.
- (3) PECs include Supply Base Uncollectible Cost Factors (Supply BUFs) as listed in Informational Sheet No. 21.
- (4) PECs incorporate Incremental Supply Uncollectible Cost Factors (ISUFs) as listed in Informational Sheet No. 20, which include a Supply Balancing Factor (SBF) in accordance with the provisions of Rider UF - Uncollectible Factors (Rider UF).
- (5) PECs incorporate the results of the Spring 2022 Procurement Event approved by the ICC on April 21, 2022, the PJM Financial Transmission Rights (FTR) Auctions finalized May 2, 2022, and the Supplemental Block Energy Procurement Event approved by the ICC on May 20, 2022.
- (6) The Summer PECs are applicable in the months of June, July, August, and September.
- (7) PECs incorporate the results of the Fall 2022 Procurement Event approved by the ICC on September 15, 2022.

Year 2022 Record of Hourly Purchased Electricity
Adjustment Factors (HPEAs), Purchased Electricity
Adjustment Factors (PEAs) and Residential Time of Use
Purchased Electricity Adjustment Factors (RTOU PEAs)

As provided for in Rate BESH – Basic Electric Service Hourly Pricing, Rider PE – Purchased Electricity and Rate RTOUPP – Residential Time of Use Pricing Pilot, HPEAs, PEAs and RTOU PEAs are determined and applied to kilowatt-hours (kWhs) provided in the applicable effective period for which ComEd procures full requirements electric supply or directly procures electric power and energy supply, as applicable.

Effective Monthly Billing Period	Charge of (Credit) (cents/kWh)		
	PEA	HPEA	RTOU PEA
January 2022	(0.232)	(0.500)	0.341
February 2022	0.500	(0.097)	0.500
March 2022	0.500	(0.384)	0.500
April 2022	0.115	(0.500)	(0.500)
May 2022	0.326	0.500	(0.500)
June 2022	0.193	0.500	(0.500)
July 2022	0.336	(0.075)	(0.161)
August 2022	0.500	0.500	0.500
September 2022	0.500	0.500	0.500
October 2022	(0.500)	0.500	0.500
November 2022	(0.500)	0.500	0.500
December 2022	(0.500)	0.500	0.500

PJM SERVICES CHARGES

Supplement to Rate BES and Rider PE (1)

Customer Group or Subgroup	Units	PJM Services Charges (PSCs) Applicable for the September 2022 Monthly Billing Period (2) (3) (4)
Residential	¢/kWh	1.345
Watt-hour Non-Electric Space Heating	¢/kWh	1.335
Demand Non-Electric Space Heating	¢/kWh	1.335
Nonresidential Electric Space Heating	¢/kWh	1.335
Dusk to Dawn Lighting	¢/kWh	1.291
General Lighting	¢/kWh	1.291

Customer Group or Subgroup	Units	PSCs Applicable Beginning with the October 2022 Monthly Billing Period and Extending Through the May 2023 Monthly Billing Period (2) (3) (4)
Residential	¢/kWh	1.347
Watt-hour Non-Electric Space Heating	¢/kWh	1.337
Demand Non-Electric Space Heating	¢/kWh	1.337
Nonresidential Electric Space Heating	¢/kWh	1.337
Dusk to Dawn Lighting	¢/kWh	1.293
General Lighting	¢/kWh	1.293

NOTES:

- (1) This informational sheet is supplemental to Rate BES - Basic Electric Service (Rate BES) and Rider PE - Purchased Electricity (Rider PE).
- (2) PSCs are designated on retail customer bills as the Transmission Services Charge pursuant to Rate BES.
- (3) PSCs include Supply Base Uncollectible Cost Factors (SBUFs) listed in Informational Sheet No. 21.
- (4) PSCs incorporate Incremental Supply Uncollectible Cost Factors (ISUFs) listed in Informational Sheet No. 20.

Filed with the Illinois Commerce Commission on
September 16, 2022.

Date Effective: September 17, 2022
Issued by T. R. Donnelly, President and COO
Post Office Box 805379
Chicago, Illinois 60680-5379

ENVIRONMENTAL COST RECOVERY ADJUSTMENT

Supplement to Rider ECR (1)

ECR Applicable Beginning with the April 2022 Monthly Billing Period and Extending Through the July 2022 monthly Billing Period (2)
0.046 ¢/kWh

ECR Applicable Beginning with the August 2022 Monthly Billing Period and Extending Through the December 2022 monthly Billing Period (2)
0.041 ¢/kWh

NOTES:

- (1) This informational sheet is supplemental to Rider ECR - Environmental Cost Recovery Adjustment (Rider ECR).
- (2) An X.XXX value is a charge, while an (X.XXX) value is a credit.

