

# Initial Prescreen Form

Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_ E-mail: \_\_\_\_\_  
City: \_\_\_\_\_ Zip: \_\_\_\_\_  
Gas Provider: \_\_\_\_\_ Account #: \_\_\_\_\_  
Electric Provider: \_\_\_\_\_ Account #: \_\_\_\_\_

## Eligibility Determination:

If possible, perform a search for the home on the city assessor's website to determine ownership and to verify property taxes are not delinquent before making contact with homeowner. Determine homeowner's eligibility for the program by asking or confirming the following questions:

1. Is your home located within City limits?  Yes  No
2. Are you the owner of the home?  Yes  No
3. Do you live in the home? *[If answer is "No", see box below.]*  Yes  No
4. Is home owned by an individual and not a trust, LLC, or form of business?  Yes  No  
If owned by a business, notify owner that Davis-Bacon wages will apply to the project.
5. Is it a single-family home or a multi-family complex with less than 3 units?  Yes  No  
*Circle One: Single Family / Duplex / Triplex*  
If multi-unit complex of 2 - 3 units, the following applies:
  - If a condo, must own it AND not share any entrances, basements or attics, or mechanical systems with other units.
  - If duplex or triplex with ½ living and ½ business, program restrictions MAY apply.
6. Are there any delinquent property taxes owed to the City?  Yes  No  
It's okay if property owner is paying current year's taxes under an installment plan.

**If the answer is "No" to any of the questions above (EXCEPT #3), the home DOES NOT QUALIFY for the residential program. Refer homeowner to Focus on Energy for other program opportunities.**

If homeowner answered "No" to #3 above, the home is still eligible; however, if financing is required, these properties will be treated as "small business", so homeowner cannot apply for financing online. Direct them to Summit's Business Services Team:

Dana Hoffmann – VP Business Services  
608-253-5000 / 800-236-5560, ext. 2862  
dana.hoffmann@summitcreditunion.com

Scott Hoerth – VP Business Services  
608-243-5000 / 800-236-5560, ext 1251  
[scott.hoerth@summitcreditunion.com](mailto:scott.hoerth@summitcreditunion.com)

## **Screening for Program:**

Determine homeowner's fit into the program by asking or confirming the following questions:

1. Was your home built prior to 1990?  Yes  No  
Year Home Built: \_\_\_\_\_ or Age of Home: \_\_\_\_\_
  
2. How is exhaust for the heating system vented?  Yes  No  
If vented up through roof with metal or masonry, select "Yes". ( $\leq 85\%$  AFUE)  
If vented through side wall with plastic pipe, select "No". ( $\geq 90\%$  AFUE)  
  
If you don't know answer to above, is heating system over 20 years old?  Yes  No  
Age of Furnace/Boiler: \_\_\_\_\_
  
3. Is the insulation original to the house?  Yes  No  
If insulation was added by you or the previous homeowner(s), indicate, when (if known) and where (i.e., attic or walls):  
\_\_\_\_\_
  
4. Verify home was NOT previously served through another energy program\*?  Yes  No  
*[i.e., Home Performance, Targeted Home Performance, Low Income Weatherization, or WE Energies or MG&E whole-house utility programs.]*  
  
\*If homeowner answered "No" to this question, inquire further about their level of participation; i.e., did they do some or all of the recommended energy improvements? If participation was limited, they may still be a good candidate for the program if their answers indicate as such.
  
5. Are winter heating bills above average?  Yes  No  
Typical home in Wisconsin is 1,200 s.f. with 3 occupants:
  - \$100 - \$149 / month = Below Average
  - \$150 - \$199 / month = Average
  - \$200 or greater / month = Above AverageFor homes larger than 1,200 s.f., assume a heating bill of \$250 or greater per month is Above Average.

Size of Home:  
\_\_\_\_\_ s.f.

