

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. EE0009930		2. Program/Project Title Weatherization Assistance Program	
3. Name and Address South Carolina State of 1205 Pendleton Street Columbia, SC 292010000	4. Program/Project Start Date 04/01/2023		
	5. Completion Date 03/31/2024		

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	\$ 639,452.00		\$ 2,945,751.00		\$ 3,585,203.00
2.						
3.						
4.						
5. TOTAL		\$ 639,452.00	\$ 0.00	\$ 2,945,751.00	\$ 0.00	\$ 3,585,203.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) GRANTEE ADMINISTRATI ON	(2) SUBGRANTEE ADMINISTRATI ON	(3) GRANTEE T&TA	(4) SUBGRANTEE T&TA	
a. Personnel	\$ 100,465.00	\$ 0.00	\$ 141,530.00	\$ 0.00	\$ 241,995.00
b. Fringe Benefits	\$ 42,700.00	\$ 0.00	\$ 60,150.00	\$ 0.00	\$ 102,850.00
c. Travel	\$ 0.00	\$ 0.00	\$ 16,710.00	\$ 0.00	\$ 16,710.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 10,000.00	\$ 0.00	\$ 1,700.00	\$ 0.00	\$ 11,700.00
f. Contract	\$ 86,000.00	\$ 236,273.00	\$ 10,000.00	\$ 241,056.00	\$ 3,150,673.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 29,553.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 29,553.00
i. Total Direct Charges	\$ 268,718.00	\$ 236,273.00	\$ 230,090.00	\$ 241,056.00	\$ 3,553,481.00
j. Indirect Costs	\$ 17,089.00	\$ 0.00	\$ 14,633.00	\$ 0.00	\$ 31,722.00
k. Totals	\$ 285,807.00	\$ 236,273.00	\$ 244,723.00	\$ 241,056.00	\$ 3,585,203.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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3. Name and Address South Carolina State of 1205 Pendleton Street Columbia, SC 292010000	4. Program/Project Start Date 04/01/2023		
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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		\$ 639,452.00	\$ 0.00	\$ 2,945,751.00	\$ 0.00	\$ 3,585,203.00

SECTION B - BUDGET CATEGORIES					
6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) HEALTH AND SAFETY	(2) PROGRAM OPERATIONS	(3) LIABILITY INSURANCE	(4) Weatherization Readiness	
a. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 241,995.00
b. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 102,850.00
c. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 16,710.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 11,700.00
f. Contract	\$ 165,137.00	\$ 1,974,226.00	\$ 0.00	\$ 437,981.00	\$ 3,150,673.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 29,553.00
i. Total Direct Charges	\$ 165,137.00	\$ 1,974,226.00	\$ 0.00	\$ 437,981.00	\$ 3,553,481.00
j. Indirect Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 31,722.00
k. Totals	\$ 165,137.00	\$ 1,974,226.00	\$ 0.00	\$ 437,981.00	\$ 3,585,203.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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WEATHERIZATION ANNUAL FILE WORKSHEET**

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IV.1 Subgrantees

Subgrantee (City)	Planned Funds/Units
Aiken/Barnwell Counties Community Action Agency (Aiken)	\$826,951.00 65
Carolina Community Actions, Inc. (Rock Hill)	\$225,845.00 17
Charleston County Human Services Commission dba Palmetto (Charleston)	\$473,801.00 38
Chesterfield-Marlboro (Cheraw)	\$228,134.00 21
GLEAMNS Human Resources Commission Inc (Greenwood)	\$699,125.00 58
Lowcountry Community Action Agency, Inc. (Walterboro)	\$47,900.00 4
Waccamaw Economic Opportunity Council, Inc. (Conway)	\$270,340.00 21
Wateree Community Actions, Inc. (Columbia)	\$282,577.00 22
Total:	\$3,054,673.00 246

IV.2 WAP Production Schedule

Weatherization Plans		Units
Total Units (excluding reweatherized)		246
Reweatherized Units		0
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	246
C	Total Units Reweatherized	0
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	246
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	\$1,974,226.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	246
H	Average Program Operations Costs per Unit (F divided by G)	\$8,025.31
I	Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	\$0.00
J	Total Average Cost per Dwelling (H plus I)	\$8,025.31

IV.3 Energy Savings

Method used to calculate savings: <input checked="" type="checkbox"/> WAP algorithm <input type="checkbox"/> Other (describe below)		
Units	Savings Calculator (MBtus)	Energy Savings

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This Year Estimate	246	29.3	7208
Prior Year Estimate	197	29.3	5772
Prior Year Actual	217	29.3	6358

Method used to calculate savings description:

IV.4 DOE-Funded Leveraging Activities

The State will not be leveraging any funds.

IV.5 Policy Advisory Council Members

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

Cathy Seawright	Type of organization: Unit of Federal Government Contact Name: Cathy Seawright Phone: 8432533093 Email: cathy.seawright@usda.gov
Evans Taylor	Type of organization: Utility Contact Name: Evans Taylor Phone: 9197915906 Email: evans.taylor@duke-energy.com
Geoffrey Penland	Type of organization: Utility Contact Name: Geoffrey Penland Phone: 8433606336 Email: geoff.penland@santeecooper.com
Jennifer Moore	Type of organization: Non-profit (not a financial institution) Contact Name: Jennifer Moore Phone: 8037335421 Email: jmoore@uwav.org
John Frick	Type of organization: Utility Contact Name: John Frick Phone: 8037393064 Email: john.frick@ecsc.org
Kaytee Watson	Type of organization: Utility Contact Name: Phone: 8032177942 Email: kaytee.watson@dominionenergy.com
Samuel D. Bass, Jr.	Type of organization: Local agency Contact Name: Phone: 8433209760 Email: sdbass@cmeoc.org
Stacey Washington	Type of organization: Unit of State Government Contact Name: Phone: 8037370804 Email: swashington@ors.sc.gov
Trish Jerman	Type of organization: Other Contact Name: Trish Jerman Phone: 8033151609 Email: trish.jerman@gmail.com

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
02/06/2023	A public hearing was held on February 6, 2023 to review the Program Year 2023 Weatherization Assistance Program State Plan. Notice of the public hearing was published in the statewide daily publication of The State Newspaper on January 25, 2023.

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IV.7 Miscellaneous

Average Cost Per Unit (ACPU)

The ACPU for PY 2022 is \$8,250.

Recipient Principal Investigator

Matthew Melton

matthew.melton@admin.sc.gov

803-734-9861

Recipient Business Officer

James Miller

james.miller@admin.sc.gov

803-734-0425

Policy Advisory Committee Representation

Sam Bass (Executive Director of Chesterfield-Marlboro Economic Opportunity Council) is the Community Action Agency representative on the PAC.

Weatherization Readiness Fund Plan

To address deferral issues in Program Year 2023, OEO will use the Weatherization Readiness Fund (WRF) as described below.

South Carolina will receive \$289,405 in WRF for Program Year 2023. Each sub-grantee will receive a WRF allocation as are outlined below.

Subgrantee	WRF Allocation
Aiken-Bamwell Counties Community Action Agency	\$83,848
Carolina Community Action, Inc.	\$21,229
Charleston County Human Services Commission dba Palmetto CAP	\$47,266
Chesterfield-Marlboro Economic Opportunity Council, Inc.	\$15,744
GLEAMNS Human Resources Commission, Inc.	\$62,998
Lowcountry Community Action Agency, Inc.	\$4,200
Waccamaw Economic Opportunity Council, Inc.	\$26,066
Wateree Community Actions, Inc.	\$28,054

Sub-grantees can spend up to \$10,000 of WRF money to prepare a dwelling for weatherization without written approval from OEO. If a dwelling requires more than \$10,000 to prepare for weatherization, subgrantees may supplement the WRF money with additional non-federal funds or request written approval to exceed the \$10,000 WRF limit.