ENERGY EFFICIENCY ADJUSTMENTS

Supplement to Rider EEPP (1)

Customer Group	EE Adjustment Applicable for the January 2022 Monthly Billing Period Period (2)(3)
Residential	0.233 ¢/kWh
Small N&L (4)	0.362 ¢/kWh
Large N (5)	0.174 ¢/kWh

Customer Group	EE Adjustment Applicable Beginning with the February 2022 Monthly Billing Period and Extending Through the December 2022 Monthly Billing Period (2)(3)
Residential	0.233 ¢/kWh
Small N&L (4)	0.363 ¢/kWh
Large N (5)	0.157 ¢/kWh

NOTES:

- (1) This informational sheet is supplemental to Rider EEPP – Energy Efficiency Pricing and Performance (Rider EEPP).
- (2) The EE Adjustment is designated on retail customer bills as the Energy Efficiency Programs.
- (3) An X.XXX value is a charge, while an (X.XXX) value is a credit.
- (4) Small N&L Group means the designation applicable to retail customers, each to which (a) one of the (i) Watt-Hour Delivery Class, (ii) Small Load Delivery Class, (iii) Medium Load Delivery Class, (iv) Large Load Delivery Class, (v) Fixture-Included Lighting Delivery Class, (vi) Dusk to Dawn Lighting Delivery Class, or (vii) General Lighting Delivery Class is applicable, and (b) the Opt-out Group is not applicable.
- (5) Large N Group means the designation applicable to retail customers, each to which (a) one of the (i) Very Large Load Delivery Class, (ii) Extra Large Load Delivery Class, or (iii) High Voltage Delivery Class, is applicable, and (b) the Opt-out Group is not applicable.

RENEWABLE ENERGY ADJUSTMENTS

Supplement to Rider REA (1)

RE Adjustment Applicability (2)	RE Adjustment Applicable for the October 2021 Monthly Billing Period and Extending Through the January 2022 Monthly Billing Period (3)
All Retail Customers	0.189 ¢/kWh
RE Adjustment Applicability (2)	RE Adjustment Applicable Beginning with the February 2022 Monthly Billing Period and Extending Through the August 2023 Monthly Billing Period (3)
All Retail Customers	0.502 ¢/kWh

NOTES:

- (1) This informational sheet is supplemental to Rider REA - Renewable Energy Adjustment (Rider REA).
- (2) The RE Adjustment is designated on retail customer bills as the Renewable Portfolio Standard.
- (3) An X.XXX value is a charge, while an (X.XXX) value is a credit.

**RIDER TAX
MUNICIPAL AND STATE TAX ADDITIONS**

Applicable to All Rates Except Rate RESS and Rate MSPS

STATE TAX ADDITIONS.

Pursuant to the provisions of the Electricity Excise Tax Law, 35 ILCS 640/2-4, imposing an excise tax on the privilege of using electricity purchased for use or consumption and not for resale, the Company charges state tax additions based upon the following cents per kilowatt-hour (ϕ /kWh) rates applied, as appropriate, to the kilowatt-hours (kWhs) delivered to retail customers, excluding business enterprises exempted under Section 2-4(c) and self-assessing purchasers as defined in the Electricity Excise Tax Law, 5 ILCS 640/2-3:

		<u>ϕ/kWh</u>
for the first	2,000 kWh used in a month	0.330
for the next	48,000 kWh used in a month	0.319
for the next	50,000 kWh used in a month	0.303
for the next	400,000 kWh used in a month	0.297
for the next	500,000 kWh used in a month	0.286
for the next	2,000,000 kWh used in a month	0.270
for the next	2,000,000 kWh used in a month	0.254
for the next	5,000,000 kWh used in a month	0.233
for the next	10,000,000 kWh used in a month	0.207
for all over	20,000,000 kWh used in a month	0.202

The total amount of such state tax additions is separately stated on the monthly bill of each retail customer to which such additions are applicable.

MUNICIPAL TAX ADDITIONS.

For each municipality that has adopted an ordinance imposing a tax on the privilege of using or consuming electricity acquired in a purchase at retail and used or consumed within the corporate limits of such municipality based on the kWh categories specified in Section 8-11-2, subparagraph 3 of the Illinois Municipal Code, 65 ILCS 5/8-11-2(3), the Company charges municipal tax additions based upon the ϕ /kWh rates listed in this Municipal Tax Additions section for such municipality applied, as appropriate, to the kWhs delivered to all retail customers located within the corporate limits of such municipality.

The rates, in ϕ /kWh, listed in this Municipal Tax Additions section for each such municipality include an addition equal to three percent (3%) of the tax to provide for reimbursement of administrative expenses as allowed by Section 8-11-2 subsection 4(c) of the Illinois Municipal Code, 65 ILCS 5/8-11-2(4c), as amended.

The total amount of such municipal tax additions is separately stated on the monthly bill of each retail customer to which such additions are applicable with the designation "Municipal Tax" or "City Tax" or by a similar legend.

(Continued on Sheet No. 259)

COMPARISON OF PREVIOUS AND CURRENT UTILITY RATES

Comparison of Previous and Current Utility Rates
Tax Credit Mixed-Finance Property - Collier Garden Apartments

NORTHERN ILLINOIS REGIONAL AFFORDABLE COMMUNITY HOUSING, IL

Note: Rates in bold text indicate changes and gray print indicates removal.

(We use the absolute value of the changes which gives us the percentage of change. This is the best way to determine a 10% change in utility rates and charges.)

