



- Financing & Funding
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## // HOA Refurbishment Schlicksweg Hamburg | Germany

### Short description object

The buildings with a total of 80 residential units were built in 1929 and destroyed during the war. Reconstruction took place in the 1950s. It is a gap development with double-shell clinker brickwork. An investor acquired the property a few years ago and converted it into condominiums. In the course of this, the windows were partially upgraded and modernized, and the night storage heaters were converted to a central heating system with a gas condensing boiler. Approximately 20 apartments owned by the investor are not yet connected to the central network.

### Brief description of the measures

Refurbishment project of the homeowner association (HOA) Schlicksweg to treat the mould problem of the exterior walls and the moisture penetration of the walls. The aim of the HOA advisory board is to ensure holistic planning and implementation of the refurbishment.

### Period // Duration

08-12/2021: Planning of energetic concept  
 01-06/2022: Implementation planning  
 07/2022: Owners' meeting: resolution on implementation  
 08-09/2022: planned implementation

### Objective

A solution was to be found to deal with the mould problem on the exterior walls and the moisture penetration in the basement area. The Schlicksweg WEG renovation project is currently in the execution planning phase. If the economic key figures are confirmed by the invitation to tender by June 2022 based on the cost estimate, then implementation should start in August/September 2022.

### Initial situation

The problem was identified by the HOA's advisory board and because of many complaints from the residents. The advisory board wanted a partner who would take a holistic approach to the property and its needs. The advisory board had been asking for a holistic concept for the upcoming measures for two years. The previous building manager was unable to provide this for unknown reasons. As a result, a new manager was sought and commissioned, who finally approached FRANK Ecozwei GmbH. They were able to implement the owners' requirements accordingly. The initiative for the refurbishment project came from the HOA advisory board.

### Implementation & measures

The property is being modernised to a BEG (Bundesförderung für effiziente Gebäude)

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Efficiency House 55. The existing clinker facade will be removed and replaced by insulation with new cladding. The windows will be converted to triple glazing. The basement ceiling will be insulated, and the top floor ceiling will be doubled again. The heating pipes will be insulated, and the heat supply will be converted to a heat pump. Alternatively, the heat supply can be converted to a district heating connection; this will be decided by the owners' meeting in July 2022.

### Results

So far, the objective set by the HOA advisory board (resolution on the planning and implementation of a holistic concept) has been achieved.

### Parties involved

HOA building manager, HOA advisory board, FRANK Ecozwei GmbH

### Beneficiary groups

The owners benefit from this project because some of them are residents themselves, and the management benefits because the residents report fewer defects after the refurbishment and are more satisfied.

### Financing // Funding

The funding is provided by the Bundesförderung für effiziente Gebäude (BEG - Federal Promotion of Efficient Buildings) and the state development bank IFB Hamburg. The BEG programme 261/461 is intended to promote the efficiency house level 55. Until the funding was stopped, owners were advised not to submit applications until they had decided on the measure. Due to the changes and the first-time exhaustion of funds, the Advisory Board was informed that an extraordinary owners' meeting should be held in May 2022 in order to apply for the subsidies under programme 461 and to be able to secure the considerable preliminary planning costs through the application. The funding is currently between 50% and approx. 59%, as not every owner can take advantage of the funds from IFB Hamburg; these are tied up under the *de minimis* rule.

How the remaining amount will be financed is still pending. Applicable financing methods were presented to the advisory board. These will then be presented to the other owners at the extraordinary meeting. The aim is to prepare the grounds for the final owners' meeting in July to decide on the modernisation measure, on the basis of which the further implementation can be determined. A total of four different basic financing options are available to the owners.

The HOA could also cover some refurbishment costs from the maintenance reserves, but this is only advisable if everyone takes advantage of the subsidy / programme 461. This is because in the case of the loan variant, the repayment subsidy is determined on the basis of the credit taken. However, the maintenance reserves are always included in the financing at the share that the owners' meeting decides. Some owners will need to take out personal loans. This in turn depends on the personal situation of each owner.

### Lessons Learned

#### Required framework conditions

The owners accept the modernisation because they currently have high heating costs, and the building shows a maintenance backlog.

#### Retrospective need for change

The issue of financing was not discussed at the first owners' meeting. For future projects, the phase of preliminary planning is to be used intensively so that each owner has sufficient time to be able to secure his individual financing of the measure. Also, due to the uncertain situation of funding availability, it was decided to apply for BEG funding in the detailed planning phase. This will provide planning security also during the implementation.



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