

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. EE0007916		2. Program/Project Title Weatherization Assistance Program	
3. Name and Address Idaho Department of Health and Welfare 450 West State St, 2nd Floor Boise, ID 837020000		4. Program/Project Start Date 04/01/2020	5. Completion Date 03/31/2021

SECTION A - BUDGET SUMMARY

Grant Program Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1. Federal	81.042	\$ 0.00		\$ 2,539,427.00		\$ 2,539,427.00
2.						
3.						
4.						
5. TOTAL		\$ 0.00	\$ 0.00	\$ 2,539,427.00	\$ 0.00	\$ 2,539,427.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) GRANTEE ADMINISTRA TION	(2) SUBGRANTE E ADMINISTRA	(3) GRANTEE T&TA	(4) SUBGRANTE E T&TA	
a. Personnel	\$ 23,180.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 23,180.00
b. Fringe Benefits	\$ 11,129.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 11,129.00
c. Travel	\$ 0.00	\$ 0.00	\$ 12,500.00	\$ 0.00	\$ 12,500.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 1,762.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 1,762.00
f. Contract	\$ 50,000.00	\$ 201,028.00	\$ 81,132.00	\$ 269,184.00	\$ 2,481,767.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
i. Total Direct Charges	\$ 86,071.00	\$ 201,028.00	\$ 93,632.00	\$ 269,184.00	\$ 2,530,338.00
j. Indirect Costs	\$ 9,089.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 9,089.00
k. Totals	\$ 95,160.00	\$ 201,028.00	\$ 93,632.00	\$ 269,184.00	\$ 2,539,427.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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SECTION A - BUDGET SUMMARY						
Grant Program Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1.						
2.						
3.						
4.						
5. TOTAL		\$ 0.00	\$ 0.00	\$ 2,539,427.00	\$ 0.00	\$ 2,539,427.00

SECTION B - BUDGET CATEGORIES					
6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) PROGRAM OPERATIONS	(2) HEALTH AND SAFETY	(3) LIABILITY INSURANCE	(4) LEVERAGING	
a. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 23,180.00
b. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 11,129.00
c. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 12,500.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 1,762.00
f. Contract	\$ 1,553,480.00	\$ 253,943.00	\$ 45,000.00	\$ 10,000.00	\$ 2,481,767.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
i. Total Direct Charges	\$ 1,553,480.00	\$ 253,943.00	\$ 45,000.00	\$ 10,000.00	\$ 2,530,338.00
j. Indirect Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 9,089.00
k. Totals	\$ 1,553,480.00	\$ 253,943.00	\$ 45,000.00	\$ 10,000.00	\$ 2,539,427.00
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SECTION A - BUDGET SUMMARY

Grant Program Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1.						
2.						
3.						
4.						
5. TOTAL		\$ 0.00	\$ 0.00	\$ 2,539,427.00	\$ 0.00	\$ 2,539,427.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) FINANCIAL AUDITS	(2) SPECIAL PROJECTS III	(3)	(4)	
a. Personnel	\$ 0.00	\$ 0.00			\$ 23,180.00
b. Fringe Benefits	\$ 0.00	\$ 0.00			\$ 11,129.00
c. Travel	\$ 0.00	\$ 0.00			\$ 12,500.00
d. Equipment	\$ 0.00	\$ 0.00			\$ 0.00
e. Supplies	\$ 0.00	\$ 0.00			\$ 1,762.00
f. Contract	\$ 18,000.00	\$ 0.00			\$ 2,481,767.00
g. Construction	\$ 0.00	\$ 0.00			\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00			\$ 0.00
i. Total Direct Charges	\$ 18,000.00	\$ 0.00			\$ 2,530,338.00
j. Indirect Costs	\$ 0.00	\$ 0.00			\$ 9,089.00
k. Totals	\$ 18,000.00	\$ 0.00			\$ 2,539,427.00
7. Program Income	\$ 0.00	\$ 0.00			\$ 0.00

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WEATHERIZATION ASSISTANCE PROGRAM (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET

(Grant Number: EE0007916, State: ID, Program Year: 2020)

IV.1 Subgrantees

Subgrantee (City)	Planned Funds/Units
Community Action Partnership, Inc. (Lewiston)	\$499,833.00 45
Eastern Idaho Community Action Partnership (Idaho Falls)	\$333,222.00 28
El-Ada Community Action Partnership (Boise)	\$501,241.00 45
Metro Community Services (Caldwell)	\$478,009.00 43
South Central Community Action Partnership (Twin Falls)	\$278,780.00 23
SouthEastern Idaho Community Action Agency (Pocatello)	\$255,550.00 21
Total:	\$2,346,635.00 205

IV.2 WAP Production Schedule

Weatherization Plans	Units
Total Units (excluding reweatherized)	205
Rewatherized Units	0

Note: Planned units by quarter or category are no longer required, no information required for persons.