ELECTRIC

Description	Measure	Summer Rates		Winter Rates		Difference		Percentage	
		11/2021	12/2022	11/2021	12/2022	Summer	Winter	Summer	Winter
Total Monthly Charges	per month	\$11.29	\$10.95	\$11.29	\$10.95	-\$0.34	-\$0.34	-3%	-3%
Total Energy Charges	per kw/h	0.106602	0.149152	0.110992	0.135952	0.042550	0.024960	40%	22%

Summer: June - September (4), Winter: October - May (8)

UPDATE 2022

DEVELOPMENT CHARACTERISTICS

HOUSING AGENCY Winnemago County Housing

DEVELOPMENT CHARACTERISTICS CHART
For Tax Credit Properties

Development Name	Number	Year Built	Building Type**	Family/Elderly?	Total # Units	# of Units by Bedroom Size					Resident-Paid Utilities (See)			A/C?				
						0	1	2	3	4	5	NGas	Electric	Wtr/Svr	Trash	Central	Window	
Collier Gardens AP2	1083	1976	W	F	150	144	6					M	I	M	M		I	

- * Please indicate with an "M" (Master-Metered) under each utility if the development has one master-meter per building and the Agency pays the utility bills.
- * Please indicate with an "I" (Resident-Paid utilities) under each utility if there are individual meters for each unit and the resident pays for the utility directly to the utility company.
- * Please indicate with a "C" (Check-Metered by agency) under each utility if there are individual meters for each unit but the Agency pays the utility company and charges the resident for excess utility usage.
- ** Building Types: Walk-Up/Apartment; Row House/Townhouse; Semi-Detached/Duplex; Detached House

Please fax to (817) 922-8885 attn: Cheryl Lord

CUSTOMIZATION FOR BASE REM/RATE MODELS

Housing Agency: **Winnebago Co HA, IL**

Customization & Energy Efficiency Measures for Base REM/Rate Models

Please check appropriate box(s) for each development and note if different for other bedroom sizes in development. NOTE: Use separate form if criteria is different for BR sizes or more than one building type per development. Blue text represents energy efficiency measures/equipment.

Development Name & No.: **Collier Garden Apartments**

Building: Year Built: **1976** Structure Type: Apt. High Rise RH SD DH
 Legend: Apt= Apartment, RH= Row House, SD= Semi-Detached/Duplex, DH= Detached House

Resident-Paid or Check-Metered Utilities: Electric Natural Gas Water Sewer Trash
 OR All Utilities are Master Metered (Paid by the Agency) (Stop here if ALL utilities are Master Metered)

Bedroom Sizes: OBR 1BR 2BR 3BR 4BR 5BR 6BR

1 Foundation Type: Concrete Slab Pier-Beam (Crawl Space) Basement
 2 Window Type: Single Pane Double Pane/Low-E Double Pane Vinyl
 3 # of Stories In Unit: one two Building has multiple stories *2 stories*

4a Heating Fuel: Electric Natural Gas Oil
 4b Is Heating Individually Metered? Yes No
 4c Heating Type: Electric Baseboard Central Boiler (Radiant) Individual Boiler
 Energy Efficiencies: Heat Pump Forced Air Furnace w/ ducts / Wall unit
 HP Seer:
 Solar Panels (Energy Efficient) Gas Furnace (48k/94 AFUE)
 4d Heating Equipment Location: Conditioned Space Unconditioned Space (attic/garage)

5 Air Ducts: Yes No
 If Yes, Location: Conditioned Space Unconditioned Space (attic)

6a Water Heater: Electric Natural Gas Oil
 Energy Efficiencies: Elec Tank .93 EF Gas Tank .62 EF Solar Panels
 Elec Tank .95 EF Gas Tankless .69 EF (Additional information will be needed)
 Elec Tankless Gas Tankless .80 EF
 6b Water Heater Type: Individual units Central Boiler
 6c Water Htr Location: Conditioned Space Unconditioned Space (attic/garage)

6 Stove/Range: Electric Natural Gas

8 Energy Efficiencies:
 Insulation: Ceiling (R-30) Ceiling (R-38) Wall (R-13)
 Low Flow Water: Shower, Faucets, &/or Toilets Lighting: 100% CFL/LED

Notes/Comments:

DEVELOPMENT REPORTS

Fuel Summary

Property
NIREACH, IL
, IL 61102
Model: APT-1BR

Organization
Fox Energy Specialists
James Rodriguez

Inspection Status
Results are projected



Collier Gardens Apts-TC MF w PH &
PBS8-APT-1BR
Collier Garden Apts-APT-1BR

Builder
NIREACH, IL

Annual Energy Cost

Natural Gas	\$570
Electric	\$320

Annual End-Use Cost

Heating	\$435
Cooling	\$30
Water Heating	\$59
Lights & Appliances	\$242
Onsite Generation	-\$0
Service Charges	\$124
Total	\$890

Annual End-Use Consumption

Heating [Natural Gas Therms]	575.5
Heating [Electric kWh]	37.7/8=5
Cooling [Electric kWh]	350.7/4=88
Hot Water [Natural Gas Therms]	78.9
Lights & Appliances [Natural Gas Therms]	25.3
Lights & Appliances [Electric kWh]	2,684.8/12=224
Total [Natural Gas Therms]	679.7
Total [Electric kWh]	3,073.2
Total Onsite Generation [Electric kWh]	0.0

