

In accordance with [HUD Notice H-2015-04](#), baseline utility allowances are required to be established every three years.

For convenience, see below required HUD's established sample size based on the number of units per bedroom size:

Minimum Sample Size Based on Number of Units per Bedroom Size:	
Number of Units	Minimum Sample Size
1-20	All
21-61	20
62-71	21
72-83	22
84-99	23
100-120	24
121-149	25
150-191	26
192-259	27
260-388	28
389 and above	29

Key Points for Owners/Agents:

1. Data Collection Requirements

- a. All data must be within 18 months prior to the renewal effective date. < (mm/dd/2025 to current)>

- b. Exclude market units and/or section 8 units no longer receiving subsidy.
- c. 12 full months of data is needed for every unit used in the analysis that had full occupancy during the timeframe the data is for.
 - i. Data can be used from the previous tenant and the current tenant to fulfill the 12-month expectation. However, there can't be a gap in data between tenants.
 - ii. Units who had one or two months of vacancy are allowed to be calculated based on 10 or 11 full months of data.
- d. If you can't provide the required minimum sample size, notify your HAP Officer.
- e. Owner cannot submit data the property is paying for.
- f. Usage report directly from the utility provider, consecutive tenant monthly statements, tenant generated utility usage reports are acceptable forms of data.

2. UA Analysis Excel Workbook

- a. Complete the UA Analysis Excel Workbook. A separate tab must be completed for each unit type.
- b. Please note the use of the workbook that is available is optional when completing the required utility baseline analysis.

3. Leapfile

- a. When possible same unit types and utility data types. Example: One-bedroom electric, two-bedroom electric, one-bedroom gas.
 - i. Please do not submit individual unit data sheets.
- b. All information should be in PDF form.

4. Tenant Requirements:

- a. Utility data requested from utility companies continues to be a struggle and we are seeing long delays in the processing of funding renewals. While having tenants sign a release form and requesting the data from the utility company is an option, it is not the only option. HUD Notice 15-04hsgn.pdf states that tenants must provide utility data and documentation if requested.
- b. If a lease violation and/or termination notice is given, provide a copy of the notice to your HAP Officer.

Please review the frequently asked questions when completing UA Baseline, [Utility Analysis FAQ](#).