Average Unit Costs, Units subject to DOE Project Rules		
VEHICLE & EQUIPMENT AVERAGE COST PER DWELLING UNIT (DOE RULES)		
A	Total Vehicles & Equipment (\$5,000 or more) Budget	\$0.00
B	Total Units Weatherized	205
C	Total Units Reweatherized	00
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	205
E	Average Vehicles & Equipment Acquisition Cost per Unit (A divided by D)	\$0.00
AVERAGE COST PER DWELLING UNIT (DOE RULES)		
F	Total Funds for Program Operations	\$1,553,480.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	205
H	Average Program Operations Costs per Unit (F divided by G)	\$7,577.95
I	Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	\$0.00
J	Total Average Cost per Dwelling (H plus I)	\$7,577.95

IV.3 Energy Savings

Method used to calculate savings: ☒ WAP algorithm ☐ Other (describe below)			
	Units	Savings Calculator (MBtus)	Energy Savings
This Year Estimate	205	29.3	6006
Prior Year Estimate	275	29.3	8058
Prior Year Actual	148	29.3	4336

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Method used to calculate savings description:

Idaho uses the WAP algorithm. The formula is the number of units times 29.3:

206 units X 29.3 MBtu = 6,036 MBtus (Million British thermal units)

IV.4 DOE-Funded Leveraging Activities

Leveraging funds will be used to support activities that will leverage additional community assistance, including creation and development of new partnerships. Current leveraging partners include a pooled group of small non-regulated electric utility companies and the local USDA Rural Development offices. Historically, Idaho has utilized leveraging funds from partners, including regulated utilities, in order to enhance weatherization services and/or to produce additional units. The estimated number of leveraged units to be produced during PY20 is 80.

IV.5 Policy Advisory Council Members

☐ Check if an existing state council or commission serves in this category and add name below

AARP	Type of organization: Non-profit (not a financial institution) Contact Name: Lupe Wissel Phone: 8662957284 Email: liwissel@aarp.org
Avista Utilities	Type of organization: Utility Contact Name: Renee Coelho Phone: 5094958607 Email: renee.coelho@avistacorp.com
Bonneville Power Administration	Type of organization: Utility Contact Name: John Williams Phone: 2088674978 Email: jjwilliams@bpa.gov
Community Council of Idaho	Type of organization: Local agency Contact Name: Irma Morin Phone: 2089897917 Email: imorin@ccimail.org
Idaho Governor's Office of Energy and Mineral Resources	Type of organization: Unit of State Government Contact Name: Katie Pegan Phone: 2083321664 Email: katie.pegan@oer.idaho.gov
Idaho Power	Type of organization: Utility Contact Name: Cheryl Paoli Phone: 2083882679 Email: cpaoli@idahopower.com
Idaho Public Utilities Commission	Type of organization: Unit of State Government Contact Name: Curtis Thaden Phone: 2083340322 Email: curtis.thaden@puc.idaho.gov
Intermountain Gas Company	Type of organization: Utility Contact Name: Kathy Wold Phone: 2083776179 Email: Kathy.wold@intgas.com
Living Independence Network Corporation	Type of organization: Non-profit (not a financial institution) Contact Name: Melva Heinrich Phone: 2083363335 Email: MHeinrich@lincidaho.org
Metro Community Services	Type of organization: Non-profit (not a financial institution) Contact Name: Rito Reynoso, Weatherization Director Phone: 2084590065 Email: rito@metrocommunityservices.net
	Type of organization: Utility

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Rocky Mountain Power	Contact Name: Charity Spires Phone: 5038137228 Email: charity.spires@pacificorp.com
South Central Community Action Partnership	Type of organization: Local agency Contact Name: Ken Robinette Phone: 2087339351 Email: ken@sccap-id.org

IV.6 State Plan Hearings (Note: attach notes and transcripts to the SF-424)

Date Held	Newspapers that publicized the hearings and the dates the notice ran
12/16/2019	Coeur d'Alene Press - November 23, 30 and December 7, 2019 Idaho Press Tribune - November 23, 24 and 26, 2019 Idaho State Journal – November 22, 26 and 29, 2019 Idaho Statesman - November 25, 26 and 27, 2019 Lewiston Tribune - November 23, 26 and 29, 2019 Idaho Falls Post Register – November 26, 27 and 28, 2019 Magic Valley Times News – November 23, 30 and December 7, 2019 The draft State Plan is available on Idaho Department of Health and Welfare website (under Food/Cash/Assistance; Home Heating).

IV.7 Miscellaneous

Recipient Business Officer and Recipient Principle Investigator

Recipient Business Officer: John Farley, 208-334-5739, John.farley@dhw.idaho.gov

Recipient Principle Investigator: John Farley, 208-334-5739, John.farley@dhw.idaho.gov

DOE 2019 American Customer Satisfaction Index (ACSI)- Action Plan Update

Idaho communicated a process with network about areas for program improvement which were identified by CFI Group DOE 2019 American Customer Satisfaction Index (ACSI) and developed an action plan to enhance program management and implement process and quality improvements.

Idaho focused our communications on the drivers identified by the survey as having the highest impact and therefore the most influence on satisfaction. Idaho scored high in the areas of Technical Assistance, Mission Fulfillment, and Monitoring & Corrective Action. Our lowest scores came from Development of the WAP Plan, Partnerships, and Customer Satisfaction Index.

We will continue working with our Administrative Contractor and Direct Service Providers to implement process and quality improvements across the network to include better communication amongst the agencies and a more inclusive state planning process. – see Attachment 10 for the an updated ACSI Table.

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This worksheet should be completed as specified in Section III of the Weatherization Assistance Program Application Package.

V.1 Eligibility

V.1.1 Approach to Determining Client Eligibility

Provide a description of the definition of income used to determine eligibility

Idaho utilizes the definition of income as defined in the most current guidance received by DOE for the grant application program year.

Describe what household eligibility basis will be used in the Program

Eligible households are defined as households at or below two-hundred percent (200%) of the OMB Poverty guidelines, receiving assistance under the Low-Income Home Energy Assistance Program or having received cash assistance payments during the preceding twelve-month period under Titles IV and/or XVI of the Social Security Act.

Application eligibility expires twelve (12) months from certification date if work on the dwelling unit (energy audit) has not been initiated.

Describe the process for ensuring qualified aliens are eligible for weatherization benefits

Program eligibility is determined using the total gross income of all individuals residing in the household to include documented and undocumented individuals.