Peak Electric Consumption

Peak Winter kW	0.27
Peak Summer kW	0.80

Utility Rates

Electricity	Default Electric Provider
Natural Gas	Default Gas Provider

Lighting and Appliances



Property
 NIREACH, IL
 , IL 61102
 Model: APT-1BR

Organization
 Fox Energy Specialists
 James Rodriguez

Inspection Status
 Results are projected

Collier Gardens Apts-TC MF w PH &
 PBS8-APT-1BR
 Collier Garden Apts-APT-1BR

Builder
 NIREACH, IL

ANNUAL SUMMARY

Summary	Consumption	Annual Cost [\$]
Lighting [kWh/Year]	268.5	22
Electric Appliances [kWh/Year]	2,416.2	201
Fossil Fuel Appliances [MBtu/Year]	2.5	19
Total	-	242

LIGHTING

Lighting Scheme	Consumption [kWh/Year]	Annual Cost [\$]
Interior Lighting	246.8	21
Exterior Lighting	21.7	2
Garage Lighting	0.0	0
Total	268.5	22

FOSSIL FUEL APPLIANCES

Appliance Type	Consumption [MBtu/Year]	Annual Cost [\$]
Clothes Dryer	0.0	0
Range/Oven	2.5	19
Total	2.5	19

ELECTRIC APPLIANCES

Appliance Type	Consumption [kWh/Year]	Annual Cost [\$]
Dishwasher	170.3	14
Range/Oven	25.3	2
Refrigerator	529.0	44
Clothes Dryer	511.0	43
Clothes Washer	68.7	6
Mechanical Ventilation	0.0	0
Ceiling Fan	76.7	6
Television	482.0	40
Miscellaneous	553.3	46
Total	2,416.2	201

Fuel Summary

Property
NIREACH, IL
, IL 61102
Model: APT-2BR

Organization
Fox Energy Specialists
James Rodriguez

Inspection Status
Results are projected



Collier Gardens Apts-TC MF w PH &
PBS8-APT-2BR
Collier Gardens Apts-APT-2BR

Builder
NIREACH, IL

Annual Energy Cost

Natural Gas	\$633
Electric	\$372

Annual End-Use Cost

Heating	\$477
Cooling	\$33
Water Heating	\$78
Lights & Appliances	\$292
Onsite Generation	-\$0
Service Charges	\$124
Total	\$1,005

Annual End-Use Consumption

Heating [Natural Gas Therms]	631.8
Heating [Electric kWh]	41.4/8 = 5
Cooling [Electric kWh]	389.2/4 = 97
Hot Water [Natural Gas Therms]	104.1
Lights & Appliances [Natural Gas Therms]	28.0
Lights & Appliances [Electric kWh]	3.259.8/12 = 272
Total [Natural Gas Therms]	763.9
Total [Electric kWh]	3,690.5
Total Onsite Generation [Electric kWh]	0.0

Peak Electric Consumption

Peak Winter kW	0.33
Peak Summer kW	0.94

Utility Rates

Electricity	Default Electric Provider
Natural Gas	Default Gas Provider

Lighting and Appliances



Property
NIREACH, IL
, IL 61102
Model: APT-2BR

Organization
Fox Energy Specialists
James Rodriguez

Inspection Status
Results are projected

Collier Gardens Apts-TC MF w PH &
PBS8-APT-2BR
Collier Gardens Apts-APT-2BR

Builder
NIREACH, IL

ANNUAL SUMMARY

Summary	Consumption	Annual Cost [\$]
Lighting [kWh/Year]	324.4	27
Electric Appliances [kWh/Year]	2,935.5	244
Fossil Fuel Appliances [MBtu/Year]	2.8	21
Total	-	292

LIGHTING

Lighting Scheme	Consumption [kWh/Year]	Annual Cost [\$]
Interior Lighting	300.5	25
Exterior Lighting	23.9	2
Garage Lighting	0.0	0
Total	324.4	27

FOSSIL FUEL APPLIANCES

Appliance Type	Consumption [MBtu/Year]	Annual Cost [\$]
Clothes Dryer	0.0	0
Range/Oven	2.8	21
Total	2.8	21

ELECTRIC APPLIANCES

Appliance Type	Consumption [kWh/Year]	Annual Cost [\$]
Dishwasher	218.5	18
Range/Oven	28.0	2
Refrigerator	529.0	44
Clothes Dryer	623.9	52
Clothes Washer	83.9	7
Mechanical Ventilation	0.0	0
Ceiling Fan	115.0	10
Television	551.0	46
Miscellaneous	786.2	65
Total	2,935.5	244

CURRENTLY ADOPTED UTILITY ALLOWANCES



**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY
PUBLIC HOUSING UNITS**

**PROPOSED MONTHLY UTILITY ALLOWANCES
Chart 1**

UPDATE 2021

Building Type: Apartment/Multi-Family

Collier Garden Apartments IL (Boiler H & WH) (EE Equip: Win, LED)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)		\$28.00	\$32.00			

Does not include Air Conditioning

A monthly average cost of the summer and winter adjustments were used for the electric costs.

L&A= Lights & Appliances

EE Equip= Energy Efficient Equipment

H= Space Heating

Win= Windows

WH= Water Heating

LED= 100% LED Lighting

Note: These utility allowances are calculated similar to method used by each utility provider. They are not calculated by end use (like the Section 8 HCV Program), but by total usage for each utility type.