Prioritization of Dwellings

Sub-grantees should prioritize dwellings in need of WRF on a first come, first served basis. After clients are deemed eligible for weatherization services (including the prioritization of Elderly Persons, Families with Children, Persons with Disabilities, High Residential Energy Users, and High Energy Burden), they can be eligible for WRF on a first come, first served basis. For WRF money to be expended an Energy Audit must be performed on the dwelling. As such, issues dealing with the safety and well-being of the auditor or general inaccessibility of areas in the dwelling (clutter) cannot be addressed with WRF. Once an Energy Audit is performed and the home is determined to be eligible for DOE weatherization (SIR of 1.0 or greater), the Energy Auditor must determine if both:

The dwelling would normally be deferred as structural, health and safety, or other issues outside the scope of weatherization exist.

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And

The dwelling can be made ready for weatherization with an investment of \$10,000 (can request to exceed \$10,000 limit) or the remaining balance in the sub-grantee's WRF, whichever is less.

If the dwelling cannot be made ready for weatherization, it should be deferred. If it can be made ready for weatherization, the sub-grantee should notify OEO in writing of their plans to use WRF money on the dwelling.

WRF Process

Once it has been determined that WRF money will be used on a dwelling, the sub-grantee must document the actions to be taken to make the dwelling ready for weatherization, the entity performing the work, and the cost of the work. The information will be documented on the new Form 120 Weatherization Readiness. All dwellings that receive pre-weatherization measures must receive an independent inspection to ensure the measures were installed correctly and the dwelling is safe. OEO anticipates this inspection will be conducted by a city or county inspector in the jurisdiction. Subgrantees must obtain written approval from OEO to use an entity other than the county or city inspector to conduct the inspection. Subgrantees must verify and document the inspector is credentialed and qualified to conduct the inspection. Subgrantees must include these credentials as well as copies of any paperwork used by the inspector (i.e., county inspection form) in the client file and complete Form 120 verifying the work done on the dwelling passed inspection. The contractor that performed the readiness work will not be paid until their work receives a passing inspection. Once the readiness work has been completed and the contractor has been paid, the sub-grantee should upload the relevant information (before and after pictures, contractor receipts, etc.) in DBA FACSPRO and notify OEO.

Once the readiness work receives a passing inspection, the sub-grantees should perform an Energy Review on the dwelling to ensure the entries in the Energy Audit have not changed before beginning weatherization work.

Restrictions on WRF Money

Any dwelling that receives WRF money must result in a DOE completion (either for the annual formula grant or BIL). This means at least one Energy Conservation Measure (ECM) using DOE funds must be installed in the dwelling. If WRF money is used on a dwelling and the dwelling does not result in a DOE completion, the sub-grantee must reimburse DOE the amount of WRF money spent on the dwelling with non-state, non-federal money.

WRF money must be tracked separately from other DOE funds. As such, WRF money cannot be spent on an ECM, Incidental Repair Measure (IRM) or other Health and Safety measure. WRF money must be expended before other weatherization measures (ECMS, IRMs, Health and Safety) are installed.

Repairs Eligible for WRF Money

The following is a non-comprehensive list of repairs that are eligible for WRF money. Items not on this list can be implemented based on the discretion of the subgrantee after discussions with and written approval from OEO.

- Roof repair
- Wall repair
- Ceiling repair
- Floor repair
- Foundation repair
- Plumbing repair
- Electrical repair

Other repairs, specifically landscaping, asbestos remediation, and lead paint remediation are not eligible for WRF money but can be completed with other non-federal funds at the discretion of the subgrantee.

WRF Tracking

WRF money will be tracked in two ways. OEO will track dwellings receiving WRF in real-time as they are notified by sub-grantees (see attached tracking spreadsheet) and DBA FACSPRO will track WRF money as jobs are completed and closed out.

WRF Monitoring

OEO will collect and report the following information in its annual monitoring of subgrantees.

1. Number of dwellings receiving WRF money by subgrantee and dwelling type (site built or manufactured)
2. Amount of WRF money spent by subgrantee and dwelling type

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3. Amount of WRF money spent per dwelling by subgrantee
4. Nature of repairs (roof, plumbing, floors, electrical, etc.) by subgrantee and dwelling type
5. For site-built dwellings, the year constructed
6. Other funds used to ready dwellings for weatherization where applicable

OEO will also ensure each dwelling that receives WRF money results in a DOE completion.

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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

Definition of Income

Income means Cash Receipts earned and/or received by the applicant before taxes during applicable tax year(s) but not the Income Exclusions listed below. Gross Income is to be used, not Net Income.

Income Inclusions

Money, wages, and salaries earned or received by the applicant before taxes during the applicable tax year(s) or before any deductions, net receipts from non-farm or farm self-employment (receipts from a person's own business or from an owned or rented farm after deductions for business or farm expenses), income also includes regular payments from Social Security, railroad retirement, unemployment compensation, strike benefits from union funds, worker's compensation, veteran's payments, training stipends, alimony, military family allotments, private pensions, government employee pensions (including military retirement pay), regular insurance or annuity payments, dividends, interest, net rental income, net royalties, periodic receipts from estates or trusts, net gambling or lottery winnings.

Income Exclusions

Capital gains, any assets drawn down as withdrawals from a bank, money from the sale of a property, house or car, one-time payments from a welfare agency to a family or person who is in temporary financial difficulty, tax refunds, gifts, loans or lump-sum inheritances, college scholarships, one-time insurance payments, or compensation for injury, non-cash benefits, such as the employer-paid or union-paid portion of health insurance, employee fringe benefits, food or housing received in lieu of wages, the value of food and fuel produced and consumed on farms, the imputed value of rent from owner-occupied nonfarm or farm housing, depreciation for farm or business assets, federal noncash benefit programs as Medicare, Medicaid, food stamps, school lunches and housing assistance, combat zone pay to the military, child support, reverse mortgages, payment for care of foster children.

In addition, earned income or unemployment compensation for minors under the age of 18 (or full-time high school students) is not considered when determining the income eligibility of an household unit.

Eligibility Documentation

- Income eligibility is determined by Subgrantees using the statewide FACSPRO database system (Subgrantees enter income information and household composition and FACSPRO determines eligibility).
- Household eligibility documentation is available through the FACSPRO system and Subgrantee's records.
- Proof of income eligibility and associated documentation must be included and clearly identified in the client file.
- If income eligibility is determined by an outside entity, verification of that determination must be included in the client file (e.g., Section 8 documentation if determined eligible by the US Department of Housing and Urban Development).
- No dwelling unit may be weatherized without documentation that household is income eligible and the dwelling unit is an eligible unit.

Eligible Dwelling Units

Structures eligible for weatherization include single family, manufactured housing (mobile homes), and both small Multifamily (5-24 units per building) and large Multifamily (25+ units per building), or if there are central mechanical systems serving more than one dwelling unit/building. 2-4 unit buildings are counted as Single Family residences in DOE reporting.

All structures must be stationary and have a specific mailing (street) address. Campers and nonstationary trailers are not eligible. All dwellings to be weatherized must be owner or renter occupied, and occupied by a household whose income is at or below 200 percent of the poverty level established by the U.S. Department of Health and Human Services.

If energy savings cannot be realized due to the condition of a home, these conditions shall be documented in FACSPRO and the home shall not be weatherized. Such energy audit conditions shall be brought to the attention of the client with referrals to other help sources available.