V.1.2 Approach to Determining Building Eligibility

Procedures to determine that units weatherized have eligibility documentation

Idaho's Weatherization Assistance Program has developed, published, and implemented procedures to ensure documentation of eligible dwellings to include age of home verification, state historical preservation organization (SHPO) assessments, and income documentation or a signed statement of income from the participant. Copies are kept in the participant's file.

Section 4 of the Idaho Weatherization Operations Manual (IWOM) outlines the process for determining building eligibility in greater detail.

Describe Reweathering compliance

Weatherization program funds may be used to weatherize a dwelling under the following conditions:

1. If a dwelling has been damaged by fire, flood, or an act of Nature, and repair of the damage to the weatherization materials is not paid for by insurance.
2. If a dwelling was previously weatherized between September 30, 1975 and September 30, 1994; and
 1. The applicant meets the eligibility criteria for assistance and the Energy Audit takes into account any previous energy conservation; and
 2. The proposed measures and the total job has a SIR $\geq$ 1.0 and does not exceed the DOE average cost per dwelling for the program year.

Re-weatherized dwellings are tracked for reporting purposes and are included in the total completed dwellings.

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Describe what structures are eligible for weatherization

Eligible dwellings include stick-built houses, mobile homes, apartments, or a group of rooms or a single room representing a separate living quarter occupied by a household who is income-eligible for weatherization services. A dwelling must be substantially complete consisting of a stationary foundation, a floor, exterior & interior walls, windows, doors, a roof, and a heating system.

Describe how Rental Units/Multifamily Buildings will be addressed

Rental dwellings are eligible for weatherization services when an eligible renter occupies them. Once the renter is determined eligible for weatherization services and prior to scheduling an Energy Audit, the renter and owner must certify in writing they accept without protest the special conditions outlined in the Homeowner and Renter Agreement.

For example:

1. OWNER agrees to reimburse the Direct Service Provider for the un-depreciated total amount of the weatherization costs if the dwelling is sold within the (12) month period beginning on the date the Job Completion Form is signed by the OWNER and/or RENTER and/or assignee. Reimbursement may be waived by IDHW on a case by case basis.
2. As the RENTER, I understand as long as I comply with the ongoing obligations and responsibilities to the OWNER, my rent will not be increased for 12 months following the completion of weatherization, nor will I be evicted solely due to the weatherization work. Nor will my rent be raised solely due to weatherization work performed.
3. As the OWNER and/or RENTER of the above property, I understand that no undue or excessive enhancement will occur to the value of the dwelling as a result of the weatherization measures funded by the US Department of Energy.

A copy of the signed agreement must be given to the property owner and renter upon completion of the weatherization services. The original must be kept in the eligible renter's participant file. When the form is mailed to the Owner, a letter of explanation will accompany the form.

Complaints received regarding a property owner raising the rent amount in a weatherized dwelling will follow the complaint process:

1. The Direct Service Provider, as the initial point of contact, will contact the property owner to determine if the rent increase was due to provision of weatherization services to the household.
2. If it is determined by the Direct Service Provider that the rent increase is due to the weatherization measures provided, Idaho's Administrative Contractor will be contacted to send a letter to the property owner explaining program guidelines, specifically that any rent increases within twelve (12) months of weatherization were agreed to per the signature on the Owner/Renter Agreement form.
3. The Direct Service Provider will follow up with the tenant to ensure the rent increase is discontinued to comply with the language on the Owner/Renter Agreement.
4. Escalation to the IDHW level will only occur in cases that cannot be resolved at the Direct Service Provider and/or Idaho's Administrative Contractor level.

Multifamily Units

Duplex or four-plex multi-family buildings may be weatherized if fifty percent (50%) of the dwellings in the building are occupied by eligible occupants. Larger multi-family buildings (five or more units) or tri-plex may be weatherized if sixty-six percent (66%) of the dwellings in the building are occupied by eligible occupants.

Low Income Subsidized Multi-Family Rental Dwellings

If the dwelling is a low-income rent subsidized complex, DSPs must obtain proof of the tenant's income. Income documentation may be obtained from an applicable housing authority or property management. Management for the multi-family dwelling must sign a master Owner/Renter Agreement for the eligible occupants. An application will be completed for the non-income eligible units, listing the names, address and apartment number and referencing it to the multi-family master application. The property owner or their designee must sign an Owner and Renter Agreement prior to receiving weatherization services. Each dwelling unit shall be assigned a job number and each dwelling unit shall be counted as a complete unit.

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Non-Subsidized Multifamily Rental Dwellings

For multi-family dwellings which are not low-income subsidized, an application will be required for each dwelling unit. Once the required number of units has been identified as eligible, applications for the remaining dwellings will indicate only the address and apartment number and services provided based upon the fifty or sixty six percent (50% or 66%) criteria. The owner or their designee must sign an Owner/Renter Agreement for each dwelling to be weatherized. Each dwelling unit shall be assigned a job number and each multi-family dwelling unit weatherized will be counted as a completed unit.

Describe the deferral Process

Deferral Process/ Walk-Away Policy

The decision to defer activities on a dwelling without providing weatherization services is difficult, but necessary in some cases. Many problems encountered in low-income housing are beyond the scope of the Weatherization Assistance Program. Deferral of weatherization services does not mean that assistance will never be available, but that any work must be postponed until the issues can be resolved, and community resources will be contacted as necessary.

In cases where deficiencies or hazards are beyond the scope of weatherization (including dangers posed by lead based paint and/or laden dust residues, asbestos, radon, VOC's, or other hazardous substances), the participant will be informed of the condition and the file will be documented. A Weatherization Deferral Form will be completed, mailed to the participant/property owner, and a copy retained in the participant's file. The deferral policy is described in further detail in the Idaho Weatherization Operations Manual (IWOM).