Avg. Monthly Heating  
Bill: \$ \_\_\_\_\_

**If the answer is "Yes" to 3 or more of the questions, the home is a GOOD candidate for the program.**

If not a good candidate for the program, discuss alternatives with the homeowner:

- In Madison, refer homeowner to Focus on Energy's Home Performance with ENERGY STAR Program.
- In Milwaukee, refer the homeowner to a Me<sup>2</sup> consultant so they can receive a subsidized assessment. If after the assessment, the homeowner is willing to do at least \$1,000 worth of work, then they can get the \$100 assessment buy-down that the Me<sup>2</sup> Program is offering as well.

**NOTIFY HOMEOWNERS THAT DO-IT-YOURSELF (DIY) WORK IS NOT ALLOWED IN THIS PROGRAM; ALL WORK MUST BE PERFORMED BY PARTICIPATING CONTRACTORS.**

### 15-Percent Energy Savings Requirement:

To participate in the Program and be eligible for program incentives and financing, an eligible home must indicate during the initial assessment that there is at least a 15 percent energy savings opportunity, and the homeowner must agree to install a mix of recommended measures that is reasonably expected to achieve 15 percent or more.

Below is a sample mix of measures that are expected to achieve the energy savings requirement for each tier:

Savings	Mix of Measures <sup>(1)</sup>	Approx. Cost	Cash Incentives Available <sup>(2)</sup>
15-24%	<ul style="list-style-type: none"> <li>Air Sealing</li> <li>Attic Insulation</li> <li>Wall or Sill Box (aka, Rim Joist) Insulation</li> </ul>	\$6,000 to \$9,000	\$1,000
25-34%	All measures in previous level, plus the following: <ul style="list-style-type: none"> <li>Additional Attic Insulation (<i>vault or knee wall</i>)</li> <li>Qualifying Equipment (<i>furnace, boiler, air conditioner</i>)</li> </ul>	\$9,000 to \$11,000	\$1,500
35% or Greater	All measures in previous levels, plus a mix of the following: <ul style="list-style-type: none"> <li>Basement (Foundation) Wall Insulation</li> <li>ENERGY STAR Qualifying Appliances (<i>dishwasher, clothes washer, and refrigerator with removal of old unit</i>)</li> <li>ENERGY STAR Windows</li> <li>Replace Incandescent Bulbs w/ CFLs or LEDs</li> </ul>	\$11,000+	\$2,000

<sup>(1)</sup>The mix of measures required to reach each savings level will vary from home-to-home depending on age and size of home, # of occupants, current energy usage, etc.

<sup>(2)</sup>Homeowner may also be eligible for Focus on Energy incentives, which go into affect 4/1/12.

### Rule of Thumb:

- Newer homes using less energy—will cost more to reach 15% energy savings.
- Older homes with high energy use—will cost less to reach 15% energy savings.

Ask homeowner if these costs are in line with their expectations. **Now is a good time to offer financing.**

If homeowner is not interested in financing, you could also mention that there are other State programs that might better serve their needs and offer greater incentives if eligible based on income level. If that seems like something the homeowner would be interested in, then give them the current income amounts needed to qualify for those programs based on their household size (see below):

Income Guidelines for the 2011-2012 WHEAP Heating Season		
Household Size	Annual Income	Who to Contact?
1	\$24,319	If household income falls <u>below</u> the income level for the number of occupants in the home, refer homeowner to the Wisconsin Home Energy Assistance Program (WHEAP) at 866-432-8947, or visit the " <a href="#">Where to Apply</a> " tab on <a href="http://www.homeenergyplus.wi.gov">www.homeenergyplus.wi.gov</a> to find a local energy assistance agency.
2	\$31,802	
3	\$39,285	
4	\$46,768	
5	\$54,250	If household income falls <u>above</u> the income level for the number of occupants in the home, refer homeowner to Wisconsin's Focus on Energy Programs at 800-767-7077, or visit <a href="http://www.focusonenergy.com">www.focusonenergy.com</a> .
6	\$61,733	
7	\$63,136	
8	\$64,539	