Determining Client Eligibility

- Income - At or below 200 percent of the federal poverty guidelines (as updated in the annual federal poverty guidelines). OEO will follow WPN 22-5 and deem applicants eligible for means-tested HUD programs as income eligible for weatherization.

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- Income Exclusions – A member of the family is receiving one of the following during the previous 12 months:
 - Cash assistance payments under Title IV (FIP)
 - Cash assistance payments under XVI of the Social Security Act (SSI)
- Proof of Eligibility – The policies outlined in “Summary of Immigrant Eligibility Restrictions under Current Law as of 2/25/2009” and “HHS Guidance on the Use of Social Security Numbers (SSNs) and Citizenship Status Verification in the HHS guidelines will be used to determine eligibility of qualified and nonqualified aliens.
- South Carolina will follow LIHEAP Guidance on providing assistance to ineligible household members. Ineligible members (such as nonqualified aliens) will have their income counted in determining the household's total income. However, they will not count toward the household size.
- Re-Certification – If weatherization services do not begin (an energy audit has not been initiated) within 12 months of the eligibility date, the household must be re-certified.

Describe what household eligibility basis will be used in the Program

A household shall be determined eligible for Weatherization Assistance if the combined income for the family unit is at or below 200% of the federal poverty level. When the federal poverty levels are adjusted, OEO notifies the sub-grantees via memo (the 2023 memo is attached to this state plan). OEO also notifies FACSPRO administrators to update the FACSPRO system with the latest levels.

Household eligibility documentation is available through the FACSPRO system and Subgrantee's records. All weatherization requirements and changes are updated in FACSPRO to ensure weatherization assistance program compliance by all Subgrantees. The FACSPRO system prevents weatherization services from commencing until the household is determined to be eligible. The FACSPRO Eligibility Determination Date is used to determine when a client becomes eligible for weatherization. This safeguard ensures that all households receiving weatherization services are eligible. No dwelling unit may be weatherized without documentation that the household is income eligible and the dwelling unit is an eligible unit.

The intake/customer report is used by Subgrantees. This application requires that all household income be calculated, per DOE requirements. It also requires that income and home ownership is verified by Subgrantee staff. Income eligibility is determined by Subgrantees using the statewide FACSPRO database system. Subgrantees are required to maintain a signed weatherization program application or FACSPRO client report. All other documentation of client eligibility is uploaded to FACSPRO. If weatherization services do not begin (an energy audit has not been initiated) within 12 months of the eligibility date, the household's eligibility must be redetermined.

South Carolina treats renters and owner occupied dwellings equally. Subgrantees are to ensure eligible households are served according to their priority, whether or not the eligible household rents or owns the dwelling. The Subgrantee's procedures are reviewed by SC OEO's monitors. South Carolina's rental policy is specified in the Homeowner and Fuel Release Form 101. Within that document, the landlord agrees not to raise the rent as a result of increased value due to weatherization work completed.

Renters have the right to appeal any rent increases they believe do not meet the requirement stated above. Any appeal must be stated in writing and must follow an appeal process as outlined in the current South Carolina's Weatherization Policies and Procedures.

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

South Carolina will follow the policies outlined in “Summary of Immigrant Eligibility Restrictions under Current Law as of 2/25/2009” in the HHS guidelines when determining eligibility of qualified and nonqualified aliens.

The policy can be found at:

<https://aspe.hhs.gov/reports/summary-immigrant-eligibility-restrictions-under-current-law>

V.1.2 Approach to Determining Building Eligibility

Procedures to determine that units weatherized have eligibility documentation

Pursuant to 10 CFR Part 440.1: The purpose of the weatherization assistance program is to increase the energy efficiency of dwellings owned or occupied by low income persons.

10 CFR 440.3 defines a dwelling unit as a house, including stationary mobile home, an apartment, a group of rooms, or a single room occupied as a separate living quarters. 10 CFR Part 440.16(a): No dwelling unit may be weatherized without documentation that the unit is an eligible unit as

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provided in 440.22.

Subgrantees are required to retain records of all dwellings that received Federal funds including LIHEAP, HUD, or USDA "weatherization" activities. Dwellings may be reweatherized after 15 years have passed since the completion of original weatherization services.

Subgrantees are required to complete, prior to any weatherization activity, a State Historic Preservation (SHPO) review for units 50 years of age or older at the time the work takes place, units that are historic properties, or units that are in a designated historic area. South Carolina's SHPO Programmatic Agreement (PA) was amended to be valid until December 31, 2030. SC OEO's review of Subgrantee household files includes verification of SHPO review and reweatherization status.

Eligible Dwelling Units

Structures eligible for weatherization include single family, manufactured housing (mobile homes), and both large (5+ units) and small (2-4 units) multifamily housing. All structures must be stationary and have a specific mailing (street) address. Campers and nonstationary trailers are not eligible. All dwellings to be weatherized must be owner or renter occupied, and occupied by a household:

1. Whose income is at or below 200 percent of the poverty level established by the U.S. Department of Health and Human Services, is eligible for means-tested HUD programs, or which contains a member who has received any one of the following at any time during the 12 month period preceding the application date for weatherization assistance: Cash assistance payments under Title IV (FIP) or XVI of the Social Security Act, (SSI).
2. Occupying a qualified rental dwelling unit in accordance with CSPM Item 608.
3. Occupying a shelter, group home or transitional facility in accordance with CSPM Item 608.1.

Describe Reweatherization compliance

No dwelling unit will be weatherized without documentation that the dwelling unit is an eligible unit, as defined in 10 CFR 440.22. Subgrantees verify applicant's income during the application process. Subgrantees are required to maintain records that include documentation of client's eligibility. Subgrantees maintain records of previously weatherized dwelling units. The database is checked prior to scheduling a household for service to ensure that the house has not been previously weatherized. If the house has been previously weatherized and is not eligible for reweatherization, the house will not be weatherized and the client will be notified. If the house is eligible for reweatherization, the subgrantee makes a determination whether or not to reweatherize the house based on their standing on the waiting list (see section V.3 for prioritization). Dwellings may be reweatherized 15 years after the completed weatherization date. Subgrantees maintain their own records of dwellings that may have received LIHEAP, HUD, or USDA weatherization.

Describe what structures are eligible for weatherization

- Structures must be stationary and have a specific mailing address.
- Campers and nonstationary trailers are not eligible.
- Eligible Structures include single family dwellings, 2-4 unit buildings, manufactured homes (mobile homes), shelters, and Small and Large multifamily housing.

Small Multifamily is 5-24 units per building and Large Multifamily is 25+ units per building or if there are central mechanical systems serving more than one dwelling unit/building. 2-4 unit buildings are counted as Single Family residences in DOE reporting.

If energy savings cannot be realized due to the condition of a home, these conditions shall be documented in FACSPRO and the home shall not be weatherized. Such energy audit conditions shall be brought to the attention of the client with referrals to other help sources available.

Describe how Rental Units/Multifamily Buildings will be addressed

Structures Eligible for Weatherization

All single family, manufactured housing, and multifamily housing.

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Rental Units/Multifamily Buildings

- Single family rental dwellings and buildings with up to four units are addressed using the NEAT software.
- Multifamily housing containing five or more units will be addressed by the subgrantee submitting a proposal to DOE through OEO providing the project details.
- Subgrantees will ensure a Homeowner, Fuel Release form 101 is completed for each building containing a dwelling unit to be weatherized.
- Shelters may be weatherized. The cost per unit is based on the shelter regulations detailing that a provider may count each 800 square feet as a dwelling or each floor level as a dwelling.