V.1.3 Definition of Children

Definition of children (below age): **18**

V.1.4 Approach to Tribal Organizations

☐ Recommend tribal organization(s) be treated as local applicant?

If YES, Recommendation. If NO, Statement that assistance to low-income tribe members and other low-income persons is equal.

Services to Idaho Native American Tribes

Five (5) Native American tribes reside in Idaho: Kootenai, Coeur d'Alene, and Nez Perce tribes in the northern part of Idaho, and Shoshone-Bannock and Shoshone-Paiute tribes in southern Idaho. The U.S. Department of Energy allows the Grantee and local Direct Service Providers to provide service to tribal members living on the reservations. Direct Service Providers are to ensure services are provided proportionately to low-income Native Americans in their respective service areas. The Grantee will work with Direct Service Providers and encourage shared initiatives with tribal housing authorities. Direct Service Providers are required to establish a referral system with tribal authorities to ensure that tribal members residing on reservations are adequately and effectively served.

Tribal members not residing on tribal reservations will not be included in the referral system but are equally eligible for services with all other applicants applying for weatherization through the Direct Service Providers.

V.2 Selection of Areas to Be Served

The Idaho Weatherization Assistance Program is operated through local Direct Service Providers in accordance with DOE program requirements.

The designated Direct Service Providers serve every county in Idaho and ensure delivery of weatherization services are provided statewide.

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V.3 Priorities

Priority service shall be given to households with:

1. One member who is elderly (age 60 and older), disabled, or a child under age 6;
2. Actual annual energy consumption costs that are greater than ten percent (10%) of the household's annual gross income (high energy burden); and
3. Households receiving the highest tier of benefit as part of the Low-Income Home Energy Assistance Program (High Energy Users)

Direct Service Providers are required to use the Application Priority Formula in order to determine positioning and maintain a waiting list in accordance with the Idaho Weatherization Operations Manual (IWOM).

V.4 Climatic Conditions

Heating degree days vary from 5,000 to over 10,000. Idaho is composed of populated valleys surrounded by sparsely populated mountainous areas. The population is concentrated along the valleys and river basins. The chart below illustrates data from NOAA concerning heating degree days for representative locations in Idaho.

DSP	City	County	HDD	Elevation
CAP	Lewiston	Nez Perce	5,220	745
CAP	Golden	Idaho	10,582	4,354
MCS	Caldwell	Canyon	6,120	2,375
MCS	McCall	Valley	9,549	4,800
EICAP	Idaho Falls	Bonneville	7,509	4,705
EICAP	Drummond	Fremont	10,024	5,610
El-Ada	Boise	Ada	5,022	3,048
El-Ada	Riddle	Owyhee	7,349	5,367
SCCAP	Twin Falls	Twin Falls	6,565	3,734
SCCAP	Hailey	Blaine	8,542	5,318
SEICAA	Pocatello	Bannock	7,461	4,462
SEICAA	Georgetown	Bear Lake	9,010	6,043

Idaho's varied elevation and heating degree day variances are documented for each weatherized unit using the web-based energy audit application. The exposure factor is also documented in order to accurately assess which measures will save the most energy for each individual dwelling. This practice ensures that measures provided to a dwelling are appropriate based on the local climatic conditions.

V.5 Type of Weatherization Work to Be Done

V.5.1 Technical Guides and Materials

SWS Incorporation and Implementation

The Grantee's Weatherization Operations Manual (IWOM) and Appendices are aligned to meet or exceed Standard Work Specifications (SWS) for Home Energy Upgrades. The DOE approved manual will be distributed to the Grantee, Idaho's Administrative Contractor, Direct Service Providers and contractors to ensure all work performed in Idaho is compliant with this document.

Initial audits, material installations and quality assurance inspections performed in Idaho will be to the standards in the Idaho Weatherization Operations Manual and in compliance with all DOE Weatherization Program requirements.

The Grantee will provide language to be included in contracts that outline the expectation for work quality and instructs Idaho's Administrative Contractor to include these expectations in any agreements entered into with Direct Service Providers and

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vendors.

All contracts and agreements will contain language which clearly states work performed meets the SWS specifications for work quality as prescribed by DOE program guidance.

Idaho has language in DSP subgrants requiring technical manuals and field guides are provided to all staff and service providers/contractors and the signature on the DSP subgrant by the agency Executive Director serves as acknowledgement.

Idaho will ensure that all weatherization activities not included in the list of Categorical Exclusion activities in Section 2.9 of WPN 19-1 require an Environmental Questionnaire (EQ-1) submission for review.

All Program Guidance updates are communicated by the Grantee to Idaho's Administrative Contractor. Idaho's Administrative Contractor follows the process detailed below:

1. Each Direct Service Provider has been signed up to receive WAP program updates directly from DOE by email.
2. The Administrative Contractor shall advise the Direct Service Providers of policy updates via email and ensure Direct Service Providers program managers have confirmed receipt, read and understand the guidance, are allowed time to review, comment, and implement expected changes.
3. Updates with effective dates, will be added to the IWOM and/or other appropriate documents.
4. Direct Service Providers will be monitored to this requirement to ensure consistency in response.

The Idaho Weatherization Assistance Program uses a US DOE approved computerized Energy Audit to determine the most cost-effective measures and the savings to investment ratio (SIR) of each measure. The most recent approval of the computerized energy audit by US DOE is October 18, 2016. The Energy Audit (EA5) is described in the Idaho Weatherization Operations Manual.

Direct Service Providers are required to conduct two blower door tests (pre and post) on all dwellings. Crews are encouraged to perform a third blower door test during installation of air sealing measures to determine if targeted airflow rates within the dwelling unit are achieved.