**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY
PROJECT-BASED SECTION 8 UNITS**

**PROPOSED MONTHLY UTILITY ALLOWANCES
Chart 2**

UPDATE 2021

Building Type: Apartment/Multi-Family

Collier Garden Apartments IL (Boiler H & WH) (EE Equip: Win,LED)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity* (L&A,A/C)		\$29.00	\$34.00			

*Includes Air Conditioning

A monthly average cost of the summer and winter adjustments were used for the electric costs.

L&A= Lights & Appliances

EE Equip= Energy Efficient Equipment

A/C= Air Conditioning

Win= Windows

H= Space Heating

LED= 100% LED Lighting

WH= Water Heating

Note: These utility allowances are calculated similar to method used by each utility provider. They are not calculated by end use (like the Section 8 HCV Program), but by total usage for each utility type.

INTRODUCTION TO EKOTROPE SOFTWARE PROGRAM

INTRODUCTION TO EKOTROPE™ SOFTWARE PROGRAM

1. Ekotrope™ Software Design Objective

Ekotrope – Residential Energy Analysis and Rating Software Program is a sophisticated, residential energy analysis, code compliance and rating software program. Ekotrope calculates heating, cooling, hot water, lighting, and appliance energy loads, consumption and costs for new and existing single and multi-family homes.

Ekotrope has many unique features, including a simplified input procedure, extensive component libraries, automated energy efficient improvement analysis, duct conduction and leakage analysis, latent and sensible cooling analysis, lighting and appliance audit, and active and passive solar analysis.

A home energy rating is calculated based on the proposed Department of Energy (DOE) Home Energy Rating System (HERS) guidelines (10 CFR 437) as modified by the RESNET/NASEO (Residential Energy Service Network/National Association of State Energy Officials) HERS Technical Committee. Ekotrope also creates value added information including energy appraisal addendum, energy code compliance (Model Energy Code (MEC) and American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)), improvement analysis (existing homes), design optimization (new homes), heating and cooling equipment sizing and U.S. Environmental Protection Agency (EPA) Energy Star Home analysis.

2. Use of Ekotrope in Utility Allowance Development

Ekotrope utilizes an Engineering approach to calculate the consumption allowance for various types of new and existing homes. The Ekotrope software program is recognized and approved by EPA, DOE and HUD.

The Nelrod Company is accredited and licensed by HERS/RESNET and a certified and licensed Ekotrope provider and user. We have successfully conducted energy home rating and energy audits using this software for over 31,550 reports.

3. Basic Procedures

The data needed for this program is collected either from the building/site plans provided and/or from a site visit. Building type models are developed for the most common building types (Single-Family Detached House, Semi-Detached/Duplex, Row/Townhouse, Multi-Family Walk-Up, and Manufactured Homes) and bedroom sizes. The program calculates heating, cooling, hot water, lighting and appliances energy load, consumption and cost based on home's design and construction features as well as climate and energy cost data.

The calculations are conducted following the Residential Energy Services Network (RESNET) Home Energy Rating System (HERS) technical guidelines, developed in cooperation with, US DOE, US Department of Veterans Affairs (USVA), HUD, and the National Association of State Energy Officials (NASEO) as the rating system used to determine energy usage in new and existing construction. The guidelines were established as the only national standard for determining energy savings based on construction types and local (community-wide) geographical locations. It estimates the annual energy quantity a home will require and the cost of that energy based on local utility rates. The guidelines make assumptions about the size and lifestyle of the family who will occupy the home. These assumptions are based on nationally accepted standards developed by the US DOE, American Society of Heating, Refrigeration and Air Conditioning Engineers (ASHRAE) and US EPA. Such assumptions include occupancy rates of 2 persons for the first bedroom and one additional person for each additional bedroom; thermostat setting of 68° Fahrenheit for heating and 78° Fahrenheit for cooling, which is the recommended setting for an energy conserving household. To determine water heater energy usage, tap water temperatures are adjusted for local geographical locations and 120° thermostat settings are used, which is considered energy conservative. In addition, architectural components are considered such as square footages, number of stories, insulation R-values, wall materials, mechanical equipment types and efficiencies.

The Ekotrope software utilizes default standards based on national trends. (See details following this introduction.) If there are no local surveys available regarding residential lifestyles, a residential rental market study can be conducted to gather data on the most common household amenities, such as, dishwashers, clothes washers and dryers, microwaves, and size of refrigerators.

Additionally, the Agency can provide architectural characteristics concerning common foundation types, exterior siding, and other structure features for their area. This information will be used to further adjust the building type models.

4. Input Values and Determination

Ekotrope provides two levels of inputs: simplified and detailed. Simplified inputs use general design characteristics and built-in algorithms to determine the results. We use detailed inputs which provide the user greater control over calculational values and development of common building type models.

The various input parameters are as follows:

- Location – List of US and Canadian locations;
- Energy costs – create or modify various utility rates based on the existing market;
- Building Component data – Foundation type, Opaque wall constructional details, window/skylights conduction and solar gain values, type of ceilings and doors, heating equipment, cooling equipment, water heating equipment, various types of lights and appliances used.

These values are determined either from verified conditions/site visits or from the building plans. A Certified IECC (International Energy Conservation Code) Inspector/HERS/RESNET (Home Energy Rating Systems/Residential Energy Services Network) Rater inputs characteristics from building plans and/or from documentation gathered from an on-site inspection of the physical, structural and mechanical details.