Rental Units

Single family rental dwellings and multifamily buildings up to four units are addressed using the NEAT software.

Subgrantees are required to enter into an agreement with landlords of multifamily properties. The agreement must state that rent on properties weatherized with DOE funds cannot be raised as a result of the increase in property value provided by the weatherization for 1 year.

South Carolina uses the 66% percent eligible rule (50% for duplexes and four units) to determine multifamily eligibility for buildings not already verified as eligible by HUD and USDA.

Subgrantees may choose to require landlord contributions when weatherizing rental properties containing two to four units. Amount of financial participation is determined at the local level. Landlord participation can be used to buy down a SIR of a multifamily weatherization project in compliance with WPN 16-5 and WAP Memorandum 035.

Landlord contributions for single family dwellings are not required but are optional and may be accepted.

The Subgrantee will ensure a Homeowner, Fuel Release Form 101 is completed for each building containing a rental dwelling unit to be weatherized prior to the weatherization of any rental unit. The Homeowner, Fuel Release Form 101 includes all necessary information to allow the weatherization improvements to proceed in an expeditious and cost-effective manner in accordance with DOE regulations and guidelines.

The Homeowner, Fuel Release Form 101 includes:

1. Owner/Agent certify that he/she will occupy either by themselves or an eligible tenant for at least one (1) year after the date the weatherization work is completed.
2. Owner/Agent agree that the quality of the installation of the materials cannot be guaranteed beyond a period of one (1) year.
3. The Tenant is the intended recipient of the benefits of the Weatherization Program.
4. Rent will not increase due to the improvements made by the weatherization work for a period of at least one (1) year.
5. Rent will not be raised unless it is clearly shown that any rent increase is not related to the weatherization work in any way.
6. The weatherization work will not increase the value of the rental units to an undue or excessive amount.
7. If rent includes utilities, the cost savings as a result of the weatherization work must be transferred to the Tenant.

Shelters

South Carolina permits subgrantees to weatherize shelters. The cost per unit is based on shelter regulations detailing that a weatherization provider may count each 800 square feet of the shelter as a dwelling unit or each floor level as one unit, as noted in 10 CFR 440.22(f).

The Subgrantee may weatherize a shelter for long or short term residents, provided the owner or organization and residents of the dwelling units meet prescribed building and income eligibility requirements. Subgrantees will document individual resident income verification unless there is such a high rate of turnover among residents that documentation of individual resident eligibility is impractical. In that case, Subgrantees will need to supply the following to SC OEO:

1. Standard Application.
2. A signed statement from the facility operator attesting that the individuals/households residing in the facility are income eligible.
3. A copy of the organization's income guidelines or a copy of the organization's mission statement in lieu of individual resident income verification.
4. Documentation that the facility is a nonprofit organization and a copy of the organization's bylaws.
5. Proof of benefit accrual to the low income tenant(s).

Job files must include all applicable client file information required and a copy of the written approval by the SC OEO staff for the weatherization of any shelter.

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Describe the deferral Process

Deferrals may take place during any phase of the weatherization process, including but not limited to: Intake/eligibility, Pre-weatherization inspection/walkthrough, Energy Audit, or In-progress weatherization activity.

To comprehensively track deferrals, subgrantees will use the DOE Deferral Tracking Template.

Postponement of work is advisable until problems can be resolved and/or alternative sources of assistance are identified.

South Carolina recognizes there are some deferral issues that would not be helped with additional funding. These include:

- Building for sale or foreclosure.
- Remodeling work in process that prohibits weatherization.
- Health negatively affected by installation.
- Refused installation of weatherization measure.
- Illegal activity concerns.
- Threatening or uncooperative behavior.
- Refusal of ASHRAE 62.2 2016 ventilation requirements.
- Refusal to remove unsafe combustion appliances.

Deferral issues that could potentially be fixed with additional funding. Sub-bullets indicate underlying issues the repairs are necessary to correct.

- Roof repair needed.
 - Mold/moisture
 - Sewage
 - Pest infestation
 - Prohibits effective weatherization
 - Structurally unsound
 - Other (explain in notes)
- Ceiling repair needed.
 - Mold/moisture
 - Sewage
 - Pest infestation
 - Prohibits effective weatherization
 - Structurally unsound
 - Other (explain in notes)
- Wall (interior and/or exterior) repair needed.
 - Mold/moisture
 - Sewage
 - Pest infestation
 - Prohibits effective weatherization
 - Structurally unsound
 - Other (explain in notes)
- Floor repair needed.
 - Mold/moisture
 - Sewage
 - Pest infestation
 - Prohibits effective weatherization
 - Structurally unsound
 - Other (explain in notes)
- Foundation or subspace repair needed.
 - Mold/moisture
 - Sewage
 - Pest infestation
 - Prohibits effective weatherization
 - Structurally unsound
 - Other (explain in notes)
- Plumbing repair needed.
 - Mold/moisture

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- Sewage
- Pest infestation
- Other (explain in notes)
- Electrical repair needed.
 - Prohibits effective weatherization (e.g., cannot insulate walls due to knob & tube wiring)
 - Safety hazard
 - Other (explain in notes)
- Cleanup or remediation required beyond scope of weatherization.
 - Mold/moisture
 - Sewage
 - Suspected Asbestos Containing Materials (indicate attic, walls, etc.)
 - Lead Paint
 - Pest infestation
 - Clutter restricting access to necessary areas
 - Other (explain in notes)
- Exterior drainage repairs needed e.g. landscaping or gutters
 - Mold/moisture
 - Sewage
 - Other (explain in notes)

When possible, subgrantees are encouraged to use Weatherization Readiness Funds, make referrals, or collaborate with other programs. However, if Weatherization Readiness Funds are not available, it is the client's responsibility to correct the condition(s) causing the deferral in order for weatherization services to proceed. When the conditions causing the deferral have been addressed, clients are asked to contact the subgrantee to reevaluate the home. These clients are then given top priority to receive services and are not placed back on the wait list. Documentation regarding the reason for deferral is required in the client file, and subgrantees are encouraged to collaborate with their state technical monitor to make decisions regarding deferral.

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.

Low-income members of Indian tribes will receive benefits equivalent to the assistance received by other low-income persons within the state.

V.2 Selection of Areas to Be Served

All forty-six (46) counties in South Carolina, are served by 8 community action agencies (subgrantees). According to the South Carolina Code Section 48-52-440, the Weatherization Assistance Program is to be administered locally by community action agencies. Subgrantees are responsible for the administration and implementation of the Weatherization Assistance Program, which serves eligible persons in their designated counties.

The Weatherization Assistance Program is to be administered locally by community action agencies, per South Carolina Code section 48-52-440. The local community action agency is responsible for administration and implementation of the program. Preference is given to any community action agency which has, or is currently administering, an effective program under 10 CFR 440 or under Title II of the Economic Opportunity Act of 1964. Funds are allocated based upon the most recent Census poverty population in the counties the subgrantees serves.

The eight subgrantees chosen to perform such weatherization work are as follows:

1. Aiken/Barnwell Counties Community Action Agency, Inc.

Counties - Aiken, Allendale, Bamberg, Barnwell, Calhoun, Greenville, Lexington, Orangeburg, Richland

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2. Carolina Community Actions, Inc.