The average cost per dwelling for materials, support, and labor shall follow DOE annual guidelines.

Expenditures for Health and Safety measures, including Renovation, Repair and Painting (RRP) Program procedures, will be charged to the Health and Safety budget line item and are not included in the average cost per dwelling. The health and safety average percentage cost will be evaluated throughout the program year. Equipment will be tracked separately.

Any existing refrigerators will be removed from the residence and disposed of properly if a new refrigerator is provided to the applicant. Vendors providing refrigerators must sign off that the existing refrigerator was properly disposed of and the Freon recycled.

Field guide types approval dates

Single-Family: 6/18/2018
Manufactured Housing: 6/18/2018
Multi-Family: 6/18/2018

V.5.2 Energy Audit Procedures

Audit Procedures and Dates Most Recently Approved by DOE

Audit Procedure: Single-Family

Audit Name: Other (specify)

The Energy Audit (EA5) which incorporates the mechanical/architectural measure interaction requirement of DOE was approved 10/18/16. The EA5 includes a web-based platform (Visual Basic.NET) that integrates with Idaho's WITSWeb data tracking system.

Approval Date: 10/18/2016

Audit Procedure: Manufactured Housing

Audit Name: Other (specify)

The Energy Audit (EA5) which incorporates the mechanical/architectural measure interaction requirement of DOE was approved 10/18/16.
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This application is also approved for use when auditing mobile homes.

Approval Date: 10/18/2016

Audit Procedure: Multi-Family

Audit Name: Other (specify)

Idaho does not currently meet the 20% requirement of multi-family completions necessary for use of a multi-family energy audit. Idaho utilizes the current comprehensive single family audit application for multi-family units that are individually heated.

Approval Date:

Comments

The Idaho Weatherization Assistance Program uses a US DOE approved computerized Energy Audit to determine the most cost-effective measures and the savings to investment ratio (SIR) of each measure. The most recent approval of the computerized energy audit by US DOE is October 18, 2106. The Energy Audit (EA5) is described in the Idaho Weatherization Operations Manual (IWOM). Idaho will provide their Energy Audit processes (and priority list(s) if applicable) to DOE for approval every five (5) years.

The Weatherization Assistance Program will continue to use a comprehensive audit system to ensure funds are managed effectively. Use of the computerized Energy Audit coupled with program policies and management decisions will ensure the most cost-effective measures are installed on a dwelling and support/labor costs are within contract requirements.

Idaho uses the computerized Energy Audit to calculate the cost effectiveness of each measure and the interaction of all measures that may be installed on a dwelling to determine the point of diminishing returns of the measure.

Direct Service Providers are required to conduct two blower door tests (pre and post) on all dwellings. Crews are encouraged to perform a third blower door test during installation of air sealing measures to determine if targeted airflow rates within the dwelling unit are achieved.

The average cost per dwelling for materials, support, and labor shall follow DOE annual guidelines.

Expenditures for health and safety measures, including Renovation, Repair and Painting (RRP) Program procedures, will be charged to the Health and Safety budget line item and are not to be included in the average cost per dwelling. The health and safety average percentage cost will be evaluated throughout the program year.

Fuel Switching

Idaho was approved by DOE with the FY17 State Plan to allow fuel switching when the site-specific energy audit demonstrates the cost effectiveness of the fuel switch over the life of the measure as indicated by the calculated SIR.

V.5.3 Final Inspection

A final inspection compliant with current DOE guidance and the Grantee Quality Control Inspection Policy will be conducted on every weatherized dwelling before it is reported as completed to the Grantee and US DOE. Weatherization inspection procedures include, but are not limited to, ensuring the following:

1. Adult member or designated head of household is present during inspection.
2. Installed materials conform to DOE standard for weatherization materials.
3. Recommendations in the Energy Audit were followed.
4. All materials charged to the job were installed properly and to standards and specifications found in the Idaho Weatherization Operations Manual (IWOM).
5. Any necessary minor adjustments are made.
6. Participants are educated on operation of newly installed measures, including equipment operation and maintenance.
7. Job Order Sheet is completed with all related information including documented justification for changes.
8. Participant and/or Property Owner are satisfied and their signature is obtained on the Job Completion Form.
9. A Home Energy Quality Control Inspector (QCI) will use a Quality Assurance Job Inspection Form to review and sign-off on jobs reported as complete.

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To allow flexibility, Idaho will be allowing its Direct Service Providers to either contract with an outside QCI or to certify in-house staff as QCI. Currently, all Direct Service Providers have decided to have in-house staff QCI certified who will be defined as an Independent QCI as per current DOE requirements.

Idaho's Administrative Contractor will actively monitor the expiration date of the training credentials for each Direct Service Provider's HEP-Certified staff, including the QCI certification.

Inspections are completed by QCI certified staff on 100% of completed units. The inspecting QCI will have no involvement in the prior work on the home either as the energy auditor or as a member of the crew. Any agency not meeting this requirement will be subject to increased monitoring and/or additional requirements.

Assurance that sub-grantees' jobs are receiving inspections from QCI-certified inspectors and to the standard of SWS standards or DOE approved variances. These jobs will be verified once during the year and then again during annual monitoring. The annual monitoring reviews will consist of five percent (5%) plus one (1) of completed units. The interim review will consist of a minimum of three (3) random participant file reviews to ensure that QCI-certified inspectors are utilizing the correct forms, inspecting work to SWS standards or DOE approved variances and documenting any irregularities that could result in additional training. Any irregularities will be treated in accordance with Idaho's established monitoring protocols.