Climate data is available for cities and towns throughout North America. This data is updated periodically with new versions of the Ekotrope software program.

Extensive utility libraries can be created and maintained for specific utility provider rates and charges and are available to apply to consumption data to determine local utility allowances.

5. Output Values, Interpretation and Use for Utility Allowances

Fifty-six preformatted reports are available for viewing on screen or printing. Reports include energy use, energy cost, design loads, rating, quick report, improvement analysis, code compliance, and economic analysis of energy upgrades.

Reports are generated from the building type models in the Ekotrope software program and analyzed for consumption usage totals by energy end-use categories. (Fuel Summary and Lights & Appliance Summary.)

U:\2022\2022 Utility Allowances\2022 Agency Studies\ABC-Other Studies\NIREACH, IL-3 MF Updates 2022\Collier Garden-MF TCwPH & PBS8 New Cons 2022\1106b-Collier Gardens Apts, IL-TCPH UPDATE-Intro REM Rate Doc.docx

**PUBLIC HOUSING HUD REGULATIONS 24 CFR 965. SUBPART E
RESIDENT ALLOWANCES FOR UTILITIES**

TITLE 24--HOUSING AND URBAN DEVELOPMENT

CHAPTER IX OFFICE OF ASSISTANT SECRETARY FOR PUBLIC AND INDIAN HOUSING, DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

PART 965: PHA-OWNED OR LEASED PROJECTS GENERAL PROVISIONS

Subpart E--Resident Allowances for Utilities

Source: 61 FR 7971, Feb. 29, 1996, unless otherwise noted.

Sec. 965.501 Applicability.

(a) This subpart E applies to public housing, including the Turnkey III Homeownership Opportunities program. This subpart E also applies to units assisted under sections 10(c) and 23 of the U. S. Housing Act of 1937 (42 U.S.C. 1437 et seq.) as in effect before amendment by the Housing and Community Development Act of 1974 (12 U.S.C. 1706e) and to which 24 CFR part 900 is not applicable. This subpart E does not apply to Indian housing projects (see 24 CFR part 950).

(b) In rental units for which utilities are furnished by the PHA but there are no check-meters to measure the actual utilities consumption of the individual units, residents shall be subject to charges for consumption by resident-owned major appliances, or for optional functions of PHA-furnished equipment, in accordance with Sec. 965.502(e) and 965.506(b), but no utility allowance will be established.

Sec. 965.502 Establishment of utility allowances by PHAs.

(a) PHAs shall establish allowances for PHA-furnished utilities for all check-metered utilities and allowances for resident-purchased utilities for all utilities purchased directly by residents from the utilities suppliers.

(b) The PHA shall maintain a record that documents the basis on which allowances and scheduled surcharges, and revisions thereof, are established and revised. Such record shall be available for inspection by residents.

(c) The PHA shall give notice to all residents of proposed allowances, scheduled surcharges, and revisions thereof. Such notice shall be given, in the manner provided in the lease or homebuyer agreement, not less than 60 days before the proposed effective date of the allowances or scheduled surcharges or revisions; shall describe with reasonable particularity the basis for determination of the allowances, scheduled surcharges, or revisions, including a statement of the specific items of equipment and function whose utility consumption requirements were included in determining the amounts of the allowances or scheduled surcharges; shall notify residents of the place where the PHA's record maintained in accordance with paragraph (b) of this section is available for inspection; and shall provide all residents an opportunity to submit written comments during a period expiring not less than 30 days before the proposed effective date of the allowances or scheduled surcharges or revisions. Such written comments shall be retained by the PHA and shall be available for inspection by residents.

(d) Schedules of allowances and scheduled surcharges shall not be subject to approval by HUD before becoming effective, but will be reviewed in the course of audits or reviews of PHA operations.

(e) The PHA's determinations of allowances, scheduled surcharges, and revisions thereof shall be final and valid unless found to be arbitrary, capricious, an abuse of discretion, or otherwise not in accordance with the law.

Sec. 965.503 Categories for establishment of allowances.

Separate allowances shall be established for each utility and for each category of dwelling units determined by the PHA to be reasonably comparable as to factors affecting utility usage.

Sec. 965.504 Period for which allowances are established.

(a) PHA-furnished utilities. Allowances will normally be established on a quarterly basis; however, residents may be surcharged on a monthly basis. The allowances established may provide for seasonal variations.

(b) Resident-purchased utilities. Monthly allowances shall be established. The allowances established may provide for seasonal variations.

Sec. 965.505 Standards for allowances for utilities.

(a) The objective of a PHA in designing methods of establishing utility allowances for each dwelling unit category and unit size shall be to approximate a reasonable consumption of utilities by an energy-conservative household of modest circumstances consistent with the requirements of a safe, sanitary, and healthful living environment.

(b) Allowances for both PHA-furnished and resident-purchased utilities shall be designed to include such reasonable consumption for major equipment or for utility functions furnished by the PHA for all residents (e.g., heating furnace, hot water heater), for essential equipment whether or not furnished by the PHA (e.g., range and refrigerator), and for minor items of equipment (such as toasters and radios) furnished by residents.