Counties - Chester, Fairfield, Lancaster, Union, York

3. Charleston County Human Services Commission dba Palmetto Community Action Partnership

Counties - Beaufort, Berkeley, Charleston, Dorchester, Jasper

4. Chesterfield-Marlboro Economic Opportunity Council, Inc.

Counties - Chesterfield, Darlington, Dillon, Marlboro

5. GLEAMNS Human Resources Commission, Inc.

Counties - Abbeville, Anderson, Cherokee, Edgefield, Greenwood, Laurens, McCormick, Newberry, Oconee, Pickens, Saluda, Spartanburg

6. Lowcountry Community Action Agency

Counties - Colleton, Hampton

7. Waccamaw Economic Opportunity Council, Inc.

Counties - Georgetown, Horry, Williamsburg

8. Wateree Community Actions, Inc.

Counties - Clarendon, Florence, Kershaw, Lee, Marion, Sumter

DESIGNATION/RE-DESIGNATION OF ELIGIBLE WAP ENTITIES

South Carolina WAP serves the entire state of South Carolina. There are eight existing Community Action Agencies (CAAs) which receive WAP funding. Each of these CAAs are each assigned areas, which includes all counties, cities and areas in the state.

CAAs are the statutorily mandated WAP subgrantees in South Carolina. South Carolina Code of Laws SECTION 58-37-50 (m)(1)(b) states "the Weatherization Assistance Program, created by Title IV of the Energy Conservation and Production Act of 1976 and codified as Part A, Subchapter III, Chapter 81, Title 42 of the United States Code, amended by the National Energy Conservation Policy Act, the Energy Security Act, the Human Services Reauthorization Act of 1984, and the State Energy Efficiency Programs Improvement Act of 1990 and administered and funded by the United States Department of Energy on the federal level and administered locally by community action agencies."

DESIGNATION/RE-DESIGNATION OF ELIGIBLE WAP ENTITIES IN UNSERVED AREAS

In the event that an agency voluntarily chooses to stop providing weatherization services, funding is at risk due to performance issues which cannot be resolved in a timely manner or the agency is in breach of the WAP grant agreement with the State, OEO will extend the geographic service area of another eligible CAA and/or submit a Request for Proposal and bid for a new eligible CAA. This will be done, as necessary, to provide services to the low-income population in that service area and shall be administered in accordance with existing Federal and State legislation. Removal of the program from the subgrantee will typically not be done until a suitable organization can be found to administer the program, either on a temporary or permanent basis.

The re-designation of the unserved area shall be granted to a CAA which has demonstrated effectiveness in meeting the goals and purposes of WAP. OEO will take into consideration the extent to which an eligible CAA achieved or is achieving weatherization goals in a timely fashion, quality of work performed, the numbers, qualification, and experience of the subgrantee's staff members and the agency's current geographical service area.

V.3 Priorities

20 points are assigned for each priority classification. DBA FACSPRO calculates the total points. Households with the highest points are selected by subgrantees for weatherization.

- 20 points - Elderly – Households with members 60 years of age and older
- 20 points - Households with members that are disabled

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- 20 points - Households with children under age 18.
- 20 points - High Energy Burden – At least 20 percent of the household income is utilized to pay for energy usage.
- 20 points - High Energy User - LIHEAP eligible household

Time Period for Income Verification

Applications must be recertified after a 12-month period.

V.4 Climatic Conditions

South Carolina's climate is classified as humid sub-tropical; that is, temperatures vary seasonally, with summers generally hot and sultry while winters are mild, and precipitation is ample and fairly well distributed throughout the year. Although March and July are usually the wettest months of the year, there is no real dry season. In eastern South Carolina, however, winter precipitation is greater than summer precipitation. Statewide, minimum precipitation is received in October and November. During summer and early fall of most years, the state receives the effects of one or more tropical storms or hurricanes.

Our demand for electricity is rather sensitive to the weather and to industrial growth. Changes in the weather patterns mean changes in energy consumption. Higher temperatures would mean:

- An increase demand for air conditioning. Higher summertime temperatures would mean increased use of air conditioners; the cooling season would also last longer.
- Decrease in demand for heating. Warmer winters would decrease the amount of energy required for heating.
- Require an increase in electrical capacity. Higher demands for air conditioning in the summer would be partially offset by lower wintertime temperatures, affecting total consumption only moderately. But the periods could require a significant increase in South Carolina's electrical capacity.

Listed below are the South Carolina weather stations and associated heating and cooling degree days.

Note: SC annual heating and cooling degree days based on January 1, 2022 through December 1, 2022.

Base temperature = 65°F.

Greenville, SC - Greenville Downtown (KGMU)

Heating Degree Days – 2,076

Cooling Degree Days – 2,247

Columbia, SC - Metropolitan Airport (KCAE)

Heating Degree Days – 1,967

Cooling Degree Days – 2,376

Charleston, SC - Charleston International Airport (KCHS)

Heating Degree Days – 1,483

Cooling Degree Days – 2,447

Source: www.degreedays.net (using temperature data from www.wunderground.com)

V.5 Type of Weatherization Work to Be Done

V.5.1 Technical Guides and Materials

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Technical Guides and Materials

- Standard Work Specification (SWS) Field Guides for Site-Built and Manufactured Housing were approved by the Department of Energy on September 14, 2021.
- All tasks performed on client homes will meet the specifications, objectives and desired outcomes outlined in the South Carolina Field Guide.
- All weatherization work will be performed in accordance with U.S. Department of Energy approved procedures and materials listed 10 CFR 440 Appendix A. Also, South Carolina subgrantees must perform all work according to the National Renewable Energy Laboratory (NREL) South Carolina Retrofitting Field Guides for Single Family and Manufactured dwellings.
- Contracts with sub-grantees specify all subcontractor agreements must contain the following language:

The Contractor shall, in a satisfactory and proper manner, install weatherization materials and equipment on designated units according to specifications approved by the Agency and in compliance with rules, regulations, and standards set forth in the Weatherization Assistance Program and enforced by the Department of Energy and the South Carolina Office of Economic Opportunity. If the Contractor's workmanship fails to meet the required standard, the Contractor must complete the work to standards at no additional cost to the Agency and the Agreement may be revoked by the Agency.

The Subgrantee shall perform weatherization services during the Term in accordance with the US Department of Energy Weatherization Assistance Program State Plan for the State of South Carolina, the South Carolina Weatherization Field Guide, Standard Work Specifications, the South Carolina Weatherization Policy and Procedures Manual, other State Weatherization directives as applicable, and any amendments thereto. The Subgrantee's signature on the Grant Agreement signifies its responsibility to follow all work standards as outlined in the documents referenced in this paragraph.

- Weatherization Policies and Procedures Manual was updated with guidance on how to implement administrative and field requirements.
- Field guidance focuses on installation techniques, proper methods of testing, health and safety requirements, and data collection and submission.
- Administrative guidance focuses on training plans and schedules, data collection and submission, and contract language and wording to communicate requirements and specifications.

The SC Weatherization Field Guide was posted to the OEO's website and uploaded to FACSPRO. Sub-grantees were notified via email regarding the approval of the SC Field Guide and the method for accessing it. Sub-grantees signed form acknowledging receipt of the SC Field Guide (included as an attachment to the State Plan).

Incidental Repairs (IRMs)

- Maximum amount of spending with DOE funds for incidental repairs is \$500 per dwelling.
- Incidental repairs are directly associated with an Energy Conservation Material (ECM).
- The Total Cost of all IRMs, not to exceed \$500 of DOE funds is added to the cost of the package of weatherization measures to calculate the whole unit (SIR).
- LWAP funds can supplement the \$500 DOE IRM maximum, but the SIR must still be 1.0 or greater to spend DOE money to weatherize the dwelling.
- Ineligible measures that do not meet the incidental repair definition, includes Lead Safe Work and Testing; Asbestos testing, encapsulation, or mitigation; Removing pollutants; or Radon Testing.