The Inspector will note deficiencies in the job completion and request follow up on work not meeting State standards and procedures. Any follow up work or additional work, considered 'Go Backs' will not be charged to DOE if the unit has been reported as completed per Department of Energy guidance. Please see Attachment 2b QCI_TMF to view the current QA Final Inspection form.

Any inadequate inspection practices will be addressed using the following process:

1. Direct Service Provider program manager will provide information on how the inadequate practice will be addressed; and
2. Idaho's Administrative Contractor will take corrective action such as providing T&TA or increasing quality assurance measures until such time when the Direct Service Provider is in compliance with established inspection practices.

See Attachment 9 for additional detail on Corrective Action/Removal Procedures.

V.6 Weatherization Analysis of Effectiveness

Analysis of effectiveness of weatherization projects is made through the energy audit software, ensuring at least a savings to investment ratio of 1.0. Monthly production and energy savings data obtained through the online data system (WITSWeb) are compared to track outcomes. Comparative data, annual programmatic and on-site monitoring reports, and meetings with the WX Managers provide the basis for identifying deficiencies and opportunities for T/TA either across the network or for individual DSPs.

The Grantee incorporates monitoring feedback by reviewing policies and procedures, and monitoring tools a minimum of annually to ensure relevance and compliance with programmatic requirements. The Grantee encourages sharing of best practices through the peer exchange in order to continually improve program implementation and a consistent approach across the state.

The Grantee tracks Direct Service Provider performance reviews using the Annual Monitoring Summary reports provided by Idaho's Administrative Contractor. Technical and financial systems and practices are reviewed by Idaho's Administrative Contractor as described in Section V.8.3. Accepted OMB procurement procedures are used to ensure current market measure costing.

V.7 Health and Safety

The Idaho Weatherization Assistance Program has a Health and Safety Program that allows for production funds to be utilized for health and safety measures. While such measures may not meet the savings to investment ratio (SIR) of 1.0, they are necessary to address health and safety issues. Please see Attachment 1 to view the current Health and Safety Plan.

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Idaho's Health and Safety Program expenditures will not exceed fourteen percent (14%) of the Program Operations budget line item. All Direct Service Providers will be held to the Health and Safety budget, regardless of per unit expenditures. This percentage is based on historical spending patterns of Program Operations and Health and Safety. Health and Safety measures, when charged to the Health and Safety line item, will not be included in the average cost per unit calculation. All Direct Service Providers have been provided an electronic copy of the most current DOE guidance.

As part of Idaho's Health and Safety plan, Direct Service Provider Staff use the Health the Health & Safety Review checklist to assist in identifying each household's pre-existing occupant and dwelling health issues. This document is also used to document presence of hazards to occupant health identified in current DOE guidance and to provide notification to the occupants.

As part of Idaho's Health and Safety plan, Direct Service Provider Staff also use the Idaho Weatherization Deferral Form to assess situations that may be beyond the scope of weatherization. Idaho's Health and Safety Plan will include ongoing training on most current DOE requirements.

V.8 Program Management

V.8.1 Overview and Organization

The Idaho Department of Health and Welfare, Division of Welfare, is the state agency that applies for Department of Energy Weatherization Assistance Program funding and also functions as Idaho's LIHEAP Grantee. A percentage of two (2) staff persons' time, the Program Manager and the Program Specialist, is funded with WAP funding and provides administrative oversight, training and technical assistance and reporting functions for this program. The Department's Contracts and External Resources Monitoring team provides compliance monitoring of the Community Action Partnership Association of Idaho.

Idaho currently contracts with the Community Action Partnership Association of Idaho, a private non-profit agency, to provide administrative oversight of the state Weatherization program. Administrative functions include program and fiscal oversight, training, and technical assistance, reporting, and some monitoring functions. Four (4) staff people totaling .90 FTE are funded under this grant.

Idaho is not currently seeking to identify additional Direct Service Providers using a competitive process.

V.8.2 Administrative Expenditure Limits

The Grantee will permit Direct Service Providers with DOE approved budgets of less than \$350,000 to receive up to an additional five percent (5%) of their total budgeted amount, based upon their approved indirect rate or a Cost Allocation Plan and Budget Summary justification.

All Direct Service Providers are reviewed to ensure its weatherization administrative costs are within the allowable administrative budget limit. Support costs are reviewed to ensure operations are efficient, related to energy savings, and in compliance with Federal DOE Regulations, State programmatic, and fiscal requirements. Additionally, Direct Service Providers are required to have financial audits conducted by an independent audit firm. All requests for reimbursement are verified for accuracy and compliance with Federal DOE Regulations, State programmatic, and fiscal requirements by the Grantee prior to payment. (see - Attachment 8b.)

V.8.3 Monitoring Activities

Purpose

Monitoring is the single most important management tool used by the Grantee to ensure Direct Service Providers comply with Federal Department of Energy regulations and State of Idaho rules governing the Idaho Weatherization Assistance Program. Monitoring determines the efficiency and effectiveness of program services and identifies areas where additional Direct Service Provider training and technical assistance is needed.

Procedure

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Idaho's Administrative Contractor conducts ongoing monitoring as part of the administrative function. Annual on-site visits are completed in accordance with program guidance. The focus of the on-site visits is to conduct random physical inspections of weatherized homes. Based upon the annual review findings, any activities found to be out of compliance will be resolved by the Direct Service Provider as defined in the Idaho Weatherization Operations Manual, Contract Compliance and Remedial Plan. Up to five percent (5%) of Grantee T&TA funds will be spent on monitoring.

Idaho's Administrative Contractor will provide a technical and administrative monitor. All technical monitor activities will use QCI Certified inspectors to ensure that DOE Inspection requirements are met by Idaho's Weatherization Assistance program.