(c) The complexity and elaborateness of the methods chosen by the PHA, in its discretion, to achieve the foregoing objective will depend upon the nature of the housing stock, data available to the PHA and the extent of the administrative resources reasonably available to the PHA to be devoted to the collection of such data, the formulation of methods of calculation, and actual calculation and monitoring of the allowances.

(d) In establishing allowances, the PHA shall take into account relevant factors affecting consumption requirements, including:

(1) The equipment and functions intended to be covered by the allowance for which the utility will be used. For instance, natural gas may be used for cooking, heating domestic water, or space heating, or any combination of the three;

(2) The climatic location of the housing projects;

(3) The size of the dwelling units and the number of occupants per dwelling unit;

- (4) Type of construction and design of the housing project;
 - (5) The energy efficiency of PHA-supplied appliances and equipment;
 - (6) The utility consumption requirements of appliances and equipment whose reasonable consumption is intended to be covered by the total resident payment;
 - (7) The physical condition, including insulation and weatherization, of the housing project;
 - (8) Temperature levels intended to be maintained in the unit during the day and at night, and in cold and warm weather; and
 - (9) Temperature of domestic hot water.
- (e) If a PHA installs air conditioning, it shall provide, to the maximum extent economically feasible, systems that give residents the option of choosing to use air conditioning in their units. The design of systems that offer each resident the option to choose air conditioning shall include retail meters or check-meters, and residents shall pay for the energy used in its operation. For systems that offer residents the option to choose air conditioning, the PHA shall not include air conditioning in the utility allowances. For systems that offer residents the option to choose air conditioning but cannot be check-metered, residents are to be surcharged in accordance with Sec. 965.506. If an air conditioning system does not provide for resident option, residents are not to be charged, and these systems should be avoided whenever possible.

Sec. 965.506 Surcharges for excess consumption of PHA-furnished utilities.

(a) For dwelling units subject to allowances for PHA-furnished utilities where check-meters have been installed, the PHA shall establish surcharges for utility consumption in excess of the allowances. Surcharges may be computed on a straight per unit of purchase basis (e.g., cents per kilowatt hour of electricity) or for stated blocks of excess consumption, and shall be based on the PHA's average utility rate. The basis for calculating such surcharges shall be described in the PHA's schedule of allowances. Changes in the dollar amounts of surcharges based directly on changes in the PHA's average utility rate shall not be subject to the advance notice requirements of this section.

(b) For dwelling units served by PHA-furnished utilities where Check-meters have not been installed, the PHA shall establish schedules of surcharges indicating additional dollar amounts residents will be required to pay by reason of estimated utility consumption attributable to resident-owned major appliances or to optional functions of PHA-furnished equipment. Such surcharge schedules shall state the resident-owned equipment (or functions of PHA-furnished equipment) for which surcharges shall be made and the amounts of such charges, which shall be based on the cost to the PHA of the utility consumption estimated to be attributable to reasonable usage of such equipment.

Sec. 965.507 Review and revision of allowances.

(a) Annual review. The PHA shall review at least annually the basis on which utility allowances have been established and, if reasonably required in order to continue

adherence to the standards stated in Sec. 965.505, shall establish revised allowances. The review shall include all changes in circumstances (including completion of modernization and/or other energy conservation measures implemented by the PHA) indicating probability of a significant change in reasonable consumption requirements and changes in utility rates.

(b) Revision as a result of rate changes. The PHA may revise its allowances for resident-purchased utilities between annual reviews if there is a rate change (including fuel adjustments) and shall be required to do so if such change, by itself or together with prior rate changes not adjusted for, results in a change of 10 percent or more from the rates on which such allowances were based. Adjustments to resident payments as a result of such changes shall be retroactive to the first day of the month following the month in which the last rate change taken into account in such revision became effective. Such rate changes shall not be subject to the 60 day notice requirement of Sec. 965.502(c).

Sec. 965.508 Individual relief.

Requests for relief from surcharges for excess consumption of PHA-purchased utilities, or from payment of utility supplier billings in excess of the allowances for resident-purchased utilities, may be granted by the PHA on reasonable grounds, such as special needs of elderly, ill or disabled residents, or special factors affecting utility usage not within the control of the resident, as the PHA shall deem appropriate. The PHA's criteria for granting such relief, and procedures for requesting such relief, shall be adopted at the time the PHA adopts the methods and procedures for determining utility allowances. Notice of the availability of such procedures (including identification of the PHA representative with whom initial contact may be made by residents), and the PHA's criteria for granting such relief, shall be included in each notice to residents given in accordance with Sec. 965.502(c) and in the information given to new residents upon admission.

SAMPLE NOTICE
HOUSING AUTHORITY OF THE CITY OF _____
NOTICE OF PROPOSED UTILITLY ALLOWANCES

DATE: _____

TO: ALL PUBLIC HOUSING RESIDENTS

The PHA has completed its annual review of the Public Housing Utility Allowances and encourages residents to review the proposed utility allowances and support documentation. Residents may also provide written comments.

Pursuant to regulation 24 CFR 965.502, the Housing Authority of the City of _____ hereby provides 60 days' notice to the public housing residents of the proposed utility allowances.