Energy Audit Procedures

Single Family Buildings

- National Energy Audit (NEAT) approved August 26, 2019.
- NEAT will be used to determine the cost effectiveness of all single family, site built family homes.

Manufactured Housing

- Manufactured Home Energy Audit (MHEA) approved August 26, 2019
- MHEA will be used to determine the cost effectiveness of all manufactured housing.

Multifamily

- No approved audit.
- Multifamily Eligibility
 - Per 10 CFR 440.22(b), multifamily buildings may be weatherized when 66 percent (50 percent if a two or four unit building) of the dwelling units in the building are eligible households or will become eligible within 180 days due to a federal, state, or local government

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program for rehabilitation of the building or making similar improvements. Determination of eligibility shall use the financial assistance guidelines to determine eligibility.

- If the entire building is not eligible for weatherization because there are not enough units to meet the 66% (or 50%) eligibility criteria, weatherization service to the entire building shall be denied.
- Subgrantees shall weatherize the entire multifamily building when the building is eligible.
- Subgrantees shall obtain a signed authorization form from the property owner/landlord or their designated agent authorizing the work to be done and agreeing to the property owner/landlord's financial participation.
- Subgrantees must use the FACSPro Application Form and the Homeowner/Fuel Release Form #101 for each rental weatherization project.
 - Subgrantee shall develop a detailed description/work order of the measures to be completed and the costs assigned to the property owner/landlord and the subgrantee/program.
 - The agreement shall include language whereas the property owner/landlord agrees not to raise the rent for at least one year from the time the work is completed, unless the increase is based on factors unrelated to the weatherization improvements.
 - The client shall be provided a copy of the signed agreement.
 - No undue or excessive enhancements shall accrue to the value of the weatherized dwelling units.
 - The maximum amount of grant funds that can be spent for weatherization is determined by the number of eligible units in the building, multiplied by the average cost per unit. This is the maximum amount that can be spent on the entire building.

Five or More Unit Multifamily Buildings

Subgrantee must provide a preliminary assessment of the multifamily buildings with 5 units or more and submit the request to OEO. OEO will then review/submit the plans and request permission from the DOE Project Officer to proceed.

The preliminary assessment is to include the following:

- Identify the certified multifamily Energy Auditor(s) and QCI(s).
- Identify the proposed multifamily energy audit program.
- Document how tenants will be notified of the WAP and the Health and Safety requirements (lead, mold, radon, and other health and safety issues).
- A commitment letter from the property owner/landlord showing the possible owner contributions.
 - If owner/landlord is responsible for paying heating costs or the units are master-metered, owner/landlord may be required to contribute up to 15 percent of the total weatherization work.
 - If the tenant is responsible for paying heating costs, the owner/landlord may be required to contribute up to 10 percent of the total weatherization work.
 - In addition, if the heating/cooling systems are being replaced, the owner/landlord must contribute 25 percent of the replacement cost of the heating/cooling system.
 - The contribution may be met in the following ways:
 - Cash contribution.
 - Rebate or rent reduction (rebate cannot exceed one year)
 - Donation of weatherization materials.
 - An exception is made for owners/landlords who themselves are eligible for the weatherization program. These owners are not required to make a contribution.
- Notification to affected eligible households that the rent cannot be increased for a period of at least one year.
- Notification to tenants of the owner contributions in the form of rebates and rent reductions, when this is applicable.
- Notification to tenants of the formal complaint process.

Property Documents to be covered during preliminary process

- FACSPro Application for all eligible households.
- Homeowner/Fuel Release Form #101 for all eligible households.
- Detailed scope of work highlighting the proposed weatherization measures and any energy problem areas.
- Matching funds, if applicable for weatherization work.
- Description of other funds the owner may be using for other repair and/or renovations.
- Project schedule.
- Net energy savings / benefits potential. This is based upon historical or expected energy savings or benefits, prior to the actual audit being completed on the building.

Field guide types approval dates

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Single-Family: 9/14/2021
Manufactured Housing: 9/14/2021
Multi-Family:

V.5.2 Energy Audit Procedures

Audit Procedures and Dates Most Recently Approved by DOE

Audit Procedure: Single-Family Audit Name: NEAT Approval Date: 8/26/2019
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Audit Procedure: Manufactured Housing Audit Name: MHEA Approval Date: 8/26/2019

Audit Procedure: Multi-Family Audit Name: Approval Date:
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Comments

<p>South Carolina will continue to require all single family and manufactured homes have a NEAT and MHEA audit to determine cost effective measures to be installed.</p> <p>Only measures that are cost effective showing a SIR of 1.0 or greater may be installed with DOE money. Measures with an SIR of 1.0 or greater are determined to be cost effective, meaning the lifetime savings produced by the measure is greater than the total cost of installation. Measures with an SIR of 0.5 or greater may be installed with LIHEAP money assuming the entire SIR of the project is 1.0 or greater.</p> <p>SINGLE FAMILY HOMES and MULTIFAMILY (2 - 4 units per building)</p> <p>South Carolina's basic housing types for single family homes are as follows:</p> <ul style="list-style-type: none">• Type A – Wood-framed with vented crawlspace and unfinished attic• Type B – Wood-framed with non-conditioned basement and unfinished attic• Type C – Wood-framed with uninsulated slab and unfinished attic• Type D – Wood-framed with vented crawlspace and kneewall attic• Type E – Wood-framed with non-conditioned basement and kneewall attic• Type F – Wood-framed with uninsulated slab and kneewall attic• Type G – Masonry with vented crawlspace and unfinished attic• Type H – Masonry with uninsulated slab and unfinished attic <p>The Weatherization Assistant National Energy Audit Tool (NEAT) will be used to determine cost effective measures for all single family homes.</p> <p>Manufactured Homes</p> <p>South Carolina's basic housing types for manufactured homes are as follows:</p> <ul style="list-style-type: none">• Type A - Pitched Roof with non-vented walls and length wise floor joists• Type B - Pitched Roof with non-vented walls and width wise floor joists• Type C - Pitched Roof with vented walls and length wise floor joists• Type D - Pitched Roof with vented walls and width wise floor joists• Type E - Bowstring Roof with non-vented walls and length wise floor joists• Type F - Bowstring Roof with non-vented walls and width wise floor joists• Type G - Bowstring Roof with vented walls and length wise floor joists• Type H - Bowstring Roof with vented walls and width wise floor joists• Type I - Flat Roof with non-vented walls and length wise floor joists
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- Type J - Flat Roof with non-vented walls and width wise floor joists
- Type K - Flat Roof with vented walls and length wise floor joists
- Type L - Flat Roof with vented walls and width wise floor joists

The Weatherization Assistant Manufactured Housing Energy Audit (MHEA) will be used to determine cost effective measures for manufactured housing.

MULTIFAMILY (5+ units per building)

South Carolina does not have an approved audit for weatherizing multifamily buildings containing 5 or more units.

Regional Priority List

OEO received approval from DOE on August 29, 2022 to implement the Regional Priority List (RPL) for single family site-built and manufactured homes. The RPL includes preapproved weatherization measures that can be installed in eligible dwelling units without an Energy Audit being conducted. OEO met with subgrantees and FACSPRO staff to develop procedures, update forms, and make changes to FACSPRO to implement the RPL. On December 28, 2022, OEO authorized subgrantees to use the RPL to weatherize eligible dwellings. The RPL is optional and subgrantees can continue to use the existing Energy Audit procedures to weatherize dwellings that meet the criteria to use the RPL. The memo, the specific RPL Policies and Procedures, and new and updated forms are attached to the South Carolina 2023 Weatherization Assistance Program State Plan.