Idaho's Administrative Contractor will contract with a QCI-Certified Inspector to perform technical on-site monitoring of all Direct Service Providers, including any follow up reviews.

Idaho's Administrative Contractor will coordinate on-site scheduling in a way that minimizes cost and ensures appropriate use of resources. The monitoring for the prior program year will be completed by June 30 annually. Monitoring travel costs are charged to T&TA and administration.

Monitoring results, and accompanying documentation, are submitted to the Direct Service Provider and Grantee. Direct Service Providers are required to correct any deficiencies identified during the monitor using non-federal funds. Monitor results will also be used to inform T&TA activities as a means of improving work outcomes. Identified noncompliance will require immediate corrective action by Idaho's Administrative Contractor to bring the Direct Service Providers into compliance with program requirements.

Any findings that result in the Direct Service Provider's contract being terminated would be reported to the DOE Project Officer by the Idaho Department of Health and Welfare.

Using Direct Service Provider monitor results as one of its tools, the state will conduct annual monitoring of Idaho's Administrative Contractor to ensure its sub-grantee is administering the program in compliance with federal and state program requirements.

Monitoring

Monitoring activities comprise three major parts:

1. Fiscal/Administrative monitoring (including a review of internal controls and agency health)
2. File reviews of completed jobs
3. On-Site reviews of completed jobs.

Idaho will not be utilizing the 'exemplary agency' waiver for the grant period. All Direct Service Providers will receive on-site reviews (of completed jobs) and file reviews.

The dates that Direct Service Providers will be monitored for fiscal and on-site reviews are as follows:

WX review:

- | | |
|---|-------------------|
| 1. Community Action Partnership, Inc. | 05/11/20-05/13/20 |
| 2. Eastern Idaho Community Action Partnership, Inc. | 05/18/20-05/20/20 |
| 3. El Ada, Inc. | 06/01/20-06/03/20 |
| 4. Metro Community Services | 06/04/20-06/05/20 |
| 5. South Central Community Action Partnership | 06/08/20-06/10/20 |
| 6. SouthEastern Idaho Community Action Agency, Inc. | 05/20/20-05/22/20 |

Financial/Administrative review:

- | | |
|---|-------------------|
| 1. Community Action Partnership, Inc. | 04/13/20-04/17/20 |
| 2. Eastern Idaho Community Action Partnership, Inc. | 05/13/20-05/14/20 |
| 3. El Ada, Inc. | 04/20/19-04/24/20 |
| 4. Metro Community Services | 04/24/20-04/30/20 |
| 5. South Central Community Action Partnership | 05/04/20-05/08/20 |
| 6. SouthEastern Idaho Community Action Agency, Inc. | 05/11/20-05/12/20 |

Projected Dates of Monitoring Visits

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Monitoring visits for all Direct Service Providers will be scheduled between April and June of each year. Please see Attachment 2a QCI_TMF to view the Technical Monitoring Form.

Approach

Idaho's Administrative Contractor and each Direct Service Provider is monitored annually for compliance with federal, state and financial requirements. This monitoring includes on-site reviews of at least five percent (5%) plus one (1) unit of completed units, participant file reviews, proper procurement/invoicing techniques, proper documentation when determining eligibility, proper designation of allowable administrative expenses between administration and program support categories, and the practice of using DOE funds to return to previously completed homes to make adjustments or include additional measures not done on the initial visit and after the unit was reported to DOE as completed.

Visit

A monitoring exit interview is held for each Direct Service Provider upon completion of the program, on-site quality assurance and participant file review. An initial monitoring report is submitted within three (3) business days. Direct Service Provider responses are due to Idaho's Administrative Contractor within thirty (30) days. Any significant findings require a Quality Improvement Plan to be developed by the Direct Service Provider and submitted within thirty (30) days. Direct Service Provider responses are incorporated into a final monitoring report and all outstanding issues are followed up by Idaho's Administrative Contractor within thirty (30) days after receipt of the final monitoring report. Any noncompliance unresolved within forty-five (45) days will be reported to the DOE Project Officer by the Idaho Department of Health and Welfare. Any sensitive or significant noncompliance findings will be reported to the DOE Project Officer immediately. Please see Attachment 9 for the Corrective Action/Removal procedures.

Tracking and Analysis

Idaho will utilize its current tracking system to note monitoring findings, observations, recommended corrective actions, deliverables, due dates, responsible parties, actions taken, and final resolutions. Upon completion of annual monitoring of all Direct Service Providers, Idaho will analyze the identified strengths, weaknesses and findings to determine any T&TA needs and planning for future monitoring.

Reporting

All Direct Service Provider monitoring visits will be summarized in a written report, including review of financial audit and program results at least annually. The results will be used to identify needs, strengths, and weaknesses of the network. All materials will be available to the DOE Project Officer for review during program monitoring visits.

V.8.4 Training and Technical Assistance Approach and Activities

Training and Technical Assistance Objective

The objective of Training and Technical Assistance funding is to provide resources designed to improve the quality of weatherization services delivered to low-income households. The types of assistance that will be provided include technical and program management training opportunities.

Types of Technical Training

Annual monitoring visits, program manager meetings (in-person or via teleconference), and release of program guidance will be used to assess Direct Service Provider training needs. Idaho encourages all Direct Service Providers to attend industry conferences, including those offered by Energy Out West and the National Home Performance Conference, and achieve/maintain QCI certification to ensure Idaho's program is utilizing industry standard technologies and techniques.

Comprehensive Training

Idaho will identify and coordinate with Interstate Renewable Energy Center (IREC) accredited training providers to administer Comprehensive, occupation specific training for all WAP workers in Idaho that aligns with the NREL Job Task Analysis (JTA) for their occupation. All Direct Service Provider staff will be required to attend training and achieve and maintain Retrofit Installer

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Technician, Crew Leader, Energy Auditor, and Quality Control Inspector certification, as appropriate to their job tasks.