DATES AVAILABLE FOR REVIEW: _____ TO _____

The PHA records and documents that provide the basis for the proposed utility allowances are available for review and comment during the dates listed above and at the following location:

**NOTE to PHA: Dates reflected above should be 30 days from date of notice.
Below choose a location and provide address and time available for review.**

- PHA's main administrative office (provide address)
- PHA development site management office (provide address)
- Other: (provide address)

Changes were made due to:

- ANNUAL UPDATE (for Resident-paid utilities directly to utility companies)
- NEW SCHEDULED SURCHARGES (for Check-metered utilities surcharged for excess usage of PHA-paid utilities)
- REVISIONS TO: (UTILITY ALLOWANCES OR SCHEDULED SURCHARGES)

Basis of determination:

NOTE to PHA: specific items of equipment and function whose utility consumption requirements were included in determining the amount of the allowances is stated in the review documents

The PHA will gather all comments and review them at the close of the comment period. The PHA will respond to comments within _____ days of the close of the comment period. Such written comments will be retained by the PHA and shall be available for inspection by residents.

PROPOSED EFFECTIVE DATE OF IMPLEMENTATION: _____

***Requests for relief from surcharges for excess consumption, payment of supplier billings in excess of the allowances for resident purchased utilities, may be granted by the PHA on reasonable grounds, such as special needs for the elderly, ill or disabled residents, or special factors, on a case by case basis. Such relief may be initiated by the verbal or written making of such request as an accommodation.**

INSTRUCTIONS FOR RESIDENT NOTICE OF PROPOSED UTILITY ALLOWANCES

Dear Housing Agency:

Attached is a Sample Notice for the 60-Day Notice of Proposed Utility Allowances with 30-Day Comment Period (required in HUD regulations 24 CFR 965.502),

Please adapt this sample notice to your needs and copy onto your Agency's letterhead. Be sure to remove all red and blue written print (these are notes to the Agency for explanation and completion of this form). Check boxes have also been provided to give the Agency choices to fit their needs.

Note: be sure to check your policies and Lease Agreement/homebuyer agreement for compliance regarding providing notification.

Review documents should be kept in a central location.

The PHA should get Board approval before setting an effective date of implementation.

Special Note: HUD regulations do not say that the PHA has to change the proposed utility allowances due to a resident's comment, but that "The PHA's determinations of allowances, scheduled surcharges, and revisions thereof shall be final and valid unless found to be arbitrary, capricious, an abuse of discretion or otherwise not in accordance with the law."



**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY
PROJECT-BASED SECTION 8 UNITS**

PROPOSED MONTHLY UTILITY ALLOWANCES

Chart 2

UPDATE 2022

Building Type: Apartment/Multi-Family

Collier Garden Apartments IL (Boiler H & WH) (EE Equip: Win,LED)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity* (L&A,A/C)		\$47.00	\$54.00			

*Includes Air Conditioning

A monthly average cost of the summer and winter adjustments were used for the electric costs.

L&A= Lights & Appliances
A/C= Air Conditioning
F= Fan Motor for heating
H= Space Heating
WH= Water Heating

EE Equip= Energy Efficient Equipment
Win= Windows
LED= 100% LED Lighting

Note: These utility allowances are calculated similar to method used by each utility provider. They are not calculated by end use (like the Section 8 HCV Program), but by total usage for each utility type.



**NORTHERN ILLINOIS REGIONAL
AFFORDABLE COMMUNITY HOUSING, IL
TAX CREDIT MIXED-FINANCE PROPERTY
PUBLIC HOUSING UNITS**

**PROPOSED MONTHLY UTILITY ALLOWANCES
Chart 1**

UPDATE 2022

Building Type: Apartment/Multi-Family

Collier Garden Apartments IL (Boiler H & WH) (EE Equip: Win,LED)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A,F)		\$43.00	\$49.00			

Does not include Air Conditioning

A monthly average cost of the summer and winter adjustments were used for the electric costs.

L&A= Lights & Appliances
F= Fan Motor for heating
H= Space Heating
WH= Water Heating

EE Equip= Energy Efficient Equipment
Win= Windows
LED= 100% LED Lighting

Note: These utility allowances are calculated similar to method used by each utility provider. They are not calculated by end use (like the Section 8 HCV Program), but by total usage for each utility type.

General Information

HUSM-Ver131_813_Summit-Update

**NORTHERN ILLINOIS REGIONAL AFFORDABLE
COMMUNITY HOUSING, IL**

Study Date:

PHA/Zip Code* Lookup:

*If zip code is unavailable, choose adjacent zip code.

Name/City of HA:

State:

Building Types		#BR	Grouping
Apartment	Yes	0-5	
Row House/Townhouse		0-5	
Semi-Detached/Duplex		0-5	
Detached House		0-5	
Mobile/Manufactured Home		0-5	

Average	
Electric	No
Natural Gas	N/A
Water	N/A
Sewer	N/A
Trash	N/A

Standard Schedule

Climate Data (Degree Days)

HEATING

January	1348
February	1093
March	862
April	476
May	198
Jun	31
July	3
August	11
September	117
October	422
November	782
December	1226
Annual	6569

COOLING

January	0
February	0
March	0
April	8
May	47
Jun	175
July	274
August	223
September	84
October	9
November	0
December	0
Annual	820

Typical Low Temp