V.5.3 Final Inspection

Subgrantees are required to perform an independent quality control inspection (QCI) at the conclusion of each Weatherization project. This inspection must include all mechanical work performed on completed dwelling units. This must occur, and be documented, before reporting the project to the State as a "completed unit". This process is to ensure that all work performed meets or exceeds the minimum specifications outlined in the SWS in accordance with 10 CFR 440.16(g). All supporting documentation including inspection and monitoring certifications will be maintained in the client's file.

Quality Control Inspector

- An evaluator who verifies the work performed against the work plan specifications and Standard Work Specifications.
- Performs building diagnostics.
- Records/reports findings and concerns, and specifies corrective actions by conducting a methodological audit/inspection of the building, performing safety and diagnostic tests, and by observing the retrofit work in order to ensure the completion, appropriateness and quality of the work providing for the safety comfort and energy savings of the building occupants.

Verifies Work Performed Against the Work Plan and SWS

- Understands the energy audit.
- Reviews the auditor's diagnostics and observations.
- Reviews the Work Order.
- Assures the Work Order provides adequate guidance.
- Indicates if there are any unusual situations that need addressing.
- Assures the work was performed as specified in the Work Order.
- Assures the work specifications were understood by the retrofit installers or contractors.
- Documents if any variances exist and assures there is sufficient documentation to support the Change Order.
- Assures the specifications follow SWS.

Observes the Weatherization Work In-Progress

- Schedules a site visit(s) early (and often) on in the process to connect with crew leader, retrofit installers, and/or contractors.
- Observes any complexities.
- Discusses outcomes.
- Participates in the process.
- Discusses any issues and flexibilities with the work.

A Quality Inspection:

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- Includes a completed and signed Data Collection/Final Inspection Form 501 as well as a signed QCI Final Inspection Certification Form 600 in the client file.
- Shall be completed after all work by the subgrantee is completed.
- Shall be performed on all jobs before they are counted as a completed job.
- Verifies applicable documents are in the file and are completed, by filling out Form 1 - Client File Checklist form.
- Includes an analysis of the energy audit to ensure that it was completed in an efficient manner, all areas of the audit have been addressed, and the Work Order reflects a comprehensive energy audit.
- Verifies that all cost-effective opportunities were completed.
- Verifies all invoices for the job are documented properly, nothing is billed incorrectly, or billed for services/work not performed.
- Includes a review of the diagnostic result, both pressure and combustion safety, to verify that all applicable tests were completed.
- Includes a review of all measures listed on the Work Performed Report to verify installation has been completed in a safe and effective manner, following program requirements.
- Verifies the cost of the IRMs do not exceed \$500 utilizing DOE WAP funds.
- Verifies the cost of Health and Safety measures do not exceed \$1,050 utilizing DOE WAP funds.
- Includes a completed and signed Form 600 - QCI Final Inspection Certification form in the client file.
- Documents the work deficiencies in pictures and writing.
- Specifies what must be done for weatherization work to pass.
- Determines the severity of issues and required responses.
- Relays information to appropriate persons.
- Reviews the energy audit to determine that all installed measures "ranked" with a SIR of 1.0 or greater (excluding Health and Safety).
- Reviews the H&S measures called for in the scope of work should have been installed and must meet the requirements of the SWS and the approved Field Guide
- Performs a final blower door test, ensuring that the ASHRAE fans are properly set.
- Performs and records combustion tests to check for carbon monoxide and efficiency of combustion fired appliances.
- Performs a CAZ test in all Combustion Appliance Zones to check "worst-case" conditions prior to passing the home.

All of the subgrantees have at least one QCI on staff.

Below is the list of subgrantees and the total QCIs on staff.

Subgrantee	QCI (s) on Staff
Aiken/Barnwell Counties Community Action Agency	7
Carolina Community Actions	1
Chesterfield-Marlboro Economic Opportunity Council	1
GLEAMNS Human Resources Commission	2
Lowcountry Community Actions	1
Charleston County Human Services dba Palmetto Community Action Partnership	1
Waccamaw Economic Opportunity Council	2
Wateree Community Actions	1

Seven of the eight subgrantees utilize contractors to install weatherization measures. Palmetto utilizes crews to install weatherization measures, but their quality control inspector is not a part of the crew and does not directly install weatherization measures. Therefore, all weatherization measures installed in South Carolina receive a Quality Control Inspection from an independent source that did not directly install the weatherization measures.

SC OEO's QCI certified inspectors will monitor (at least) 10 percent of the completed units and accompanying client files for each subgrantee until the Subgrantee has in-place an independent QCI assessor and inspector. Subgrantees are required to ensure that each Weatherization completion receives an appropriate and properly executed final inspection. This inspection must be performed by a certified Quality Control Inspector (QCI). SC OEO, as part of their regular monitoring procedure will review final inspection forms, subgrantee inspection processes and completed homes to ensure the inspections are being performed correctly and in a manner that is consistent with DOE expectations as outlined in WPN-15-4.

When SC OEO QCI identifies SWS discrepancies, corrections must be performed using nonfederal funds. Should monitoring reveal repeat SWS discrepancies of poorly performed inspections, SC OEO will at the very minimum, place the subgrantee on corrective action. Should the corrective action fail to correct the issue, SC OEO will seek stiffer actions as allowed in the Weatherization Subgrantee Grant Agreement. Failure by the subgrantee to utilize the QCI process correctly may result in all associated costs being disallowed and returned to SC OEO.

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V.6 Weatherization Analysis of Effectiveness

The state requires that pre- and post-weatherization inspections include use of diagnostic equipment such as a blower door, combustion analyzer, etc. Subgrantees must utilize ASHRAE 62.2 (2016) for determining the proper ventilation for single-family and manufactured dwellings. Subgrantees are not allowed to report units as completed until a final inspection is performed and the work has been accepted and approved by a Quality Control Inspector.

Program production, goal attainment, and expenditure costs will be tracked on a monthly basis for each subgrantee at the State level using FACSPRO. SC WAP will utilize FACSPRO to track weatherization work performed on dwellings.

Also, OEO tracks subgrantees performance on the OEO Monitoring Summary Report. The Summary report tracks findings, trainings, contractor licenses/insurances, and requested training needs.

The routine monitoring process will confirm that measures are performed and tracked according to program standards, and that diagnostic and health and safety tests are performed and documented correctly on the Data Collection and Final Inspection Form 501.

SC WAP maintains files on the subgrantees that include the Grant Agreements, monthly financial status reports, and related information from which staff can obtain a current and complete financial picture of the subgrantee. The information kept in the files provides an updated picture of how each subgrantee is meeting contractual responsibilities.

SC WAP compares productivity between subgrantees by monitoring the number of dwellings reported monthly. Subgrantees not meeting quarterly production goals are contacted by state staff and required to provide a production plan to support it meeting prescribed quarterly goals and ensuring completion of the contractually required number of DOE houses by the end of the program period. This plan will include any additional training or technical assistance needs that may hinder the subgrantee in meeting production goals. Agencies who fail to achieve the production quota agreed to by the community action agency and OEO may have DOE administrative funding reduced in the following program year. This reduction will at no time reduce the allocation for administration below the DOE mandated 5%. Additionally, if agencies fail to achieve the production quota for a period of two consecutive years, OEO reserves the right to rebid the selected service area.

Training and technical assistance needs are determined during the onsite monitoring of each subgrantee. By compiling the results of the production and monitoring reports, the state office determines what T&TA activities can be provided through peer to peer coordination or made available statewide.