Training events will be scheduled by certification type, trainer availability and to allow Direct Service Provider production to continue without delay.

In 2019, all technical weatherization staff in Idaho across six (6) Direct Service Providers have completed Comprehensive training. Idaho will continue to send staff to Comprehensive training as needed. Idaho is prioritizing Comprehensive training within the Energy Auditor job function as defined by the NREL Job Task Analysis to provide certifications for any DSP staff seeking Home Energy Professional (HEP) Energy Auditor certifications. Additional Comprehensive Training will be prioritized for the Retrofit Installation Technicians and Crew Leaders positions as training requirements for Energy

Auditor are met.

New staff hired by the Direct Service Providers will be registered for Comprehensive training within ninety (90) days of achieving permanent full-time employee status. Existing staff assigned to a new position will be registered for applicable Comprehensive Training within ninety (90) days of their reassignment.

Specific Training

Subgrantees may receive Specific training pertaining to professional development and program/industry changes.

Direct Service Provider Peer Exchange

Idaho will utilize the Direct Service Providers within its network to enhance technical expertise and application techniques and to ensure efficient, cost effective use of limited Training and Technical Assistance resources.

Other Trainings

Mandatory trainings will be coordinated by Idaho's Administrative Contractor.

Direct Service Providers are required to track attendance at trainings (intra-agency, inter-agency, and outside) and report quarterly. This information is included in the annual DOE Leveraging and T&TA Report. These activities also will be reviewed as part of the annual agency monitoring activities.

Idaho will prioritize developing partnerships with the statewide home performance industry on training issues, if needed.

All Direct Service Providers are required to expend at least fifty percent (50%) of allocated Training and Technical Assistance funding on training prior to re-allocating this funding to Program Operation line items.

Client Education

Client education will be provided to align with the requirements in the Standard Work Specifications and the State Health and Safety Plan. In multifamily units, the building manager will also be provided education on the maintenance of provided weatherization measures.

Training and Technical Assistance Plan

T & TA Funding Allocation

The portion of T&TA funds allocated for program monitoring is 5.25%. This amount is based on actual costs incurred during PY 18 monitoring. Idaho's Administrative Contractor contracts with a QCI-certified inspector to complete annual on-site quality assurance monitoring duties.

Provided Training

All Direct Service Providers receive a T&TA allocation in order to ensure program staff has access and resources to attend training opportunities. Needs are assessed with Direct Service Provider Program Managers on an individual basis to identify additional trainings not covered in the statewide prioritization to ensure consistency of service delivery and quality assurance. Idaho's Administrative Contractor coordinates all mandatory trainings and tracks attendance. Comprehensive training will be

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coordinated by Idaho's Administrative Contractor as described in section V.8.4 of this plan.

Lead Training Certification

Lead Safe Work Practice training is required of all new hires within ninety (90) days of permanent employee status. All Direct Service Providers must have at least two (2) EPA Certified Lead Renovators on staff. All contractors providing services with DOE funds must have at least one (1) EPA Certified Lead Renovator on staff to ensure compliance with current DOE guidance. All Direct Service Providers are encouraged to train program staff at all levels in OSHA, CPR/First Aid, and general safety procedures.

QCI Certification

All Direct Service Provider Inspectors will be required to achieve and maintain QCI certification. As part of the annual monitor, Idaho will review and verify continued certification standards for QCI inspectors are being met as part of its QA and monitoring activities.

There are currently fifteen (15) QCI-certified Inspectors in Idaho's Weatherization network of six (6) Direct Service Providers. In addition, each Direct Service Provider has a minimum of one (1) QCI Inspector with the majority of Direct Service Providers having more than one staff person certified.

The Grantee, Idaho's Administrative Contractor and Direct Service Providers will be responsible for securing retention agreements from staff or subcontractors in exchange for QCI training.

Idaho's Administrative Contractor will actively monitor the expiration date of the training credentials for each Direct Service Provider's Home Energy Professional (HEP) Certified

Training Assessment

Direct Service Providers will produce and maintain permanent training records for staff that includes date of hire, course work, course date and training provider. Idaho's Administrative Contractor will assess the needs of Direct Service Providers on a quarterly basis to track Direct Service Provider progress and provide training opportunities as needed.

Training Priority Development

Idaho Administrative Contractor assesses Direct Service Provider productivity on a quarterly basis. Any anomalies noted in energy audits and in providing holistic weatherization services to program participants.

The current priorities for training are as follows:

1. Twice per year - quality assurance reviews of participant files;
2. Annual review of trends observed during annual on-site monitoring;
3. Discussion of trends with Weatherization Manager network to share best practices and ensure standards and program guidance are implemented consistently throughout Idaho; and
4. Use of redacted photos to demonstrate on-site observations of measure installation challenges and best practices.

Idaho's Administrative Contractor will also coordinate training and technical assistance events at least once per year and on an individual Direct Service Provider basis, as deemed necessary based on monitoring results and/or at the Direct Service Provider's request.

Percent of overall trainings

Comprehensive Trainings:	73.0
Specific Trainings:	27.0

Breakdown of T&TA training budget

Percent of budget allocated to Auditor/QCI trainings:	53.0
Percent of budget allocated to Crew/Installer trainings:	32.0
Percent of budget allocated to Management/Financial trainings:	15.0

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V.9 Energy Crisis and Disaster Plan

In the event of disasters, DOE WAP resources may be requested by the appropriate authority within the state of Idaho. Idaho will enlist their existing weatherization network to appropriately follow DOE program requirements as stated in WPN 12-7.