Subgrantee Default, Suspension, Transfer / Termination

The OEO may, by giving reasonable written notice specifying the effective date, terminate this grant in whole or in part for cause. Such cause may include:

- Failure, for any reason, of the subgrantee to fulfill in a timely and proper manner its obligation under this grant including compliance with the approved work program and attached conditions, and such statutes, executive orders, and DOE and/or OEO directives as may become generally applicable at any time;
- Late submission by the subgrantee to the OEO of DOE reports that are incorrect or incomplete;
- Ineffective or improper use of funds provided under this grant;
- Suspension or termination by DOE of the grant to the state under which this grant is made, or the portion thereof delegated by this grant. The state may also assign and transfer this grant as required by DOE directives.
- Suspension or termination by DOE of the grant to a subgrantee.

If the subgrantee is unable or unwilling to comply with the terms of this grant or with additional conditions as may be lawfully applied by DOE and/or USHHS to the grant, or the state, the subgrantee may terminate the grant by giving thirty (30) days written notice to the state signifying the effective date thereof. Furthermore, the residual assets and property purchased by the subgrantee under this grant shall be transferred at the discretion of the state to an organization which is exempt from Federal income tax as an organization described in Section 501 (c)(3) of the Internal Revenue Code (1954) or to the appropriate federal, state or local government for exclusively public purposes. In such event, the state shall require the subgrantee to ensure that adequate arrangements have been made for the transfer of all property and finished or unfinished documents, data, studies, and reports purchased by the grantee under this grant. The subgrantee may be entitled to compensation for any unreimbursed expenses reasonably and necessarily incurred in satisfactory performance of the grant.

Notwithstanding the above, the subgrantee shall not be relieved of liability to the state for damages sustained by the state by virtue of any reimbursement to the subgrantee for the purpose of set-off until such time as the exact amount of damages due the state is determined.

V.7 Health and Safety

**U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM (WAP)
STATE PLAN/MASTER FILE WORKSHEET**

(Grant Number: EE0009930, State: SC, Program Year: 2023)

Utilizing DOE Monies – Health and Safety

Health and Safety costs are recorded and tracked separately in the weatherization database. The Cost Center report accounts for all health and safety expenditures. Health and Safety expenditures are also reported on the subgrantee's monthly financial status report.

The maximum DOE funded health and safety cost per dwelling is \$1,050.

For specifics on allowable Health and Safety measures, see the attached Health and Safety Plan.

V.8 Program Management

V.8.1 Overview and Organization

The South Carolina Weatherization Assistance Program is administered by the South Carolina Department of Administration, Office of Economic Opportunity in Columbia, South Carolina. Created by the Community Economic Opportunity Act of 1983, the Office of Economic Opportunity (OEO) is the state's administering agency for the Community Services Block Grant, Low-Income Home Energy Assistance Program, Weatherization Assistance Program and Emergency Solutions Grant. OEO works in partnership with community action agencies and other non-profit agencies to administer and distribute funds for local initiatives designed to appreciably impact the causes of poverty.

OEO utilizes eight (8) subgrantees to administer the Weatherization Assistance Program for all forty-six (46) counties in South Carolina.

The OEO staff responsible for the oversight of the Weatherization Assistance Program in South Carolina are James Miller, OEO Director; Kimberly Cosare, Executive Fiscal Administrator; Landry Phillips, Fiscal Analyst; Sarah Cassidy, Attorney; Matthew Melton, Weatherization Assistance Program Manager; Savannah Brock, Weatherization Assistance Program Coordinator; Faith Kithome, Grants Manager; Quality Control Inspector and Energy Auditor position currently vacant.

The primary point of contact for South Carolina's WAP is Matthew Melton. The weatherization community action agencies and OEO utilize accredited IREC training centers. Financial monitoring is performed for all 8 Weatherization subgrantees.

V.8.2 Administrative Expenditure Limits

Grantee can take up to 7.5% of the total DOE 2023 allocation for administration. Subgrantees who were allocated more than \$350,000 in 2023 DOE funds must limit administrative expenses to 7.5% of their award amount. Those subgrantees who are allocated less than \$350,000 in 2023 DOE funds must limit administrative expenses to 12.5% of their award.

V.8.3 Monitoring Activities

See attached Monitoring Plan.

V.8.4 Training and Technical Assistance Approach and Activities

See attached Training and Technical Assistance Plan.

Percent of overall trainings

Comprehensive Trainings: 75.0

Specific Trainings: 25.0

Breakdown of T&TA training budget

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM (WAP)
STATE PLAN/MASTER FILE WORKSHEET

(Grant Number: EE0009930, State: SC, Program Year: 2023)

Percent of budget allocated to Auditor/QCI trainings:	50.0
Percent of budget allocated to Crew/Installer trainings:	25.0
Percent of budget allocated to Management/Financial trainings:	25.0

V.9 Energy Crisis and Disaster Plan

PURPOSE

To provide guidance on allowable activities using Department of Energy (DOE) Weatherization Assistance Program (WAP) resources for low income individuals and families in the event of disasters as declared by the President of the United States or the Governor of State of South Carolina.

POLICY

DOE WAP funds may be used to re-weatherize eligible dwellings damaged by a disaster as declared at the state and/or the federal level. The use of DOE WAP funds is limited to eligible weatherization activities and the purchase and delivery of weatherization materials. Subgrantees are required to consult with OEO before engaging in any disaster activities.

Allowable expenditures under WAP include:

1. The cost of incidental repairs to an eligible dwelling unit if such repairs are necessary to make the installation of weatherization materials effective.
2. The cost of eliminating health and safety hazards, elimination of which is necessary before the installation of weatherization materials. To the extent that the services are in support of eligible weatherization (or permissible re-weatherization) work, such expenditure would be allowable. For example, debris removal at a dwelling unit so that the unit can be weatherized would be an allowable cost. Debris removal from a dwelling unit that is not to be weatherized would not be an allowable cost. As such, using DOE funds to pay for weatherization personnel to perform relief work in the community as a result of a disaster is not allowable.

Weatherization personnel can be paid from DOE funds to perform functions related to protecting the DOE investment. Such activities include:

- Securing weatherization materials, tools,
- Securing equipment,
- Securing weatherization vehicles,
- Securing protection of local agency weatherization files, records, and the like during the initial phase of the disaster response.

Subgrantees may use weatherization vehicles and/or equipment to help assist in disaster relief provided the WAP is reimbursed according to the DOE Financial Assistance Regulations 10 CFR Part 600.

The use of DOE funds for disaster related hazards is limited to the following:

- The total allowance for disaster related hazards is limited to the Average Cost Per Unit (ACPU) for PY 2023 = \$8,250.
- The total allowance for incidental repairs in support of installation of weatherization materials is limited to the DOE Incidental Repair maximum previously defined in Section V.5.1 = \$500.
- The total allowance for health and safety costs is limited to the DOE maximum as defined in the Health and Safety Plan = \$1,050.
- To the extent that the services are in support of eligible weatherization (or permissible re-weatherization) work, such expenditure would be allowable.

Reprioritization of Weatherization requests coming from the disaster area

For reprioritization of weatherization requests coming from the disaster area, WAP rules require that priority be given to identifying and providing weatherization assistance to elderly persons, persons with disabilities, families with children, high residential energy users, and households with high energy burdens (10 CFR 440.16(b)). However, it would be permissible to consider households located in the disaster area a priority as long as the households are eligible and meet one of the priorities established in regulation and are free and clear of any insurance claim or other form of compensation resulting from damage incurred from the disaster.